

**OPTIMUM MARKET-POSITIONING MODELS FOR SOUTH AFRICAN ARTS
FESTIVAL SCENARIOS**

by

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ABSTRACT

The purpose of the study was to develop an optimum market-positioning model for the special interest tourism market to support arts festivals in South Africa (SA). Three subareas were deemed essential for the model, namely determining which attributes contribute to the success of three arts festival scenarios, comparing the different arts festival packages as a tourism attraction and then combining these subareas to develop a model enabling future researchers and marketers to present a successful arts festival in South Africa.

The three main arts festivals in South Africa, at Potchefstroom, Grahamstown and Oudtshoorn, were studied. Screening questions followed by judgmental and quota sampling were used to select only like-minded respondents from festival attendees on a scenario basis. In personal interviews the data were collected and then analysed using conjoint analysis and game theory. Conjoint analysis was used in a linear regression model with individual ratings for each product. The average of the r-squares in this study was 0,83, indicating a good fit between data and model developed. Then these results were used in the game theory, comparing the three arts festival scenarios to identify the most successful tourism attraction. A different combination of attributes gave each of the three festival scenarios an optimum market position in its own niche market.

The study contributes to the existing body of positioning knowledge, specifically in the festivals and events domain. It also adds value as this model can be applied to other festivals in South Africa and also to other business sectors.

Key terms: Arts festivals, tourism, special interest tourism, market-positioning model, conjoint analysis, game theory

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DECLARATION

I declare that this Doctor's thesis, which I hereby submit for the degree D. Com. Tourism Management at the University of South Africa, is my own work and has not previously been submitted by me for a degree at another university.

ABBREVIATIONS

ABSA	Amalgamated Bank of South Africa
CA	Conjoint analysis
CVA V2	Conjoint value analysis version two
CHE	Christian higher education
GDP	Gross domestic product
IFEA	International Festival and Event Association
KKNK	Klein Karoo National Arts Festival
LSM	Living standards measure index
MDS	Multi dimensional scaling
MICE	Meetings, incentives, conventions and exhibitions
NASPERS	National South African Press
NEA	National endowment for arts
OLS	Ordinary least squares
PC	Personal computer
SA	South Africa
SABC	South African Broadcasting Corporation
SIT	Special interest tourism
St	Standard
SSPS	Statistical Software package for the social sciences
T&T	Travel and tourism industry or economy
UK	United Kingdom
USA	United States of America
USP	Unique selling proposition
WTO	World Tourism Organisation
WTTC	World Travel and Tourism Council
4Ps	Four marketing mix instruments, namely product, place, price, promotion

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CHAPTER 1

1 BACKGROUND TO THE STUDY

1.1 INTRODUCTION

In a world of change, one constant has been the continued growth of tourism. In a global context, tourism has been remarkable in its resistance to adverse economic and political conditions (Cooper, Fletcher, Gilbert & Wanhill, 1998:1). By the mid-1990s, the World Travel and Tourism Council (WTTC) estimated that tourism was the world's largest industry (WTTC, 1996:1). According to Grant Thornton Kessel Feinstein (2002:45), travel and tourism in South Africa in 2002 amounted to a R108,5 billion industry in terms of total demand, and this figure is expected to grow by 4,8% per annum between 2002 and 2012. The travel and tourism industry (T&T) currently contributes 3% to South Africa's Gross Domestic Product (GDP), and measured in its broadest form, the travel and tourism economy contributes 7,1% of South Africa's GDP. The WTTC expects this figure to increase to 8,1% by 2012.¹

The WTTC is the business leaders' forum for Travel and Tourism and its forecast for South Africa is shown in Table 1.1.

¹ The WTTC calculates the economic impact and job creation potential of tourism on the basis of two definitions: that of the Travel and Tourism Economy and the Travel and Tourism Industry. The Travel and Tourism Economy includes the Travel and Tourism Industry and capital expenditure on tourism, for example investment in hotel buildings, transport vehicles and craft, furniture and equipment, as well as personal capital expenditure. In contrast, the Travel and Tourism Industry only includes direct spending by tourists and not capital expenditure, making theirs a narrower definition.

Table 1.1: WTTC estimates and forecasts – travel and tourism’s contribution to South Africa’s economy and jobs

		2002			2012		
		Rands Bn	% of total GDP	Growth %	Rands Bn	% of total GDP	Growth %
GDP	T&T industry	31,1	3,0	2,2	84,8	3,5	5,1
	T&T economy	72,5	7,1	3,2	194,3	8,1	4,9

		2002			2012		
		000’s	% of total employ- ment	Growth %	000’s	% of total employment	Growth %
Employ- ment	T&T industry	492,7	3,0	1,8	679,2	3,4	3,3
	T&T economy	1 148,0	6,9	2,7	1 555,3	7,9	3,1

Source: WTTC, 2003:1.

Although the WTTC forecast emphasises the growth and prosperity of this industry, the threat of maturity and levelling off which often follows steep growth should be recognised. Based on the *Annual Tourism Report* (South African Tourism, 2005:11) the South African tourism industry will eventually also level off and reach the maturity phase of the product life cycle. This natural process of the tourism product life cycle should be monitored in the leisure and the business travel markets (WTO, 1999a:117).

The continued growth and expansion of the tourism industry has resulted in more opportunities in this sector than in many others, i.e. there is a wider selection of products and services to choose from (Poon, 2003:133).

However, Derrett (2001:7) and the World Tourism Organization (1999:118) state that tourists have become more knowledgeable and sophisticated, as they are more mobile, have more money, can choose from a wider selection of tourism activities and have extensive knowledge due to the new information technology available worldwide.

In other words, tourists have become more “streetwise” and approach tourism with different expectations. This is why tourism stakeholders should take note of the changing needs or requirements of tourists and develop suitable products in both the leisure and business travel markets.

1.2 PROBLEM STATEMENT

Continuous innovation is required to survive in today's rapidly changing tourism market (Poon, 2003:139). Innovation in this instance refers to being creative and bringing new ideas and tourism services to the market place (Poon, 2003:139). Traditional tourism products like sunbathing and sightseeing will no longer be adequate for the emerging new generation of tourists (Buhalis cited in Wahab & Cooper, 2001:80). Instead, Buhalis notes that a more individualised tourism product is needed which should be sophisticated enough to attract the new, streetwise customer. Moreover, a degree of specialisation is required to cater for individual needs and wants. This sophistication and specialisation can only be achieved by detailed market segmentation and tailor-made product offerings that strive for total customer satisfaction with the tourism product and thus manage to “seduce” the tourism clientele (Buhalis cited in Wahab & Cooper, 2001:92).

All tourism stakeholders will have to gain a thorough understanding of the changing trends in demand and of the use of modern marketing and information technology tools. In essence, the producer has to get closer to the customers, the new “streetwise” tourists, to know their needs and wants (Poon, 2003:139). Only by understanding the tourism market can a producer satisfy the market.

Tourism organisations that do not understand this, and destinations which do not achieve this, will probably lose their sustainable competitive advantages in the market place.

This realisation creates new segments in the tourism domain, and one of these segments; namely, special interest tourism (SIT), in the leisure travel market is the most comprehensive (WTO, 1999a:118).

Special interest tourism is defined as the provision of customised leisure and recreational experiences driven by the specific expressed interests of individuals and groups (Derrett cited in Douglas, Douglas & Derrett, 2001:3). The other segment in the business travel market is often referred to as the meetings, incentives, conventions and exhibitions (MICE) market (WTO, 1999a:125).² Figure 1.1 indicates the different types of SIT, which may include eco-tourism as well as tourism for adventure, cultural events, education, festivals and events, health, heritage, regional, rural, wine and food, sex and sports.

² The terms *special events*, *events* and *festivals* (including *arts festivals*) are classified under the collective noun: *events*, as recommended by Dimmock and Tiyce (cited in Douglas et al., 2001:356-357; Getz, 1997:1).

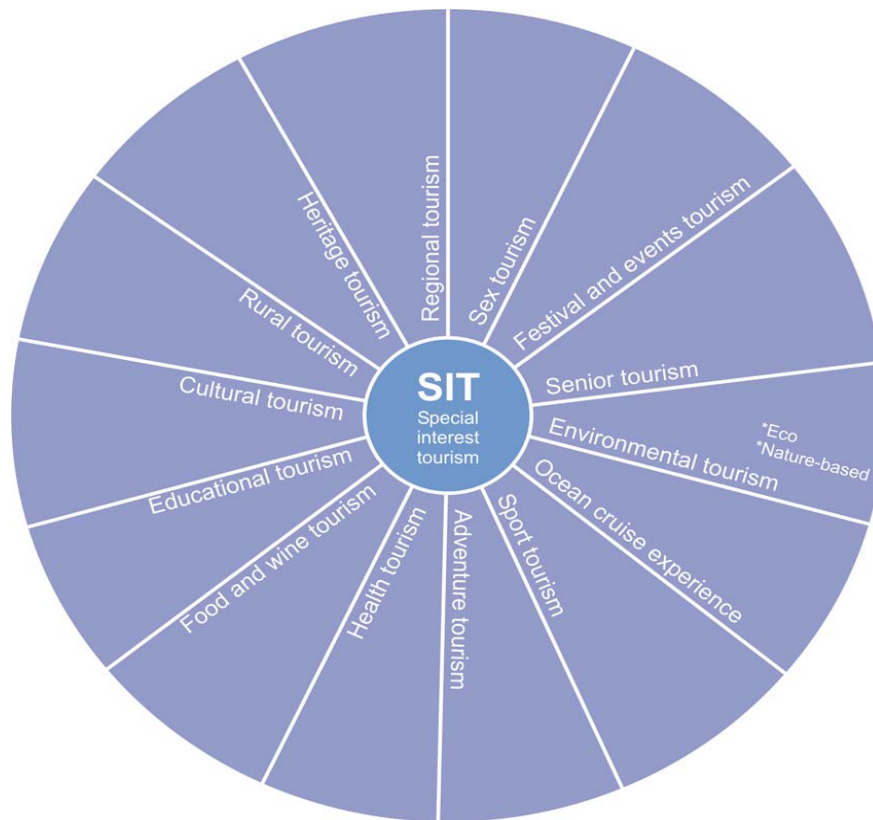


Figure 1.1: The different types of SIT opportunities

The different types of SIT opportunities in the market place are analysed further in Chapter 2. This growth trend in special interest tourism was reported as long ago as the 1990s and is increasingly being reported in the new millennium (Derret, 2001:21; Weiler & Hall, 1992:1). One type of SIT firmly established in the market place is event tourism (Tassiopoulos, 2005:25).

Event tourism (a subcategory of SIT) has shown a stronger growth curve than overall leisure demands (Kim, Uysal & Chen, 2002:127; Shifflet & Bhata, 1999:26). It refers to leisure-oriented special events, fairs, festivals, arts festivals, shows and exhibitions. The performing arts and other festivals (central to the concept of events) have now become a worldwide tourism phenomenon (Prentice & Andersen, 2003:8; Grant & Paliwoda, 1998:217). In the South African arena, attendees have a choice of more than 85 festivals throughout the country (Witepski, 2002:52). Ironically, however, the popularity and growth of the festival industry in South Africa might threaten its survival as prospective attendees have on average a choice of four

festivals per month or one festival per week. This overabundance of festivals has a direct impact on the sustainability of the individual festivals as it ultimately leads to a situation of “festival fatigue” where it becomes financially impossible for a festival attendee to choose among the profusion of festivals. While people in South Africa might find that attending festivals is gradually losing its novelty, research into what makes a festival a tourism attraction is becoming of paramount importance.

Table 1.2 contains a list of the calendar of festivals and events in South Africa (SA). The list is based on exploratory research and various resources is consulted and used in the process. It should be noted that the exploratory nature of the list of South Africa festivals and events as well as the continuous entry of new events, caused that some festivals and events might have been overlooked and not included in the list that has been updated up to January 2005. On the basis of research by Wilson and Udall (1982:3), the types of festivals have been divided into seven broad categories: arts festivals; dance, jazz and music festivals; sacred, language and religious festivals; heritage and culture festivals; harvest and food festivals; shows, fairs and festivals; and sports events.

Table 1.2: A detailed list of festivals and events in South Africa as at January 2005

Arts festivals	Culture and heritage festivals	Dance, jazz and music festivals	Harvest and food festivals	Sacred, language and religious festivals	Shows, fairs and festivals	Sports events
Aardklop National Arts Festival, Potchefstroom	150-year Commemoration Festival, Middelburg, Eastern Cape	Afrikaans Music Festival, Margate Beach, KZN	Algoa Bay Chilli Festival, Port Elizabeth	9 th Poetry Africa Festival, Durban	Addo Rose Festival	Burger-Sanlam cycle race, Bellville
Bloemfontein National Arts Festival, Free State	Africana Arts and Water Festival, Deneysville	Afrikaans Rock Festival, Roodepoort	Aloe Festival, Albertinia	Afrikaans Word/Language Festival, Stellenbosch	Agricultural and Wildflower Show, Piketberg	Caltex-Voet van Afrika Marathon, Bredasdorp
Cape Town Festival (arts & culture festival)	Apollo Festival of South African films, Victoria West	Arts Alive, JHB	Amajuba Winter Festival, Newcastle	Barney Simon Young Writers Festival, JHB	Bien Donne Expo, Paarl	Cape Epic-mountain bike race
Cederberg Voorbrand Festival, Clanwilliam	Bastille Festival, Franschhoek	Awesome Africa Music Festival	Apple Festival, Uniondale	Carols by Candlelight	Bloemfontein Rose Festival	Cars in the Park, Pretoria
Cullinan Arts Festival	Dias Festival, Mossel Bay	FNB Dance Umbrella, Wits Theatre, JHB	Asparagus Festival, Fouriesburg	Festival of Lights, Pietermaritzburg	Cape Gourmet Festival, Good Hope Centre, Cape Town	Comrades Marathon, Durban
InniBos-Lowveld National Arts Festival, Nelspruit	Durban	Giant Steps African Music Festival, Spier, Stellenbosch	Banana Festival, Port Edward	Fire-walking, Durban	Cape Town International Flower Show	Currie cup finals
		Guinness Jazz	Beer and Bread Festival, Caledon	Fireworks Festival, Saldanha	Cape Town International Kite Festival, Muizenberg	Dusi Canoe Marathon, Pietermaritzburg
			Bieliemealie Festival, Reitz	FNB Diwali Festival of Light, Durban	Decorex, Midrand,	Easter Schools
			Biltong Festival, Mokopane	Helderberg Festival of		
			Calamari Festival, Plettenberg Bay			
			Cattle Festival, Stella			
			Cherry Festival, Ficksburg			

Arts festivals	Culture and heritage festivals	Dance, jazz and music festivals	Harvest and food festivals	Sacred, language and religious festivals	Shows, fairs and festivals	Sports events
KKNK, Oudtshoorn	International Film Festival	Festival, JHB	Citrus Festival, Citrusdal	Lights, Somerset West	Johannesburg	Festival-Rugby, JHB
Magoebaskloof Spring Festival	Groot Marico Culture Festival, North West Province	Haenertsburg Spring Fair, Letaba, Northern Province	Drostdy Flower Festival, Tulbagh	Kavady Hindu Festival, Durban	Design for Living Festival, Cape Town	Fish River Canoe Marathon, Cradock
Natal Witness Hilton Arts Festival, KwaZulu-Natal	Jacaranda Festival, Pretoria	International Eisteddfod of South Africa, Roodepoort	Dundee Biltong Festival, Dundee	Leipoldt Festival, Clanwilliam	Festival of the Mountains, Koue Bokkeveld, Ceres	Gunston 500, surfing, Durban
National Festival of the Arts, Grahams-town	Karoo Festival, Graaff-Reinet	Jomba Contemporary Dance Experience, Durban	Eastern Cape Biltong Festival, Somerset East	Love Festival, Elim	Flower Festival, Elim	Ironman Triathlon, Port Elizabeth
One City Festival in Cape Town	Macufe Festival, Bloemfontein	Farm Festival, Agri Moedwil, near Rustenburg	Eleven O'clock Rooibos Cederberg Festival, Clanwilliam	Maynardville Open Air Theatre, Wynberg	Fynbos Festival, Stanford	Isuzu Berg River Canoe Marathon, Paarl
Oude Libertas Arts Programme, Amphitheatre, Stellenbosch	Mangaung African Cultural Festival, Bloemfontein	Food and Wine Festival, Malmesbury, Simonsberg	Game Festival, Thabazimbi	Time of the Writer Festival, Durban	Gardenex & Growtech Flower and Garden Show, Northgate	J & B Met, (horse-racing) Kenilworth, Cape Town
Pink Loerie Knysna Festival	National Choir Festival, JHB	Minstrel Carnival, New Year, Cape Town	Gansbaai Crayfish Derby, Gansbaai	Zionist Church Gathering, Polokwane	Getaway Show, JHB	July Handicap, (horse-racing), Durban
Savanna up the	North West Cultural Calabash	Neptune's Festival,	Graca Crayfish Festival, Lambert's Bay		Hermanus Whale and Calf Festival	Knysna Cycle Tour
			Grape Festival, Nylstroom		Hibiscus Festival, South Coast	

Arts festivals	Culture and heritage festivals	Dance, jazz and music festivals	Harvest and food festivals	Sacred, language and religious festivals	Shows, fairs and festivals	Sports events
Creek Festival, Swellendam	Festival, Taung	Kenton on Sea	Hantam Meat Festival, Calvinia		Jeffreys Bay Shell Festival	Knysna Forest Marathon, "the Glebe" in the Knysna forest
Spier Summer Festival, Stellenbosch	One City Festival, Cape Town	North Sea Jazz Festival, Cape Town	Harvest Festival, Constantia		Johannesburg Pride Festival, (gay and lesbian parade), JHB	Life-cycle Week, , Cape Argus/Pick 'n Pay Cycle Tour, Cape Town
Stokkiesdraai Arts Festival, Wellington	Rustlers Valley Festival, Free State	Oppikoppi, Easter Festival, Northam Farm , Limpopo	Harvest Festival, Olive, Food & Wine Festival, Prince Albert		Ladysmith Show	Million Dollar Golf Challenge
Vuka Ukulhuleke Arts Festival, Tembisa, JHB	Transnet Heritage Foundation Festival, George	Picnic Concerts at Botanical Gardens, Roodepoort	Harvest of the Sea Festival, Saldanha Bay		Laingsburg Karoo Festival	Model Aircraft Show, Oudtshoorn
Welkom Arts Festival, Free State	Tulbagh Goes Dutch Festival, Tulbagh	Play Festival, Montagu	Hibiscus Coast Sardine Festival, Margate Beach		Midlands Fuchsia Festival, Hilton	Old Mutual Two Oceans Marathon, Cape Town
White River Arts Festival	Van der Stel Festival, Stellenbosch	Rain Festival, Upington	Kamberg Valley Trout Festival, KZN Midlands		Paarl Show	Om-die-dam-running race, Hartebeespoort Dam
Windybrow Theatre Festival, JHB	Vasco da Gama Festival, St	Secunda Jazz Festival, Mpumalanga	Knysna Oyster Festival		Postberg Flower Season (private area in nature reserve bordering Langebaan, West Coast)	
		Splashy Fen Music Festival,	Maize Festival, Morgenzon		Rand Easter Show, JHB	
			Mampoer Peach Festival, Magaliesberg (near Pretoria)		Rose Festival,	
			Muscadel Festival, Montagu			

Arts festivals	Culture and heritage festivals	Dance, jazz and music festivals	Harvest and food festivals	Sacred, language and religious festivals	Shows, fairs and festivals	Sports events
	Helena Bay	Underberg (in Drakensberg Mts) Standard Bank Cape Town, Jazzathon, V & A Waterfront Summer Sunset Concerts, at Kirstenbosch National Botanical Gardens, Cape Town Unyazi Electronic Music Festival, JHB Voorkamerfest at the Hello Darling! Festival, Darling Womad in Benoni	McGregor Apricot Carnival, McGregor Merino Festival, Colesberg, Eastern Cape Nampo, Harvest Day/Festival, Bothaville Natrossie Festival [Bunch of grapes], De Doorns Nouveau Wine Festival, Paarl Olive Festival, Groot Constantia Ostrich Festival, Oudtshoorn Port Festival, Calitzdorp Potato and Venison Festival, Petrusburg Potato Festival, Bethal Prawn Festival, Mtunzini, Zululand		Germiston Rose Festival, Stilfontein Royal Show, Pietermaritzburg Sabie Forest Festival SARCDIA International Trade Exhibition, Midrand Sasol Kruger National Park Bird-watching weekend, Skukuza Sasol-Marakele Bird-watching weekend, Marakele National Park Sasol-Sci-fest, Grahamstown Splash Festival, Port Elizabeth	Pick-'n-Pay-94,7 Cycle Race, JHB Soweto Marathon, JHB Stilbaai Touchies, Stilbaai Trans-Agulhas Rubber duck Race, Keurboomstrand, Hermanus Vodacom/Clifton Touch Rugby, Cape Town Witwarm Touchies, Strand, Hermanus, Struisbaai, Mossel Bay, Plettenberg Bay

Arts festivals	Culture and heritage festivals	Dance, jazz and music festivals	Harvest and food festivals	Sacred, language and religious festivals	Shows, fairs and festivals	Sports events
			Prickly Pear Festival, Willem Pretorius Museum, Pretoria Prickly Pear Festival, Uitenhage Pumpkin Festival, Worcester Queen Pineapple Sports Festival, Hluhluwe, KZN Red Meat Festival, Vrede, Free State South Africa Cheese Festival, Bien Donne, Paarl and Franschhoek in Western Cape Seafood Festival, Hawston Sweet potato Festival, Napier Tomato Festival, Lutzville Various wine festivals at Paarl and Kuruman		Summer Festival, Plettenberg Bay Super Splash Festival, Mossel Bay The Cape Outdoor Adventure Experience, Kiks, Cape Town Tshwane Show, Pretoria Ultimate Horse Festival, Lipizzaner shows, JHB Water Sports Festival, Gariiep Dam, Free State Wildflower Show, Darling Wildflower Festival, Caledon Xtreme Air and Track	

Arts festivals	Culture and heritage festivals	Dance, jazz and music festivals	Harvest and food festivals	Sacred, language and religious festivals	Shows, fairs and festivals	Sports events
			Venison Festival, Dundee Venison Festival, Thabazimbi Wheat Festival, Groblersdal Witblits Festival, Philippolis, Free State Wool Festival, Ermelo Yellowtail Festival, Struisbaai		Festival, Pretoria	

As shown in Table 1.2, more than 85 festivals of various kinds are held throughout the year in South Africa, creating an overabundance in the market. Research is therefore undertaken into the festival package or arts festival presentation to determine what makes a festival successful and sustainable as a tourism attraction in a crowded market place. The different niche markets in which these festivals operate should also be identified. The following three prominent arts festivals were chosen from the list and are considered as three scenarios in this study:

- In scenario A, Festival A refers to the Aardklop National Arts Festival in Potchefstroom.
- In scenario B, Festival B refers to National Festival of the Arts in Grahamstown.
- In scenario C, Festival C refers to the Klein Karoo National Arts Festival (KKNK) in Oudtshoorn.

Scenarios were selected for the purposes of this study based on research by Handy (1996) that noted *scenarios* are typically used in cases where uncertainties in possible future outcomes need to be determined. These three are regarded as major arts festivals in the South African arena and are semi-competitive in the market place (Witepski, 2002: 52-53). In semi competition due to the fact that they are held at different times of the year and at different places in South Africa. These particular arts festival scenarios were selected for the following reasons:

- These three arts festivals have the longest time frame (have been held for more than five years) and attract more than 100 000 attendees each year. The National Festival of Arts in Grahamstown has been held for 32 successive years, KKNK for 12 years and the Aardklop Arts Festival for the past 8 years.
- Research by the North-West University shows that the KKNK generated an income of almost R98 million in 2003, compared with Aardklop's R65 million and the Grahamstown Festival's R35 million (Saayman, 2004). Although various other arts festivals, such as the Volksblad National Arts Festival and the Innibos-Lowveld National Arts Festival have been added to the festival

calendar during recent years, their economic impact does not yet justify their inclusion in the category of South Africa's prominent arts festivals. These younger festivals only generate about R9 million annually (Van Niekerk & Saayman, 2004).

- Previous research at master's level identified a lack of positioning for the Aardklop Festival (Van Zyl, 2002:158). The dissertation titled "The participation of the host community in the Aardklop National Arts Festival" determined the motivational factors that push and pull the local residents of Potchefstroom, South Africa, to attend and participate in the Aardklop Festival, as well as the situational inhibitors that discourage them from participating in the festival. The specific festival activities they enjoyed most were also identified, namely *performances, music and art*. The major findings of the research revealed that *family togetherness* and *event novelty* were the strongest overall push attributes, whereas *information and marketing, food and beverages (refreshments)* and *entertainment or festival activities* were the strongest pull attributes at the festival. *Time and money, accessibility/transport* and *social problems* were considered the largest situational inhibitors or constraints preventing the respondents from attending the festival.
- The selected three festivals also entail a longitudinal study, as empirical data from previous research were the conceptual basis of the data-collecting instrument (questionnaire) for the present research.

Irrespective of the growth of festivals and events and increased profit generating, it should also be noted that it is highly unlikely that this widespread growth in the festivals and event industry will continue at full strength nationally and internationally (Van Zyl; 2003; Witepski, 2002:52; Getz cited in Gartner & Lime, 2000a:175; Wicks & Fesenmaier, 1993:19). This is also apparent with regards to the three arts festivals selected. In some cases, a slight decline in the number of attendees and ticket sales has already been noted in South Africa, which could threaten the future of the individual festival (Burger, 2003:3; Malan, 2003:21; Slabbert, 2002:36).

The National Arts Festival in Grahamstown recorded a decline in the number of attendees and ticket sales in 2001, though the Aardklop Festival in Potchefstroom recorded the same ticket sales in 2001 as in 2000 (Nieuwoudt, 2002:5). To prevent this research should be conducted into the perception prevailing in the market regarding which combination of attributes induces the attendees to choose to attend a specific arts festival in preference to another arts festival; in other words, what unique position does the festival hold in their minds (Van Gessel, 2003).

The greater ability of one tourism product (festival) to attract a market segment *vis-à-vis* others in the market, is based on the market positioning of that tourism product (Calantone & Mazanec, 1991:101-119). For the purpose of this study an arts festival is classified as a service (intangible characteristics) however, it can also be referred to as a tourism product (tangible characteristics) therefore the words product and service will be used interchangeably. (Refer to Section 3.5.4 with regards to this classification). In tourism, market positioning is the process of establishing and maintaining in the minds of the potential visitors a distinctive place for a tourism product in the market (George, 2004:138; Walker, 2004:752; Chacko, 1997:1; Echtner & Ritchie, 1993:3; Crompton, Fakeye & Lue, 1992:20). In addition, Lovelock (2003:110) argues that market positioning involves developing and communicating the attributes of a key product or service, and is not primarily about creating advertising images. Kotler, Bowen and Makens (2003:283) augment this by noting that “positioning is the way the product is defined by consumers on important attributes”.

It may be argued that the decision on market positioning for a tourism product (arts festival) is the most critical strategic decision for a producer because it is central to determining visitors' perceptions and their decisions about choices (Alford, 1998:67). Aaker and Shansby (1982:56) mention that market-positioning decisions often mean selecting those associations and attributes to be emphasised, and those to be de-emphasised. Therefore, when using a market-positioning approach to tourism marketing, the marketer first has to do market research to ascertain which product attributes determine tourism (festival) choice.

Thus, survival in the crowded festival market means that market positioning is paramount. Consequently, festival managers have to consider the dynamic business environment so that they can operate successfully. Festivals have to be positioned and differentiated in the market to keep their customers. These factors have to be addressed and researched, particularly in event tourism (Kay, 2004:191). For the purpose of this study the terms customer, tourist and attendee are used interchangeably as a tourist can be an attendee to a festival and at the same time be a customer that consumes a service.

The notions of market positioning have been well researched in the field of marketing and to a lesser extent in tourism, but this research is not mirrored in the area of festivals and events. In fact, secondary research indicates that the growth pattern of tourism and specifically that of festivals and events does not match the growth curve researched for the tourism field (Hughes, 2003; Getz, 2000b:10). It has also been proved that the use of market positioning in tourism is fairly uncommon and that the use of more sophisticated research techniques in the science of marketing has not evolved in the tourism (events and festival) industry (Reich, 1999:1; Grabler, 1997:101). Furthermore, various authors (Van Gessel, 2003; Allen, O'Toole, McDonnell & Harris, 2002; Getz, 2000b; Formica, 1998; Smith & Jenner 1998; Scott, 1996) agree that this weakness is a tremendous opportunity for researchers to contribute to tourism.

A comprehensive summary of the positioning articles reviewed, indicates a vast number of application studies and various techniques for positioning analysis in the marketing and tourism literature. The various techniques used in the positioning process are discussed in Chapter 3 (Section 3.5.5). However, preliminary research on arts festivals, especially in the South African domain, offered little or no results on the market positioning of arts festivals. To date, little empirical research has been undertaken to determine which attributes are better for positioning purposes. The core concern of this thesis is therefore to conduct research into the three dimensions of the problem.

Firstly there is a crowded festivals and events calendar in South Africa, secondly, new ones are added continuously to the calendar creating confusion in the market place, and, thirdly, no market-positioning model is available, which could communicate a simple message to the market to help ensure a sustainable future for festivals and events. The following three subareas have been identified in the problem statement, namely –

1. to determine which attributes and/or combination of attributes would drive best practices in arts festival scenarios. The situational inhibitors that might prevent respondents from participating in each of these scenarios should also be addressed;
2. to compare the different arts festival packages and their attributes with one another and to determine the optimum arts festival package and position for each arts festival in the market; and
3. to determine how an arts festival could gain the best possible market position to ensure its future survival. A model should be developed specifically for arts festivals, which could be used to ensure the sustainability of these festivals.

This research will make a valuable and unique contribution to the existing body of positioning knowledge, specifically in the festival and events domain. The development of such a market-positioning model for this niche tourism sector will add value to the future of these festivals. The value added to the field of Tourism Management is that, though this model would concentrate specifically on arts festivals, it could also be applied to other festivals in South Africa. Furthermore, the market-positioning model could also be applied to other business sectors in the economy such as banking and insurances, and motor manufacturing etc. as these business sectors could apply the steps followed in the study.

1.3 RESEARCH OBJECTIVES

The primary and secondary objectives of this thesis are elaborated below:

1.3.1 Primary objective

To develop a market-positioning model in the special interest tourism (SIT) market for South African arts festival scenarios.

1.3.2 Secondary objectives

In this case, a number of objectives have been identified:

- to determine which attributes and combination of attributes make the different arts festival scenarios successful as well as the situational inhibitors that might prevent respondents from attending festivals;
- to compare the different arts festival packages and their attributes with one another to determine the optimum arts festival presentation in terms of a tourism attraction;
- to integrate the data and then use the result in the design of the model;
- to refine a classification system for the festivals and events that forms part of special interest tourism in South Africa;
- to evaluate the available market-positioning models used in marketing, tourism marketing, festivals and events;
- to carry out longitudinal research based on the results obtained for this study *vis-à-vis* the dissertation completed in 2002;
- to contribute to the existing body of knowledge in the field of study; and

- to identify opportunities for future research.

1.4 RESEARCH METHODOLOGY OF THESIS

1.4.1 General

The primary objective of the thesis is to develop a market-positioning model in the special interest tourism market for arts festivals in South Africa. In order to determine how attendees evaluate an arts festival package offered in the market, three prominent arts festivals in South Africa were identified and presented as scenarios. The population for each scenario was a group of people attending arts festivals and residing in the three scenario areas (Potchefstroom, Grahamstown and Oudtshoorn).

Only those likeminded individuals who attended at least one of the arts festivals in 2003 or any of the previously held festivals and who were familiar with the prominent arts festivals, were considered. Therefore, the current study will generate meaningful results on the optimum combination of attributes for attendees of arts festival scenarios in the South African market and consequently the best market positioning of an arts festival. The secondary research, analysing previous research on the Aardklop Festival, was summarised and the available literature evaluated in order to achieve the objectives of the study.

1.4.2 Secondary research

The term *secondary literature research* is defined by Cooper and Schindler (2003:281) as studies made by others for their own purposes. The main advantages of secondary data sources are that information can be obtained more quickly and cheaply and that secondary sources provide information useful for interpreting the primary data. In addition, secondary information can also be used as a guideline on the formulation of recommendations. An extensive literature study was undertaken. This is outlined in Chapters 2, 3 and 4 of the thesis.

The secondary study for this thesis embraced the following four concepts: (1) tourism and special interest tourism; (2) festivals and events; (3) tourism marketing in South Africa; and (4) market-positioning models.

The databases consulted included library databases; South African magazines; theses, multimedia; Educational; ABI/Inform (R) Global; General Business File International; Newspaper Source Plus; Science Direct; Emerald Full Text; Econ Lit; Sabinet Online Record Display; Nexus Database System; NISC DIS Cover Report; EBSCO host; Book Data Premier-CD. A detailed list of the sources consulted appears in the list of references at the end of this thesis.

1.4.3 Primary research

Primary data are obtained from original research and consist of information collected especially for the specific purpose at hand (Cooper & Emory, 1995:240). As good data are essential to formulate good decisions, care has to be taken when collecting original data to ensure that such data provide the most relevant, accurate, up-to-date and unbiased information to the decision maker.

The primary research for the study was undertaken in an endeavour to achieve the primary objective of the study, namely to develop a market-positioning model for attendees at arts festival scenarios in South Africa. This primary research objective of the study is underpinned by secondary research objectives. The first is to determine which attributes and combination of attributes will drive the best practices offered by arts festival scenarios. The situational inhibitors that might prevent respondents from attending a festival in these scenarios are also addressed.

The second is to compare the different arts festival packages with one another and by doing so to identify the most successful arts festival presentation in terms of a tourism attraction. In support of this, the third secondary objective is to integrate the data and design a model specifically for arts festivals. It is hoped that this market-

positioning model would add value and contribute to the body of knowledge about South African arts festivals.

Primary data were gathered from prominent arts festivals in South Africa in order to address the before-mentioned research objectives of the study. The three arts festivals selected for research were identified in the problem statement, Section 1.2 of the study. (Refer to Appendix A1 for a map of South Africa and the three respective provinces where the festivals are held). This study is scenario-based and the three arts festivals are presented as three scenarios. Scenario-based studies are typically used in cases where uncertainties in possible future outcomes need to be determined (Handy, 1996). Based on these trajectory routes of arts festivals *scenarios* were used. The primary research followed in the present study is discussed according to the seven steps of the research process as illustrated in Figure 4.1 of Chapter 4. Each of these steps as applied in the present study is briefly discussed below.

One of the *first* steps in primary research is to develop the sample plan. The design plan 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 festivals and residing in the three scenario areas (A, B, and C). The sample unit refers to those individuals (known as repeat visitors) residing in the survey/scenario areas. The sample element included individual members residing in the survey/scenario areas (A, B, and C), who attended at least one of the arts festivals in 2003 or any of the previous years' arts festivals and who were familiar with the prominent arts festivals presented in any of the arts festival zones. The survey was conducted in 2003. The selection of the survey areas was based on the regions (geographic areas where the festivals took place) and represents prominent arts festival zones in South Africa (Scenarios A, B and C). The assumption was that people residing in these areas and repeat attendees would be more likely to have an informed opinion (they are likeminded individuals) about arts festivals than people residing outside these areas (Assael, 2004:224; Schreuder, 2003; Van Zyl, 2003).

The nature of the research instrument (see Section 4.4) of this study largely determined the choice of personal face-to-face interviews as the data collection method. Unfortunately it was not possible to obtain a master list of arts festival attendees who had attended all three of the prominent arts festivals in South Africa. There was no database on any of the three arts festival scenarios at the time of conducting this research.

The current research is scenario-based and therefore requires a scenario-based sample. (See paragraph 4.1 for justification of scenarios used). A combination of judgmental and interlocking quota samples was drawn for the current study, based on the specific criteria stipulated. (Refer to paragraph 4.3.4 for sampling method criteria used). It should be noted that the current study is not a representative sample of the population.

The sample size of 380 was determined on the basis of the scenarios and by using the judgement of an expert researcher in the field. The selected sampling procedure for this study was based on the guidelines of Cooper and Emory (1995:207) and Krejcie and Morgan (1970:608) for general research activities, applicable to any defined population, which states that for a population (N) of 100 000 the recommended sample size (S) is 384.

However, these authors also state the apparently applicable rule of the thumb that diminishing returns are obtained when the sample size increases beyond 300. The total population in the scenario of 392 000 arts festival attendees (based on 2002 figures in this regard), made the recommended sample size of 380 appear appropriate to the current study. A sample of 0,096% from each of the three festival scenarios was proportionally drawn. The sample size was also affected by the method of collecting data, as personal interviewing is an expensive method but produces some of the best results. Table 1.3 indicates the sample size of the three selected arts festival scenarios.

Table 1.3: Population and sample size of the three selected arts festival scenarios in South Africa

Arts festival	N=Population size Attendance figures in 2002	S=Recommended sample size
Festival A	130 000	126
Festival B	102 000	99
Festival C	160 000	155
Total	392 000	380

Source: Aardklop Impact Study, 2002:1; *Weekend Post*, 2002; Witepski, 2002:53

At least 30 questionnaires were completed by respondents in each gender and age group (Diamantopoulos & Schlegelmilch, 2002:17). Orme (1998:9) states that "... for investigational work and developing hypotheses about a market, between 30 and 60 respondents may do ..." to obtain statistically significant results in conjoint analysis studies. The present study met this criterion.

In the present study, a non-probability sample, called interlocking quota sampling, was used, which guided the interviewers clearly so that they would know exactly what to do and how to handle any problems when contacting prospective respondents. Failing to develop a proper operational plan for selecting the sample elements could jeopardise the entire sampling process. The operational sampling plan was carried out accordingly in the present study.

The *second* step in primary research is to design the research instrument (questionnaire). The research instrument was designed to explore the objectives of the study, and was based on previous research (Van Zyl & Botha, 2004:213; Van Zyl, 2002:158; Botha, 2002), a literature review, preliminary interviews with a researcher (Schreuder, 2003) and the Aardklop management (Van Zyl, 2003) as well as consultation with the other two festivals. The research instrument was compiled to support the conjoint analysis model designed for the study.

The structured questionnaire for the interviews appears in Appendix A3 and A4. Show cards were included to facilitate the completion of the questionnaire. The questionnaire consisted of four sections, Sections A, B, C and D.

Section A contained a few screening questions to determine whether or not a respondent qualified to participate in the research project. Section B consists of an introductory section, prompting respondents to complete all the questions; an example question on one profile and the 16 actual questions on profiles. A 9-point semantic differential rating scale was used to rate the 16 packages. Five different attributes with three different attribute levels were developed and the rationale for selection is discussed in Section 4.8.5 of the present study. Section C measures the perception of the situational inhibitors that might prevent respondents from attending an arts festival. The rationale for the situational inhibitors selected in the present study and their levels are discussed in Section 4.8.5. An 11-point interval rating scale was used to evaluate the situational inhibitors that might influence the respondent's decision negatively. In Section D, the responses to questions on certain demographic information about the respondent were incorporated as variables with a rank-order rating of the various push attributes identified in previous research (Van Zyl, 2002:105).

The questionnaire was pre-tested on 15 respondents to identify and eliminate potential problems. No problems were reported and respondents understood the questionnaire. The analysis of the pre-test responses was used when checking the actual survey to ensure that the data collected contained the necessary information. R-square testing was done on Section B of the questionnaire for the 16 profile packages to test whether the respondents understood the conjoint section, thereby testing the validity of the questionnaire. In this study, any R-squared values below 0,4 were omitted from the study. Individual respondent numbers 210 and 185 were deleted as their R-squares were below the norm. The average of R-squares for this study was 0,83, which indicated a good fit between the data and the model. (See discussion in paragraph 4.8.5 on Step 6 for the ideal R-square value).

The following *three* steps (Steps 3 to 5) in the primary research process are concerned with the data namely the fieldwork (data collection and editing), the coding of the data, the capturing and cleaning of the data.

The fieldwork was performed and the interviews were conducted between 15 and 27 October 2003, which included weekdays and a weekend. The data collection times were between 08:00-12:00, 14:00-18:00 and 19:00-22:00. The interviews were conducted in the three scenario areas as demarcated by the Municipal Demarcation Board where the arts festivals are held annually. Each interview took 20-30 minutes and only respondents who met the design criteria were interviewed. In total, 31 interviewers/field workers were used for data collection at all three festival scenarios. They were fully briefed beforehand on the background of the study, as well as the manner in which interviews should be conducted. The respondents who took part in the research were briefed on its purpose, and responded openly and honestly. For convenience and to assist the interviewers, they were given written instructions on conducting the interview (see questionnaire in Appendix A4). A quota control sheet in the middle of the flip file contained the exact quota of respondents the particular interviewer had to interview in the geographical region of the festival in the scenario (see Appendix A2).

The fieldwork supervisor checked that each interviewer had collected the exact quota of respondents and interviewees were awarded incentives accordingly. A total of 380 personal face-to face interviews were conducted. The data for the present study were edited during the fieldwork. A 10% check-back was performed for verification to test if completed questionnaires were correct.

Data coding in this study, was done by using numerical codes to combine the pre-coding and post-coding. At this point, data capturing and cleaning took place as the data from questionnaires had been entered into a database and stored electronically. A final check was done for errors before proceeding with the tabulation and statistical analysis of the survey results. One returned questionnaire, File number 152, contained missing data was therefore deleted from the data set.

Two other returned questionnaires were deleted because their r-squares were below 0,4 (see Section 4.8.5). In total, 377 questionnaires were used in the analysis of the data.

The *sixth* step is the analysis of the data and the two techniques used for analysing the data in the current study are conjoint analysis and game theory. The conjoint analysis technique was employed to address the secondary research objective of the study, namely to determine which attributes and combination of attributes would drive the best practices of arts festival scenarios. With conjoint analysis (CA), the importance of each attribute as well as the part-worth values of each level of each attribute of the three arts festival scenarios can be assessed by means of a linear regression model using the rating each person gave to each product (a combination of levels of attributes). Such a rating indicates how much a respondent prefers a particular arts festival product.

The conjoint technique as employed in the present study, is discussed in Section 4.8.3. In addition, two techniques often used as complementary to and in conjunction with conjoint analysis, namely cluster and correspondence analysis, were mainly used to draw the positioning maps contained in the study. Cluster and correspondence analysis are discussed in Section 4.8.1 and 4.8.2.

The results of the conjoint analysis were used to construct the game theory. Game theory studies decision making in situations where there is semi-competition (Mansfield & Yohe, 2004:441). The game theory technique is employed to address the secondary research objective, namely to compare the different arts festival scenarios with one another and to identify the most successful arts festival presentation as a tourism attraction. The outcome of these games was used in developing the market-positioning model for arts festivals. The game theory technique as employed in the current study, is discussed in Section 4.9.

The *last* step in the research process is to present the research findings and is discussed in Chapter 5 of the study.

The demographic, geographic and behaviour criteria of respondents who attend arts festivals are listed in Section 5.2, Table 5.1. The situational inhibitors that affect respondents in the three selected arts festival scenarios negatively are discussed in Section 5.2.1. These inhibitors provide valuable information about the respondents in the three arts festival scenarios and can add value to the market-positioning model. The inhibitors were incorporated as a demographic variable in the analysis of the data.

The conjoint analysis technique was employed to address the first secondary objective of the study and the results are presented in Sections 5.3.1 to 5.3.5. The results from these sections make it possible to determine the optimum combination of attributes for each arts festival scenario. In order to take the results to the next level another technique that of “game theory” was used. The “game theory” technique is used to address the second secondary objective of the study and the results are reported in Section 5.4. The information gained from the above-mentioned analysis was used to develop a market-positioning model specifically for arts festivals.

The research methodology is discussed in more detail in Chapter 4.

1.5 DEFINITIONS OF TERMS

1.5.1 Tourism and Special Interest Tourism

The Tourism Society in the United Kingdom has adopted a short definition by Burkart and Medlik (1981:1) according to which “... tourism is deemed to include any activity concerned with the temporary short-term movement of people to destinations outside the places where they normally live and work, and their activities during the stay at these destinations”. The World Tourism Organization’s (WTO) current definition is very similar to the above definition, as it is workable and has gained acceptance globally (Lumsdon, 1997:2).

In recent years, the *same-day visitor* or *excursionist* (low involved tourism) has been included in the statistics, but here too there are definitional issues. Although the literature offers various working definitions of tourism, in summary it involves movement away from the home environment for varying periods of time, even only for a day. Literature describes the total experience (from planning the trip to reminiscing about it afterwards) of individuals who participate in different activities and who use various forms of transportation and hospitality services.

When considering the dynamic nature of tourism, it is natural for various subsegments to develop. One of these segments, special interest tourism (SIT) was new in the 1980s, but has become firmly established as a significant ingredient in the marketing strategies for destinations and places (Getz, 1997:2). SIT is akin to adventure, culture, heritage, sports, eco-tourism and other special interest markets.

Twenty-five years ago, Read argued that special interest tourism would become a “prime force in the expansion of tourism”, and would “... dominate the industry in the next decade and be responsible for an unprecedented rise in visitor satisfaction” (1980:195). He also defined special interest tourism as “travel for people who are going somewhere because they have a particular interest that can be pursued in a particular region or at a particular destination” (Read, 1980:195).

Weiler and Hall (1992:5) refer to the term SIT as active or experiential travel and this only “occurs when the traveller’s motivation and decision-making are primarily determined by a particular special interest”.

Derrett (2001:3) takes a different approach and covers some new ground, different from that important earlier work. This author claims that special interest tourism (SIT) may be defined as “the provision of customised leisure and recreational experiences driven by the specific expressed interests of individuals and groups”. A special interest tourist chooses to engage with a product or service that satisfies particular interests and needs. SIT is either the focus of the entire holiday, or a way of spending one or two days during a holiday (Swarbrooke & Horner, 1999:38). SIT may be a new

term, but is not a new phenomenon and many new names have been given in the literature for the services offered to participants in "serious" leisure and tourism.

In summary, SIT is a subset niche market in tourism and encompasses an extraordinarily diverse range of special interest opportunities, of which festivals and events are an important sector (Derrett, 2001:357; Hall, 1997; Uysal, Gahan & Martin, 1993:5). The complex nature of this sector is outlined and defined in the next section.

1.5.2 Special events and festivals

Special events and *festivals and events* are terms frequently used in the events literature. Even though the core meaning of these terms are similar (a specific happening celebrated in a certain way), their definitions vary, which often causes confusion (Getz, 1997:4).

The field of special events is so vast that it seems difficult, if not impossible, to give a definition that includes all varieties and shades of events (Allen, O'Toole, McDonnell & Harris, 2002:11). The Collins English Dictionary (1998:535) defines an *event* as "anything that takes place or happens, especially something important; happening; incident".

Although the definition is very wide, it specifies things of significance that happen. The definition by Goldblatt (2002:6), namely that "a special event recognises a unique moment in time celebrated with ceremony and ritual to satisfy specific needs" is more flexible and can suit different situations. Groundbreaking work by Getz (1997:4) on the typology of events, defines events as "transient, and every event is a unique blending of its duration, setting, management, and people". It is rather confusing to determine when an event is a special event or just an event, because of the difficulty of defining the element *special*. For the purpose of this thesis, the terms *special event* and *events* are therefore regarded as synonymous.

A festival can be classified as a hallmark tourist event (Dimmock & Tiyce cited in Douglas et al., 2001:356; Getz, 1997:4; McCleary, 1995:1; Ritchie, 1984:2). *Hallmark event* is another term frequently used. A hallmark is a symbol of quality or authenticity which distinguishes goods or pertains to a distinctive feature (Getz cited in Jafari, 2000d:210). An event or festival, can aspire to be a hallmark of its destination, facility or organisation and therefore the link. The different types of festivals, of which arts festivals is one type, as well as their definitions, are discussed below.

Festivals are categorised by Wilson and Udall (1982:3) as sacred; harvest and food; festive subgroup gatherings; regional and local folk art festivals; and special activity festivals. Arts festivals are among the most acknowledged festivals in the secondary literature (Gitelson & Kerstetter cited in Allen, Harris, Jago & Veal 2000:179; Hughes, 2000:27; Smith & Jenner, 1998:86; Getz, 1997:11) and are the primary focus of this research. For the purpose of this study a festival is an event which is an arts festival, thus the three terms are used interchangeably in this thesis.

Although there are a wide variety of festivals, the definitions essentially apply to all types of festivals and the object of celebration is often recognisable in the name (Getz, 1997:8), such as the Aardklop National Arts Festival, which indicates its nature.

A key characteristic of a festival, which distinguishes it from other events, is that there is a clearer community and celebratory focus to the occurrence. Wilson and Udall (1982:3) define a festival as "a public celebration of some happening, either a fact or a concept". As Manning (1983:4) explains, a celebration is a performance: "It is, or entails the dramatic presentation of cultural symbols." Falassi (1987:2) describes festivals as "a sacred or profane time of celebration, marked by special observances". Getz (1997:8) defines a festival as "a public, themed celebration".

In summary, festivals are:

- public in nature and usually have a central celebratory theme;
- the cultural resources of an area that enable the successful hosting of visitors;
- important attractions for tourists, which provide unique experiences for attendees;
- derived from the word *feast* and imply a time of celebration;
- an escape from the ordinary day-to-day activities and provide experiences beyond normal life;
- family-fun events that are regarded as “owned” by a community because the community provides the support services for the festival; and
- annually recurring events of limited duration, which develop their character and reputation over a number of years.

However, although these mentioned definitions and characteristics have been covered in literature there remains a need to address marketing issues as well in this study. In order for festivals and more specifically arts festivals to sustain and survive in the long term, they have to be effectively positioned in the market place (Crompton 2003:1; Van Zyl, 2003; Allen et al., 2002:176).

Therefore, market positioning can assist a festival management with successfully distinguishing its festival from other festivals in the market and with increasing its attendance figures.

1.5.3 Market positioning

In a series of articles in 1972, Ries and Trout (1981:3) define positioning as “... not what you do to the product. It is what you do to the mind of the prospect”. Their latest definition (2001:3) is: “How you differentiate yourself in the mind of your prospect.” These authors focus on the end product of positioning strategies, namely the position that the product, or the service, holds in the minds of customers. Since the 1970s, various other authors have endorsed Ries and Trout’s idea and have expanded on

their original concept (Mullins et al., 2005; Jobber, 2004; Kotler, Bowen & Makens, 2003; Lovelock, 2003; Morrison, 2002; Kotler, 2000; Lewis & Chambers, 2000).

Boyd and Walker (1990:315) and Kotler (2000:298) state that positioning can be defined as the act of creating a positive and unique image of an organisation's offering to occupy a distinctive place in the mind of the target market. Lovelock and Wirtz (2004:63) add to this, and define positioning as "the process of establishing and maintaining a distinctive place in the market for an organisation and / or its individual product offerings". Kotler, Bowen and Makens (2003:282) define market positioning as "the way the product is defined by consumers on important attributes – the place the product occupies in consumers' minds relative to competing products". *Top-of-the-mind awareness*, *optimum selling idea*, and *unique selling proposition (USP)* are some of the terms that new era marketers frequently use, but the core meaning remains the same.

It is the customer-oriented (Reich, 1999:2), "top-of-the-mind" awareness that motivates tourists (attendees) to select one tourism product (festival) above another (Reich, 1997:5; Ennis, 1982:261).

Positioning is a facilitating process which co-ordinates the marketing functions and is relevant to the micro and the macro levels of marketing.

Positioning can be based on the physical characteristics of a festival (attributes) and the images created through promotional efforts (Burnett, 1993), which often highlights the brand. It is through positioning that marketers strive to find or create a perception, image or brand – to establish a position – in the targeted visitor's mind, a niche which is not occupied by another (Mill & Morrison, 2002:176; Morgan & Pritchard, 2001:247; Lewis & Chambers, 2000:286). Branding is closely related to positioning and branding has become so strong that hardly anything goes unbranded, even fruits and vegetables (Kotler & Armstrong, 2004:285; Kotler, 2004:30).

Therefore, positioning is the process of establishing and maintaining a distinctive place for a festival in the minds of potential customers in selected target markets in the market place.

In summary, positioning:

- is about groups of customers and competitors and is therefore a multidimensional issue;
- is the favourable distinguishing of one festival from other festivals;
- compares one's product with others in the market on specific attributes, features, customer benefits or brand;
- creates a distinctive place in the minds of potential customers;
- is something one does to influence the minds of customers;
- is the "top-of-the-mind" awareness that motivates tourists or attendees;
- is a facilitating process, which co-ordinates the marketing functions;
- is relevant to the micro and the macro levels of marketing;
- is tangible (physical characteristics of the festival) or intangible (based on the images created through promotion);
- strives to find a distinctive niche in tourists' minds;
- differentiates one festival from another in their minds; and
- has a strong relation with the specific brand.

The specific attributes of a festival that lure attendees to the festival can be defined as the positioning attributes (Van Zyl, 2002:21; Botha, 1998:12; Crompton & McKay, 1997:425). Positioning attributes refer to the "push" factors (social-psychological motivators) and "pull" factors (festival attributes) likely to motivate attendees to select one festival from a wide variety of alternative leisure activities in the tourism industry (Van Zyl, 2002:47; Botha, 1998:12; Crompton & McKay, 1997:425). However, when analysing the positioning attributes of a festival, the situational inhibitors (barriers or constraints), which might prevent attendance, also have to be considered (Van Zyl, 2002:58; Botha, 1998:13).

1.6 ORGANISATION OF THESIS

In view of the problem statement given in the previous section, the chapters in the thesis are arranged as follows:

Chapter 1 is a general introduction to the thesis, providing the background context, the problem statement, research objectives, research methodology and definitions of the relevant terms used throughout this thesis.

Chapter 2 contains a review of the literature relating to the tourism phenomenon, special interest tourism, festivals and events, and more specifically, arts festivals from a South African perspective.

Tourism marketing and the theory of the market positioning of arts festivals in the South African context are outlined in Chapter 3.

Chapter 4 describes the research methodology used for collecting the data on the arts festival scenarios. The survey population, the development of the measuring instrument and administrative procedures are also included. The specific statistical techniques used for analysing the data are also discussed in Chapter 4.

Chapter 5 reports the results of the analyses and interprets the data on the attendees at each of the three selected arts festival scenarios in South Africa.

The thesis concludes in Chapter 6 with a summary of the findings and a discussion of the implications these findings might have, the market-positioning model designed specifically for arts festival scenarios as a recommendation, the limitations of the study and recommendations for further research. Figure 1.2 is a flowchart of the following chapters in the thesis.

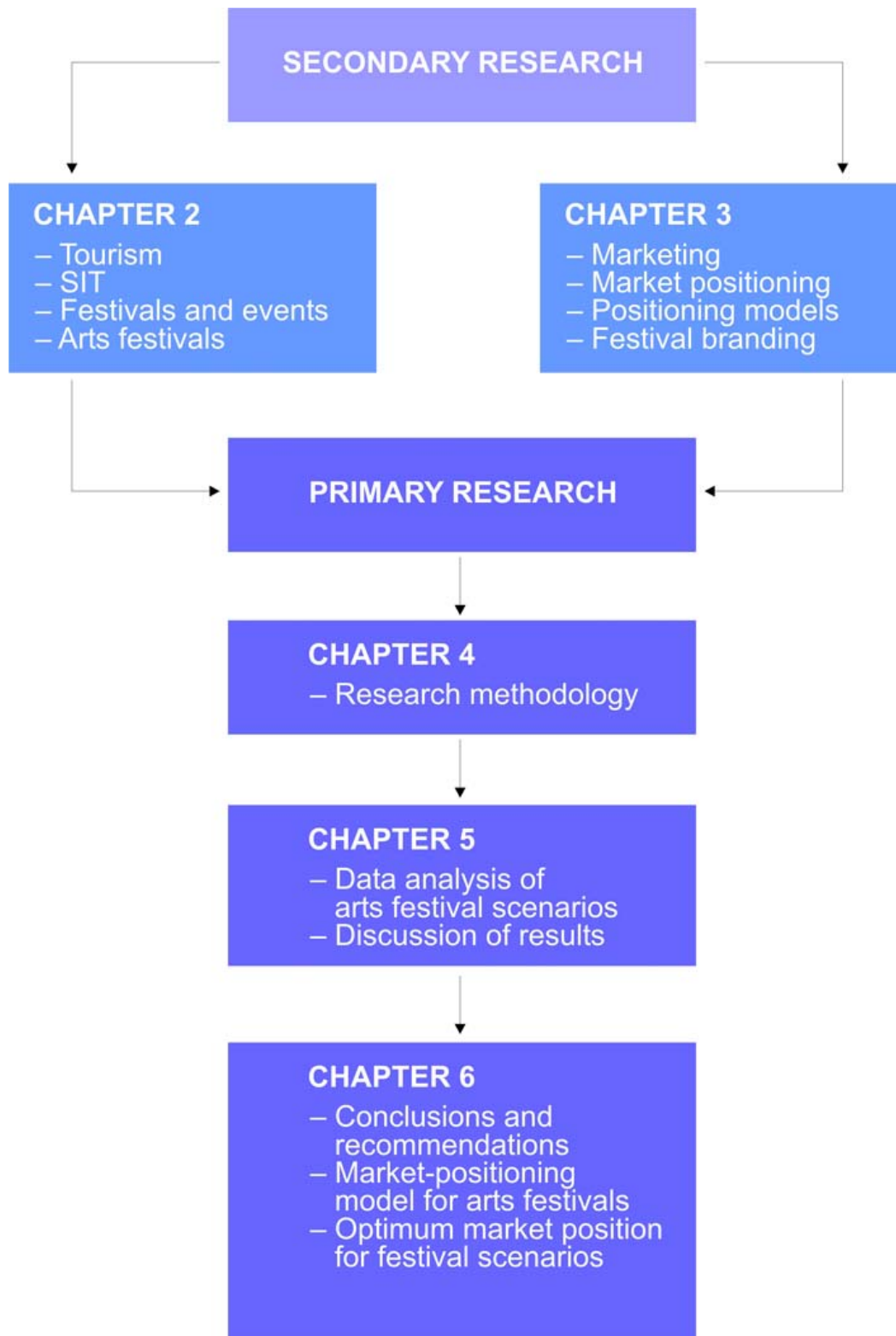


Figure 1.2: Chapter outline of the thesis.

CHAPTER 2

2 TAXONOMY OF TOURISM, SPECIAL INTEREST TOURISM: ARTS FESTIVALS AND EVENTS

2.1 INTRODUCTION

Tourism is a multifaceted industry, which interfaces with all spheres of life, and which is the world's largest and most diverse industry (WTO, 1999a:3). Growth in tourism has continued in the late twentieth century and the new millennium (Page, 2003:2; Cooper et al., 1998:1). There are many attempts in the literature to define the concept of *tourism* (see Section 2.3.1). In mid-1996 the entire tourism industry worldwide, and especially in South Africa, has recorded sustained growth. This growth is currently perceived as very positive as it contributes between 7%-8% to GDP and creates approximately 512 000 job opportunities (South African Tourism, 2004:1).

Inevitably, like all industry lifecycles, Cooper et al. (1998:2) notes that the pattern of growth is beginning to slow down as the market matures and as the type of tourists and their demands or needs change (see Section 2.3.1.2). These authors suggest that the tourism sector would have to be more creative in supplying products to satisfy the new tourist's dynamic demands. Adding to this complexity is the constantly evolving, developing and reformulating nature of the tourism phenomenon (Page, 2003:3).

Page (2003:3) further argues that the tourism industry and private businesses has to appeal to the tourist in a focused manner. This entails aligning new marketing ideas, products, services and destinations to the varied needs of the new tourists. The next section focuses on the flow process from the "new" tourist to the arts festival tourist.

2.2 FLOW PROCESS OF THE TOURISM PHENOMENON

The phenomenal growth of tourism has contributed to maturity in the market and the changing needs and demands in this sector (Derrett, 2001:7). This “filtering down” or flow process of the tourism phenomenon is illustrated in Figure 2.1. Although there are different types of SIT opportunities in the market as illustrated in Figure 1.1 only one type i.e. festival and event tourism is depicted in Figure 2.1 and more specifically arts festivals resulting from that.



Figure 2.1: Flow process of the tourism phenomenon

The concern in the tourism industry manifests internationally in an interest in developing niches to cater for the specific interests and activities that the “new” tourists might find interesting and worth spending their money and leisure time on (Page, 2003:3; Derrett, 2001:5; Weiler & Hall, 1992:1). Ultimately, this understanding has been translated into the rise of special interest tourism (SIT), for example nature-based tourism or ecotourism including bush walking, bird- and whale-watching or festival and event tourism. Various authors (Douglas, Douglas & Derrett, 2001:1) comment that special interests are a rapidly developing pattern in tourist activity and that these are not restricted to a handful of selected individuals. Tourists may engage in a number of special interest tourism products simultaneously or combine a special interest with a conventional holiday product (Douglas et al., 2001:1). (See Section 2.4 for the different types of SIT opportunities.)

One of the key aspects of special interest tourism is that it holds a promise of incorporating the principles of sustainability (Derrett, 2001:7). Special interest tourism (SIT) has the potential to contribute to the wellbeing of the host destination and is therefore always welcomed (Weiler & Hall, 1992:11). SIT may offer new opportunities to establish a form of tourism compatible with the socio-cultural and natural environments of a particular area. One of these subcategories of this type of tourism, associated with the culture and heritage of an area, is festival and event tourism (Lee, Lee & Wicks, 2004:61).

This subcategory has grown strongly and is now a worldwide tourism phenomenon (Goeldner & Ritchie, 2003:224; Prentice & Andersen, 2003:8; Derrett, 2000:120). Interest in and research on festivals and events has grown considerably in the past 15 years, owing to the large number of public celebrations and their social and economic contribution to society (Arcodia & Robb, 2000:154; Formica, 1998:131; Schneider & Backman, 1996:139). Although the benefits of festival and event tourism are increasingly being recognised in South Africa, more research is needed on this market segment (Tassiopoulos, 2005:25).

Ironically, the very popularity and growth of the festival industry in South Africa might threaten its future (Witepski, 2002:52). Festivals and events are discussed in Section 2.5, and Section 2.5.4 contains a classification of festivals in the South African context. This classification could help to create and maintain positive images in the minds of festival attendees or customers by creatively marketing and effectively positioning of a festival or event.

As might be expected for an emerging industry, literature on festival and event tourism is growing but still limited, especially regarding the specialised field of arts festivals (O'Sullivan & Jackson, 2002:325; Getz, 2000b:10). Arts festivals were selected for the purpose of the research for this thesis, as these are currently one of the fastest-growing sectors of tourism (Gitelson & Kerstetter, cited in Allen et al., 2000:180). The definitions, reasons for participation and establishing festivals, as well as the advantages and disadvantages of arts festivals are discussed more fully in Section 2.5.5. This particular category of festivals is of particular significance to this study and the following determinants also played a role in the selection of the prominent arts festival scenarios to be researched:

- large in size with more than 100 000 attendees;
- significant for host community's wellbeing and community pride;
- recurrence period as the festivals should have been held annually for more than five years;
- of limited duration, i.e. held for between 5-8 days only;
- capacity to enhance the awareness, appeal and profitability of a destination in the short term with considerable economic impact (more than R37 million per festival).

The three arts festivals in South Africa classified as hallmark tourist events³ by Van Zyl (2002:24) are as follows:

³ *Hallmark events* are events that become so identified with the spirit or ethos of a town, city or region that such events become synonymous with the name of the place, and gain widespread recognition and awareness (Bowdin, McDonnell, Allen & O'Toole, 2001:17).

- Aardklop Festival in Potchefstroom, referred to in this thesis as Festival A,
- National Arts Festival in Grahamstown, referred to in this thesis as Festival B,
- KKNK in Oudtshoorn referred, to in this thesis as Festival C.

The future trends affecting tourism industry as well as the challenges these trends pose to the marketing and positioning of festivals in the global and South African market are discussed in Section 2.5.7.

2.3 THE TOURISM PHENOMENON

2.3.1 Defining tourism

The dynamic nature of tourism entails that a definition for tourism is still evolving. Various authors and stakeholders interpret and define tourism according to their own relevant frame of reference, and each country tends to adopt a different definition (Goeldner & Ritchie, 2003:7).

The British definition of tourism by Burkart and Medlik (1981:1) in Section 1.5.1 is very similar to the definition established in 1991-2 by the World Tourism Organization (1993:1), the major intergovernmental body concerned with tourism. The WTO definition is workable and has gained acceptance worldwide (Lumsdon, 2000:2), and is intended for general use:

- “Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business, and other purposes.”

Furthermore, although literature offers various working definitions of tourism, such as those by Middleton (2001:8-9), Goeldner, Ritchie and McIntosh (2000:16) or Burkart and Medlik (1981:2), the definition given by Mill and Morrison (2002:8) is perhaps the most comprehensive as it includes elements of pre- and post-event trip evaluation as

well as those activities which take place at the destination. According to the definition by these authors, an understanding of the entire tourism process has fundamental implications for the tourism marketer:

- “Tourism is the term given to the activity that occurs when people travel. This encompasses everything from the planning of the trip, the travel to the destination area, the stay itself, the return, and the reminiscences about it afterwards. It includes the activities the traveller undertakes as part of the trip, the purchases made and the interactions that occur between host and guest in the destination area. In sum, it is all of the activities and impacts that occur when a visitor travels.”

Mill and Morrison (2002:8) also note that the term *recreation* overlaps in many ways with the term *tourism*. Accordingly, recreation is defined as what happens during an individual's leisure time. Furthermore, the activities in which people engage during leisure time, such as attending an arts festival, are known as recreation.

This definition of recreation includes the overlapping stages of customer activity and provides a useful point of departure for the analysis of the tourism process. It gives the tourism marketer an opportunity to understand the complete tourism process and not only the travel journey and the destination.

In summary, tourism involves movement away from the home environment for varying periods of time (even for just a day). It describes the total experience (from planning the trip to the reminiscing afterwards) of individuals who participate in different activities and who use various forms of transportation, hospitality and accommodation facilities. Based on the above definition, the people who attend arts festivals (*special interest tourists*) will be classified as *tourists* for the purposes of this study.

2.3.1.1 The growth of tourism

The concept of travel and tourism is as old as civilisation itself and can be traced back many thousands of years to the Ancient Greeks and the Romans (Mill & Morrison, 2002:9). A ten-volume travel guide entitled *A guide to Greece* published in 170 AD was the first to be documented in literature (WTO, 1999a:9). Since then, tourism has grown remarkably as an activity and also as an industry in the economy of the world, and has also gained global importance and significance. Tourism has emerged as one of the world's major socio-economic sectors, and has steadily expanded at an average rate of about 4-5 % annually during the last quarter of the 20th century (WTO, 1998:14).

The current tourism industry is worth US\$4,4 trillion and is projected to grow to US\$10 trillion by 2010, with international tourist arrivals increasing by 4,3% p.a. between 1995 and 2020 (WTO, 1998:14). Grant Thornton Kessel Feinstein (1998:5) reports that travel and tourism in South Africa was worth nearly R60,5 billion in 1997, and is set to grow at a rate of 12,2% p.a. until 2010. Tourism already contributes between 7% and 8% of South Africa's gross national product (GDP), and this is predicted to grow to more than 10% by 2010.

Furthermore, Africa recorded a 4,6% increase in international arrivals in 2001, despite a worldwide decline (WTO, 2002:4). The WTO *Tourism 2020 Vision* (1999b:3) further forecasts growth rates of over 5% per annum in Africa, compared to the world average of 4,1%, and South Africa remains the most important destination in Africa. As a result of a steady increase in overseas tourist arrivals, the South African tourism industry is increasingly gaining buoyancy (South African Tourism, 2005:4). This growth can be attributed to several factors, including the increasing perception of South Africa as a "safe" destination after global events such as post 11 September 2002, the war in Iraq, and the latest terrorist attacks in places such as London and Egypt.

Although the growth and prosperity of the South African tourism industry are recognised, tourism marketers cannot afford to ignore the challenges posed to this dynamic industry.

As periods of continued growth will not persist, any signs of maturity in the South African market should be monitored. This is particularly important, as continued growth in the tourism industry has led to maturity in the market elsewhere such as a decline of the seaside resort in the United Kingdom as a long-stay destination and in several other European countries (Hughes, 2000:84; WTO, 1999a:117).

The continued growth and expansion in tourism have resulted in a wider selection of tourism products and services (Page, 2003:3). In addition, tourists have also become more knowledgeable and there is a new generation of tourists with completely different expectations (Buhalis, 2001:71). If tourism stakeholders and planners are to survive, they will increasingly need to identify the changes (new trends in demand) in the market. This is challenging in an environment characterised by a constant state of flux. For this reason, the tourism industry should offer and market meaningful tourism products to satisfy tourists' constantly changing and increasingly sophisticated demands.

2.3.1.2 Changing needs of tourists

Various authors report that the rapid growth in tourism has led to fundamental changes in the needs and demands in the industry as well as to a new, more "streetwise" tourist (Page, 2003:4; Buhalis, 2001:69; Swarbrooke & Horner, 1999:29; Lickorish & Jenkins, 1997:4). The tourism market has to respond to these changing patterns so that it can meet the demands of these tourists (Poon, 2003:139). No longer is sunbathing next to the pool of a luxury five-star hotel (old traditional tourism market) the main attraction. Instead, there has been a shift to new kinds of experiences and tourism products (Poon, 2003:141; WTO, 1999a:118). The most significant trends or changing patterns in the tourism sector have been summarised in various sources (Allen et. al., 2002:8; Buhalis, 2001:71; Chang, Milne, Fallon &

Pohlmann, 1996:284; Van Harssel, 1994:3; Goodall, 1988:34; WTO, 1985:9) and include the following:

- socio-demographic changes, marked by an active but ageing population, later marriage, two-income families, childless couples and a rising population of single adults;
- higher incomes, more leisure time and changing lifestyles, indicating continued expansion in the industry and more demands for tailor-made tourism packages and experiences (Van Harssel, 1994:3);
- the development of public events, celebrations and entertainment resulting from such changes (Allen et. al., 2002:8);
- changes in tourism demand towards new types of tourism products which value the individuality and independence of tourists (Buhalis, 2001:71);
- a new generation of tourists that is better educated, more experienced and knowledgeable, and demands good quality facilities and services in its travels, but at good value for money (Buhalis, 2001:71; Goodall, 1988:34);
- the rapid expansion of special interest and adventure tourism, as well as other specialised forms of tourism, including festivals and events, nature-based or ecotourism, "roots", regional, health and religious tourism;
- growth in cultural and heritage tourism, with the phenomenon of heritage tourism predicted to rise as people become more mobile and can reach the sites of cultural resources (Chang et al., 1996:284);
- a desire to participate or a "preference to live holidays rather than to spend them" by taking part in activities such as recreation, sports and adventure, and also by learning more about the history, culture and natural environment of areas that tourists visit (WTO, 1985:9);
- the growing popularity of ecotourism as a means of justifying and achieving conservation objectives; especially as more environmentally sensitive tourists wish to visit well-planned destinations and avoid creating environmental or social problems;
- more frequent, shorter vacation trips taken throughout the year;

- more travelling by older, active retired people, although younger middle-aged people also still travel in large numbers;
- the continued expansion of business travel, travel as a business incentive, and travel to attend meetings, conferences and exhibitions (MICE); and
- the growing use of modern technology as an important information and marketing tool, for example using the Internet for reservation services and marketing.

These trends or changes contributed to the substantial difference in the tourism and travel markets between the 1970s and early 1980s and again during the 1990s to 2000s. The changing needs of the travelling public drive the greater product differentiation in the tourism market (WTO, 1999a:132).

Furthermore, these changing demand patterns have serious implications for marketing management, as marketing is central to the growth, acceptance and sustainability of the new tourism products and services (Derrett, 2001:8). The challenge for public-sector and private-sector tourism planners and management in countries such as South Africa will be to meet the changing needs of more sophisticated tourists while using the country's scarce resources responsibly, preserving traditions and cultures and satisfying these niche markets.

One of these specialised tourism trends has been identified as special interest tourism (SIT) (Goeldner et al., 2000:689). The growth and proliferation of tourism products in this niche market is set to provide the tourist of the twenty-first century with a wide array of travel choices (Swarbrooke & Horner, 1999:146). Since special interest tourism, like other tourism sectors, is market-driven, marketers should respond to these specific needs of the target market (Derrett, 2001:8).

Special areas of leisure travel are notoriously difficult to consider, because special interest tourism “appeals to the human imagination” and that, as an activity, has no boundaries (Page, 2003:4). New special types of tourism services are continually

being added to meet the travel needs of this sector. The origin and different types of SIT opportunities are discussed in the next section.

2.4 SPECIAL INTEREST TOURISM (SIT)

Tourism stakeholders have noted the dynamic nature of tourism demand in special needs and the special interests emanating from it. Read (1980:195) observes that special interest travel will become a “prime force in the expansion of tourism and would dominate the industry in the *next decade* and be responsible for an unprecedented rise in visitor satisfaction”.

Weiler and Hall (1992:5), the pioneers in the field of special interest tourism, define special interest tourists as “those tourists whose motivation and decision-making are primarily determined by a particular special interest”. However, the term has different meanings to different authors. Derrett (cited in Douglas et al., 2001:3) defines *special interest tourists* as “the provision of customised leisure and recreational experiences driven by the specific expressed interests of individuals and groups”. By contrast, Hughes (2000:60) argues that SIT is defined not as much by type of activity but rather by interest, motivation and involvement. Special interest tourists will therefore choose products or services that satisfy particular interests and needs. There is also an element of fashion and trendsetting or of being “in with the crowd” in their motivation to participate in this type of tourism.

In spite of the many different opinions, SIT represents some of the faster-growing areas of tourism. There are many new names given in literature to the services being offered to participants in “serious” leisure and tourism. SIT is therefore set to provide tourists with an array of different travel choices, ranging from ecotourism, rural, adventure, health and educational tourism to regional, cultural, heritage, festival and event tourism, as shown in Figure 1.1 of Chapter 1. SIT and its various subcategories are relatively new to academic circles, except for nature-based tourism and ecotourism, and little research has yet been done on SIT.

Table 2.1 lists the different types of SIT opportunities available as a result of the fundamental changes that have taken place in the tourism market. Due to the complexity and extent of each type of SIT opportunity, a summary of the core meaning of each type of opportunity is given.

Table 2.1: Analysis of the different types of SIT opportunities

Type of SIT and examples	Definition
Adventure tourism • “Hard” tourism e.g. mountain climbing • “Soft” tourism e.g. bicycle tourism	“The desire to participate in activities that provide a challenge, thrill, or intense experience and rely on natural, environmental features” (WTO, 1999a:122). • “Conjures up images of risk-taking in challenging environments; • Emphasis on educational discovery through natural and cultural interpretation by tour guides” (Morpeth, 2001:215).
Cultural tourism	“Referring to historical and heritage sites, arts and craft fairs and festivals, museums, the performing arts and the visual arts which tourists visit in pursuit of cultural experiences” (Tighe, 1986:2).
Educational tourism • Academic studies	“Travel in which learning occurs within a structured or formal program.” (WTO, 1999a:124)
Environmental tourism: • Nature-based- • Wildlife; • Ecotourism divided into two types – “hard” and “soft”⁴	“Tourism <i>for</i> the environment rather than <i>in</i> the environment: • the viewing of nature is the primary objective and the focus is upon the study and/or observation of flora, fauna and/or landscape; • addressing living organisms of the environment, focusing on one component such as bird or whale watching; • embraces aspects of both nature-based and wildlife tourism, but includes elements of conservation, education, responsibility and community participation” (Dowling, 2001:299).

⁴ *Hard tourism* presents the tourist with challenging environments and risk taking is the key motivation, whilst with *soft tourism* education is the tourists motivation, and the environmental and cultural appreciation an important aspect of the experience (Morpeth in Douglas et al., 2001:215).

Type of SIT and examples	Definition
Festival and event tourism • Special event • Mega event • Hallmark event • Community festivals	“That which is different from a normal day of living” (Goldblatt, 2002:6). “Huge, affects whole economies, reverberates in the global media” (Dimmock & Tiyce, 2001:356).” “Major one-time or recurring events of limited duration often developed primarily to enhance awareness, appeal and profitability of a tourism destination in the short term and/ or long term. Such events rely for their success on uniqueness, status, or timely significance to create interest and attract attention” (Ritchie, 1984:2). “Celebration of something the local community wishes to share” (Dimmock & Tiyce, 2001:356).
Food and wine tourism	“Food is the visitation to primary and secondary food producers, food festivals, restaurants and specific locations for which food tasting and/or experiencing the attributes of a specialist food production region are the primary motivating factors to travel; Wine is the visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors” (Hall & Mitchell, 2001:308).
Health tourism • Health, fitness travel • Spa tourism • Reconstructive surgery • Medical treatment	“Travel to facilities and destinations for obtaining health-care services or health-related benefits” (WTO, 1999:123).
Heritage tourism • A subset of cultural tourism	“Movements of persons for essentially cultural motivations such as study tours, performing arts and cultural tours, travel to festivals and other cultural events, visits to sites and monuments, travel to study nature, folklore or art, and pilgrimages” (WTO, 1985:6).
Ocean cruise experience	“A voyage on a ship undertaken wholly for reasons of leisure and recreation” (Douglas & Douglas; 2001:459)
Regional tourism	“Tourism in concentrated tourist areas, coastal resorts, towns and other

Type of SIT and examples	Definition
	urban settlements, and the countryside, hinterland or coastline outside capital cities. It does not rely on particular activities or experiences; rather, its character is determined by the environments in which it takes place" (Prosser, 2001:89).
Rural tourism • Farm tourism	"Travel to simpler less developed areas and includes a multitude of forms" (WTO, 1999a:121).
Senior tourism	"Distinctive aspects of tourism in which older tourists have specific needs and wants" (Ruys & Wei; 2001:459)
Sex tourism • Gay and lesbian celebration • Prostitution	"Travel associated with sex, whether involving intercourse, voyeurism or observation" (Ryan, 2001:385).
Sports tourism • Participators • Spectators	"All forms of active and passive involvement in sporting activity, participated in casually or in an organized way for non-commercial or business reasons, that necessitate travel away from home and work locality" (Weed & Bull, 2004:44).

It is clear that tourists might engage in a number of SIT categories simultaneously. Getz (cited in Uysal, Gahan & Martin, 1993:5) notes that festivals and events are becoming increasingly popular as a form of SIT. Allen et al. (2002) argue that festival and event tourism should be seen as catalysts for attracting visitors and increasing their average expenditure and length of stay. These authors add that festivals and events are also seen as image-makers, creating a profile for destinations, positioning them in the market and providing a competitive marketing advantage. This category is associated with the content of the thesis and is discussed in Section 2.5. Furthermore, festivals and events tourism is distinguished from the remaining items on the list. The reasons for this distinction include the following:

- festivals and events are an important part of the tourism industry (Goeldner et al., 2000:234);
- festivals and events have become more important in recent years to countries and their economies (O'Toole, 2005:215);

- academic interest in and research on festivals and events have grown considerably in the past 15 years (Kim et al., 2002:127; Shifflet & Bhata, 1999:26; Schneider & Backman, 1996:139);
- previous research by Van Zyl (2002:159) revealed that limited research has been done in the area of festivals and events in South Africa, particularly with regard to the marketing of festivals;
- secondary literature in South Africa indicates that, although research has been done among other things on nature-based tourism and more specifically ecotourism (Cousins & Kepe, 2004; Tapela, 2001; Mosidi, 1996), and there is some research on sports tourism (Marx, 2003; Saayman & Uys, 2003; Herbst & Schreuder, 1999), the area of festivals and events has been largely neglected. Apart from various economic impact studies on arts festivals and some relating to the artistic content (Saayman & Saayman, 2004; Snowball & Antrobus, 2002; Van Heerden, 2002; Van Zyl, 2002; Witepski, 2002; Snowball & Antrobus, 2001; Silva, 1998; Williams, 1997) little research has been done on the marketing and positioning of arts festivals; and
- festivals and events are identified as one of the fastest-growing forms of leisure and are a tourism-related phenomenon globally (Lee et al., 2004:62; Derret, 2000:120). Tassiopoulos (2005:4) identifies the festivals and events industry in South Africa as “young and dynamic”, and as growing and maturing rapidly with a great deal growth potential.

The above clearly indicates the need for formal and scientific research that would enable the field of SIT to grow to its full potential in the South African market. Getz (1997) argues that festivals and events are some of the most common forms of cultural celebration and, although many of these festivals and events are traditional with long histories, the majority has only come into existence in recent decades.

Shone and Parry (2004:2) add that festivals and events have long played an important role in human society, as there have always been reasons for festivity where people can come together in celebrating, demonstrating, worshipping, honouring, remembering and socialising.

The variety and range of festivals and events are astonishing, from big internationally organised sports spectacles, such as the Olympic Games, to parades and trade fairs and even to the family ceremony for christening the new baby next door (Shone & Parry, 2004:3). As it is sometimes difficult to grasp the full extent of these festival and event activities, their variety, their role and how they operate, some kind of definition and a means of classification are clearly necessary.

2.5 FESTIVALS AND EVENTS

2.5.1 Introduction

Festivals and events have become strong demand generators that play a significant role, and which make a considerable contribution to the tourism industry of a country (Arcodia & Robb, 2000:154). This sector of the tourism industry has been identified globally as well as in South Africa as having growth potential (Tassiopoulos, 2005:25; Goldblatt, 2000:9). Tourism stakeholders are increasingly turning to this growth industry, which is capable of delivering economic benefits to their region and country.

The terms *festivals* and *events* can be quite confusing as 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 always been standardised, making it difficult to translate them to the South African scene. It may be appropriate at this point to clear up some of the confusion by illustrating the use of these two terms. Figure 2.1 demonstrates the meaning of the two terms, *festivals* and *events* by categorising the salient aspects.



Figure 2.2 A categorisation of the two terms, festivals and events

The main difference between the two terms relates to the period over which they are held (Hall, 1992:3). Festivals are held annually, whereas events are once-only happenings. However, he further argues that festivals can be classified as events, although they often differ in scale type and form. Thus, for the purpose of this thesis, the two terms are used synonymously. (See also the discussion in paragraph 2.5.3 which further elaborates on the definitions of festivals and events).

Although there has been academic interest and research on festivals and events, the pattern has increased considerably during the past 15 to 20 years (Yeoman Robertson, Ali-Knight, Drummond, & McMahon-Beattie, 2004:1). With the exception of Tassiopoulos (2005, 2000), Saayman (2001) and Van Zyl (2002), few academics have researched the history of festivals and events in South Africa. From an international perspective, various definitions have also come to the fore, and these will be explored in paragraph 2.5.3.

2.5.2 History of festivals and events

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, saints' days and the like (Allen et al., 2002:5). The origins of the very first festival and the father of all festivals are outlined in the next paragraph.

Handel (whose centenary was commemorated in 1784) might be regarded as the father of all arts festivals as no other composer ever stimulated so much musical homage and devotion (Schofield, 1995:7). The Three Choirs event (1713) is hailed as the first arts festival, was established nearly two centuries ago (Hughes, 2000:89). Schofield (1995:7) notes that in 1769 the town of Stratford-on-Avon marked the bicentennial of Shakespeare's birth with a festival for which Thomas Arne composed special music. However, the majority of music festivals have been held since the 1960s, when the Woodstock Festival was one of the best-known. Globally, the festival and event industry emerged during the 1980s and 1990s (Bowdin et al., 2001:9).

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, and had very modest beginnings in 1974. Only this one festival became well established during the 1980s (Silva, 1998:1). Secondary research found that the majority of South African festivals and events became established later, during the late 1990s, and began peaking from 2000 onwards.

It is clear that some form of definition and classification is essential, because festivals and events differ enormously in scale, type and form.

2.5.3 Definition of festivals and events

While this industry has emerged only recently, it offers a wide variety of festivals and events in the market place; and new ones are continually being added to the annual festival and events calendar. Preliminary research indicated that there are inconsistent definitions and even no precise classification of the type of festival or event, since festivals and events differ considerably in their nature and size. Though the differences between definitions might seem minor, they highlight the ease with which confusion might arise in the communication of concepts. Table 2.2 lists various definitions of festivals and events.

Table 2.2: Definitions of festivals, events and special events

Events	Are transient, with a unique blending of duration, setting, management, and people (Getz, 1997:4).
Festivals	Are themed public celebrations (Getz, 1993:945); Are themed public occasions designed to occur for a limited duration that celebrates valued aspects of a community's way of life (Dimmock & Tiyce, 2001:356); Are celebrations of something the local community wishes to share and which involve the public as participants in the experiences. Festivals should have as a prime objective a maximum number of people participating, and should be an experience that is different from ordinary day-to-day living. It is not necessary to attend festivals for longer than one day, though it is often economically desirable Tourism South Australia (cited in Hall, 1992:4).
Special events	Are a once-only or infrequently occurring event outside the normal programme or activities of the sponsoring or organising body (Getz, 1997:4); Are events, which differ from a normal day of living (Goldblatt, 2002:6).

It is clear that a key characteristic of festivals, which distinguishes them from other events, is that the occurrence has a clearer focus on community and celebration. Although there are various definitions in literature, most definitions of festivals include the following elements:

- the word *festival* calls to mind images of fun, festivity, families, laughter, being out together, and generally celebrating something;
- the celebration may involve a display of fine art and entertainment, bringing people together to honour the work of an individual;
- whatever the theme, the object of celebration is a central element;
- it may involve a time of year, an annual occurrence, a special occasion, the start or end of a particular thing, the showcasing of an asset, or anything else;
- festivals and events involve the principle of limited duration, so that people know and expect such celebrations to end within a certain limited time frame; they are therefore not continuous;
- these events may differ in size, volume and impact, and the rationale for hosting them might differ widely; and
- festivals and events have a particular concentration of activities over a short period of time.

Getz (1997:6) notes that the universe of festivals and events is so diverse that any classification is bound to be incomplete. An attempt is made in the next section to provide a classification or categorisation of particular types of festivals and events.

2.5.4 Classification of festivals and events

Various authors (Allen et al., 2002:17; Dimmock & Tiyce, 2001:356; Arcodia & Robb, 2000:155; Getz, 2000d:210; Getz, 1997:4; Hall, 1992:4) note the complexity of festivals and events and attempt to classify them in categories, though categorisation might limit the interrelationships that exist between certain categories of festivals and events.

Mega events, hallmark events and community-based (local) events are the most common categories of events, although their definitions are not precise and distinctions often become blurred (Allen et al., 2002:11, Dimmock & Tiyce, 2001:356; Jago & Shaw, 1998:29). In the present research, the intention was to use the three broad festival and event categories shown in Table 2.3.

Table 2.3: Classification into three broad categories of festivals and events

TYPE OF EVENT	FEATURES	EXAMPLES
Community-based (local) event	• Small in scale and size • Limited duration • Held more regularly than mega or hallmark events • Celebrates features of a community's way of life.	• Madcat Women's International Film and Video Festival, San Francisco • Tswane Jacaranda Festival • Ficksburg Cherry Festival.
Hallmark event	• Large in size and scale • Significant to a community or region • Once-only or recurring • Limited duration • Enhances awareness, appeal and profitability of a destination in the short term.	• Edinburgh Arts Festival • Festivals of Sydney, Melbourne and Adelaide • Aardklop National Arts Festival • Grahamstown National Arts Festival • KKNK.
Mega-event	• Affects entire communities • Limited duration • Requires vast resources • Reported in global media.	• Olympic Games; • ICC World Cup Cricket • World Summit on Sustainable Development.

Source: Adapted from Douglas et al., 2001:356

Each of these three categories can be elaborated on as follows:

- *Community-based festivals* occur more regularly than large mega and hallmark events, are small in scale and appeal to a far smaller market segment (Dimmock & Tiyce, 2001:356). Included are carnivals, tournaments,

contests, competitions, exhibitions, fetes, fiestas or shows, which originated in a sector of the community with a need or desire to celebrate features of its way of life or history. Festivals may be topic-specific, such as arts or music festivals, and may include various types of leisure activities combined with other cultural activities (Mihalik & Ferguson, 1994:75). The event may be held annually to coincide with a crop harvest or floral bloom, such as the Rose Festival in Bloemfontein, South Africa.

- *Hallmark events* recur at intervals and have such significance, in terms of tradition, attractiveness, image or publicity, that the event gives the host venue, community, or destination a competitive advantage (Getz, 1997:5). A hallmark is a symbol of quality or authenticity, which distinguishes goods or pertains to a distinctive feature (Getz, 2000d:210). The term *hallmark event* cannot be confined solely to large-scale events held in cities. Community-based festivals can also be described as hallmark events in relation to their regional, local and cultural significance (Hall, 1992:4). As festivals constitute a wide variety of activities including art, entertainment, music, sports and recreation, the Aardklop National Arts Festival is classified as a hallmark event on the basis of the above description (Van Zyl, 2002:24). However, the concept of a hallmark event is sometimes used when describing an event that often has a variety of connotations (Getz, 1997:5).
- *Mega-events* are so huge that they have the potential to affect whole economies and reverberate in the global media (McDonnell, Allen, O'Toole, 1999:11). Therefore, these events can be defined as events that yield extraordinarily high levels of tourism, media coverage, prestige or economic impact for the host community or destination (Getz, 2000d:210). Examples from an international perspective are the Olympic Games and World Fairs, whereas locally South Africa's first mega events have been the World Cup Rugby (1995) and the ICC World Cup Cricket (2003). A future mega event will be the World Cup Soccer to be held in 2010 in South Africa.

As festivals and events also play a significant role and make a considerable economic contribution to the tourism industry in South Africa, there is a need for standardised terminology. Defining and classifying become even more significant when measuring the economic impact associated with festivals (Arcodia & Robb, 2000:155). It is well known that it may become extremely difficult to measure such an economic impact as it is difficult to distinguish between local and visitor spending, and this inability might obscure the value of the festival industry's contribution to the economy (Arcodia & Robb, 2000:155). Although Tassiopoulos (2005:11) defines festivals and events in South Africa, he also manages to suggest a structure but does not spell out the relationships between the various kinds of events.

The intention with the current research was to explore the concept of festivals and events further and to design a categorisation system to accommodate the more than 85 festivals and events in South Africa.

These festivals are a celebration of South African folk spirit and should continue to stimulate tourism and growth in this sector of the economy (Witepski, 2002:52). The categorisation of the overcrowded festival calendar in South Africa is derived from the system used by Wilson and Udall (1982:3). These authors based their categorisation on six broad categories: namely sacred, harvest and food, festive subgroup gatherings, regional and local folk art festivals and special activity festivals.

For the purposes of this study, the types of festivals in South Africa have been classified into the following seven broad categories:

- arts festivals;
- dance, jazz and music festivals;
- heritage and culture festivals;
- harvest and food festivals,
- sacred, language and religious festivals;
- shows, fairs and festivals; and
- sports events.

Table 2.4 lists the definitions and themes on which the classification for South Africa is based, with some examples to illustrate each category.

Table 2.4: Festival categories, definition and themes of the South Africa festival and events calendar

Festival category	Definition and theme	Examples in South Africa
Arts festivals	Celebrate an art form focusing on the aesthetic, visual and theatrical appeal of the arts.	Aardklop, KKNK, Grahamstown Festival
Dance, jazz, music festivals	Celebrate specifically dance or music performance in any of these speciality fields.	North Sea Jazz, FNB Dance Umbrella, National Choir Festival
Heritage and culture festivals	Celebration is based on nostalgia about the past or cultural traditions inherited from the past.	North-West Cultural Calabash Festival, Tulbagh Goes Dutch Festival
Harvest and food festivals	Celebrate the crop or harvest from a specific agricultural area.	Cherry, Potato and Bieliemealie Festivals
Sacred, language, religious festivals	Celebration of a language or a particular religion, holiday, sacred sites. Most festivals originally originated from this category.	Afrikaans Word Festival, Zionist Church Gathering, Fire-Walking Festival
Shows, fairs, festivals	Contain either of these categories in the name and do not belong to or fit into the other popular categories.	Hermanus Whale Festival, Wildflower Show, Darling
Sports events	Celebration of the most popular South Africa sports activities.	Rugby/Cricket Currie Cup finals, Comrades Marathon, J & B Metropolitan (horseracing).

At times it may be difficult to distinguish between the categories, as it is not always clear whether a festival is categorised for example as an arts festival or a dance, jazz and music festival. Nevertheless, the importance attached to arts festivals in the South African context (as identified in the problem statement) indicates the urgent need to do research on this category (Van Zyl, 2003). The following reasons played a role in the selection of the arts festivals to be researched in this study:

- the exponential growth of arts festivals in South Africa;
- the economic impact that arts festivals have on the host region;
- the lack of marketing research on this category in South Africa;
- the stage of maturity of some South African arts festivals;
- the threat to the sustainability of arts festivals in South Africa;
- the South African government now consider the arts as so important that the broader public should have access to arts festivals (Government Gazette of South Africa, 2001:4);
- stimulating tourism as part of the reason for the growth in the number of arts festivals (Hughes, 2000:95); and
- the changes in society, as mirrored in the changes in the style of public events, such as civic and arts festivals (Allen et al., 2002:17).

The above clearly show that arts festivals are a topic meriting further research. Section 2.5.5 below addresses the definitions, the reasons for establishing arts festivals and for people participating in these festivals, the composition of arts festival audiences as well as the advantages and disadvantages associated with arts festival tourism.

2.5.5 Arts festivals

2.5.5.1 Introduction

Arts festivals can be regarded as a new form of tourism with the potential to create economic prosperity and development nationally and internationally in cities, towns

and in rural and coastal areas (Yeoman et al., 2004:1). The term *arts* is often closely linked to festivals and events (e.g. Aardklop National Arts Festival in South Africa, Adelaide Festival of Arts in Australia), and the arts are seen as an integral part of any country's history and culture (Yeoman et al., 2004:4). The question that comes to mind concerns what comprises *the arts*.

From a traditional perspective, *the arts* usually refers to performing arts, such as classical music, ballet, plays and opera, and also to activities, such as paintings and sculpture (the *fine arts*) (Hughes, 2000:13). These are also referred to as the *high arts* and are associated with "refinement". Tusa (cited in Hughes, 2000:13) notes, "it is something being more than the average man or woman could either produce or appreciate without training, education and effort". However, the arts nowadays include a wider collection of activities, such as contemporary dance, film, popular music and the various components of visual arts. Indeed, the programme content of any national or international arts festival reflects the diversity of the contemporary arts and its audience base.

Arts festivals are found virtually everywhere in the world and resonate as a type of arts-related tourism product that has the potential to attract audiences from a geographical area or region.⁵ By definition, arts festivals celebrate an art form, artist or historical event in the world of the arts (Getz, 1997:11). Such festivals may bring together an unusual repertoire of performances or exhibits, top performers and artists in the field, and may also include educational events.

Emphasis on the sustainable development of future programmes will ensure that these arts festivals figure prominently in years to come (Getz, 2000d:210). To be sustainable in the long term, these festivals are dependent on sponsorship (Getz, 2000d:212). Nevertheless, the reasons for establishing and hosting these festivals require attention, and these are discussed in the next section.

⁵ *Arts-related tourism* is any tourism which includes a visit to the arts, regardless of initial interest (Hughes, 2000:2).

2.5.5.2 Reasons for establishing arts festivals

The reasons (aims and objectives) for establishing arts festivals are crucial and need to be highlighted as they affect many aspects of the event, including marketing and sponsorship (Salem, Jones & Morgan, 2004:16). Getz (1997:1) notes that arts festivals have different operating costs and might fall into either the not-for-profit or the profit-making categories.

Arts festivals reflect almost unlimited diversity in the form and types of arts featured and there are many different reasons or aims for holding these festivals.

The main reason or objective may be identical to that of the festival organiser whose focus as a non-profit organization is on the survival of the arts, but will at least complement the festival's aims and will have a key role in achieving them (Watt, 1998:11). Salem et al., (2004:16) argue that the reasons for establishing festivals may fall into one of three main categories:

- the economic reasons may be direct or indirect, e.g. marketing a particular product or area;
- social and cultural reasons may focus on encouraging local participation to increase awareness of a venue, occasion, tradition or socio-cultural value; increase civic pride; heighten an area's profile; satisfy the needs of special interest groups or conserve local heritage; and
- there may be political reasons, e.g. in cases where arts festivals become "policy tools" for promoting cultural development, etc.

The above reasons emphasise further that most festivals have economic aims, although these may not be the main reason and may at most only be to break even. Therefore, the purposes of arts festivals vary and there are many tangible and intangible reasons why communities host festivals and events (Backman, Backman, Uysal, & Sunshine, 1995:15). Table 2.5 summarises the various reasons for holding arts festivals.

Table 2.5: Reasons or aims for holding arts festivals

Getz (1993:11); Getz & Frisby (1989:7)	Making it happen: the cultural and entertainment industries handbook (1997:152)	Hughes (2000:90)
For agriculture	To showcase a local industry or product	
For arts	To celebrate a particular art or sporting form or a mixture of same	
For community celebration and cultural identity	To celebrate local talent and provide a "party" for a localised community	An "artistic vision" such as a desire to celebrate, promote awareness of and increase an understanding of a particular art form or culture
For culture and education (Mayfield & Crompton, 1995:14; Dunstan, 1994:1)	To expose local people to national or international artists or sportspeople	The drive to establish an arts festival may come from enthusiasts across the country, who wish to come together to share a common interest
For natural resources	To highlight the natural and human-made assets of an area	
For recreation or socialisation	To focus on cultural tourism issues.	The tourism potential that an arts festival provides has been an important consideration for developing many of the more recent festivals
For tourism	To highlight the location of or recent changes to an area	
Making money is one overt reason for both external and internal revenue generation	To increase tourism to an area and generate economic impact	A desire to enable local residents of smaller towns to attend arts festivals, since residents of such towns may have few cultural opportunities

The above summary clearly indicates that some festivals have an entertainment and educational approach, which could be used to bring different communities together, whereas other festivals may be used to enhance the economy of a region. The bottom line is that, by their very nature, arts festivals are held *for* communities *in* communities with different aims, for example, a festival may be held to celebrate the culture and language of a particular region.

However, Hughes (2000:91) remarks that “this togetherness of people is the essence of a festival, that is, a relatively large number of artists and performances together in one place, over a concentrated period of time”. Figure 2.2 indicates the features of arts festivals that attract tourists.

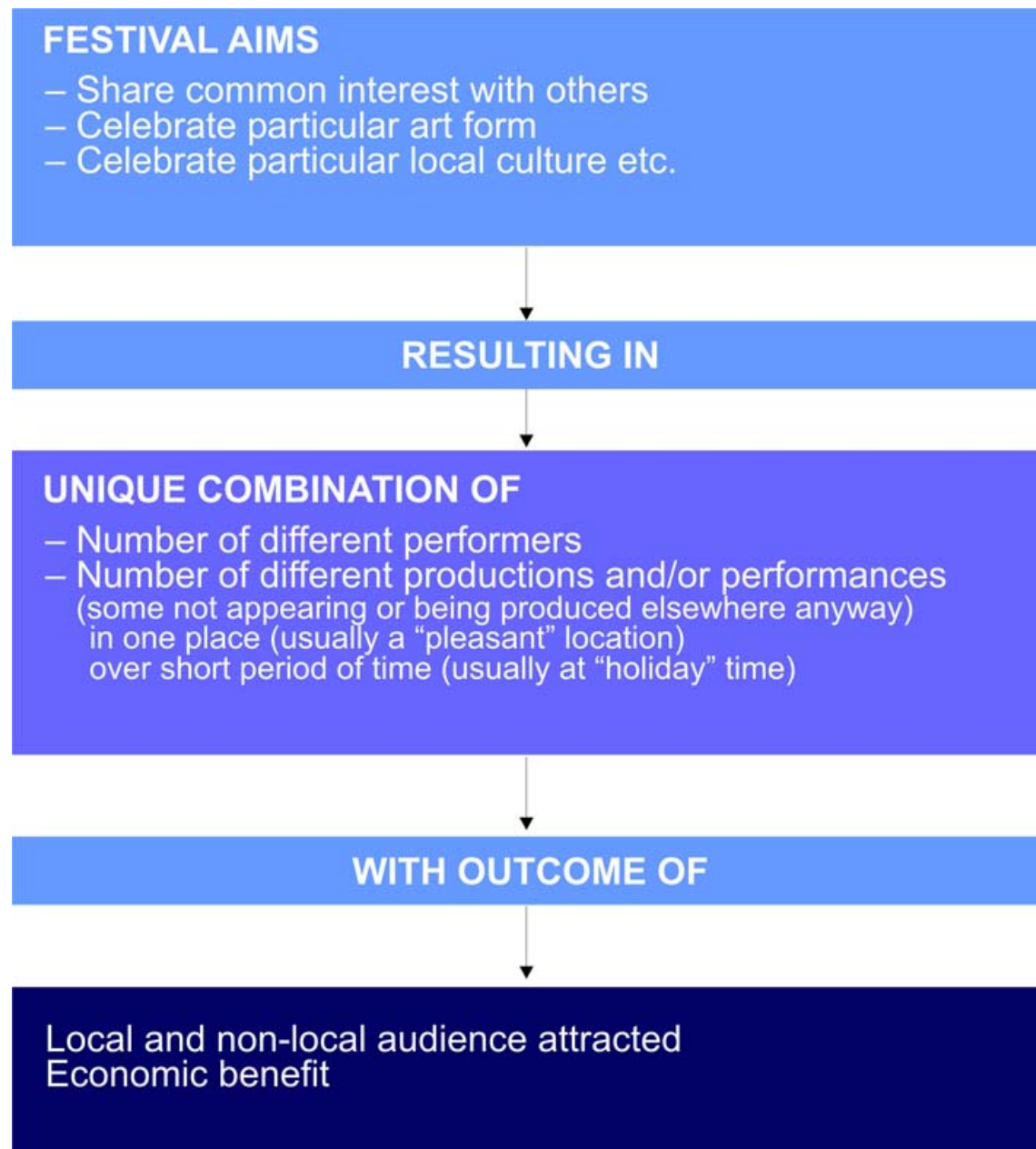


Figure 2.3: Arts festivals: features that attract tourists (adapted from Hughes, 2000:90).

Going to arts festivals is a leisure activity in which many people indulge; however not all of them participate in the arts festival activities. Irrespective of the reason for holding arts festivals, a wide range of audiences is involved, each with its own different expectations, and this has a direct effect on the management process that should be considered for each festival (Yeoman et al., 2004:1).

The challenge to the management of arts festivals is to complement the environment in which the festival takes place and to have regard for diminishing resources and also for the more discerning and sophisticated taste of arts festival audiences.

The audience is a core component because without it no arts festival can be held (Van der Wagen, 2001:53). The arts festival audience has significant implications for marketing and positioning strategies, as festivals are held in a semi-competitive market (Watt, 2001:66). The key to the marketing concept is a focus on the customer in the audience. This implies that good marketing should flow from a complete understanding of who the members of the audience are, where they live and what their needs are (Allen et al., 2002:192). The composition and characteristics of the arts festival audience are discussed in the next section.

2.5.5.3 The arts festival audience

Identifying the potential audience of an arts festival remains a vital aspect of marketing. Without an audience to whom the festival can be promoted, all the efforts of the management and organisers will be futile. Old or young, rich or poor, arts or music supporters, the target audience should be quite clear and the arts festival should be planned to suit their specific needs. Getz (1997:251) warns that "many events suffer from a 'product orientation' – that is, they try to sell their event with little or no regard for what potential customers need, want, and will pay for". Figure 2.4 illustrates the composition of the arts festival audience.



Figure 2.4: The composition of the arts festival audience

The potential arts festival audience may be anywhere in the country or the world, and is unlikely to be concentrated in one particular place. It may be appropriate to target particular categories of people and/or particular parts of the country or world. Proper market research can identify who and where the potential audiences are so that the marketing and positioning effort can be directed strategically (Van der Wagen, 2001:53; Watt, 2001:64).

The composition of the arts festival audiences or the catchment areas of the people consist of a local market (nearby and concentrated) and a non-local market (distant and dispersed) (Hughes, 2000:103). The local market consists of day visitors or excursionists and local residents mainly low involved tourists, whereas the non-local market consists mainly of highly involved tourists.

Given these two dimensions to the target tourism market, it is almost inevitable that the effort and cost involved in attracting non-locals will be relatively high compared to that of attracting a local audience (Hughes, 2000:103). The effort to attract non-locals is likely to be of a scattergun approach than the localised efforts where market knowledge about locals may be greater. Nevertheless, secondary literature indicates that for most festivals and even the largest of them, audiences are primarily local or regional and have not been drawn from a wide catchment area (Hughes, 2000:95). This trend has also been experienced in South Africa, where more than 35% of the Aardklop Festival's audience come from the region of Potchefstroom (Aardklop Impact Study, 2001:4). As mentioned above, not everyone who visits arts festivals will participate in the festival, and an explanation is needed as to why this is the case. Table 2.6 depicts the main reasons for participation or non-participation in arts festivals.

Table 2.6: Reasons for participation or non-participation in arts festivals

Participation	Non-participation
• Early childhood exposure to festivals • Level of education which will in turn influence income and occupation • A higher level of education and knowledge are considered "superior" • Peer group pressure to attend, though there are exceptions to the rule	• Time constraints and a desire to spend leisure time at home watching videos or TV, cost, especially for low-income groups (Moore, 1998:53) • Significantly influenced by cultural differences • Certain dominant groups have defined art in society and excluded others, which might have created a perception among various people that art is not for them • A negative perception of arts and regarding it as exclusive to certain people, difficult to understand and expensive • Peer-group pressure not to attend • No early childhood exposure to the arts.

Source: Adapted from Hughes, 2000:17

Table 2.6 clearly indicates that participation is triggered by certain external factors, such as socio-economic background. The participation rates can be summarised as being highest among:

- people who are relatively well-off,
- had previous exposure to arts or festivals,
- well-educated, and
- in the older age groups.

These criteria were also used in the judgemental sampling process to include only the Living Standards Measure (LSM) groups 6, 7, 8, 9 and 10, but most of the sample were mainly in LSM groups 7 to 10 (Martins, 1998:40).

According to the 1997 Survey of Public Participation in the Arts in the United States of America (National Endowment for Arts, 1999:6) the following profile of arts festival attendees can be depicted:

- the older age groups (between 45 and 54 years) prefer classical music, opera, plays (musical) and ballet;
- the younger 18 to 24 age group prefers non-musical plays, jazz and other dances;
- there is a definite relation between education and arts participation: those who attended graduate school had the highest attendance rates for every arts activity; and
- in terms of race and ethnicity, the highest participation rates were among whites with the exception of the categories for jazz and other dance performances.

Based on previous research this pattern of participation shows some similarity to South Africa (Saayman & Saayman, 2004:634; Van Zyl, 2002:86). As a result, the distribution of people participating in the arts does not usually match the demographics of the general population (Hughes, 2000:16).

Furthermore, it may be of interest and of use for management to know where these audiences come from and who they are so that the marketing and positioning activity can be focused accordingly.

Although it is clear who the members of the arts festival audience could be and where they come from, insight into the advantages and disadvantages of arts festivals might provide valuable information for ensuring the long-term sustainability and success of arts festivals. This is discussed in the next section.

2.5.5.4 The advantages and disadvantages of arts festivals

Arts festivals have strong drawing power and can attract large numbers of locals and non-locals in the festival audiences (Hughes, 2000:78; Getz, 1997:44). Hughes (2000:92) notes that greater awareness of the arts can be created through arts festivals than through an ongoing arts or entertainment programme in a theatre, and a larger number of people may recognise arts festivals than theatre programmes. The main need for arts festivals is therefore to reach the widest possible audience and to succeed in attracting locals and non-locals in the audience. Although this indicates some of the advantages, the possible disadvantages should also be listed. The advantages and disadvantages of arts festival tourism are outlined in Table 2.7.

Table 2.7: The advantages and disadvantages of arts festival tourism

Advantages	Disadvantages
Spending by tourists (less and highly involved) in the audience contributes to an additional flow of money into the host region	In some cases, festival tourists have no economic impact on the host region. They may have visited anyway and others may have brought forward their visit. In such cases, the festival brings no real benefit
The festival may also create good publicity and a good image for the area, with two possible effects: • tourists at non-festival times; and • other non-related businesses are encouraged to locate in the area (inward investment)	Some regular visitors to the area may have been deterred from coming because of the event, so the festival tourists would therefore only replace them, with little or no addition to overall numbers
Arts festivals held in the community establish a strong sense of community pride and provide an opportunity for all to attend, which might otherwise not have been possible	There may be fewer tourists than anticipated at festivals, partly because of people's constraints and beliefs that the festival would be overcrowded or that they would be unable to obtain tickets or book accommodation. The very popularity of a festival may be counter-productive
Arts festivals hold strong elements of educating arts and culture to previously excluded groups	Arts festivals may easily lose their unique appeal, leading to a decline in attendance
Usually started by volunteers, are service-oriented and on non-profit principles.	As it is difficult to do market research during festivals, this leads to insufficient data on the requirements of attendees
No barriers exist to entry into the field at present; anyone can start a similar festival;	Attendees do not always have a responsible attitude to the environment where the festival is held
Festivals are likely to raise greater ongoing awareness of the arts and confirm a sense of belonging to a social group	Lack of quality in the production and management of arts festivals
Festivals encourage audiences from a wide	The positive impact of arts festivals seems to be

Advantages	Disadvantages
catchment area, in the local as well as the non-local market	short-lived
Word-of-mouth recommendation of festivals is still one of the best marketing tools and is cheaper than other tools	Certain productions are likely to be characterised by high prices and this cost may deter the audience from attending these
Create a “refinement” of the nation as the arts are now available through festivals to a wider group of people	Some people might regard arts festivals as being only for the well educated and wealthy sections of society, thus excluding others
Tickets for performances are less expensive at arts festivals than in city theatres and halls	Difficult to market arts festivals in the long term as the nature of performances and audience might change
Participation by all cultural groups of society is a priority in sponsorships	Poor productions at festivals draw smaller audiences, so there is less income to improve the productions, causing a vicious circle
Live performances at festival can be more satisfying than other aspects of popular culture at home such as computer games, TV, recorded music.	Most spending by locals on tickets and associated services adds little to the economic contribution and may only be diverted from spending on other local goods and services. It is merely local money being recirculated unless it can be shown that the locals would have spent that money outside the area.

Source: Hughes (2000:93) and Getz (1997:16).

It is clear that cases of poor performances at arts festivals and negative media publicity will have a negative impact on people's future attendance of arts festivals. Such cases might result in less revenue, in turn endangering the future of the arts festival (Hughes, 2000:96). The arts festivals might find that they are in a vicious circle and should combat such a situation at all costs. Table 2.7 indicates why arts festivals will continue while there is a demand for them.

Arts festivals have the power to help promote a destination and to attract tourists (Robinson, Picard & Long, 2004:187). These might also include reasons for establishing the arts festivals in South Africa.

2.5.6 South African arts festivals

The South African festival and events calendar has no shortage of arts festivals. The phenomenon has grown exponentially since 1994 which marked the end of the apartheid era (Hauptfleisch, 2001:169). Arts festivals, both globally and in South Africa, have become a favourite way of experiencing and celebrating a country's culture and heritage. These festivals serve the interests of special interest tourism while also making the arts and culture available to some infrequently visited regions of the country (Kakaza, 2000:6). The reasons for the proliferation of festivals in South Africa are manifold and complex, but the collapse of the old, focused and wealthy state-funded subsidy system for the performing arts, the disappearance of the "struggle" support for anti-apartheid theatre and the rise of a predominantly freelance theatre industry have been important (Hauptfleisch, 2001:169).

Although some of the characteristics of each arts festival are unique, others show similarities. Tourists often seek out these festivals for an authentic cultural experience (Getz, 2000d:226). The question arises whether the three selected and prominent South African arts festivals would survive in a fast-changing market such as leisure tourism. The answer might lie in marketing, which is widely regarded as a core business function concerned with matching the needs, wants and interests of its target market (Laws, 2002:4).

The value of sound marketing principles and effective positioning can therefore never be underestimated, and the trends in and future impacts on the festival and event sector should be acknowledged. Arts festival managers should therefore keep up with the latest trends and market their event effectively against increasingly keen competition for the customer's time and money (Leisen, 2001:49; Getz, 1997:249).

A realisation of these trends and the effects thereof might have on the sustainability of the festival is of significance.

2.5.7 Trends in and impacts on the festivals and events sector

In such a dynamic festival environment, each country should keep up to date with the latest happenings in the industry. Understanding change and learning how to take advantage of it is a vital aspect of successful festival and event management (Janiskee, 1996:411). A thorough knowledge of trends and future impacts helps festival and event management and organisers to develop tourism products suited to the current needs of the festival or event, and the specific market it attracts.

Creativity is required to present the tourism product differently and in ways that appeal to customers. Also required are the managerial skills necessary to ensure these customers' expectations of satisfying experiences are met, and that quality services are provided (Laws, 2002:4). The festivals and events that will survive and flourish in the long term should capitalise on the latest trends and should formulate their marketing and positioning strategies accordingly. The following global trends were identified in the festival and event industry:

- a spectacular growth in the number, diversity and popularity of events over the past several decades and a continuation of this growth trend (Getz, 2000c:3; Goldblatt, 2000:3; Janiskee, 1996:411);
- festivals and events with a strong cultural component are increasing considerably in numbers and will continue to do so (Lee et al., 2004:61; Getz cited in Gartner & Lime, 2000a:176);
- the explosive growth of festivals has generated too many events in some areas, which might cause the risk of saturation and decline (Getz cited in Gartner & Lime, 2000a:176);
- in some cases, there are indicators that many festivals and special events may be losing their novelty appeal for many of their visitors (Richards, 1996:323);

- the lack of strategic planning and research in the event organisations may explain why some festivals will decline or cease to exist (Getz, 1998:33);
- attending festivals and events remains one of the top choices of the public, because festivals offer the lowest cost per hour of any activity, i.e. festivals offer relatively cheap entertainment (Epperson, 1986:1);
- the upward steep (growth) trend in festival and event production means more intense semi-competition among all the different kinds of events (Getz cited in Gartner & Lime, 2000a:175; Janiskee, 1994:10);
- in many communities, a glutted or overcrowded festivals and events calendar will create severe problems for any new, lower-quality or poorly marketed or advertised festival and event (Janiskee, 1994:10);
- event management should continually strive to improve the quality of festival products, avoid stagnation and develop better marketing strategies to sustain the festival in a Darwinian “survival-of-the-fittest” environment (Robinson & Noel, 1991:78);
- festival and event management and organisers copy successful ideas on a widespread basis, and many perform again at different events in the same community, so a considerable amount of event “copycat” (homogenisation) takes place in the industry;
- there is no barrier to entry and any individual may start an event;
- it is difficult for festivals or events to differentiate their festival product from the rest. Festival audiences are also becoming more sophisticated and are more likely to realise when festivals and events are average or have been staged with shortcomings, such as insignificant interpretation and inferior performance (Uzzell, cited in Janiskee, 1996:411; Plog, 1991);
- governments now consider the arts as so important that they want everyone in the public to be encouraged to have access to arts festivals (Government Gazette of South Africa, 2001:4); and
- festivals and events that do not freshen and modernise their offerings are likely to be discontinued, because “competing for event audiences whose expectations continue to rise will require new management strategies and an emphasis on service quality” (Wicks, 1995:12).

Most of these global trends are being noted in the South African festivals and events scenario. A thorough knowledge of trends helps to keep events topical and alive, enabling the management of South African events to prepare longer-term strategies and to survive. This means that each individual festival is responsible for determining the relevance of these trends to its situation, and for detecting other trends of local or regional significance. South Africa now has an overcrowded festivals and events calendar, in which different festivals and events compete for the customer's valuable time and money. The rationale for this research was in fact the continuing growth in the festival and events industry and the challenges this poses.

The long-term success of the festivals and events industry requires a stronger differentiation among festivals and events in the market place as well as sound marketing and strategic positioning in the market for special interest tourism. This tourism sector is market-driven and responds to the specific needs of its participants.

2.6 CONCLUSION

The layout of this chapter follows the flow diagram of the tourism phenomenon shown in Figure 2.1. The first focus in this chapter is on defining tourism and addressing the growth in tourism, leading to a discussion of the changing needs or demands of tourism (see Section 2.3). The different types of SIT opportunities are identified in Section 2.4. Festivals and events are identified as one of the fastest-growing categories of these new types of tourism offerings, as discussed in Section 2.5.

The history of festivals and events, definitions and classification of festivals in a South African context appear in Sections 2.5.2, 2.5.3 and 2.5.4. The last part of the chapter focuses on arts festivals (see Section 2.5.5) and the future trends that may have an impact on the industry (see Section 2.5.7).

At the beginning of the new millennium, tourism (especially arts festivals) is still a constantly evolving phenomenon, developing and reformulating itself as a customer activity (Page, 2003:3). A greater range of niche products has been developed and marketed to satisfy the demand for the increasingly sophisticated tastes of tourists. Festivals and events are among the fastest growing categories of these new types of tourism offerings.

This new trend is also seen in the South African scenario where customers can choose from an average of four festivals a month, or one a week, with new festivals constantly being added to the events calendar. One category that of arts festivals is of selected for the purpose of this study. The successful development of niche products as regards this, will certainly benefit the South African tourism industry, but may also pose major challenges for tourism marketers. The characteristics of a successful festival have to be determined so that the marketers of a festival can sustain the festival despite the severely overcrowded environment and calendar. This clearly indicates the importance of sound marketing and strategic positioning in this special interest tourism sector.

Tourism marketers should target their promotional campaigns at the tourist markets most likely to choose the given festival or destination (Leisen, 2001:58). The most important attributes or benefits an arts festival offers should therefore be identified in order to develop effective market positioning strategies and sound marketing principles, especially in the current uncertain times beleaguering the tourism industry since global threats such as the September 11 attacks on the USA, war and terrorist attacks in the Middle East and Europe and the Indian Ocean Tsunami disaster, SARS and avian flu viruses.

The future and the sustainability of arts festivals will be in jeopardy without sound marketing and effective positioning from an organisational and management point of view. Positioning is one of the classic tasks of marketing management and literature gives a vast number of models and various techniques for positioning analysis (Grabler, 1997:101).

However, positioning is not often applied to a festival context. To date, the more sophisticated techniques of positioning developed in marketing science have not yet spread into this particular field. The notion of positioning also recognises that tourists or the customers of tourist services evaluate and buy products based on the perceptions and images unique to each product or brand (Witt & Moutinho, 1994:332). The notion of marketing and market positioning in tourism and the festival context is discussed in greater detail in Chapter 3.

An understanding of strengths and weaknesses is of paramount importance for marketers, developers and planners involved in strategy development. As creating a market position is vital to long-term success, strategies to gain an advantage in market competitiveness should be of great interest to marketers (Chen & Uysal, 2002:987).

This chapter, the first of the two chapters on the secondary research focused on South African tourism, special interest tourism and the festivals and events industry. The next chapter focuses on tourism marketing in South Africa and the various market-positioning models that can be used to position an arts festival strategically in the market.

CHAPTER 3

3 MARKETING AND MARKET POSITIONING IN THE ARTS FESTIVAL CONTEXT

3.1 INTRODUCTION

Festivals and events in South Africa currently face increasing competition in the market place with a choice of more than four festivals per month or one per week on the annual events calendar. Each tourism product (arts festival or event) also has to be marketed effectively against increasing competition for the customer's leisure time and money. It is a moot point whether all these festivals (more than 85 reported in South Africa) would survive in the long term.

A festival or event will not succeed unless it can meet the motivations, expectations and needs of the participants (which will often be the local community) and the visitors (Shone & Perry, 2004:144; Hall, 1992:137). Marketing is the golden thread that helps make an arts festival successful or an event possible (Hall, 1992:137). Those festivals that determine customer requirements and that deliver the greatest value to their customers (referred to as customer satisfaction) will be successful (Lamb, Hair, McDaniel, Boshoff & Terblanche, 2004:5). Satisfying old and creating new customers (customer satisfaction) is a basic tenet of marketing and it is becoming more important than ever before in the South African festival and event scenario.

Unfortunately, many festivals and events, especially the medium to smaller ones, are probably conducted without the benefit of a marketing plan or positioning strategy and such arts festivals will not survive in the long term (Hall, 1992:137). The arts festivals and events that succeed in attracting audiences are those with proper marketing and positioning strategies (Van der Wagen, 2001:53).

Successful arts festivals can best define and satisfy festival attendees' requirements in the context of the ever-changing market environment.

The festival's success depends largely on marketing and the right marketing mix, then communicating it and ultimately positioning and branding the arts festival strategically in the market.

The purpose of this chapter is to give an overview of the area of tourism marketing and market positioning in an arts festival context in South Africa. Following on Section 3.2, the definitions of marketing and event marketing are briefly discussed. The eight elements involved in the marketing mix for events are discussed in Section 3.3. Market segmentation (Section 3.4) focuses on grouping together customers who have similar requirements and buying characteristics, and introduces the festival and event customer at the core of the market.

By addressing the benefits or attributes that customers seek (push and pull attributes), a target group can be selected. Such a target group is central to market positioning (Mullins et al., 2005:17). The marketing programme should aim at positioning the festival product or service directly to the targeted customers in the market. As market positioning is central to marketing, Section 3.5 defines market positioning in a marketing and tourism context as well as in a festival context, discusses positioning models and the steps to be followed in the positioning process, which is explained in Section 3.6. Branding is briefly discussed in Section 3.7 and concluded in Section 3.8.

The aim of this chapter is to introduce the body of knowledge on positioning in marketing and tourism, discuss various positioning models, use them and build on them in Chapters 4 and 5 by doing original research and integrating the literature on positioning, as discussed in this chapter, with the previous secondary research and the new empirical results appearing in Chapters 4 and 5. On this basis, the development of a new model for positioning arts festivals is discussed in Chapter 6.

3.2 DEFINING MARKETING

The definitions of marketing demonstrate the different approaches that academics, researchers or applied business purposes have taken to marketing philosophy (Dibb, Simkin, Pride & Ferrell, 2001:5).

Marketing means far more than the popular view of only selling and advertising and other sales promotions (such as coupons or complimentary tickets) or the traditional “four Ps” of product, place, price and promotion (Perreault & McCarthy, 2002:4). These implications are spelled out in the definitions below, as well as in the general discussion. The principal definitions of marketing are introduced consecutively.

Kotler (2000:8), the American marketing academic, defines marketing as follows:

- “A social and managerial process by which individuals and groups obtain what they need and want through creating, offering and freely exchanging products and services of value with others.”

Perreault and McCarthy (2002:8) define marketing from both a micro and macro perspective:

- “Micro marketing is the performance of activities that seek to accomplish an organization’s objectives by anticipating customer or client needs and directing a flow of need-satisfying goods and services from producer to customer or client.”
- “Macro marketing is a social process that directs an economy’s flow of goods and services from producers to consumers in a way that effectively matches supply and demand and accomplishes the objectives of society.”

In other words, micro marketing looks at the needs of the potential customers of individual organisations/festivals whereas macro marketing emphasis the whole marketing system from production, from the planning of the festival to the execution and evaluation thereof. It should be noted that as a result of the broad scope of marketing and the overall relevance in all disciplines (corporate, academical, tourism etc.) the application of marketing in this thesis will not distinguish between the concepts of a festival, organisation or company individually but rather interchangeably. However, for the purpose of this study a festival is an organisation and in the case of direct quotation it is referred to as a company.

Other academics suggest that the marketing concept can only work if it is embedded in the whole culture of the organisation/festival. The United States management consultant Drucker (1973:64), for example, considers this view and defines marketing as follows:

- “Marketing is so basic that it cannot be considered a separate function. It is the whole business seen from the point of view of its final result, that is, from the customer’s point of view...Business success is not determined by the producer but by the customer.”

This author later adds – “Because the purpose of business is to create and keep customers, it has only two central functions – marketing and innovation. The basic function of marketing is to attract and retain customers at a profit” (1999:4).

This latter definition suggests that everyone who is involved in the marketing process of an organisation/festival, should ultimately consider the customer as being central to its activities. The notion of customer satisfaction is then the central pillar of marketing. This suggests that marketing involves an all-encompassing philosophy, which often means that an organisation/festival has to change its internal business culture to accommodate this new approach.

The American Marketing Association, cited in the *Dictionary of Marketing Terms* (1995) offers the following definition:

- “Marketing is the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, services to create exchanges that satisfy individual and organizational goals.”

Dibb et al. (2001:5) give the following definition of marketing, which is similar to that of the American Marketing Association:

- “Marketing consists of individual and organisational activities that facilitate and expedite satisfying exchange relationships in a dynamic environment through the creation, distribution, promotion and pricing of goods, services and ideas.”

In the dynamic world of marketing, an effective solution to satisfying customer’s needs tends to be short-lived. Sunbathing on the beach no longer satisfies most tourists’ needs; special interest travel, therefore, has taken a dominant share of the market (Buhalis, 2001:71). (See the discussion in paragraph 2.3.1.2 which elaborates on the changing needs of tourists). Marketers should constantly study their customers’ requirements and be prepared to change their marketing activity accordingly. The assessment of marketing opportunities is an ongoing process, requiring regular revision and updating. The Chartered Institute of Marketing (Lynch, 1994:4), the professional body for practising marketers in the United Kingdom, defines marketing as:

- “The management process responsible for identifying, anticipating and satisfying customer requirements profitably.”

Although this definition has been criticised for its use of the word *profitability*, it is argued that non-profit-making organisations (such as arts festivals) can use the market philosophy to become more effective rather than simply more profitable.

The definition is useful in that it identifies the role of marketing as being to identify the needs and wants of customers both now and in the future, and then to meet them. Kotler (2004:30) refers to this as the *traditional marketing approach* and defines it as to "... find needs and fill them".

He also notes that the challenge is to invent new needs "... by creating a new value proposition and/or a new business system that offers leaps in benefits and/or reductions in acquisitions efforts/costs" (Kotler, 2004:30). Nowadays, marketing should be understood in the new sense of satisfying customer needs.

This new sense refers to the theme *connectedness* which means that "... we are all connected to each other and to things near and far in the world around us" (Armstrong & Kotler, 2003:xvii).

The secondary literature has few definitions of marketing for festivals and events and none that are original in the South African context, apart from Tassiopoulos (2005:253) who cites Hall's definition (1992) as quoted by Watt (1998:61) as "the function of event management that can keep in touch the event's participants and visitors (consumers), read their needs and motivations, develop products that meet these needs, and build a communication programme which expresses the event's purpose and objectives."

However, those definitions that emphasise or focus on the process, a customer orientation, a mutually beneficial relationship, and marketing to all the stakeholders (participants and spectators, sponsors, media, VIPs, staff, advertisers, public) are appropriate due to the comprehensiveness thereof to the South African festivals and events sector. Getz (1997:250) accordingly defines marketing in the festivals and events sector as:

- Marketing events is the process of employing the marketing mix⁶ to attain organizational goals through creating value for clients and customers. The organization must adopt a marketing orientation that stresses the building of mutually beneficial relationships and the maintenance of competitive advantages.”

The above-mentioned definitions stress that the core of the marketing concept focuses on the target market being the festival or event attendee. The top marketing priority for any South African festival and event should be to create, retain and satisfy customers, seeking their loyalty and consumption. Selling more tickets to festival and event customers, who in turn provide profits and ensure the sustainability of the festival, is the reward for such festivals.

The fundamental principle is creating customer value and satisfaction as no festival or event could be held without customers, neither globally nor in South Africa (Jobber, 2004:13).

Marketing is a critical element in the hosting and management of a successful festival and event as it focuses on satisfying the targeted customers' needs and wants (Duncan, 2002:13; Hall, 1992:136). The event manager can develop a specific marketing mix in order to achieve goals, i.e. satisfy customers' needs and wants (Pride & Ferrell, 2003:7). In addition, these marketing goals should be achieved in a manner that differentiates them in customers' eyes from competitors' marketing mixes. This will give a competitive edge over rivals, though the marketing goals should be regularly updated to reflect new trends and developments in the market (Dibb et al., 2001:7).

The marketing mix traditionally involves four elements, namely product, price, promotion and place or distribution (Jobber, 2004:16). These four Ps determine how a service (festival) is presented, how much it costs (ticket price), where it is held and

⁶ The *marketing mix* is the unique blend of product/service, pricing, promotion, offerings and distribution designed to meet the needs of a specific group of consumers (McDaniel & Gates, 2001:5).

distributed (region or town) and how it is presented in all festival communications. For the purpose of this study an arts festival is classified as a service however, the words products and service will be used interchangeably.

3.3 MARKETING MIX

Marketers need a marketing plan so that they can carry out their marketing functions. This plan, amongst other, consists of marketing objectives, the identification of target markets and a marketing mix, which will serve each of the target markets (Dibb et al., 2001:22). The “marketing mix” consists of those elements or tools that the festival and event manager has some ability to control, manipulate or influence to achieve goals over the short term (Mullins et al., 2005:18). Traditionally, the four Ps in marketing are defined as “the controllable variables that the company puts together to satisfy a target group” (Perreault & McCarthy, 2002:46).

Armstrong and Kotler (2005:58) note that the four Ps represent the seller’s view of the marketing tools available for influencing buyers. From the buyers’ viewpoint in this age of connectedness, the four Ps might be better described as the four Cs:

• Four Ps	Four Cs
• Product	Customer solution
• Price	Customer cost
• Place	Convenience
• Promotion	Communication

The customers see themselves as buying either value or solutions to their problems, so each marketing tool should be designed to deliver a customer benefit (Armstrong & Kotler, 2005:58). Because customers want two-way communication, the winning companies will be those who first consider the four Cs and then build the four Ps on that platform (Kotler & Armstrong, 2004:64).

In the marketing of services, Cowell (1984:6) developed a variation on the original four Ps and proposes a seven-P marketing mix, comprising product, price, promotion, place, people, physical evidence (layout, furnishing of venue, sound quality) and process (customer involvement in the leisure service). However, the last three Ps are only part of the product element of the marketing mix (Cowell, 1984:6). The product is split into other P elements, which cause the additional Ps. This may confuse people's marketing thinking and action, but could also assist festival and event marketers to think strategically (Allen et al., 2002:212).

In addition to the traditional four Ps of marketing, tourism researchers such as Morrison (2002:21) suggest another four Ps (people, packaging, programming and partnership) that may be regarded as especially important in tourism marketing. The Economic Planning Group of Canada (cited in Getz, 1991:197) suggests another P, namely positioning.

Although positioning is undoubtedly important in the festival and event marketing process, the current study regards positioning as a component of the traditional Ps as positioning is integrated in the other eight Ps. Getz (1997:251) adapted Morrison's approach and used eight elements as mentioned below for festivals and events. A tailor-made marketing mix for South African festivals and events based on Getz's (1997) approach is presented in Table 3.1, which summarises the eight Ps of the marketing mix for festivals and events, listing the various elements of each P.

Table 3.1: The marketing mix and its elements for South African festivals and events

Eight Ps	Elements
Product or service	The end result is the festival offering. • location or the venue for the event, cleanliness of venue, seating, queuing, lighting, entertainment variety offered, quality of food and entertainment; • prominence given to name of event and what that name means to customers, i.e. branding of event; • where event is to be positioned in terms of customers' demand; • socialisation; • customer participation, merchandising.
Price	Price or value placed on event experience: • willing to pay for admission, the ticket price; • cost of ticket, travel, time taken to travel; • other constraints or lost opportunities.
Promotion (marketing communication)	Promotional mix refers to tools, including: • logo, destination or event image; • advertising – TV, radio, newspaper, magazine, outdoor; • sales promotion – merchandising, public relations; • flyers, brochures; • personal selling.
Place	• location, setting; • ambience or atmosphere of venue; • destination features; • ticket sellers, tourist info desks, tour wholesalers.
People	• staff; volunteers are referred to as the “cast”; • and lead to “internal marketing”, well-trained people; • customers or audience;

Eight Ps	Elements
	• host and guest relations; • customer care and teamwork.
Packaging and distribution	Package is the combination of elements offered at a single price: • the way the event is presented as a package. The distribution network becomes important: • intermediaries of various kinds are required (travel agents, computerised ticketing agents, e.g. Compu-ticket).
Programming	Events are a key programming element in animating the place: • i.e. a scheduled event on an annual events calendar; • elements of style; and • quality of programming.
Partnerships	• stakeholders in producing the event • engage in joint marketing initiatives with city/town promotional offices.

Source: Adapted from Allen et al., (2002:164); Morrison (2002:21); Van der Wagen (2001:61); Watt (1998:66); Getz (1997:251) and Hall (1992:142)

All eight elements are important in the marketing mix of festivals and events due to its complexity. However, the core of the mix is the promotional element, namely the marketing communication between a festival or event and its customers, because these variables can be manipulated to achieve an event's objectives (Allen et al., 2002:166). Three of the elements, namely product, promotion and place, require up-front expenditure before any revenue is obtained from ticket sales. It is therefore important for the marketing process to be thorough, thoughtful and realistic in forecasting both revenue and expenditure (Allen et al., 2002:167). Any confusion in the marketing process may have negative consequences for the viability, sustainability and longevity of any festival and event.

Good marketing emanates from a full understanding of the festival and event customers and the marketing mix attracting them (Van der Wagen, 2001:61).

A detailed understanding of the varying needs and requirements of different customers is fundamental to the principles of marketing (Dibb & Simkin, 1996:10).

Identifying the festival and event customers' specific needs requires segmenting the market or focusing on a particular group (Van der Wagen, 2001:57). The festival management may perceive the visitors to festivals and events as a diverse market, in which anyone within the geographic boundaries of South Africa or elsewhere in the world may be a prospective festival and event customer. Some form of categorisation/segmentation in the market is necessary to target groups with similar requirements and similar buying characteristics.

3.4 SEGMENTING FESTIVAL AND EVENT CUSTOMERS

Because of the diverse market that it attracts, no festival or event can be all things to all people. A marketer can rarely satisfy everyone in a market (Yeoman et al., 2004:19). However, Hall (1992:137) observes it is essential to understand the behaviour of festival and event visitors and to incorporate this knowledge into marketing strategies. Marketers should design strategies that build the right relationships with the right customers (Armstrong & Kotler, 2005:185). This includes identifying the market segments that are likely to have their needs satisfied by the festival and event activities, or to ensure the event contains those elements or benefits/attributes which can satisfy an identified target market's⁷ needs. Many festivals and events now embrace target marketing (Shone & Parry, 2004:145; Getz, 1997:260).

According to Kotler (2000:256), target marketing requires marketers to take three major steps:

⁷ "Target market is a group of people for whom a company creates and maintains a marketing mix that specifically fits the needs and preferences of that group" (Dibb et al., 2001:21).

1. identifying and profiling distinct groups of buyers who might require separate products/services or marketing mixes (market segmentation);
2. selecting one or more market segments to enter (market targeting); and
3. establishing and communicating the key distinctive benefits/attributes of the products or services (market positioning) to the market.

Getz (1997:260) furthermore notes that, depending on the circumstances, festival and event attendees are not homogeneous and any one segmentation strategy or combination of strategies could be used to delineate the existing and target markets. The larger an event, the more likely it is to attract a more diverse range of people, for which more comprehensive market segmentation might be needed (Swarbrooke, 2002:58). Therefore, the technique marketers use for obtaining knowledge about the diverse nature of markets is referred to as market segmentation (Jobber, 2004:210).

Market segmentation is a two-step process of: (1) naming broad product-markets and (2) segmenting these broad product-markets in order to select target markets and develop suitable marketing mixes (Perreault & McCarthy, 2002:73). Churchill and Peter (1995:290) define market segmentation as the process of subdividing a market into distinct subsets of customers who behave in the same way or have similar needs. There are various levels and patterns of market segmentation, but market segmentation shows the organisation's market segment opportunities (Armstrong & Kotler, 2005:199). These various segments should be evaluated and the target segments selected. Moreover, target marketing can be carried out at several different levels, as indicated in Figure 3.1.

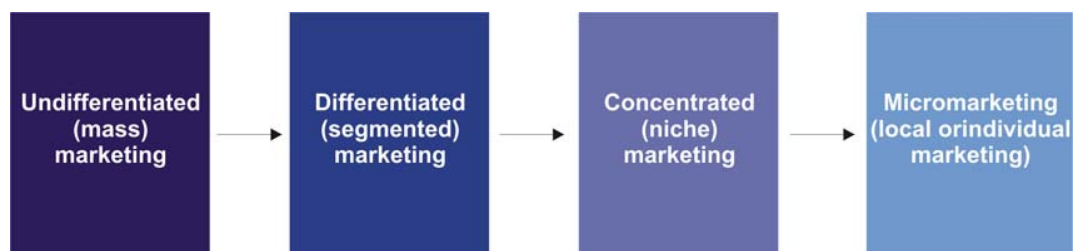


Figure 3.1: Different strategies for target marketing (Armstrong & Kotler, 2005:200)

The above figure indicates that festival management can target very broadly (undifferentiated or mass marketing), very narrowly (micromarketing), or somewhere in between (differentiated or concentrated marketing).

Although the starting point of any segmentation is mass marketing or undifferentiated marketing,⁸ Armstrong and Kotler (2005:256) note that the “one-size-fits-all” marketing concept is dying out. Differentiated (segmented) marketing is found when a festival decides to target several market segments and designs separate offers for each (Armstrong & Kotler, 2005:201). Concentrated or niche marketing is a market-coverage strategy in which a festival goes after a large share of one or a few segments, or niches (Armstrong & Kotler, 2005:201). This strategy is especially popular if a festival’s resources are limited. In the previous two approaches, marketers tailor their packages/offers and marketing programmes to meet the needs of various market segments and niches, but do not customise them to each individual customer (Armstrong & Kotler, 2005:202).

Many organisations are now turning to micromarketing in local areas and at individual levels. Micromarketing practises the tailoring of products and marketing programmes to suit the needs of specific individuals and local customer groups (Armstrong & Kotler, 2005:202). Kotler (2000:259) notes that in future there is likely to be more self-marketing, a form of individual marketing in which individual customers take a greater initiative in designing their products and brands. However, festivals differ widely in their abilities to serve different segments of the market (Armstrong & Kotler, 2005:185).

In addition to this strategy options in Figure 3.1 different kinds of segmentation bases or strategies can be used in customer markets. Bennett and Strydom (2001:66) continue and note that segmentation is a fairly subjective process, which may differ in the case of each festival and event.

⁸ “*Mass marketing* is a market-coverage strategy in which a firm decides to ignore market segment differences and go after the whole market with one offer” (Armstrong & Kotler, 2005:200).

In other words, there is no single way to segment a market, and a marketer has to try different segmentation variables, alone and/or in combination (Bennett & Strydom, 2001:66). Segments may be identified along the lines of basic customer characteristics such as geographic, demographic, psychographic and socio-economic status; and should also consider product or festival-related behavioural characteristics such as purchase behaviour, purchase occasion, the benefits or attributes sought, consumption behaviour and the user's status and attitude to a product or service (Dibb et al., 2001:211). Table 3.2 comprehensively illustrates the options available to the festival and event marketer.

Table 3.2: Major segmentation variables for festival and event markets

Demographics: Who are the customers? Age, sex or gender Family status (one- and two-parent families) Race/ethnicity Religion Family lifecycle concept
Socio-economics: Who are the customers? Income level Occupation Level of education Social class Different income groups with different needs
Geographic location: From where are the visitors? Country Region City
Psychographics: Who are the customers? Personality Beliefs; attitudes Values Motives Lifestyle <i>Benefits sought:</i> What do they want? Trip motives (push and pull factors) Experiences desired <i>Type of trip:</i> Under which conditions will they attend? Holiday Day trip Business Visiting friends/relatives <i>Seasonality:</i> Peak season only All-year potential <i>Repeat visits:</i> How often will they attend? Once only First-time (might repeat)

Source: Adapted from Dibb et al. (2001:211); Getz (1997:260-262)

Each of these segmentation variables will be discussed from a festival and event perspective.

3.4.1 Demographic segmentation

Age and gender along with marital and family status are usually important factors affecting the demand for events. Household type and size are potentially useful in segmenting the market as well as race and ethnicity that reflect the multicultural nature of the population (Getz, 1997:261). Multicultural festivals are often aimed at fostering bettering communication and understanding between different cultures therefore, any under-representation of certain groups should be determined (Getz, 1997:262).

The same author notes that young unmarried people have a set of values, desires, opportunities and constraints, which is quite different from those of married couples, “empty nesters” and elderly retired people. Arts and cultural festivals are more likely to attract females (Getz, 1997:262). Demographic and geographic segmentation are popular forms of segmentation because the statistics are readily available, uniformly defined and accepted, and easy to use. It is common for demographic and geographic segmentation to be used in combination, giving rise to geo-demographic segmentation (Morrison, 2002:181).

3.4.2 Socio-economic segmentation

This group of variables pertains to an individual's or household's economic status and related factors such as educational attainment (Getz, 1997:262). Certain marketing academics include some of these variables in the demographics label. Although income is the greatest predictor of travel and entertainment expenditure, it is not a sufficient indicator to explain everything (Getz, 1997:262). The higher the level of education, the greater a person's propensity to participate in cultural activities, including arts and community festivals (Torkildsen, 1983:5).

Morgan (1996:103) observes that the age at which individuals finish their formal education (16 or 18 years, or after higher education, at 21 years) may indicate their aspiration and intelligence and, significantly for event managers, their curiosity about the world in which they live. Festival and event management with arts and cultural elements have a target market of an educated population (Allen et al., 2002:173).

3.4.3 Geographic segmentation

By dividing the market into different geographical units such as countries, regions, cities, urban, rural and climatic regions, clusters of likeminded individuals and so forth. These variables can also be used to differentiate between primary, secondary and emerging markets (Bennett & Strydom, 2001:69).

It is extremely important to know where potential customers live or work in order to communicate with them. Getz (1997:260) observes that most festival and event visits will be generated inside the local or regional market area.

3.4.4 Psychographic segmentation

This form of segmentation has recently gained popularity in tourism research, but some researchers have found it of limited value unless it is combined with other segmentation variables (Getz, 1997:262). Psychographics is the development of psychological profiles of customers and psychologically-based measures of distinctive modes of living or lifestyles (Mill & Morrison, 1998:181). Plog (1987 cited in Ritchie & Goeldner, 1994) identified the following eight dimensions commonly used in psychographics-based tourist segmentation:

- Adventurousness (the explorer types);
- Pleasure-seeking (related to the desire for luxury);
- Impulsiveness (will spend a lot, without planning);
- Self-confidence (will travel alone);

- Plan-fullness (prefer package tours and bargains);
- Masculinity (the action-oriented and outdoor groups);
- Intellectualism (lured by culture and history);
- People orientation (want to be close to others).

Getz (1997:263) notes that whatever psychographic segmentation is employed, it has to be linked to one or more of the other segmentation methods. In addition he notes that the marketers of event tourism who use psychographic segmentation could expect ideal segments, based on the following:

- *Lifestyle*: the concept is defined by how people spend their time (activities), what they consider to be important in their environment (interests), and what they think of themselves and the world around them (opinions) (Assael, 2004:280). These are all factors used in lifestyle segmentation, including being active in a variety of sports, arts, or in the community; already a customer that make use of similar products.
- *Personality traits*: personality variables are used to segment markets such as conservatives who will buy packages, or adventurers who will seek out the authentic and unique (Getz, 1997:263).
- *Perceptions, values, and beliefs*: these are classified as the behaviour variables because perceptions, beliefs and values are strongly linked to behaviour. Customers are categorising by grouping together those who view the products in a festival market in a similar way and who have similar beliefs (Jobber, 2004:217).

On the same topic the author concludes that there are apparent differences in segmentation (especially with regards to psychographic and behavioural segmentation) in the fields of traditional marketing versus tourism (festival) marketing. According to Getz (1997:263), the below mentioned segments form part of the psychographic segmentation, whilst Kotler and Armstrong (2004:244) view psychographic and behavioural segmentation separately.

- *Benefits or attributes sought:* customers can usually identify what they want from an event or travel experience, such as a desire to enjoy social and family relationships, to learn about cultures, to have fun and so forth (Getz, 1997:263). Customers or potential visitors will rank the attributes of most interest to them and can then use these benefits. Segments based on stated benefits have to be correlated with other factors, especially demographics. For example, older adults with high incomes are more likely to seek an authentic cultural experience. Benefit segmentation is the division of a market according to the benefits customers want from the product or service (Dibb et al., 2001:219);
- *Type or purpose of trip:* visitors to an event are most likely to attend as either a day trip, a family vacation, visiting friends and relatives, on business, or travelling only because of the event. Other segmentation variables can be combined to form useful trip-type segments (Getz, 1997:263).
- *Seasonality:* although this variable is often ignored, it has particular relevance to events. Some groups are easier to attract in the off-season, whereas others are likely to be attracted in the summer holiday season or during school holidays (Getz, 1997:263).
- *Repeat visits:* the loyal group of return visitors, usually including a high proportion of area residents. This important group includes a segment with strong “brand loyalty” to particular events, returning again and again, and a segment which attends many different events. Arts and music festivals in particular seem to attract a mobile audience, and sport has dedicated travelling supporters. Research indicates that repeaters tend to be middle-aged, married and well-educated, with fewer students, young people and senior citizens (Getz, 1997:263).
- *Product-related variables:* people with an interest in sports events or arts festivals can be identified by the equipment they own, the magazines they read and their leisure activities. An event can also concentrate on people who are frequent users of certain facilities, and clubs with specialised demands (such as antique porcelain hobbyists). The main object is to identify the

products or services linked to the target market and the event (Getz, 1997:264).

- *Distribution channel variables*: target groups are defined by the ways in which the event can be linked to potential customers in the way they are reached (Getz, 1997:264).

Although psychographic segmentation has serious limitations for an event marketer, it does provide valuable information about the characteristics of the target market and the benefits that these groups seek from a leisure experience (Allen et al., 2002:175).

Perhaps the most popular bases for customer segmentation are the benefits or attributes customers seek from purchasing, consuming, owning the product or having the service (Dibb & Simkin, 1996:14). It is of the utmost importance to determine the correct attributes or benefits (Chacko & Fenich, 2000:212). These authors state that the review of literature shows that many (festival) attributes are important in the selection but the extent of influence and importance of each attribute is not clear.

However, it should be noted that in the tourism literature the attributes or benefits of a festival or event are referred to as the *push* and *pull attributes* or *factors* that are part of the positioning attributes (Botha, 1998:59). In the marketing field, push and pull factors have a slightly different meaning.⁹ Positioning attributes or *push* and *pull factors* are terms borrowed from the marketing field and it may not always be practical to translate them into another discipline, which is why new or different meanings for words or concepts are adopted when translated into another field, such as the tourism field in this case (Cooper & Schindler, 2003:42).

Positioning differentiates one festival from another festival due to attributes (push and pull factors) that are meaningful to customers and that give the festival a competitive advantage in the market (Chacko, 1997:1).

⁹ In the marketing field, *push* and *pull* are terms used as basic sales promotion strategies to move products through the distribution channel from the point of manufacture to the point of consumption (Duncan, 2002:571).

Positioning attributes are comprised of socio-psychological motivators (*push factors*) and festival drawing-power or attributes (*pull factors*) (Botha, 1998:56). *Push factors* deal with attendees' internal visitation motives per se and refer to the social-psychological benefits offered by a festival's attractions and people (Goossens, 2000:300; Botha, 1998:55).

Pull factors refer to the tangible attributes offered by a specific festival, such as sunny weather, restaurants and performing artists. These motivational factors embrace the external drawing power or attractiveness of the festival as perceived by attendees (Hughes, 2000:36). However, when analysing the positioning attributes of a festival the situational inhibitors (constraints), which might prevent attendance, also have to be taken into account. Positioning attributes therefore refer to the push factors that are intangible and origin-related, and they motivate or create a feeling or desire to satisfy a need (Crompton, 1979:410) and pull factors are the motives aroused by the festival, rather than emerging from the inner feelings of the festival attendee (Crompton, 1979:410).

Nevertheless, no matter which way the market is segmented, for market segments to be effective they have to satisfy the following eight criteria or requirements (Morrison, 2002:175; Kotler, 2000:274):

- *measurable*: it should be possible to measure the size, purchasing power and characteristics of the segments;
- *substantial*: the segment should be big enough to be profitable;
- *accessible* or *reachable*: the segments should be effectively reached and served with the marketing mix developed;
- *defensible*: the target market should be defended from competitors;
- *durable* or *sustainable*: the stability or sustainability of a segment over time. i.e. a market segment should have a long-term potential and should be able to survive. Some segments are short- or medium-term, meaning that they last for less than a year;

- *competitive or differentiable*: the segment has to provide something distinct or unique for these customers;
- *homogenous*: the segments should be different from one another, or be as heterogeneous as possible, but the people in each segment should be as similar, or homogeneous as possible; and
- *compatible*: the new target market should be compatible with existing target markets that are already served.

Once market segments have been identified and targeting decisions made, it is necessary to consider exactly how to position the festival product in the market. The market position of the festival product relates to the attributes that customers ascribe to it (Dibb & Simkin, 1996:17). The term *market positioning* is discussed in more detail in the next section.

Each and every tourism destination or festival and event has one or more primary markets and several secondary markets from which it attracts the majority of its visitors or guests (Perdue, 1996:39; Bonn & Brand, 1995:31). The ability to attract these market segments is based on the unique market position of the destination or festival – it is the image it portrays in the minds of customers (Jeffrey & Xie, 1995:857; Herbig & Milewicz, 1993:18; Barich & Kotler, 1991:95; Calantone & Mazanec, 1991:101).

3.5 MARKET POSITIONING

3.5.1 Introduction

The term *positioning* is such an all-encompassing concept that more attention should be given to its meaning, importance and appropriate application, especially as researchers and practitioners may interpret it differently, as may people in the marketing, tourism and festival field of study. The next section contains a discussion

of the definitions as well as the importance and objectives of positioning in the fields of marketing, tourism and, more specifically, festivals and events.

A comprehensive literature review of articles on positioning in tourism marketing revealed a scarcity of literature on such positioning in the context of arts festivals, especially in South Africa (as noted in the problem statement, Section 1.2). In order to address the fifth secondary objective the generic models of positioning and their application are evaluated according to the available market-positioning techniques in Section 3.6. The origin of the concept is discussed in the next section.

3.5.2 Defining positioning in various contexts

The concept of positioning dates back to the late 1960s and early 1970s (Lamb et al., 2004:189). In 1972, Ries and Trout (2001:3) addressed the concept of positioning in a series of articles titled “The Positioning Era,” published in *Advertising Age*. However, Driscoll and Lawson (1990:106) argues that the conceptual origin of positioning began with the work of economists on market structure, the competitive position of the firm, and the concepts of substitution and competition among products (Wind & Robinson, 1972:155), although the behavioural foundation of positioning originated in the Gestalt psychology. These latter authors claim that marketing scholars and practitioners have adopted the conceptual and behavioural ideas and incorporated them into the field of marketing.

3.5.3 Marketing

Effective marketing may take many forms, ranging from a formulated to a more creative form. Marketing is typically seen as the task of creating, promoting and delivering goods and services to customers and businesses (Kotler, 2000:28). The key objective is still to satisfy the needs of numerous customers who might continually change. Positioning is one of the marketer’s tools, which can be used to develop an effective marketing strategy (Lamb et al., 2004:189).

There is general agreement that the concept of positioning has become one of the fundamental components of modern marketing management (Mullins et al., 2005:201; Hooley, Saunders & Piercy, 1998:203) and one of the bases for firms (festivals) to create psychological barriers around their offerings (Bhat & Reddy, 1998:32; Sheinin, 1998:2). To define the term *positioning* in a marketing context and to address the academic significance of positioning, it is first necessary to indicate where the concept fits into the marketing process.

Various researchers assert that the concept of positioning is often used together with the terms *segmentation* (first stage) and *targeting* (second stage) and that positioning is the third stage in the marketing process (Lamb et al., 2004:182; Kotler et al., 2003:264; Morrison, 2002:204; Perreault & McCarthy, 2002:85; Dibb et al., 2001:209). These three elements work together closely when determining which way to offer a product or a service (a festival) and in which markets to which target group. The elements relate to one another as indicated in Figure 3.2:



Figure 3.2: Basic elements of segmentation (Dibb, et al., 2001:209).

Positioning in marketing can be defined as the act of designing the organisation's offering and image to occupy a distinctive place in the minds of people in the target market (Kotler, 2000:298). Assael (2004:555) adds that products can be positioned with respect to customers and with respect to competitors. Various authors note that positioning is the process of creating an image for a product in the minds of target customers (Evans cited in Baker 2003:279; Dibb et al., 2001:233; Ries & Trout, 2001:3).

Kalafatis, Tsogas and Blankson (2000:417) debate the issue of positioning and are of the opinion that with respect to the widely quoted definitions of Ries and Trout, and Kotler, "a single, universally accepted definition has yet to emerge".

However, they also believe that the statement by Arnott (1992:14) that the various definitions and terminologies are simply "... several sides of the same coin ..." illustrates the fact that most of the apparent definitional differences are substantively superficial. The marketing literature contains several definitions of the concept of positioning, but Arnott (1993) gives a definition, which combines both the strategic and operational perspectives. He defines positioning as: "... the deliberate proactive, iterative process of defining, measuring, modifying and monitoring consumer perceptions of a marketable object ..." So the process of positioning can also be described as repetitive, as it requires the deliberate involvement of the marketer, it involves decisions at conceptual, strategic and operational levels and it should reflect the consultation of the company or organisation, its competitors and its target market or customers."

To summarise, any product offered has to have particular characteristics (attributes) that set it apart (differentiate) from others in the eyes of the customers. Since positioning is based on customers' perceptions, it is only partly under the control of (festival) marketers. External factors might influence the way customers think about a product or festival. These factors can be widely diverse and may include changes in the price or characteristics of competing products (festivals), reports by the media, new legislation (such as legislation against smoking in public places), or changes in customers' preferences.

The term *positioning* originated in marketing literature and spread to tourism literature during the early 1980s.

3.5.4 Positioning in the tourism context

Positioning is not a new phenomenon in the tourism industry and the topic is well documented by an array of authors. Table 3.3 indicates that the term *positioning* in tourism was first popularised during the early 1980s and later on by various authors and reached a peak in the 1990s while the latest literature dates it to 2004.

Table 3.3: Development of positioning research in tourism

Author and period 1980-1989	Author and period 1990-1999	Author and period 2000 and onwards
Aaker & Shansby (1982), Lewis (1981, 1982, 1985a, 1985b), Lovelock (1984), Ries & Trout (1981) and Woodside (1982) Fenton & Pearce (1988), Haahti (1986), Harris (1988), Middleton (1988), Morrison (1989)	Ashworth & Voogd (1994), Baker (1992), Burke & Resnick (1991), Crompton, Fakeye & Lue (1992), Connell (1994), Dev, Morgan & Shoemaker (1995), Echtner & Ritchie (1993), Fodness & Milner (1992), Zins (1994), Witt & Moutinho (1994) and Alford (1998), Bramwell & Rawding (1996), Kotler, Bowen & Makens (1996, 1999), Lovelock, Vandermerwe & Lewis (1990, 1999), Mazanec (1995), Morgan & Pritchard (1998), Reich (1997, 1999), Walmsley & Young (1998).	Chen & Uysal (2002), Lewis & Chambers (2000), Middleton (2001), Morgan & Pritchard (2000, 2001), Morrison, (2002), Bennett & Strydom, (2001) Moutinho (2000), Scott, Parfitt & Laws (2002), Dickman, (2003) Kotler, Bowen & Makens, (2003), Walker, (2004).

Many descriptions and definitions of the concept of positioning have been postulated in tourism literature, and the term is subject to considerable differences in interpretation similarly to the discussion on marketing in paragraph 3.6.1.

In tourism, positioning is the process of establishing and maintaining a distinctive place for a destination (tourism product) in the minds of the potential visitors/travellers in the targeted markets (Walker, 2004:752; Chacko, 1997:1; Crompton, Fakeye & Lue, 1992:20). Lovelock and Wirtz (2004:63) describe positioning in services marketing as the process of establishing and maintaining a distinctive place in the market for an organisation and/or its individual product offerings. These latter authors argue that positioning such services involves developing and communicating key product attributes, and is not primarily about creating advertising images.

In contrast to image, Crompton et al. (1992:20) applied Woodside's (1982:2) approach to positioning, which suggests that the key to successful positioning is matching the benefits provided by a tourism product with the benefits sought by consumers in a target market who consider paying a visit to that tourism product. Furthermore, Kotler et al. (2003:283) define positioning as "the way the product is defined by consumers on important attributes – the place the product occupies in consumers' minds relative to competing products". Tourism marketers should seek to match the attributes of their product and buyers' perceptions of those attributes with the needs and priorities of customers in that specific segment (Evans, Campbell & Stonehouse, 2003:132). The main components of positioning can be summarised as the segmentation decision, image, selection of product's (festivals) features to emphasise (differentiation) and branding (Kotler et al., 2003, Aaker & Shansby, 1982; Woodside, 1982).

The above-mentioned authors emphasise segmenting the market and then matching the product to the needs of those segments. It could be argued that the positioning decision for a tourism product is the most critical strategic decision for a tourism product because it is central to determining visitors' perceptions and their decisions about a choice (Alford, 1998:67). Aaker and Shansby (1982:56) mention that positioning decisions often mean selecting the associations and attributes that should be emphasised, and those that should be de-emphasised.

Therefore, when applying the positioning process to tourism product marketing, the marketer first has to research the market to ascertain which product attributes determine the tourism product choice.

Positioning can also be applied to other tourism-related product offerings such as festivals and events; and there is also a difference between the marketing of products and the marketing of services.

Positioning a tourism product presents a number of challenges, two of which are inherent in marketing a service “product”, namely intangibility and inseparability (Moutinho, 2000:134). Events are like services; they are distinctively different from industrial products. For the purpose of this study an arts festival is classified as a service, but can also be referred to as tourism product and thus the two terms are used interchangeably in this thesis. Positioning is concerned with the attempt to modify the tangible characteristics and the intangible perceptions of a marketable object (a festival) in relation to others in the market (Arnott, 1993, 1992). Various authors (Middleton, 2001:42; Van der Wagen, 2001:54; Watt, 2001:61; Moutinho, 2000:134) address the basic differences between products and services and summarise the special features of services as follows:

- *Intangibility*: customers can experience the benefits and feel the enjoyment, but cannot touch them. There is a large service component involved when marketing something purely intangible such as the atmosphere at a festival. In some respects, it is very difficult to market something that the customer cannot take home or physically consume. There is also less quality control over intangible than over tangible goods.
- *Inseparability*: the service and the service provider are distinguished by their inseparability. This means that the event organiser relies heavily on staff and the performers or participants, depending on the type of event, to meet the needs of the audience/spectators. Customers associate one event with the next; they identify with the organisation’s reputation for quality.

- *Perishability*: the fun of an event is transitory; it is rare to have lasting evidence. The decision to attend or not to attend is generally made shortly before the event and is irrevocable. If a customer decides not to attend, the revenue is lost to the event organiser. In contrast to tangible products (such as soft drinks) that can be bought and sold at a later stage, unsold tickets for an event cannot be put back on the shelf at a reduced price.
- *Consistency*: customers demand consistency in for example the artists performances and it is important to achieve it;
- *Variability*: different responses from two or more customers to the same experience.
- *Lack of ownership*: events do not belong to anyone but are temporarily enjoyed by many.

The product range may differ in the product lines for tangible goods and the products are available throughout the year, but in the case of festivals, the products are intangible, may differ widely and are not available throughout the year: this is more of an incidental purchase. The positioning of festivals requires some thought to distinguish one festival from other festivals, which are far away from one another, and to have it regarded as unique. Positioning in a festival context seems to be more complex because festivals are geographically dispersed (far away), take place at different times of the year and each festival has a different approach.

Surprisingly, despite the fact that the concept of positioning is one of the fundamental components of modern marketing management, marketing researchers have overlooked issues relating to the positioning of festivals and events, such as in the case of the three arts festival scenarios chosen for this study. Positioning in a festival and event context is discussed in the next section.

3.5.5 Positioning in festivals and events

The topic of positioning has received some coverage in the tourism field but only nominal coverage in festival and event literature, compared to its apparent

importance in this area. The only reports on festival and event researchers broadly covering the topic are mainly in textbooks such as those by Hoyle (2002), Bowdin et al. (2001), Hughes (2000) and Getz (1997). In academic journals, amongst others the only references to positioning were by Prentice and Andersen (2003), Chacko and Fenich (2000), Scott (1996) and Crompton and Love (1995). An array of research covered the motivating factors for attending festivals, but not much is written about the contribution that demonstrates motivations.

What motivates people to attend one festival is likely to differ from the motivations for attending another festival. The research by Scott (1996:121) on the comparison of visitors' motivations to attend three urban festivals should be acknowledged.

Scott (1996:127) notes that people's motivations to attend festivals have implications for the marketing or positioning of different festivals. He cites the definition by Morrison (2002:222) which is updated by the author, namely that effective positioning entails creating an image, communicating customer benefits and differentiating the brand (festival) from competitive services (festivals). He argues further that festival organisers/management and marketers could more effectively sell their festivals by understanding the unique combination of motivations or benefits that visitors seek, and by formulating promotional strategies which highlight these benefits.

The objective of positioning is to create a distinctive place in the minds of potential customers. Such a position should create images of an arts festival in the customers' minds, namely positive images that differentiate the arts festival from other festivals and portray it as a place that can satisfy their needs and wants (Chacko, 1997:1). Essentially, if customers are offered a superior product (festival) at a reasonable price, they are less likely to visit competitors' festivals (Reich, 1999:1).

Hoyle (2002:18) concludes that festival and event marketing relies on the proper positioning of the product: *positioning* is the key to a successful marketing plan for events, festivals and conventions and expositions. Positioning in the festival context is a strategy for determining, through intuition, research, and evaluation, those areas

of consumer needs that the festival can fulfil. Festival marketers should therefore take heed of the following questions:

- Which niche are we trying to fill?
- What makes us different?
- How can we exploit our unique qualities to market our festivals?
- Which markets will be receptive to our festival concept?

Marketers who can answer these questions have the best opportunity of fulfilling customer expectations.

Chacko (1997:1) and DiMingo (1988:34) argue that true positioning is the process of distinguishing a product (festival) from others along real dimensions – or product features, or corporate values that are meaningful to customers – to become the preferred product (festival) in the market and maintain a competitive edge. The aim of positioning is therefore to distinguish your product (festival) as regards the attributes that have meaning and relevance to the customer. It does not make sense to position the festival on something customers do not value.

Kotler and Armstrong (2004:239), Hooley, Saunders and Piercy (1998:202) and Grabler (1997:101) agree that the concept of positioning has become one of the fundamental components of modern marketing management. It shows how groups of potential customers (tourists) perceive competing or semi-competing products and services in the market place. However, positioning has not yet received the attention in the tourism field as in that of general marketing (Grabler, 1997:101) as the secondary literature review did not yield any findings on the market positioning of festivals or arts festivals in South Africa.

This indicates that positioning in tourism is fairly uncommon and that the more sophisticated techniques of positioning developed in marketing science are not yet being used in the tourist industry (Grabler, 1997:101).

Although various articles on positioning (see Table 3.4) can be found in tourism literature, few were in a festival context, except for the festival-specific articles by, among others, Prentice and Andersen (2003:8), Scott (1996:121) and Crompton and Love (1995:20). The author researched these articles to illustrate which techniques are used in positioning and which have not been used as much. Table 3.4 contains a comprehensive summary of the positioning articles reviewed and indicates a vast number of application studies and various research techniques used for positioning in the general marketing and tourism literature.

Table 3.4: A summary of positioning research articles reviewed and research techniques used in marketing and tourism literature

	Author	Year	Topic	Study field	Action-grid analysis	Analysis of variance (ANOVA)	Cluster analysis	Conjoint analysis	Correspondence analysis	Customer interchange analysis	Discriminant analysis	Descriptive statistics	Factor analysis	Linear probability models (Logit modelling)	Multidimensional scaling	Multiple-regression analysis	Multivariate analysis of variance (MANOVA)	Perceptual mapping	Preference mapping	Self-organising maps	Game theory
1	Wilkes, R.E.	1977	Product positioning by multidimensional scaling.	Advertising			X								X						
2	Neal, W.D.	1980	Strategic product positioning a step-by-step guide.	Marketing														X			
3	Arabie, P., Douglas C.J., DeSarbo, W., Wind, J.	1981	Overlapping clustering: a new method for product positioning.	Marketing				X													
4	Lewis, R.C.	1981	The positioning statement for hotels.	Tourism																	
5	Aaker, D.A. & Shansby, J.G.	1982	Positioning your product.	Marketing											X						
6	Lewis, R.C.	1982	Positioning analysis for hospitality firms.								X		X								
7	Woodside, A.G.	1982	Positioning a province using traveller research.	Tourism																	
8	Lewis, R.C.	1984	Isolating differences in hotel attributes.	Tourism		X							X								

	Author	Year	Topic	Study field	Action-grid analysis	Analysis of variance (ANOVA)	Cluster analysis	Conjoint analysis	Correspondence analysis	Customer interchange analysis	Discriminant analysis	Descriptive statistics	Factor analysis	Linear probability models (Logit modelling)	Multidimensional scaling	Multiple-regression analysis	Multivariate analysis of variance (MANOVA)	Perceptual mapping	Preference mapping	Self-organising maps	Game theory
9	Lewis, R.C.	1985a	The market position: mapping guests' perceptions of hotel operations.	Tourism			X				X										
10	Lewis, R.C.	1985b	Predicting hotel choice: the factors underlying perception.	Tourism												X					
11	Dillon, W.R., Domzal, T & Madden, T.J.	1986	Evaluating alternative product positioning strategies.	Marketing							X				X			X			
12	Haahti, A.J.	1986	Finland's competitive position as a destination.	Tourism											X						
13	Shostack, G.L.	1987	Service positioning through structural change.	Marketing														X			
14	DiMingo, E.	1988	The fine art of positioning.	Business																	X
15	Calantone, R.J., di Benedetto, I., Hakam, A. & Bojanic, B.C.	1990	Multiple multinational tourism positioning using correspondence analysis.	Tourism					X												
16	Driscoll, A. & Lawson, R.	1990	New Zealand's position as a destination for New Zealanders: a multidimensional scaling approach.	Tourism											X						
17	Fodness, D.	1990	Consumer perceptions of tourist	Tourism			X			X					X						

	Author	Year	Topic	Study field	Action-grid analysis	Analysis of variance (ANOVA)	Cluster analysis	Conjoint analysis	Correspondence analysis	Customer interchange analysis	Discriminant analysis	Descriptive statistics	Factor analysis	Linear probability models (Logit modelling)	Multidimensional scaling	Multiple-regression analysis	Multivariate analysis of variance (MANOVA)	Perceptual mapping	Preference mapping	Self-organising maps	Game theory
			attractions.																		
18	Lewis, R.C.	1990	Advertising your hotel's position.	Tourism																	
19	Ahmed, Z.U.	1991	The influence of the components of a state's tourist image on product positioning strategy.	Tourism									X								
20	Schewe, C.D.	1991	Strategically position your way into the aging marketplace.	Marketing																	
21	Carmichael, B.	1992	Using conjoint modelling to measure tourist image and analyse ski resort choice.	Tourism				X													
22	Crompton, J.L., Fakeye, P.C. & Lue, C.	1992	Positioning: the example of the Rio Grande Valley in the winter long stay destination market.	Tourism									X								
23	Fodness, D. & Milner, L.M.	1992	A perceptual mapping approach to theme park visitor segmentation.	Tourism			X			X					X						
24	Horsky, D. & Nelson, P.	1992	New brand positioning and pricing in an oligopolistic market.																		X
25	Myers, J.H.	1992	Positioning products/services in attitude space.	Marketing														X	X		

	Author	Year	Topic	Study field	Action-grid analysis	Analysis of variance (ANOVA)	Cluster analysis	Conjoint analysis	Correspondence analysis	Customer interchange analysis	Discriminant analysis	Descriptive statistics	Factor analysis	Linear probability models (Logit modelling)	Multidimensional scaling	Multiple-regression analysis	Multivariate analysis of variance (MANOVA)	Perceptual mapping	Preference mapping	Self-organising maps	Game theory
26	Shaw, M.	1992	Positioning and price: merging theory, strategy, and tactics.	Tourism																	
27	Echtner, C.M & Ritchie, J.R.B.	1993	The measurement of destination image: an empirical assessment.	Tourism									X								
28	Manrai, L.A. & Manrai, A.K.	1993	Positioning European countries as brands in a perceptual map: an empirical study of determinants of consumer perceptions and preferences.	Tourism														X			
29	Crompton, J.L. & Love, L.L.	1995	The predictive validity of alternative approaches to evaluating quality of a festival.	Tourism									X								
30	Dev, C.S., Morgan, M.S. & Shoemaker, S.	1995	A positioning analysis of hotel brands.	Tourism											X			X			
31	Mazanec, J	1995	Positioning analysis with self-organizing maps: an exploratory study on luxury hotels.	Tourism																X	
32	Kim, H.	1996	Perceptual mapping of attributes and preferences: an empirical examination of hotel F&B products in Korea.	Tourism														X			

	Author	Year	Topic	Study field	Action-grid analysis	Analysis of variance (ANOVA)	Cluster analysis	Conjoint analysis	Correspondence analysis	Customer interchange analysis	Discriminant analysis	Descriptive statistics	Factor analysis	Linear probability models (Logit modelling)	Multidimensional scaling	Multiple-regression analysis	Multivariate analysis of variance (MANOVA)	Perceptual mapping	Preference mapping	Self-organising maps	Game theory
33	Scott, D.	1996	A comparison of visitors' motivations to attend three urban festivals.	Tourism		X							X								
34	Baloglu, S. & Brinberg, D	1997	Affective images of tourism destinations.	Tourism											X						
35	Font, X.	1997	Managing a tourist destination.	Tourism											X			X			
36	Grabler, K.	1997	Perceptual mapping and positioning of tourist cities.	Tourism						X			X		X			X			
37	Reich, A.	1997	Improving the effectiveness of destination positioning.	Tourism									t-tests								
38	Alford, P.	1998	Positioning the destination product-can regional tourist boards learn from private sector practice?	Tourism			X	X		X					X						
39	Bowen, J.T.	1998	Market segmentation in hospitality research: no longer a sequential process.	Tourism				X							X						
40	Walmsley, D.J. & Young, M.	1998	Evaluative images and tourism: the use of personal constructs to describe the structure of destination images.	Tourism									X								
41	Baloglu, S. & McCleary, K.W.	1999	U.S. International pleasure travellers' images of four Mediterranean destinations: a comparison of visitors and	Tourism									X				X				

	Author	Year	Topic	Study field	Action-grid analysis	Analysis of variance (ANOVA)	Cluster analysis	Conjoint analysis	Correspondence analysis	Customer interchange analysis	Discriminant analysis	Descriptive statistics	Factor analysis	Linear probability models (Logit modelling)	Multidimensional scaling	Multiple-regression analysis	Multivariate analysis of variance (MANOVA)	Perceptual mapping	Preference mapping	Self-organising maps	Game theory
			non-visitors.																		
42	Botha, C., Crompton, J.L. & Kim, S.	1999	Developing a revised competitive position for Sun/Lost City, South Africa.	Tourism									X								
43	Mazanec, J.A.	1999	Simultaneous positioning and segmentation analysis with topologically ordered feature maps: a tour operator example.	Tourism				X												X	
44	Nickerson, N.P. & Moisey, N.	1999	Branding a state from features to positioning: Making it simple?	Tourism			X					X									
45	Andreu, L., Bigne, J.E. & Cooper, C.	2000	Projected perceived image of Spain as a tourist destination for British Travellers.	Tourism														X			
46	Chacko, H.E. & Fenich, G.G.	2000	Determining the importance of US convention destination attributes.	Tourism			x									X					
47	Uysal, M. Chen, J.S. & Williams, P.R.	2000	Increasing state market share through a regional positioning.	Tourism														X			

	Author	Year	Topic	Study field	Action-grid analysis	Analysis of variance (ANOVA)	Cluster analysis	Conjoint analysis	Correspondence analysis	Customer interchange analysis	Discriminant analysis	Descriptive statistics	Factor analysis	Linear probability models (Logit modelling)	Multidimensional scaling	Multiple-regression analysis	Multivariate analysis of variance (MANOVA)	Perceptual mapping	Preference mapping	Self-organising maps	Game theory
48	Chen, J.S. & Uysal, M.	2002	Market positioning analysis: a hybrid approach.	Tourism					X					X							
49	Huan, T., Beaman, J. & Shelby, L.B.	2002	Using action-grids in tourism management.	Tourism	X																
50	Orth, U.R. & Tureckova, J.	2002	Positioning the destination product- Southern Moravia	Tourism			X						X		X						
51	Prentice, R & Andersen, V.	2003	Festival as creative destination.	Tourism			X														

In Table 3.4 positioning literature review demonstrates that various techniques are used in the positioning process. Only 5 of the 51 articles on positioning reviewed, employed the method of conjoint analysis, which demonstrates the minor use of this technique in positioning an arts festival. However, the technique of game theory was applied to marketing; only 1 article was linked with positioning and none in a tourism context. The game theory technique is frequently applied to economics and on the search “game theory and economics” in the database EconLit 2003-2005/05 a mere 53 records were returned.

The most popular techniques used for positioning research in the tourism and marketing field of the 51 articles reviewed, were the following:

- perceptual and preference mapping in 13 cases
- factor analysis in 12 cases
- cluster analysis in nine cases
- multidimensional scaling in eight cases
- conjoint and discriminant analysis in five cases
- correspondence analysis in three cases
- analysis of variance (ANOVA) and multivariate analysis of variance (MANOVA), customer interchange analysis, multiple regression and self-organising maps in two cases each, and
- action-grid analysis, descriptive statistics, and linear probability models (LOGIT) and game theory once.

The most popular techniques used in positioning research in these fields were therefore perceptual and preference mapping, factor and cluster analysis and multidimensional scaling.

It is clear that successfully positioning a product (festival) in the market requires more than intuition and creative genius, therefore researchers have to depend upon methods and techniques to understand the complex field (Hooley, Saunders & Piercy, 1998:202).

Since positioning is based on customers' perceptions, it is only partly under the control of marketers (Dagmar Recklies, 2001:2). It is therefore advisable to use in-depth market research techniques to determine the relevant parameters and gain an understanding of how customers rate different products and marketing variables.

As the author is now familiar with positioning in the festival context due to the covering of relevant literature, the current study addresses the different market positioning models, the steps to be followed in the positioning process and the various techniques or methods applied.

3.6 RESEARCH ON POSITIONING (MODELS OF POSITIONING)

Building upon the definitions of positioning in both marketing and tourism and more specifically in arts festivals, six different market-positioning models (with the various techniques used in the positioning process) are discussed, namely (1) Ries and Trout (2001, 1982, 1981) the pioneers in the marketing field; (2) Boyd and Walker (1990) who present some of the most comprehensive or thorough coverage of positioning research in marketing; (3) Kotler (2003, 2000, 1991), one of the world's foremost authorities on marketing who, along with hospitality marketing experts Kotler, Bowen and Makens (2003, 1999, 1996) applied marketing to the tourism industry; (4) Lovelock (2003, 1991, 1984), one of the first to apply positioning to a service business in the market place; (5) Aaker and Shansby (1982), marketing and marketing strategy gurus with their six stages of developing a positioning strategy; and (6) Reich (1999, 1997), who applied positioning to a tourism destination and states that it can be applied to any hospitality-related product.

These six models are emphasised in the tourism literature by Reich (1999) though relatively little research has been done and only minor attention given to the festival and event scene.

In addition, these six positioning models were selected for the following reasons: the models developed by Ries & Trout (2001), Kotler (2000), as well as Boyd and Walker (1990) – the prominent authors of market positioning – have been adopted and employed in the tourism literature. They have also received a considerable amount of attention in marketing (consumer behaviour) and tourism literature.

Lovelock (2003) recognises positioning and applies it to the services marketing business. He lists the pitfalls if businesses/festivals do not position themselves effectively in the market. Aaker and Shansby (1982), who are frequently cited in the tourism literature, draw conclusions on how to develop a positioning strategy in marketing. Reich (1999, 1997) introduced and applies the topic of positioning to hospitality and tourism marketing as well as to tourism destinations.

3.6.1 Pioneering model by Ries and Trout (2001, 1982, 1981)

Ries and Trout (2001:219-228), the pioneers of positioning in the marketing field, suggest that one should work through the following six questions to get started on a positioning programme:

- What position do you own?
- What position do you want to own?
- Whom must you outgun?
- Do you have enough money?
- Can you stick it out?
- Do you match your position?

They later expanded these ideas in a book (Ries & Trout, 2001:219; 1981:193). Their principle of positioning is expressed in the following terms: “Instead of starting with yourself, you start with the mind of the prospect. Instead of asking what you are, you ask what position you already own in the mind of the prospect.

Changing minds in our over communicated society is an extremely difficult task. It's much easier to work with what you really are."

In recent years, however, writers such as Kotler (2000) on the subject have also credited Ries and Trout with being the authors who popularised the term *positioning*. In their seminal work (2001:2; 1986), they conclude that:

- "Positioning starts with the product. A piece of merchandise, a service, a company, an institution, or even a person. Perhaps yourself."

At the same time, they note that it should be recognised that positioning is not what is done to the product, but rather what is done to the mind of the prospect (i.e. customer). The essence is to position the service or product in the mind of the customer, so that "... positioning shifts the emphasis of marketing from the product to the battle for your mind". A newer definition entails "...how you differentiate yourself in the mind of your prospect" (2001:3).

Ries and Trout (1981:242) therefore focus on the end product of positioning strategies, namely the position the product holds in the minds of customers. However, they were criticised for viewing positioning in the limited context of advertising as they asserted that positioning was achieved by "manipulating customers' perceptions of reality." Other authors subsequently expanded on this pioneering notion of positioning as it was recognised that it involved much more than creative advertising (Crompton, Fakeye & Lue, 1992:20).

Ries and Trout (2001, 1982), together with a number of authors (Evans cited in Baker, 2003:279; Woodside, 1982:2) note that positioning is finding a niche in the mind of the customer and occupying that niche. Positioning is not something that is done to the product, but is something that marketers do to the minds of customers (Evans cited in Baker, 2003:280). However, Boyd and Walker (1990:333) also refer to the work of Ries and Trout in their model for market targeting and positioning decisions.

3.6.2 Market targeting and positioning decisions model by Boyd and Walker (1990:315-344)

In their publication, *Marketing management: a strategic approach*, these authors (1990:315) present some of the most comprehensive and thorough coverage of positioning research. They begin by defining the two terms:

- *Market targeting* – “determining which segment or segments within a market the firm will direct its marketing efforts toward”;
- *Market positioning* – “designing a marketing program and product that a segment’s customers will perceive as desirable, and that will give the firm a differential advantage over current and potential competitors”.

Furthermore, they manage to link the two terms in describing the process of market targeting and positioning. These two strategic decisions are the focus of their comprehensive research. Firstly, evaluating the target market becomes increasingly important, as customers' needs, organisation resources and objectives, or competitor actions change over time and need to be adjusted. Secondly, once the target segment is chosen, the critical question arises: “How can the business or organisation position its offering so that customers perceive it as providing desired benefits – and at the same time gain an advantage over current and potential competitors?”

Only a few organisations utilise mass markets, and most will divide the market into segments with relatively homogeneous requirements. Managers will then create a marketing mix (products, prices, place and promotion) designed to attract the chosen segments. A market’s attractiveness/business position matrix is recommended by the authors as it provides a useful tool to help managers decide which market segments to target and how to allocate resources and marketing efforts.

After choosing the appropriate targeting strategy (mass-market, niche and growth-market strategy), it should be noted that the chosen market segments might change over time due to changing customers' needs and competitors' actions or the organisation's own objectives and resources. This means that the organisation's position in the marketplace has to be analysed and evaluated constantly.

Positioning, therefore, concerns the perceived match between a particular product/service offering and the target market (Boyd & Walker, 1990:327). In some instances, as in the case of the arts festival, positioning analysis provides useful information to the marketer by identifying the festival's unique attributes and thus differentiating it from other festival offerings in the market. The process of determining the perceived positions of a set of product (festival) offerings and evaluating strategies for positioning a new entry or repositioning an existing one, involves the steps as set out in Figure 3.3.

An eight-step process is proposed for determining existing perceptions and making a positioning decision for a new product or for repositioning a current product (Boyd & Walker, 1990:328). The steps in the positioning process have been adapted by applying it to festivals in this research to fit into the framework of the current study, and are shown in Figure 3.3:

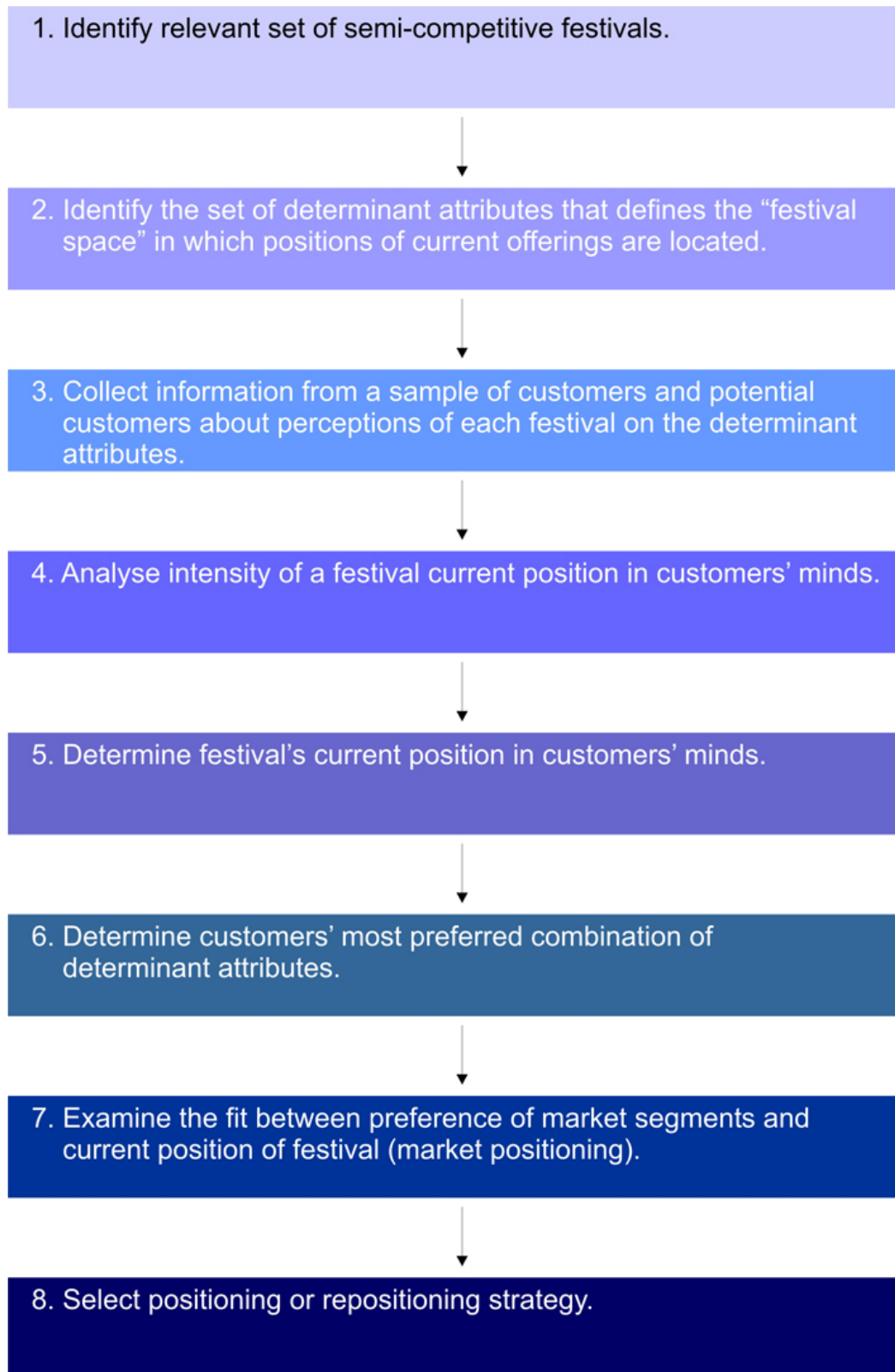


Figure 3.3: Steps in the positioning process (adapted from Boyd & Walker, 1990:329)

Each of these steps is introduced next, in the scope of the current study.

Step1: Identify a relevant set of festivals (products)

First identify a relevant set of semi-competing arts festivals in the South African festival market. Positioning analysis is undertaken on both the product category (festival offering) and brand level. The product category level includes various products regarded as substitutes for the product a business's management is attempting to position. Positioning of the product category and brand level examines customer perceptions about the types of products they might consider as substitutes to satisfy the same basic need.

Brand-level analysis is concerned with how the festival's/business's brand is viewed in terms of various important attributes as compared with other brands. The positioning analysis should help determine the strengths and weaknesses relative to others, and potentially viable or more suitable positions based on the festival's attributes. To understand the position of the festival in the market, the manager could obtain customer perceptions of the other festivals and compare these to likely substitute festivals, using various determinant attributes. Positioning maps can be used in this case, although Boyd and Walker (1990:331) warn against a myopic view, which conducts only a brand-level positioning analysis because it might overlook threats from possible substitutes in other product categories.

Step 2: Identify determinant attributes that define the festival (product) space

Determinant attributes should be identified in order to create the positioning maps in Step 1. Determining these attributes will depend on the analytical technique the marketer uses. The attributes applied in this study were derived from the authors previous study where one of the objectives was to identify most prominent push and pull factors in the arts festival context (Van Zyl, 2002:9).

Findings from the mentioned study concluded that some attributes, such as the atmosphere at the festival (push attributes) may be important but are generally not critical to the customer's decision on whether or not to attend the festival. Determinant (pull) attributes are those that have the greatest influence on choice and only these attributes should be used in the analysis. Previous research in this regard identified a set of critical or determinant product (festival) attributes (Van Zyl, 2002:125):

- entertainment or festival activities
- refreshments (food and beverages)
- transport
- ticket prices.

Step 3: Collect information from a sample of customers and potential customers about their perceptions of each product on the determinant attributes (determine customers' perceptions)

Several techniques help marketers to collect and analyse customers' perceptions about the positions of alternative festival products or brands, and identify the determinant attributes underlying those perceptions. Factor analysis, discriminant analysis, conjoint measurement and multidimensional scaling are common techniques used to identify perceptions. Table 3.5 briefly describes these techniques as well as some of their advantages and disadvantages.

Table 3.5: Alternative techniques used for analysing customers' perceptions of the semi-competitive positions of different festival products or brands

1. Factor analysis	2. Discriminant analysis	3. Multi-attribute compositional models (conjoint measurement)	4. Multidimensional scaling (MDS)
To employ factor analysis, the analyst first has to identify the salient attributes consumers use to evaluate festival products in the study field. Then the analyst collects data from a sample of consumers concerning their ratings of each product or brand on all attributes. The factor analysis program uses the data to determine which attributes are related to the same underlying construct. The analyst uses those underlying constructs or factors as the dimensions for a product space map, and the program indicates where each product or brand is perceived to be located on each factor.	The technique requires the same input data as factor analysis. This program then determines the consumers' perceptual dimensions, on the basis of which attributes best differentiate or discriminate among brands. These underlying dimensions can be used to construct a product space map; but they are usually not as easy to interpret as the factors identified through factor analysis.	Conjoint measurement determines which combination of a limited number of attributes is most preferred by consumers.	Unlike the other techniques, where the underlying dimensions identified depend on the attributes supplied by the researcher when collecting data, multidimensional scaling produces dimensions based on consumer judgements about the similarity of – or their preferences for – the actual brands. These underlying dimensions are thought to be the basic affective dimensions that consumers actually use to evaluate alternative brands in the product class. MDS programmes that use similarity data construct geometrically spaced maps on which the brands perceived to be most similar are placed together. Those that use consumer preferences produce joint space maps that show consumer ideal points and then position the most preferred brands close to those points.
<i>Advantages:</i> The analyst can use objective and	<i>Advantages:</i> As with factor	<i>Advantages:</i> The technique is helpful	<i>Advantages:</i> it allows determinant attributes to be inferred from

1. Factor analysis	2. Discriminant analysis	3. Multi-attribute compositional models (conjoint measurement)	4. Multidimensional scaling (MDS)
subjective attributes; and the dimensions of the product space are relatively easy to determine and interpret. <i>Disadvantages:</i> The analyst has to identify the salient attributes before collecting data; and the factors identified are a function of the attributes used in data collection.	analysis, the underlying dimensions may be a function of the attributes used to collect consumer ratings rather than that of the product features that consumers actually regard as most important.	for identifying appealing new product designs and important points that might be included in a product's advertising. <i>Disadvantages:</i> Although it can provide some insights into consumer preferences, it cannot provide information about how consumers perceive the positioning of existing products in relation to product dimensions.	customer perceptions about similarities and differences among product offerings <i>Disadvantages:</i> The underlying dimensions of the maps produced by MDS can be difficult to interpret. In addition, the dimensions identified are only those that already exist for currently available brands. This makes the technique less useful for investigating new-product concepts that might involve new characteristics. Finally, the technique is subject to statistical limitations when the number of alternative brands being investigated is small. As a rule, such techniques should only be used when at least eight or more different products or brands are being examined.

Source: Boyd & Walker (1990)

Boyd and Walker (1990) recommend multidimensional scaling (perceptual maps) because of its ability to identify underlying attributes without a priori assumptions. The primary advantage is that multidimensional scaling allows determinant attributes to be inferred from customer perceptions about similarities and differences among product offerings.

Step 4: Analyse the intensity of the current position of a festival (product) in customers' minds

In this step, the above information is analysed to determine the intensity of a festival's current position in customers' minds (how familiar customers are with the festival product, and whether the festival occupies a predominant position in their minds in terms of at least one determinant attribute).

Boyd and Walker (1990) refer to the argument by Ries and Trout that the marketer's objective is to achieve "an intense, distinctive position for a brand so that it is thought of first and evaluated as the best brand on at least one determinant attribute by customers preparing to make a purchase". The first step in assessing intensity is to find out which festival brand people think of first for a specific product category (e.g. arts festival).

This is referred to as *top-of-mind awareness*, which is determined by measuring the average ranking of competing brands through unaided recall. The festival brand should also rank high on the various determinant attributes assessed by target market before making a purchase.

Normally, festival management should not focus on more than one, or perhaps up to three attributes, especially for low-involvement products about which customers do not think for very long. In addition, if a competitor is already strongly positioned in a determinant attribute, the festival management will probably have to select another attribute for its focus. A better option is to concentrate on an attribute not strongly associated with the dominant brand, and to position the challenger as a feasible substitute under certain situations or for a peripheral segment of the market.

A constraint on establishing a strong position is that the market's preference may change, making it difficult for the festival to change its position. A considerable advertising budget may be necessary to persuade customers that the focus has been changed.

Step 5: Determine the festival's current location in the product space (product positioning) or analyse the current relative position of the festival (product)

The location of the festival's position relative to other festivals in the festival (product) space is analysed in Step 5. Positioning maps with determinant attributes as the axes can be used in the process (see Chapter 5, Section 5.3.4, Figure 5.4 for an example). Analysing these maps can also give marketers information about any gaps not currently being filled in the market.

Product positioning indicates how alternative products or brands are positioned relative to one another in customers' minds. Product positioning analysis has limitations because it does not tell the marketer which positions appeal most to customers. To overcome these limitations, the next step, market-positioning analysis, is carried out.

Step 6: Market positioning – determine customers' most preferred combination of determinant attributes

The customers' most preferred combination of determinant attributes should be determined next. This requires the collection of additional data (Step 6). These preferences can also be located in the festival space. The festival data are analysed by means of various statistical techniques such as discriminant or factor analysis, multivariate and multidimensional scaling (customers are surveyed to ascertain their ideal product for any specific category), conjoint analysis, game theory, regression analysis and t-tests. Then the festival's product is compared with the attributes of this ideal product. This step introduces the methodology used, which is discussed in detail in Chapters 4 and 5.

Step 7: Examine the fit between preferences of market segments and the current position of the product (market positioning) or define market positioning and market segmentation

The market-positioning map can also be used to identify market segments. In addition to the location of various brands or products on the axes, segments of customers with similar needs and wants can be identified. If most customers cluster around one point on the positioning map, there is probably one segment for the applicable variables. Two or more clusters denote distinct segments with different requirements. The size of the segments can be represented on the map by varying the size of a circle used for the segment. This step helps to inform marketers about how well a festival is positioned to meet each segment's needs and wants, what positioning the semi-competitors have and what possibility there is of finding a unique position in the market.

Because differences between customers' ideal points reflect variations in the benefits they seek, a market positioning analysis can simultaneously identify distinct market segments as well as the perceived positions of different brands.

Step 8: Select positioning or repositioning strategies

In Step 8, the degree of fit between the positions of semi-competitive festivals (products) and the preferences of various market segments can be examined as a basis for choosing a successful strategy for positioning a new entry or for repositioning an existing festival (product). The selection of a position considers the preferences of market segments and the positions of semi-competing festivals. The highest means or highest differentiators are taken to select the desired strategy. Managers can use these highest means/differentiators to develop a positioning strategy.

The basic choices include (Boyd & Walker, 1990:343-345):

- *mono-segment positioning*: targeting a marketing programme at a single market segment;
- *multisegment positioning*: finding a location between two segments whose needs and wants the business can satisfy;
- *imitative positioning*: the business can select the same position as an existing successful brand, hoping that it can attract some of its customers. Since this strategy will often elicit a response from the similar semi-competitor, businesses attempting it should have some kind of competitive advantage, such as a newer concept, a larger advertising budget or a better-quality product;
- *defensive positioning*: if a business determines that it is vulnerable to imitation positioning, it could defend itself by introducing similar products for its current market. The purpose of this strategy would be to lower the attractiveness of its market segment; and
- *anticipatory positioning*: if there is currently little demand for a certain location on the positioning map, but marketers feel that demand will increase, then this position might be pursued.

The positioning model by Boyd and Walker (1990) is often cited along with that of the authoritative marketing author Kotler (2003, 2000, 1991), which have also been adapted to other fields of study such as banking and insurances.

3.6.3 Kotler's (2003, 2000, 1991) differentiation and positioning model

Kotler's differentiation and positioning model receives considerable attention in marketing and the tourism literature (Morrison, 2002:225; Bennett & Strydom, 2001:61; Middleton, 2001:129; Morgan & Pritchard, 2001:248; Kalafatis et al., 2000:416; Swarbrooke & Horner, 1999:182; Reich, 1999:2; Vellas & Becherel, 1999:53; Hooley, Saunders & Piercy, 1998:203; Lumsdon, 1997:63). Kotler (1991:374) focuses on identifying the unique attributes of the target market and states: "In general, firms will occupy different competitive positions in the target market".

Kotler (2000:298) defines positioning as “the act of designing the company’s image and value offer so that the segment’s customers understand and appreciate what the company stands for in relation to its competitors”. He also defines differentiation and positioning:

- “*differentiation* is the act of designing a set of meaningful differences to distinguish the company’s offering from competitors’ offerings”; and
- “*positioning* is the act of designing the company’s offering and image to occupy a distinctive place in the target market’s mind” (Kotler, 2000:298).

Although the definitions are virtually identical, Kotler views differentiation and positioning as a linked pair of planning activities, firstly focusing on what to differentiate, and secondly considering how to promote the differences so that they will be valued by target customers. Once a festival has decided what segments to enter, it should decide on its market positioning strategy and communicate it.

When developing a positioning strategy, marketers need a good understanding of how their product differs from others. Kotler (2000:298) suggests that a difference is worth establishing to the extent that it should satisfy the following criteria:

- important to a sufficient number of buyers;
- distinctive, i.e. the difference is not offered in the same way, or at all, by others in the market;
- superior to others in achieving the same/more benefit;
- pre-emptive, i.e. difficult for others in the market to copy;
- affordable for the target market or buyers; and
- profitable and possible for the organisation to introduce the difference.

Kotler refers to Ries and Trout (1982), stating that a festival should select “one consistent positioning message” or a “unique selling proposition” (USP) and stick to it and heavily promote only that one benefit.

Since the target market tends to remember the “number one” message better than others – particularly in today’s over-communicated society – this comment is still valid today.

Typically, in the festival and event arena lower ticket prices, greater value, sufficient safe parking at venues, high quality performances and excellent ticketing service are examples of such single-benefit positioning messages. However, Kotler furthermore proposes a double or triple benefit positioning strategy, depending on the organisation's/festival's specific nature. In addition, if semi-competing festivals promote similar benefits, then an additional benefit or two could be added to the strategy. One of the advantages of using benefit or need-based segmentation is that it is most useful in determining the positioning strategy.

Kotler warns organisations/festivals of four major positioning errors, as listed in Table 3.6.

Table 3.6: Four major positioning errors as documented by Kotler

Under-positioning	Over-positioning	Confused positioning	Doubtful positioning
Some companies discover that buyers have only a vague idea of the brand. Buyers do not really know something special about it.	Buyers may have too narrow an image of the brand.	Buyers could have a confused image of the brand. This confusion might result from making too many claims or changing the brand's positioning too frequently.	Buyers may find it hard to believe the brand claims in view of the product's features, price or manufacturer.

Source: Kotler (2000:300)

When deciding which position to adopt, an organisation/festival should promote its major strengths, provided the target market values these strengths. To overcome the problem many organisations/festivals face of how to release the psychological grip that large brands have on the market, an organisation/festival can decide on determining the position on various attributes compared to semi-competitors, the importance of improving on that position, the affordability and speed with which the

position can be changed, the semi-competitors' ability to improve their position, and a recommendation on what to do for each positioning attribute (among others hold, improve, monitor).

If it is found that a festival and a semi-competitor are equally well rated in terms of value, an important attribute for their target market, the festival has essentially two options. It can either select another attribute to promote, or it can promote value and one or more additional attributes. Once the positioning decision is made, management can go ahead and select its marketing mix variables.

The world's foremost marketing expert, Kotler (2000, 1991) co-author along with Kotler, Bowen and Makens (2003, 1999, 1996) shares his knowledge and expertise, applying it to hospitality and tourism marketing. Accordingly, market positioning follows market segmentation and target marketing, and a product's position is therefore the way the product is defined by customers on important attributes – the place the product occupies in customers' minds relative to competing products (Kotler et al., 2003:264).

Since customers do not have the time to evaluate products every time they make a purchase, they perceptually position products based on how well the product compares with alternatives. Different positioning strategies can be followed (Kotler et al., 2003:282):

- *attribute positioning*: focusing on specific product attributes, such as Aardklop Festival advertises its location near Gauteng;
- *benefit positioning*: focusing on the needs products fill or the benefits they offer, for instance KKNK advertises itself as an “in place” or with ample food and beverages;
- *use or application positioning*: positioning the product as best for some use or application;
- *user positioning*: certain classes of users such as a festival advertising itself as a “women's arts festival”;

- *competitor positioning*: against an existing competitor;
- *product category positioning*: the product is positioned as the leader in a certain product category; and
- *quality or price positioning*: the product is positioned as offering best value.

Kotler (2000:303) notes that an organisation's differentiating and positioning strategy has to change as the product, market and semi-competitors change over time; in other words, they reformulate their marketing strategies several times during a product's life cycle. In choosing and implementing a positioning strategy, the positioning task consists of the three steps as illustrated in Figure 3.4:



Figure 3.4: The three-step approach to positioning (Kotler, Bowen & Makens, 2003:264)

Whatever the attribute or bundle of attributes, each organisation/festival has to attempt to determine the advantages that can help differentiate it from semi-competitors. Examples include physical attributes, location, services offered, quality employees and the overall image of the festival. It is not possible for every festival to develop significant competitive advantages; minor advantages have to be found. As the impact of a competitive advantage decreases, so does the festival's longevity. The reason is that festivals, may need to change strategies frequently to keep semi-competitors off guard and such frequent changes may eventually result in closing down the festival.

Kotler et al. (2003:291) recommend perceptual mapping as a research tool, which is sometimes used to measure a brand's position.

This technique can also be developed by using customers' perceptions of a number of product attributes.

Multiple maps plotting different attributes should be studied to get a good "feel" for the market place. Determining the right position should therefore be based on the requirements of being important, distinctive, superior, communicable, pre-emptive, affordable and profitable (Kotler et al., 2003:289).

After selecting the positioning characteristics and a positioning statement, the festival then determines how it will communicate the position, differentiate from other competitors and organise its marketing mix of variables to support it. The next authors positioning model will be introduced. Lovelock and Wirtz's (2004:57) services positioning model note that positioning is the key to developing an effective competitive posture, as discussed in the next section.

3.6.4 Lovelock and Wirtz's (2004) and Lovelock's (2003, 1991, 1984) model for positioning a service in the market

Lovelock covers positioning as a service in the market place and begins his model by differentiating between goods and services. He defines this differentiation as the process of establishing and maintaining a distinctive place in the market for an organisation and/or its individual product offerings (Lovelock & Wirtz, 2004:57; Lovelock, 1991:110). Heskett's (1984:45) view is supported in that the service business has to separate itself from semi-competitors by differentiating or altering the common characteristics of its industry. In addition, repositioning is defined simply as changing the existing position (Lovelock & Wirtz, 2004:57; Lovelock, 1991:110).

Lovelock further notes that many marketers associate positioning with the promotional elements of the marketing mix, which he terms *copy positioning*, thus ignoring the overall aspects of the term *product positioning*. Lovelock and Wirtz (2004:64) and Lovelock (1991:111) highlight the uses of positioning for "product development, service delivery, pricing, and communications strategy". Three procedures are involved in developing a positioning strategy for a service organisation, namely market analysis, competitive analysis and internal analysis.

Positioning plays a pivotal role in marketing strategy, since it links market analysis and competitive analysis to internal corporate analysis. This process, developed by Lovelock, is illustrated in Figure 3.5.

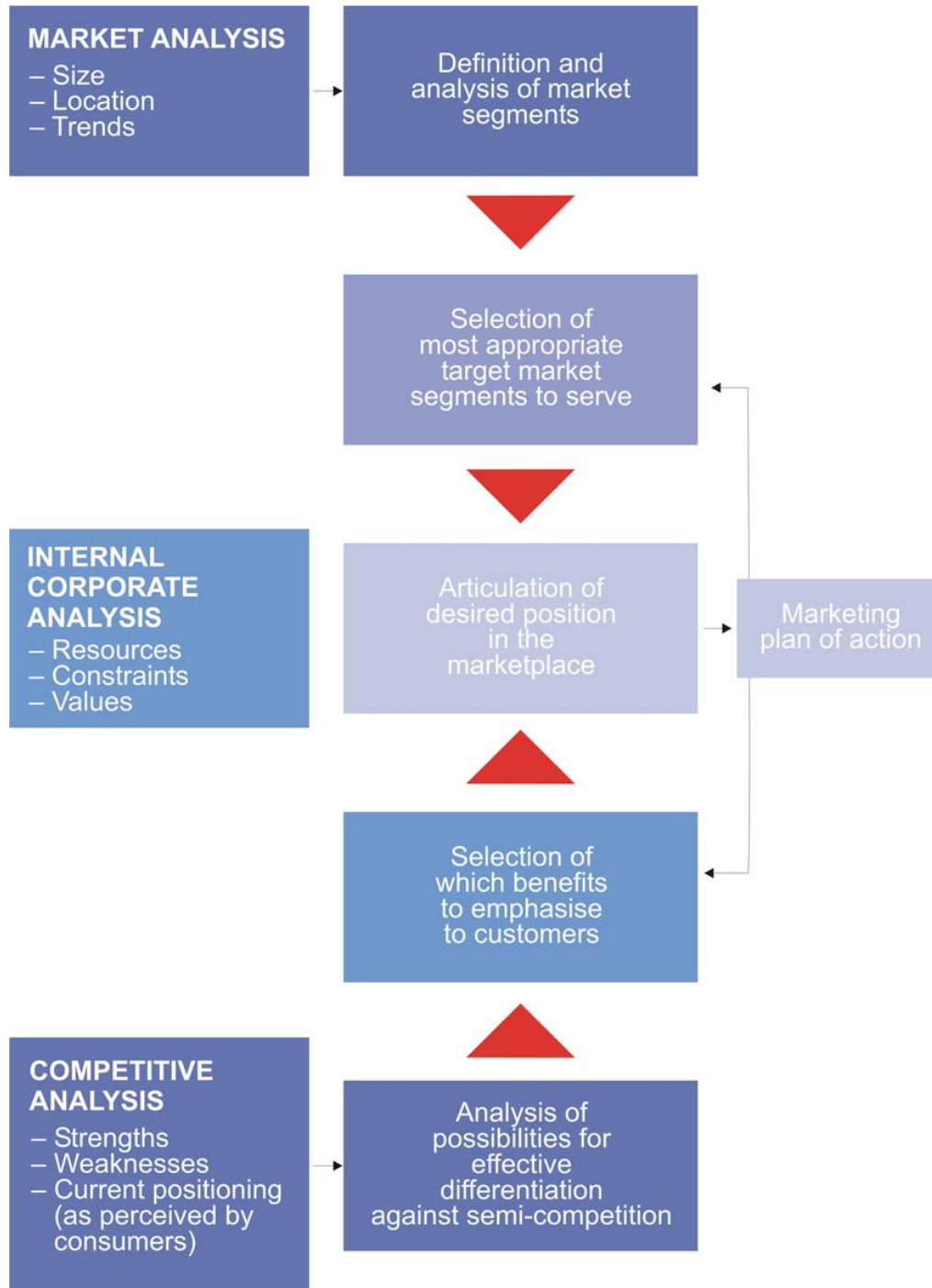


Figure 3.5: Developing a market positioning strategy (Lovelock & Wirtz, 2004:67)

A positioning statement can be developed from these three procedures, enabling the service organisation to answer the following questions:

- What is our product (or service concept)?
- How does it differ from competitive offerings?
- How well does it meet the needs of customers in different market segments?

A positioning strategy may have to be developed for the organisation, for a given outlet or for a specific service. Failing to select a desired position in the marketplace may have the following results:

1. facing head-on competition from stronger semi-competitors;
2. being pushed into a position with little customer demand;
3. customers not knowing how the firm is positioned (why they should select it over other options);
4. having no position at all in the marketplace, because no one is aware of it.

Once a position has been selected, management should prepare for the possibility that a semi-competitor may select the same or a similar position, and the potential reactions of that firm. One way to avoid this copying is to perform a detailed competitor analysis, including developing the likely position that may be selected by primary competitors.

Lovelock (2003) also recommends the use of positioning maps to identify perceived differences in how customers view a firm or its offering. Of critical significance is the differentiation between determinant attributes (key to determining choice) and important attributes (those that are expected and offered by most semi-competitors). Lovelock is careful to generalise about the priorities of a particular market segment.

Needs may vary for the same person, based on the purpose of the purchase, the person(s) making the decision, timing (evening, day, week, season, and so forth), whether alone or in a group, and the composition of the group. Some attributes are easy to quantify, such as price or speed of service, but qualitative attributes, such as atmosphere, may be more difficult to determine.

Lovelock concludes with a recommendation that, because of the dynamics of the marketplace, managers should reassess their positions. Lovelock (cited in Alford, 1998:55) argues that positioning services involve developing and communicating key product attributes, and are not primarily about creating advertising images. In contrast to image, position requires a frame of reference, which is provided by competitive destinations (Crompton, 1992:20). It is a stage subsequent to market segmentation at which the marketer determines which of the visitor target market's important needs a destination is better able to service than its semi-competitors. By contrast, Aaker and Shansby (1982:56) once again emphasise market segmentation and matching the product to the needs of those segments, as discussed in the next model.

3.6.5 Positioning strategy model by Aaker and Shansby (1982)

The positioning strategy model developed by Aaker and Shansby (1982:56) has received attention in marketing and the tourism literature (Reich, 1999:73; Alford, 1998:55; Chacko, 1997:5; Crompton, Fakeye & Lue, 1992:20). They note that most marketing managers address positioning questions; but positioning means different things to different people. Yet all of the managers consider and address positioning as a niche in the mind of the customer or attendee. Positioning is concerned with three issues: the segmentation decision, image and the selection of a destination's features to emphasise (Aaker & Shansby, 1982:56).

The approach adopted by Aaker and Shansby of emphasising market segmenting and then matching the products to the needs of those segments, is also taken by Woodside (1982:2) in the tourism field.

Woodside (1982:2) suggests that the key to successful positioning is matching the benefits provided by a destination or festival with the benefits sought by a target market considering that destination or festival.

This relationship between attributes and benefits sought is evident in Kotler's (2000:404) explanation of product branding, a subject closely allied to positioning.

Kotler (2000:404) views branding as having six levels of meaning: attributes; benefits; values; culture; personality and user. In addition, it may be argued that the positioning decision is the most critical decision for a destination because it is central to determining visitors' perceptions and their choices (Crompton, Fakeye & Lue, 1992:20). It is the key to developing an effective competitive posture (Lovelock, 1984:134). Aaker and Shansby (1982:56) state: "Since all elements of the marketing program can potentially affect the position, it is usually necessary to use a positioning strategy as a focus for the development of the marketing program. A clear positioning strategy can insure that the elements of the marketing program are consistent and supportive." Furthermore they provide the following six approaches to positioning strategies:

1. positioning by attribute;
2. positioning by price/quality;
3. positioning with regard to use or application;
4. positioning by the product user;
5. positioning with regard to a product class; and
6. positioning with regard to a competitor.

Developing a strategy involves organising and synthesising different types of information. The identification and selection of a positioning strategy are complex, but the strategy is likely to be most effective if its evolution is supported by marketing research. Burnett (1993:59) believes that "positioning is only as good as the research it is based on".

Aaker and Shansby (1982:59) break down the marketing research needed to identify a position into six steps, which were adapted for use in this thesis. Figure 3.6 illustrates this process.

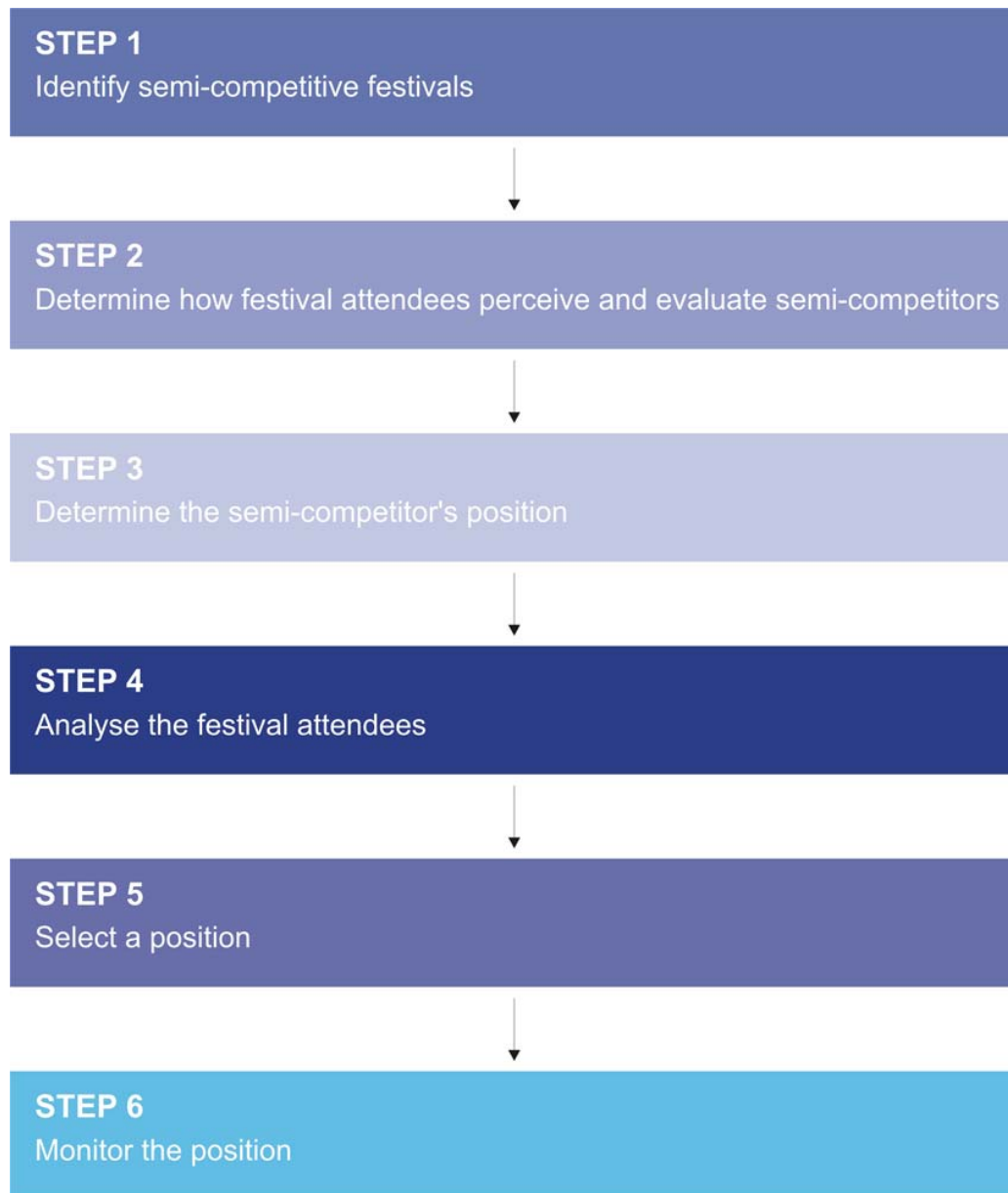


Figure 3.6: The process of marketing research needed for positioning (adapted from Aaker & Shansby, 1982:59)

In the first step, semi-competitive festivals, which include both primary and secondary competitors, are identified. The second step is to determine how these semi-competitors are perceived and evaluated by attendees. Identifying festival attributes and measuring their relative importance by interviewing attendees achieves this. Attributes include festival characteristics and attendees' benefits as well as the way the festival is associated and compared with a competitive festival.

Thirdly, a semi-competitor's position is analysed by measuring its characteristics. This can be done through attribute-based multidimensional scaling (tourists are asked to rate various elements on the attribute dimension scale), or by non-attribute-based multidimensional scaling (which reflects the similarity of two objects in the eyes of tourists). The fourth step is to analyse attendees by identifying which festival attributes they perceive as being most important and then identifying groups of tourists who value similar attributes. A position is selected by revising the information derived from the first four steps. Five considerations are suggested prior to making this final decision (Aaker & Shansby 1982:68):

1. the decision should be guided by an economic analysis based on potential market size and penetration probability;
2. segmentation commitment;
3. sticking with successful advertising;
4. do not try to be something that you are not;
5. considering symbols likely to be associated with a tourist destination; and
6. monitoring of the position after it has been selected, since it may change over time.

To summarise, positioning decisions often mean selecting those associations and attributes to be emphasised, and those to be de-emphasised (Aaker & Shansby, 1982:56). Reich (1999, 1997) acknowledges most of the positioning models and formulates his positioning process for tourism destinations and hospitality-related product offerings.

3.6.6 Reich's (1999, 1997) model for positioning tourism destinations

Reich (1999:78) proposes a positioning process, which can be applied to any hospitality-related product, such as an arts festival. He believes that strategies need a process to position hospitality-related products or a festival effectively in the market. Though there is no single process or formula that will yield a perfect positioning strategy, marketers should proceed in the most effective and efficient manner possible. This model is reported but was not used in total, although elements thereof overlap and was used, in the present research. Based on his experience in the field and literature review, Reich (1999:78) recommends the positioning process as shown in Figure 3.7.

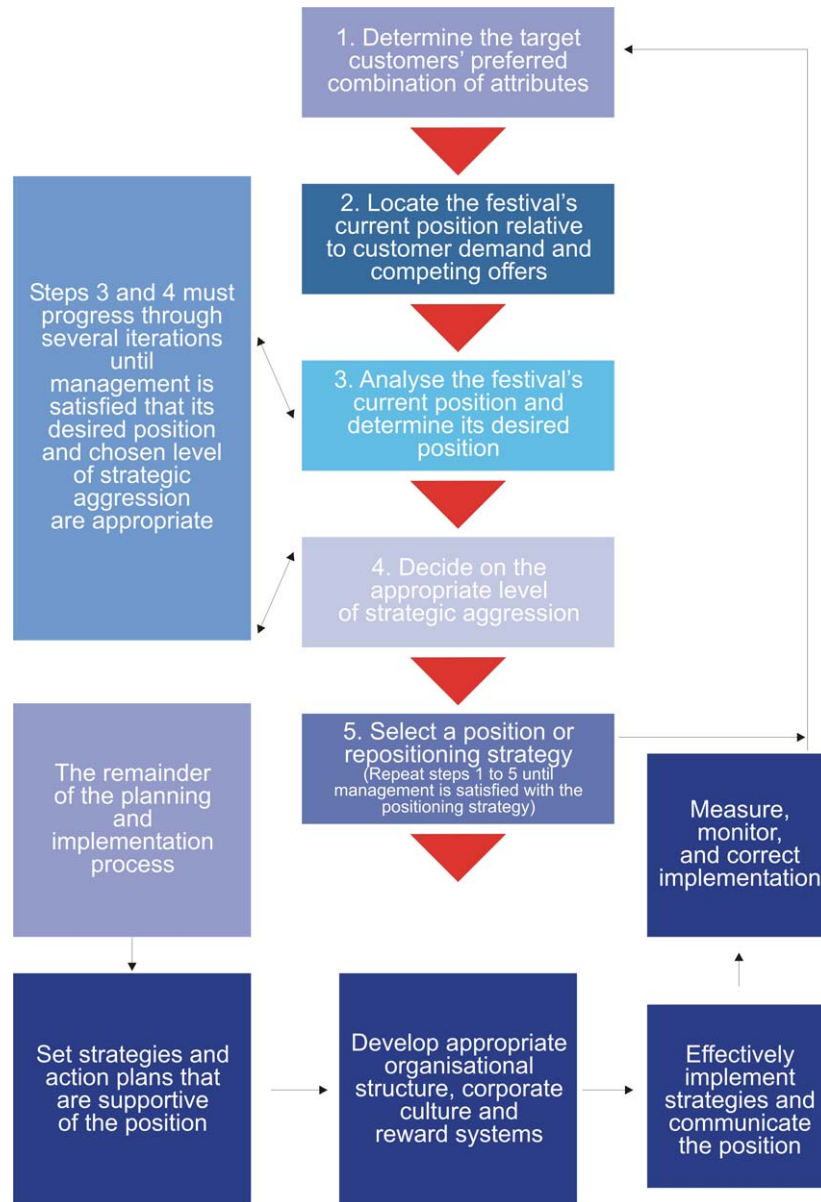


Figure 3.7: The positioning process for tourism destinations/festivals (adapted from Reich, 1999:78)

Each of these steps are discussed in turn:

Step 1: Determine the target customers' preferred combination of attributes

To develop a positioning strategy, marketers should first have identified their target customers and their demands and preferences in a systematic way (Reich, 1999:79).

This is often a neglected area and to a certain extent it is easier to repeat what has been done in the past instead of taking the time to analyse the broader markets for untapped sources of customers (Reich, 1999:79).

The task of identifying *preferred attributes* is based on research methods (Reich, 1999:79). Since the second step in the positioning process deals with locating a festival's position and concurrently has a major research component, readers can review it for recommendations on finding out what travellers or attendees expect. If desired, steps one and two of the positioning process can be combined.

Future desired attributes: as a festival tries to find a unique position in its market, it obviously has to study its customers' preferences and semi-competitors' offerings. What customers desire in the near and long-term future can often be determined by asking customers questions. Although such information is valuable it may not yield enough differentiation to determine a unique and defensible position.

Step 2: Determine the target customers' preferred combination of attributes or locate the festival's current position relative to customer demand and competing offers. Locate the geographic destination's (festival's) current linear position relative to customer demand and competing offers

Instead of the usual positioning maps, a *market position model* or *linear positioning* is designed to:

- display the destination (festival) and its environment graphically;
- help to explain and quantify the destination's position relative to semi-competing firms; and
- assist in selecting a future desired position.

There is a tendency for an organisation's market position to move forward and backward in a linear manner. There is also generally a direct (linear) and graphic relationship between the image of a destination (and the primary components of that

image, such as product quality and value) and its financial success. The main advantage of the *market-position model* over positioning maps is that it represents the overall or linear position, as opposed to its position on selected attributes. Although positioning maps play a supportive role in this task, they are valuable and useful for determining the specific future position, rather than determining the overall current position. The purpose here is not to discriminate between variables, but rather to position the destination or festival based on how customers perceive it holistically.

**Step 3: Analyse the festival current position and determine its desired position:
Market-position model for linear positioning**

Determining the market position assists festivals by providing a graphic means of displaying position information. A festival should determine its desired position (the most effective combination of products to offer), because this would inform everyone how resources should be allocated. Together with the impact of environmental factors such as the economy, societal changes and competitors' actions will determine the festival's market position. In Step 4, management is required to decide how aggressive it should be to achieve the desired position.

Step 4: Decide on the appropriate level of strategic aggression

Steps 3 and 4 have to progress through iterations until management is satisfied that its desired position and chosen level of strategic aggression are appropriate. Only then can management decide how aggressively they should act to achieve the desired position. The festival must now decide on the choices available: whether it should be proactive (identify opportunities and act before competitors), reactive ("copy-cat" or quickly following innovators), passive (do the same with little focus on changes, because this is what its market expects), adaptive (choose to be flexible to allow the festival to adapt to a stable environment) or discordant (not a viable selection, one that is acquired through poor performance, rather than chosen).

Sometimes more aggressive strategic options are needed to achieve desired positions.

Step 5: Select a positioning or repositioning strategy

Up to this point, management has gained information about its target customers' desired attributes, the performance of the festival and of the performance by semi-competitors and their current positions, the desired future position for the geographic area, the forecast positions of semi-competitors and the appropriate level of strategic aggression. Now management has to begin the process of deciding which attributes should be focused on to achieve this desired position.

Repeat Steps 1 to 5 until management is satisfied with its new positioning strategy. Before positioning decisions are made, management has to understand its attributes thoroughly and they should review the environmental factors to learn about the unique needs (attributes) of its targeted markets. Time should be taken before making the positioning decisions. The goal is to satisfy customers in a manner that will make the festival stand out from other festivals.

Reich (1999:108) notes that positioning and implementing the strategies are as important as the strategies themselves. Reich concludes his model by addressing positioning maps and makes extensive use of the work by Barich and Kotler (1991:94-104).

Positioning models in the generic marketing field as well as the travel, tourism and hospitality field were included. These six models discussed above were selected on the basis of their marketing orientation and the significance of their contribution to the topic of positioning in the current study. However, it should be noted that some excellent references were not included owing to the similarity of their contents.

The six positioning models are dissected and evaluated to choose the most appropriate model. Although these six models offer similarities, some distinct features differentiate them from one another.

A decision was taken that the model by Boyd and Walker (1990) would be used, based on the extensive research done on the topic among the six positioning models researched. Boyd and Walker present some of the most thorough coverage of positioning. They begin by offering definitions of the two terms, *market targeting* and *market positioning*. A detailed description of the process should be followed in the case of each of these two terms. The eight steps to be followed in determining existing perceptions and the positioning decision for a new product or the repositioning of a current product are outlined. As illustrated in Figure 3.3, this model is workable for the current study because of the ease with which the model (the steps in the positioning process) could be applied or adapted to the needs of the current study.

The model by Ries and Trout (2001) has been incorporated into virtually all the positioning research conducted. They were the first to popularise the concept of positioning, as it concerned the communication or advertising elements of positioning. The model of positioning is relatively recent and is generally attributed to Ries and Trout.

These two authors wrote a book, titled *Positioning: the battle for your mind* (2001:3; 1982), in which they observe, "... positioning is what you do to the mind of the prospect." Since then other marketers have endorsed their idea and expanded on their original concept or model. Kotler (2000) adopts the theme of Ries and Trout and addresses positioning according to these authors' work in 1982. Kotler introduces positioning of the product offering through the product life cycle. This is of value to the current study as the three arts festivals chosen for this study are in the maturity stage and, as arts festivals are in semi-competition (with other festivals), they copy new ideas or attributes.

Therefore, festivals that can introduce new and valued benefits early are the ones that will be profitable (Kotler, 2000:321). The body of positioning knowledge of Kotler and Ries and Trout is acknowledged as some of the most widely quoted in literature. These authors' models have not been used specifically, although they are widely incorporated into the literature framework of the study owing to their resemblance to generic marketing.

Kotler distinguishes between *positioning*, which he sometimes calls product positioning and *competitive positioning*. However, Kotler does not use the term *market position*. He begins his positioning and differentiation model by offering certain criteria to be met when developing a positioning strategy. Kotler introduced the single, double and triple benefit positioning strategies and warns organisations/festivals against the four major positioning errors (see Table 3.6). Kotler later shared his knowledge with Bowen and Makens (2003, 1999, 1996) and applied this knowledge to hospitality and marketing. Together these three authors introduced the three-step approach to positioning (see Figure 3.4), which is useful in the context of the current study but as it has a rather simplified nature, it has not been used.

Lovelock and Wirtz (2004) and Lovelock (2003) cover positioning services in the market place and leads up to his model by noting the differences between products or goods and services. He addresses these differences as the problems and challenges inherent in marketing a service product. Due to their intangible nature, arts festivals have characteristics of services. Lovelock's marketing textbook uses Pearce's model (see Figure 3.5) for developing positioning strategies.

This model proposes three procedures for developing a positioning strategy: market analysis, internal analysis and competitor analysis. Lovelock argues that positioning a service involves developing and communicating key product attributes, and does not concern creating advertising images. He also warns against and lists certain pitfalls for businesses/festivals, which do not effectively position these attributes. He recommends the use of positioning maps and introduces repositioning.

Although his model provides a valid methodology, which allows researchers to be equally accurate in determining attributes, it cannot accurately assess the customer's perceptions and is therefore not practicable for the current study.

Aaker and Shansby (1982) apply the approach of selecting a positioning-strategy model, presented in a six-step process (see Figure 3.6). This model is similar to the eight-step model by Boyd and Walker (see Figure 3.3) but has a more simplified approach and two fewer steps. Although the Aaker and Shansby model is workable, that of Boyd and Walker offers more detail in its application. Therefore the model by Aaker and Shansby has not been used in the current study.

Although Reich's five-step positioning model (see Figure 3.7) offers comprehensive positioning research and a workable option, it shows similarities to the eight-step model of Boyd and Walker (see Figure 3.3). Reich's concepts of linear positioning and strategic aggression are not covered in Boyd and Walker's model. The current study has not used Reich's model, as some of the steps are duplicated in the model by Boyd and Walker. This latter model proved to be the preferred model for the current study.

Festivals and events face various problems when positioning themselves in the market owing to the intangible outcomes and inseparable nature of the festival product. Considering these challenges, one of the main tasks facing tourism marketers of leisure products, such as arts festivals, is to overcome the challenge of effectively positioning the brand (Morgan & Pritchard, 2001:261).

Therefore arts festivals operating in the tourism industry should pay special attention to their branding decisions. Branding is also closely related to positioning (Kotler, 2004:30). The concept of branding is discussed in Section 3.7.

3.7 FESTIVAL BRANDING

Branding, among other things, is a way to position a festival product to create recognition and perception in the market (Lewis & Chambers, 2000:321). Branding is one of the oldest techniques in product marketing and is also a means of adding perceived value or benefit to a product (Holloway, 2004:134). In the age of information technology, branding is one of the most powerful tools a marketer can use (Dickman, 1999:156).

Perreault and McCarthy (2002:260) state that branding involves the use of a name, term, symbol, or design – or a combination of these – to identify a product. Customers, and in this case festival attendees, view a brand as an important part of the product, and branding can add value to that product (Armstrong & Kotler, 2003:289). A brand consists of a brand name and a brand mark (Pride & Ferrell, 2003:297). A *brand name* refers to the part of the brand that can be expressed verbally. This includes the use of letters, words and numbers, such as KKNK.

The development of a brand name may in due course give the arts festival a competitive advantage, but has to be monitored to ensure that this benefit endures. The element of a brand that is not made up of words – often a symbol or design – is a *brand mark*. An example is the flag of the Grahamstown National Arts festival, as illustrated in Figure 3.8.



Figure 3.8: An illustration of an arts festival's brand mark

Ascribing a brand name or symbol to a festival product offers tourism marketers and management certain benefits, such as:

- identifying a festival product and distinguishing it from others in the market;
- associating particular benefits, especially quality, with brand names and therefore acting as a "cue" in the decision-making process;
- due to the intangibility of tourism products, such as attending arts festivals where performances cannot be seen or sampled in advance, purchasing branded festival products helps attendees/customers to reduce the perceived risk of buying these intangible benefits;
- creating brand loyalty, i.e. repeat purchases of the brand;
- employing brand stretching, i.e. introducing new products to the existing range under the same brand name; and
- providing an opportunity to enhance the corporate image because of attendees' feelings about a specific brand (Bennett & Strydom, 2001:111).

The characteristics of a good brand name are listed in Table 3.7.

Table 3.7: Characteristics of a good brand name

– Short and simple	– Suggestive of product benefits
– Easy to spell and read	– Adaptable to labelling needs
– Easy to recognise and remember	– No undesirable imagery
– Easy to pronounce	– Always timely: does not go out-of-date
– Can be pronounced in only one way	– Adaptable to any advertising medium
– Can be pronounced in all languages	– Legally available for use

Source: Adapted from Perreault and McCarthy, (2002:263).

The right brand name can help build brand familiarity, which results in a level of comfort with the brand, thus building brand equity (Perreault & McCarthy, 2002:263).

A well-managed brand is an asset to an organisation and the value of this asset is referred to as *brand equity*. Brand equity is therefore the marketing and financial value associated with a brand's strength in the market (Pride & Ferrell, 2003:299). The four major elements underlying brand equity are illustrated in Figure 3.9.

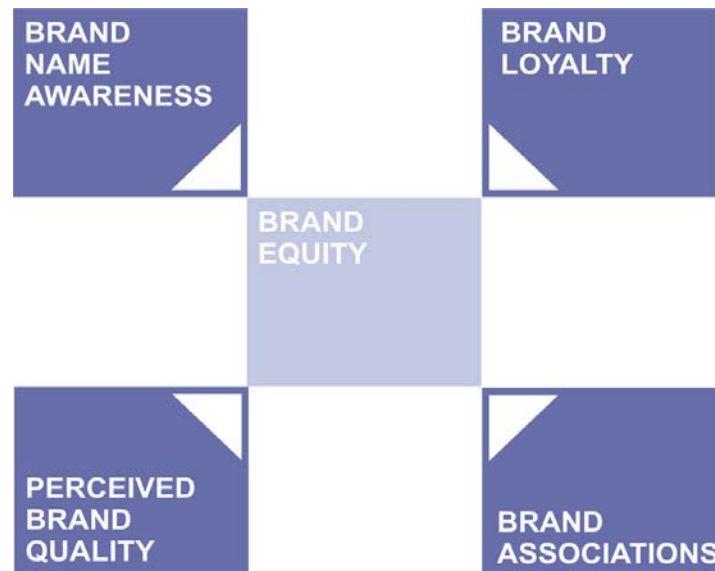


Figure 3.9: The four major elements of brand equity (Aaker, adapted in Pride & Ferrell, 2003:300)

One of the elements of brand loyalty is significant to the case of the arts festival, as most attendees usually indicate their plan to attend an arts festival again in future. Brand loyalty indicates festival attendees' favourable attitude to a specific brand (Pride & Ferrell, 2003:299).

To summarise, a brand is a method used either to differentiate a product or service (arts festival) from others or to identify a service provided by an institution or organisation. In today's highly competitive leisure and tourism market, brand position has to remain fresh and relevant. A powerful brand is a live asset and it may risk losing its value over time if marketing is neglected (Middleton, 2001:133).

The value of branding and brand positioning in the arts festival context should not be underestimated.

3.8 CONCLUSION

The first part of this chapter provided an overview of marketing in the context of arts festivals in South Africa. The most important matters addressed are defining the event marketing, identifying the marketing mix elements for South African festivals and events and introducing the festival and event customer through market segmentation (see Sections 3.2, 3.3, 3.4). By grouping customers with similar requirements and buying behaviour, a target group can be selected which forms a core part of market positioning.

Market positioning is central to marketing, and is the focus of the second part of the chapter (see Section 3.5). The aim in this second part is to define the topic of positioning in various contexts, such as in the marketing context whence it originated, in the tourism context where it spread during the early 1980s, and in a festival and event context where little coverage is reported in secondary literature. An important aspect identified in this part of the chapter is the lack of research on the market positioning of arts festivals and specifically in South Africa (see Section 3.5.5).

Familiarity with market positioning in the festival context as a result of previous research informs the last part of the chapter, focusing on various authors' positioning models, which can be used to gain an optimum position in the market (see Section 3.6). These six models were selected on the basis of their marketing orientation and the significance of their contribution to the topic of positioning in the present study. The six positioning models are dissected and evaluated to choose the most appropriate model for the present study. Although these six models show similarities, some distinct features differentiate them from one another. Positioning models in the generic marketing field and the field of travel, tourism and hospitality were included in this discussion.

These six models were selected as the models developed by Ries and Trout, Kotler, and Boyd and Walker – the pioneers of the market positioning – have been adopted and employed in tourism literature.

These authors have also received a considerable amount of attention in marketing (consumer behaviour) and tourism literature. Lovelock (2003) recognises positioning and applies it to the services-marketing business and lists the pitfalls for businesses, which do not effectively position themselves. Aaker and Shansby (1982) draw conclusions on developing a positioning strategy in marketing. These latter authors are frequently cited in tourism literature. Reich (1999, 1997) introduces and applies positioning to hospitality and tourism marketing and also to tourism destinations.

After extensive research on the topic and on the six positioning models, the model by Boyd and Walker (1990) was selected for the present study. Boyd and Walker present some of the most thorough coverage of positioning and begin by offering definitions of the two terms: *market targeting* and *market positioning*. A detailed description of the process to be followed in each of these two cases is given. Eight steps should be followed for determining existing perceptions and making the positioning decision for a new product or the repositioning of a current product. As illustrated in Figure 3.3, the model by Boyd and Walker is workable for the current study owing to the ease with which the model (the steps in the positioning process) can be applied or adapted to the current study's needs.

Chapters 2 and 3 comprise the secondary research chapters for the current study, whereas Chapters 4, 5 and 6 are the primary research chapters. In Chapter 2, tourism and the niche market SIT, specifically the festivals and events sector, are acknowledged, whereas Chapter 3 acknowledges the body of knowledge on positioning in the tourism and marketing field. This thesis is unique in its application of these two bodies of knowledge to suit the needs of the research undertaken. By integrating the secondary literature on tourism, SIT (Chapter 2) and market positioning (Chapter 3) with the empirical results and primary research (Chapters 4, 5) of this study, it was possible to develop a new model for positioning (Chapter 6).

The next chapter discusses the methodology that was used in order to explore the research objectives of the study.

CHAPTER 4

4 RESEARCH METHODOLOGY

4.1 INTRODUCTION

The earlier chapters provide some of the key theoretical foundations associated with tourism, special interest tourism, festivals and events, as well as marketing and market positioning of arts festivals. The focus in this chapter turns to the primary research conducted on three arts festival scenarios in South Africa.

The primary research objective of the study is to construct a market-positioning model, which South African event co-ordinators can use as guidelines for ensuring an optimal arts festival. This primary research objective of the study is underpinned by secondary research objectives. The first is to determine which attributes and combination of attributes will drive the best practices offered by arts festival scenarios. The situational inhibitors that might prevent respondents from attending a festival in these scenarios are also addressed.

The second is to compare the different arts festival packages with one another and by doing so to identify the most successful arts festival presentation in terms of a tourism attraction. In support of this, the third secondary objective is to integrate the data and design a model specifically for arts festivals. It is hoped that this market-positioning model would add value and contribute to the body of knowledge about South African arts festivals.

In the remainder of this chapter the research methodology of the study is discussed. The methodological approach is shown in Figure 4.1.

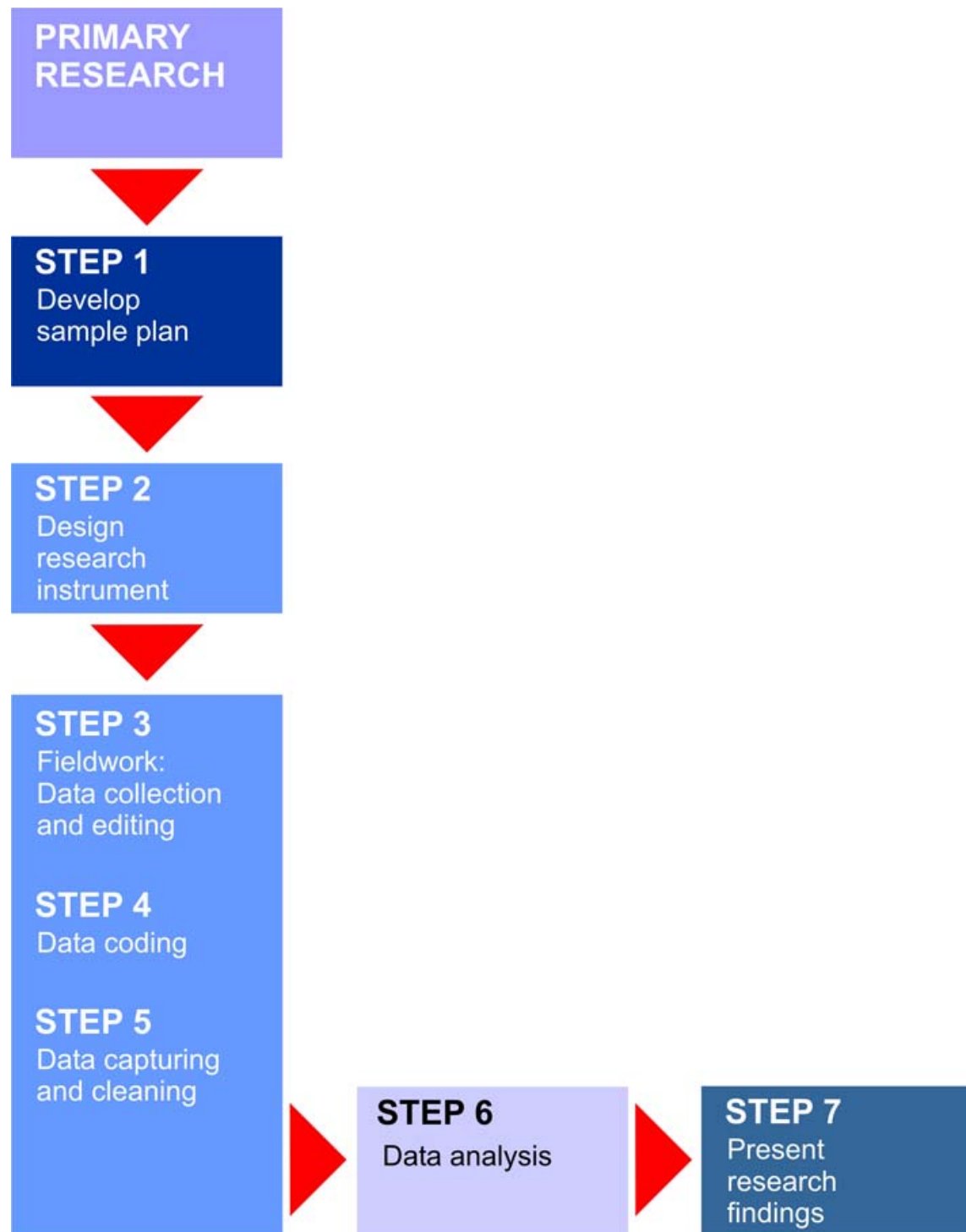


Figure 4.1: Primary research in the research process (adapted from Tustin, Ligthelm, Martins & Van Wyk, 2005)

Figure 4.1 illustrates the steps associated with the primary research in the research process. Certain specific steps have to be followed in any research project. The first five steps of the research process are discussed in this chapter as applied in the present study, and the sixth and last step is discussed in Chapter 5.

Primary data were gathered from prominent arts festivals in South Africa in order to address the before-mentioned research objectives of the study. Refer to Appendix A1 for a map of South Africa and the three respective provinces where the festivals are held. The three arts festivals selected for research are identified in this study as:

- Festival A, referring to the Aardklop National Arts Festival;
- Festival B, referring to the National Arts Festival in Grahamstown; and
- Festival C, referring to the Klein Karoo National Arts Festival (KKNK).

This study is scenario-based and the three arts festivals are presented as three scenarios. Scenario-based studies are typically used in cases where uncertainties in possible future outcomes need to be determined (Handy, 1996). Based on these trajectory routes of arts festivals *scenarios* were used. The three scenarios are discussed below in Section 4.2.

4.2 ARTS FESTIVAL SCENARIOS

There are various arts festivals in South Africa and different people from different areas attend these festivals. (See the discussion in paragraphs 1.2 and 2.5.4 which further elaborates on the reasons for selection of these festivals). Various communities discovered the potential of festivals held in their midst (Getz, 2000d:210). In this study, three different arts festival scenarios have been selected and are evaluated.

Each of these arts festivals, which are briefly described below, has its own unique characteristics and its own unique niche market.

4.2.1 Scenario A

Scenario A refers to the Aardklop National Arts Festival held annually in the North West Province at the town of Potchefstroom. Besides this town's claim to be the oldest town in the North West Province, few other towns are as symbolic of South Africa's constitutional, cultural and religious origin and development. The first *Staats Courant* (Government Gazette) was printed and published in Potchefstroom in 1857. The town is home to the University of the North West and three other tertiary institutions, 30 schools and several research and training centres. The Aardklop National Arts Festival started in 1998 to meet the need for an arts festival in the northern part of South Africa, and is currently in its eighth year of operation. The festival is held for five days in September during spring. An estimated 130 000 people visit this festival annually. This festival is hailed by the organisers as a safe, friendly arts festival for the whole family, and the festival audience is drawn mainly from Gauteng and the North West Province. The estimated economic impact of the festival in 2003 was R65 million (Saayman, 2004).

A few main sponsors are involved, such as the daily paper *Beeld* (media publicity), AngloGold, Clover, First National Bank and Standard Bank, Sasol and the Municipality of Potchefstroom. The festival programme includes the genres of classical music, theatre, children's and street theatre, dance, cabaret, rock, jazz, literature and visual arts. New shows are staged each year at the festival. The shows mainly have an Afrikaans perspective and origin, but also include other popular languages, such as English and Dutch.

The name of the festival in Scenario A has a distinctive meaning. The first part of the Afrikaans word *aardklop*, i.e. *aard*, means *earth* and has the connotation of *the belonging feeling of South Africans, as they are people from the soil and earth*. The second part, *klop*, means *beat* and refers to the pulsating rhythm of the music and arts at the festival (Van Zyl, 2002:3).

The productions and shows are held at various venues throughout the town. The festival's main activities take place at the Bult area near the university campus. Ample parking is available at the venues. There are various food and beverage outlets in the area as well as temporary food stalls and a flea market.

It is clear from this description that the Scenario A festival is typically held for a certain niche market focusing on Afrikaans-speaking white South Africans, but accommodates other language activities as well (Saayman & Saayman, 2004:634). For the purpose of this study, the festival is referred to as Festival A and presented as Δ A.

4.2.2 Scenario B

Scenario B refers to the National Arts Festival that is held annually at Grahamstown in the Eastern Cape Province. Formerly known as the Standard Bank National Arts Festival, the festival changed its name after the main sponsor, Standard Bank, withdrew in 2002. Grahamstown is known in South Africa not only as the festival capital of South Africa, but also as the city of saints and scholars as it is home to many churches, schools and the Rhodes University. The 1820 Settlers' Foundation held the first festival in 1974 to celebrate, re-establish, empower and maintain the cultural heritage of English. Although this purpose has become broader, it is still the essence of the festival, making this festival a unique and distinctive event.

This festival is currently in its 32nd year of operation and is the oldest arts festival in South Africa. The festival is internationally renowned as one of the major festivals in the world, and one of the first to introduce a multidisciplinary arts festival to South Africa (Witepski, 2002:53). This Scenario B festival is in several ways a benchmark for the organisers of other festivals as it was the first established South African arts festival.

The Grahamstown festival is held for about nine days in June/July during winter and is attended by an estimated 102 000 or more people. The festival audience is drawn mainly from the local area and the southern provinces of South Africa.

Overseas attendees comprise a small percentage (11%) (Witepski, 2002:51). The estimated economic impact of the festival in 2003 was R35 million (Saayman, 2004). A few main sponsors are involved, such as the National Lottery Distribution Trust Fund, the Eastern Cape provincial government, Standard Bank, The National Arts Council and the South African Broadcasting Corporation. The festival programme includes music, drama and comedy theatre, exhibitions, dance, music theatre, children's choice, cabarets and indigenous theatre.

Every hall or large room becomes a theatre, and parks and sports fields become flea markets. Temporary traffic officers control the congestion in the normally quiet streets and parking is available at the venues or nearby areas. Various food and beverages are available throughout the town. The festival has a certain niche market catering especially for people interested in English literature and drama. For purpose of this study, the festival is referred to as Festival B and presented as ΔB .

4.2.3 Scenario C

Scenario C refers to the Klein Karoo National Arts Festival, more popularly known as the KKNK, held at Oudtshoorn in the Western Cape Province. Oudtshoorn has unique significance to the origins of the Afrikaans language. The first and revered Afrikaans playwright C.J. Langenhoven (1873-1932) lived and worked in Oudtshoorn. This arts festival, first held in 1994, was the first mainly Afrikaans arts festival in South Africa and is currently in its 12th year of operation.

The festival is held for eight days in March/April. The estimated number of attendees is 160 000 or more, and this art festival is hailed as one of the largest in South Africa (Saayman & Saayman, 2004; Snyman, cited in Sawubona, 2002:34). The festival audience is drawn from all corners of South Africa, but the southern provinces are best represented. The estimated economic impact of the festival in 2003 was R98

million (Saayman, 2004). A few main sponsors are involved, such as NASPERS (National Press) and ABSA Bank.

The festival programme includes mainly the visual and performing arts, music theatre, classical music, opera, cabaret, drama, jazz, stand-up comedy and popular folk music.

The productions and shows are held at various venues throughout the town and parking is available at all these venues. There are various food and beverage outlets in the area as well as temporary food stalls and a flea market. The arts festival is a non-profit organisation run on sound business principles and it strives to take the arts to all parts of the Little Karoo. The festival has a certain niche market catering especially for people interested in the Afrikaans language (although English is also catered for). The KKNK and Aardklop Festivals have been lauded for creating a trend in local arts festivals by catering for niche markets such as attending arts festivals. For the purposes of this study, the festival is referred to as Festival C and presented as Δ C.

The first five steps of the research used in the present study, as illustrated in Figure 4.1, are discussed below. The sixth and seventh step is discussed in Chapter 5. One of the first steps in primary research is to develop the sample plan, which is discussed in the next section.

4.3 DEVELOPING THE SAMPLE PLAN

The plan for drawing the sample used in the present study is discussed according to the seven steps illustrated in Figure 4.2.

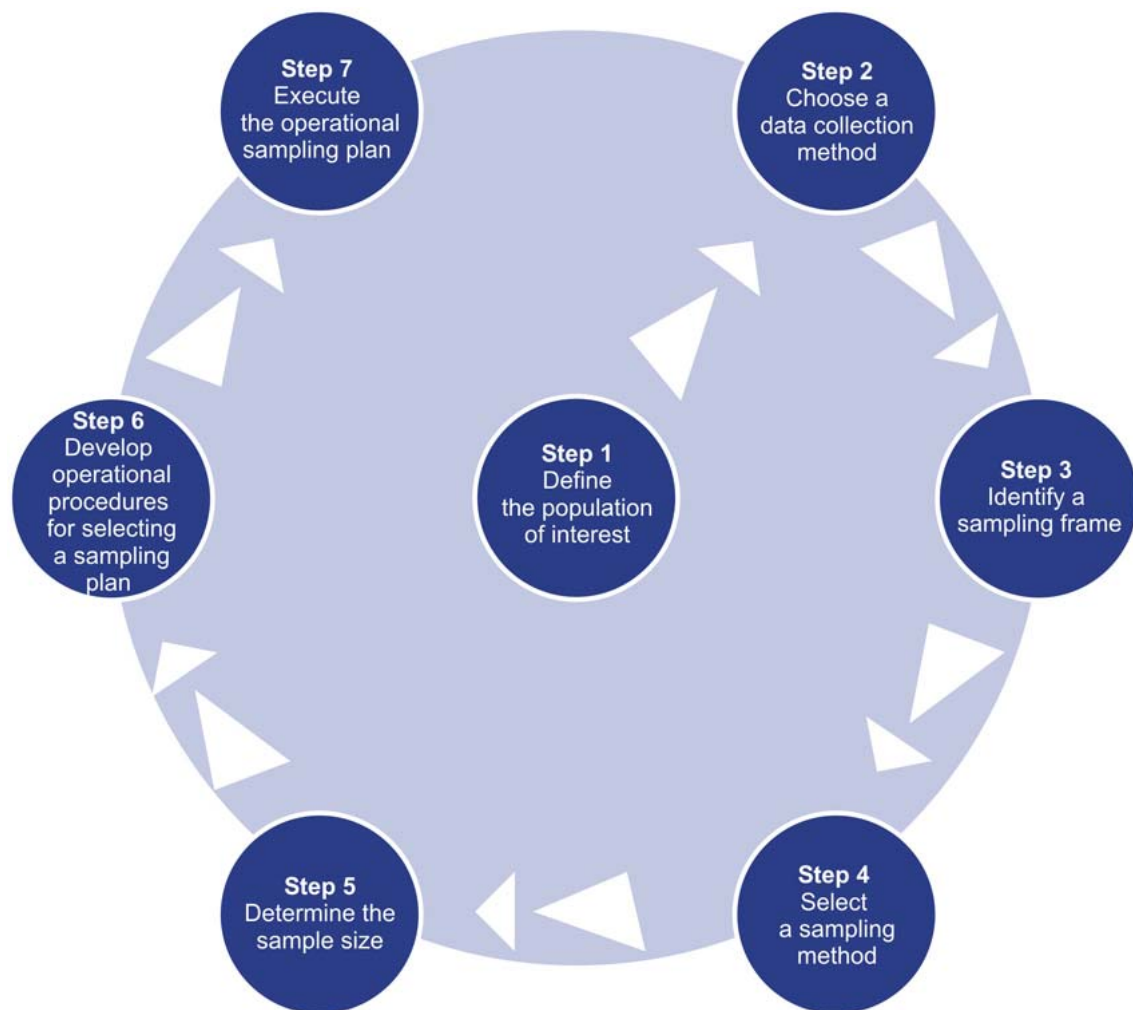


Figure 4.2: Design of plan for drawing the sample (adapted from McDaniel & Gates, 2004:272)

Each of the steps followed in designing a sample plan is discussed in detail.

4.3.1 Step 1: Define the population of interest

The survey population is the total group of individuals from whom information is required (McDaniel & Gates, 2004:270). Tustin (2004:1) defines this as a group of individuals who participate in a research initiative. The survey population for the present study was selected from a group of people attending festivals and residing in

the three scenario areas (A, B, and C). The sample unit refers to those individuals (known as repeat visitors) residing in the survey/scenario areas.

The sample element included individual members residing in the survey/scenario areas (A, B, and C), who attended at least one of the arts festivals in 2003 or any of the previous years' arts festivals and who were familiar with the prominent arts festivals presented in any of the arts festival zones. The survey/scenario area included a group of people, who might be participants meaning performers, special interest groups related to the event theme, known users of related events, repeat visitors, tourists and potential tourists. In addition, the group might include tourists and potential tourists who can evaluate an arts festival package and who travel not only to this festival but also to other festivals.

The survey was conducted in 2003. The selection of the survey areas was based on the regions (geographic areas where the festivals took place, see Chapter 1) and represents prominent arts festival zones in South Africa (Scenarios A, B and C). The assumption was that people residing in these areas and repeat attendees would be more likely to have an informed opinion (they are likeminded individuals) about arts festivals than people residing outside these areas (Assael, 2004:224; Schreuder, 2003; Van Zyl, 2003).

4.3.2 Step 2: Choose a data collection method

A data collection method describes the specific method used for gathering the data and depends on the selected design. Either a paper-based or computer-based method can be used. The nature of the research instrument (see Section 4.4) of this study largely determined the choice of a paper-based method, namely personal face-to-face interviews. A personal interview or face-to-face communication is defined as a two-way conversation initiated by an interviewer to obtain information from a participant (Cooper & Schindler, 2003:323).

The research instrument for this study was supplemented by show cards and checklists, based on a conjoint analysis model (see Section 4.4).

Cooper and Emory (1995:270) remark that a personal interview, if conducted successfully, is an excellent technique for data collection.

Personal interviewing based on the selected research instrument was the most convenient and cost-effective method for the time frame and scope of the present study.

4.3.3 Step 3: Identify a sampling frame

A sampling frame is a master list of all the population units in the population (Diamantopoulos & Schlegelmilch, 2000:14). Unfortunately, no such list of population units/elements was available for selecting the sample units/elements of the present study. There was no database on either of the three arts festival scenarios at the time of conducting this research.

4.3.4 Step 4: Select a sampling method

The sampling method or approach selected depends on the objectives of the study, the financial resources available, time limits and the nature of the research problem being investigated (McDaniel & Gates, 2004:276). The major sampling methods in research are grouped into two broad categories of probability¹⁰ and non-probability¹¹ samples (Churchill & Brown, 2004:403). Each type has several alternatives or a wide range of alternatives to suit all sampling designs, as shown in Table 4.2.

¹⁰ *Probability sampling* is used where all the subsets of the population have a known non-zero chance of being selected (Terre Blanche & Durrheim, 2002:276-281).

¹¹ *Non-probability sampling* is used where certain subsets of the population have little or no chance of being selected for the sample (Terre Blanche & Durrheim, 2002:276-281).

Table 4.1: Types of probability and non-probability sampling methods

Probability sampling methods	Non-probability sampling methods
Simple random sampling	Convenience sampling
Systematic random sampling	Judgemental sampling
Stratified random sampling Proportionate Disproportionate	Quota sampling
Cluster sampling Area sampling	Multiplicity (snowball) sampling Internet samples

Source: Adapted from McDaniel & Gates, 2004:277; Hair, Bush & Ortinau, 2000:345

A scenario-based sample was required for the current research. As the study had to determine which attributes and combination of attributes would drive the best practices offered by arts festivals, a combination of non-probability sampling methods was used. Non-probability sampling methods also yield good estimates of the population's characteristics (Malhotra, 2004:322). These samples usually involve personal judgement in the selection process (Churchill & Iacobucci, 2002:454). A judgement sample is defined as one in which the researcher attempts to draw a representative sample of the population by using a judgemental selection procedure (Malhotra, 2004:322). A judgemental sample was drawn for the study, based on the following criteria:

- select only individuals residing in the arts festival scenario areas as demarcated by the Municipal Demarcation Board (2003) within the municipal boundaries of Scenario A as NW402 (Potchefstroom Local Municipality), Scenario B as EC104 (Makana Local Municipality) and Scenario C as WC045 (Oudtshoorn Local Municipality) (See Appendix A1 for a map of each of these scenario areas);

- draw individuals from three different age groups which is 18-30, 31-45, and 46 years and older to ensure that all age groups typically present at arts festivals would be represented (Van Zyl, 2002);
- include both males and females in a 50:50 % ratio;
- include only individuals in the Living Standards Measure (LSM) groups 6, 7, 8, 9 and 10, but mainly LSM groups 7 to 10 (Martins, 1998:40);
- select individuals who would understand the language, either English or Afrikaans, used in the questionnaire. This would probably include people who would attend such a festival as the main languages at the three selected festivals are Afrikaans and/or English; and
- select only repeat attendees, using a screening question, to ensure that a respondent had previously attended at least one of the selected arts festivals in the scenarios. The screening question was intended to ensure that only likeminded individuals familiar with festivals would be included in the sample.

Another non-probability sampling method, more specifically interlocking quota sampling, was also used. Quota sampling is used to improve the representativeness of each group (e.g. gender and age groups), and steps are taken to obtain a sample similar to the population for some pre-specified characteristics (Martins, Loubser & Van Wyk, 1996:254). These authors note that in interlocking quotas a specific element has to comply with two or more characteristics. Table 4.2 shows the three age groups, two gender groups and three arts festival scenario groups, giving a total of 18 cells (3x2x3) for the present study. The table also indicates how the interlocking quota sample was constructed for this study.

Table 4.2: Interlocking quota sample for the three arts festival scenarios

		Age in years			Total
		18-30	31-45	46+	
Festival A	Males	21	21	21	63
	Females	21	21	21	63
	Subtotal	42	42	42	126
Festival B	Males	17	16	16	49
	Females	17	17	16	50
	Subtotal	34	33	32	99
Festival C	Males	26	26	25	77
	Females	27	26	25	78
	Subtotal	53	52	50	155
Total		129	127	124	380

The specific characteristics and quota size of each subgroup were based on the researcher's judgement given previous research experience (Van Zyl, 2002) and an expert researcher in the field (Schreuder, 2003), to ensure that the sample contained the desired number of respondents (See paragraph 4.3.5 in this regard) in each subgroup. Consequently, the present study used a combination of judgemental and quota sampling.

The next step was to determine the sample size.

4.3.5 Step 5: Determine the sample size

The present study does not claim to have drawn a representative sample of the population. The sample size of 380 used in the present study was a scenario-based sample using the judgement of an expert researcher in the field (Schreuder, 2003). However, for the purposes of this study, the number of festival attendees in 2002 was used as a guideline for Festival A and Festival B. Ticket sales in 2002 were used for Festival C as no figures on attendee numbers in 2002 could be obtained for Festival C and the available information was used instead.

A decision was taken in conjunction with the management of the three festivals and the Consulta Research Company, that only the qualifying attendees in the local market area of each of the three arts festivals would be approached at a convenient time for them. Local market area is defined as demarcated within the municipal boundaries of Scenario A as NW402, Scenario B as EC104 and Scenario C as WC045 (See Appendix A1 for a map of each area).

However, the selected sampling procedure for this study was based on the guidelines of Cooper and Emory (1995:207) and Krejcie and Morgan (1970:608) for general research activities, applicable to any defined population, which states that for a population N of 100 000 the recommended sample size S is 384. However, these authors also give as a rule of thumb that the law of diminishing returns will apply when the sample size increases above about 300.

For the present study, the total average population (N) in the scenarios was 392 000 arts festival attendees (based on the 2002 figures for arts festival attendees in Table 4.3), so the recommended sample size (S) of 380 seemed appropriate. A sample of 0,096% was proportionally drawn from the population of each of the three festival scenarios. The sample size of the group was also influenced by the method of collecting data, as personal interviewing is an expensive method, but usually produces the best results.

Table 4.3 lists the population and sample size of the three selected arts festival scenarios in South Africa.

Table 4.3: Population and sample size of the three selected arts festival scenarios in South Africa

Arts festival	N=Population size of scenario attendance figures in 2002	Percentage distribution	S=Recommended sample size
Festival A	130 000	33,2 %	126 (380 X 33,2%)
Festival B	102 000	26,0 %	99 (380 X 26,0%)
Festival C	160 000 Ticket sales	40,8 %	155 (380 X 40,8%)
Total	392 000	100%	380

Source: Aardklop Impact Study (2002:1), *Weekend Post* (2002:16) and Witepski (2002: 53).

At least 30 questionnaires were completed by respondents in each gender and age group (Diamantopoulos & Schlegelmilch, 2002:17). Orme (1998:9) states that "... for investigational work and developing hypotheses about a market, between 30 and 60 respondents may do ..." to obtain statistically significant results in conjoint analysis studies. The present study met this criterion.

4.3.6 Step 6: Develop operational procedures for selecting a sampling plan

This step outlines the actual procedures used for contacting each of the respondents. The type of sample used, determines the instructions that respondents should follow. The procedures are far more important to the success of drawing a probability sample than for a non-probability sample (McDaniel, & Gates, 2004:278). In the present study, a non-probability sample, called interlocking quota sampling, was

used, which guided the interviewers clearly so that they would know exactly what to do and how to handle any problems when contacting prospective respondents.

Failing to develop a proper operational plan for selecting the sample elements could jeopardise the entire sampling process.

4.3.7 Step 7: Execute the operational sampling plan

The final step in the sampling process is to carry out the sampling plan discussed in the previous step. It is important for this step to be controlled adequately to ensure that data collectors follow the specified procedures (McDaniel & Gates, 2004:279). In the current study, this step was similar to conducting the data collection activities in fieldwork, as discussed in Section 4.4. After the plan for sampling has been developed according to the seven steps outlined in Figure 4.2, the research instrument or questionnaire should be designed, as discussed in Paragraph 4.4 below.

4.4 DESIGN THE RESEARCH INSTRUMENT

The next step in primary research is to design the research instrument (questionnaire) as shown in Figure 4.1, Step 2. In this case, the research instrument was designed to explore the objectives of the study, and was based on previous research (Van Zyl & Botha, 2004:213; Van Zyl, 2002:158; Botha, 2002), a literature review, preliminary interviews with a researcher (Schreuder, 2003) and the Aardklop management (Van Zyl, 2003) as well as consultation with the other two festivals.

The research instrument was compiled to support the conjoint analysis model designed for the study. The structured questionnaire for the interviews appears in Appendix A3 and A4. Show cards were included to facilitate the completion of the questionnaire. Table 4.4 contains an analysis of the types of questions in the questionnaire.

Table 4.4: Types of questions used

Type of question	Section number on questionnaire
Pre-coded questions	Section A
Rating questions 9-point semantic differential scale and 11-point interval rating scale	Section B, C
Structured responses Dichotomous response (yes/no) Multiple-choice response	Section A, D Section D
Scaled responses Rank-order scales	Section D
Screening questions	Section A

Section A of the arts festival questionnaire contained a few screening questions to elicit responses indicating whether or not a respondent qualified to participate in the research project. This was necessary, as only likeminded individuals¹² were included in the survey.

Section B consists of an introductory section, prompting respondents to complete all the questions; an example question on one profile and the 16 actual questions on profiles. A 9-point semantic differential rating scale was used to rate the 16 packages.

¹² *Likeminded individuals* in this study were determined as individuals who attended arts festivals in the past, residing in the areas of Scenarios A, B and C, and are aware of the prominent arts festivals in South Africa.

Five different attributes with three different attribute levels were developed, based on the results obtained from previous research (Van Zyl, 2002:158; Crompton & Mckay, 1997; Getz, 1997) and the secondary literature on positioning and conjoint analysis:

- Attribute 1: Festival brands, comprising three attribute items;
- Attribute 2: Entertainment or festival activities, comprising three attribute items;
- Attribute 3: Refreshments (food and beverages), comprising three attribute items;
- Attribute 4: Transport, comprising three attribute items;
- Attribute 5: Ticket prices, comprising three attribute items.

The rationale for the five attributes selected in the present study and their levels are discussed in Section 4.8.5.

Each set of questions comprises a left-side and a right-side paired profile. The left-side and right-side paired profiles comprise three items on arts festivals, representing each of the festival attribute levels. The respondents were requested to read the left-side and the right-side as an independent festival package for a respondent, and then had to compare the two packages as a whole.

The respondents had to select the arts festival package they preferred (either the left- or the right-side) by indicating the appropriate value rating on the conjoint scale and the interviewer ticked the number on the answer sheet – e.g. *strongly prefer* package on the right-side or *strongly prefer* package on the left-side (see Figure 4.3). If respondents were indecisive, they were instructed to choose the middle value, being *neutral*. Each interviewer had to repeat these steps with the respondents for the remaining 16 questions on arts festival packages.

Figure 4.3 shows an example of a profile question in the questionnaire.

“Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year are not a problem.”

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	C		A
that offers ...	... quality arts (e.g. visual art, exhibitions)		... quality music (e.g. classical & opera, choir & ensemble, cabaret & music, blues & jazz, rock)
With ...	... friendly service and refreshments (food and beverages)		... wide variety of good-quality refreshments (food and beverages)
and has ...	... safe and secure parking facilities at venues		... good transport (accessibility) to venues
at ...	... the same as the current price		... higher than the current price

Strongly prefer Left					Strongly prefer Right				
1	2	X	4	5	6	7	8	9	

Figure 4.3: An example of a profile question

Section C measures the perception of the situational inhibitors that might prevent respondents from attending an arts festival. The rationale for the situational inhibitors selected in the present study and their levels are discussed in Section 4.8.5. An 11-point interval rating scale was used to evaluate the situational inhibitors that might influence the respondent's decision negatively.

A 10 was indicated if a constraint was extremely likely to influence a respondent's attendance, or a 0 if it was not at all likely to affect a respondent's decision with any appropriate number between 0 to 10 for a less extreme response or a don't-know response. In Section D, the responses to questions on certain demographic information about the respondent were incorporated as variables with a rank-order rating of the various push attributes identified in previous research (Van Zyl, 2002:105).

To ascertain whether the respondents answered correctly, the questions were designed to include cross-checks and links among them (a copy of the questionnaire

appears in Appendices A3 and A4). The questionnaire was pre-tested on 15 respondents to identify and eliminate potential problems. No problems were reported and respondents understood the questionnaire.

The author made sure that the respondents interviewed in the pre-test were similar to those included in the actual survey in terms of their familiarity with arts festivals. The respondents in the pre-test were drawn from the same population (five respondents from each of the three festival scenario areas). The responses obtained from the pre-test were then coded and analysed. The analysis of the pre-test responses was used when checking the actual survey to ensure that the data collected contained the necessary information. R-square testing was done on Section B of the questionnaire for the 16 profile packages to test whether the respondents understood the conjoint section, thereby testing the validity of the questionnaire. (See discussion in paragraph 4.8.5 on Step 6 for the ideal and the current study's R-square value). *Validity* is defined as the extent to which respondents accurately reflect what they are meant to reflect (Veal, 1997:186).

The following three steps in the primary research process are concerned with the data as discussed in the following three sections (see Figure 4.1).

4.5 FIELDWORK: DATA COLLECTION AND EDITING

After developing a research instrument, one of the first steps is to do the fieldwork. All fieldwork involves the selection, training and supervision of the people who collect data (Malhotra, 2004:388). The number of interviewers used and process followed in the study will be identified later on in this section. The validation of fieldwork and the evaluation of field workers are also part of the data collection process, namely collecting the data in the field and editing the data collected (see Figure 4.1 in this regard).

The interviews were conducted between 15 and 27 October 2003, which included weekdays and a weekend. The data collection times were between 08:00-12:00, 14:00-18:00 and 19:00-22:00. The interviews were conducted in the three scenario areas as demarcated by the Municipal Demarcation Board where the arts festivals are held annually. Each interview took 20-30 minutes and only respondents who met the design criteria were interviewed.

The 31 interviewers approached respondents and invited only interested individuals to participate by asking a screening question. In cases where the individuals were not interested in participating, the field worker closed the interview without collecting data. In each case, the following important criteria were set for participation by respondents (see Appendix A3 Section A for the screening questions):

- Gender: Male or female;
- Age: 18-30 or 31-45 or 46+ (Age grouping was based on previous research);
- Did you attend the following arts festival? Festival A, referring to the Aardklop Festival, or Festival B, referring to the Grahamstown Festival or Festival C, referring to KKNK?

A time-test was done on the interview to ensure it did not exceed the time norm of one hour. The length of the questionnaire (time to complete each questionnaire) and the perceived level of complexity of a conjoint analysis questionnaire were initially a concern. However, these factors did not prove to be a problem, since the field workers obtained the quotas and the response rate was high (100%). Only two participants requested that their responses be kept confidential.

In total, 31 interviewers/field workers were used for data collection at all three festival scenarios. They were fully briefed beforehand on the background of the study, as well as the manner in which interviews should be conducted. The respondents who took part in the research were briefed on its purpose, and responded openly and honestly.

All the interviewers had a tertiary education qualification or were in their final year of tourism studies. The number of interviewers involved for each arts festival scenario was as follows:

- In Potchefstroom (Festival A), ten graduate students in the Department of Tourism and Recreation at the North West University were each given an interviewer number from 1-10,
- In Grahamstown (Festival B), nine graduates in the Department of Statistics at Rhodes University were each given an interviewer number from 1-9.
- In Oudtshoorn (Festival C), 12 final-year diploma students in the Department of Tourism at the South Cape College in Oudtshoorn were each given an interviewer number from 1-12.

Interview numbers were assigned so that quality control checks could be done on interviewers. A supervisor was appointed at each festival scenario to manage the fieldworkers. The field workers were selected for their maturity, enthusiasm for the project and background regarding each of the three selected arts festivals. As the structured interview and the conjoint analysis interview were rather complex, the author trained each of these groups of field workers to assist respondents if necessary. The author also trained the interviewers beforehand to conduct a personal interview and to complete a conjoint analysis questionnaire at each of the three arts festival scenarios. They all had to perform role modelling to ensure they understood the interviewing process.

When the interviewers introduced themselves to the prospective respondents, they informed these of the tertiary institution at which they were studying or had studied, and that they were not employed by any of the three arts festivals selected for the scenarios. Following that, the interviewers explained that the aim of the study was to gain a better understanding of the best way to position arts festivals so that the festival could be sustained in the long term.

For convenience and to assist the interviewers, they were given written instructions on conducting the interview (see questionnaire in Appendix A4). The training included a description of the conjoint instructions for use in the interview and how to handle any problems. Each interviewer was given a pencil and eraser as well as show-cards and a detailed flip file on how to conduct the interview. The conjoint flip files, conjoint show-cards, instructions and profiles had Afrikaans on one side and English on the other side. The three age groups were clearly marked with the exact quota in each folder on these age categories. This gave the interviewer an opportunity to interview the respondent and to complete the questionnaire in the respondent's preferred language.

The interviewers were also informed during the training sessions that each interviewer number would be checked. Their results of role playing were also subjected to checking before they proceeded with the interviews.

In the first section of the questionnaire, the respondents were confronted with an imaginary scenario that they might have experienced at an arts festival. In total, there were 16 profiles or questions, each containing a different set of Benefit Packages¹³. The respondents were asked to consider these packages against the scenario and to indicate their strongest preference in each question. The subsequent sections of the questionnaire were designed to establish the respondents' perceptions of situational inhibitors and some demographic information. The procedures that the interviewers followed were deemed to be valid and reliable for the purpose of this study.

A quota control sheet in the middle of the flip file contained the exact quota of respondents the particular interviewer had to interview in the geographical region of the festival in the scenario (see Appendix A2). The respondents were identified by either targeting a residential or a business area in the specific geographic region or

¹³ *Benefit Packages* refer to the five items called attributes (*Festival brands, Entertainment or festival activities, Refreshments, Transport, Ticket prices*) which comprise the arts festival scenario you might experience.

survey area, and selected according to the exact design criteria of the questionnaire in the parameters of the quotas.

A merged document contained the exact design criteria for each questionnaire in the study, in which each questionnaire was numbered as follows:

- 1-126 for Potchefstroom (Festival A),
- 127-281 for Oudtshoorn (Festival C) and
- 282-380 for Grahamstown (Festival B).

A master checklist was kept for each questionnaire number assigned to each interviewer number to check the status of the personal interviews. The supervisor in each area as well as the researcher controlled this checklist procedure.

The fieldwork supervisor checked that each interviewer had entered his/her name on the questionnaire and signed the checklist for each number taken. At the end of each day the interviewers reported back to the supervisor and handed in the completed questionnaires for checking. As an incentive, the author would pay a bonus to each interviewer who interviewed the required quota of respondents and kept to the deadline. Only the completed questionnaires handed in to the supervisor qualified for such payment.

After the field workers/interviewers had been interviewed by the author and her team, they held a total of 380 personal face-to-face interviews with the respondents attending each of the three arts festivals (local market areas).

The data for the present study were edited during the fieldwork. Editing is the process of checking the raw data for any errors made by either the interviewer or the respondent (Hair et al., 2000:481). The field edit checked the interviewers by means of monitoring and validation procedures, the process of ascertaining that interviews had actually been conducted as specified (McDaniel & Gates, 2001:387).

Editing is therefore a review of the questionnaires with the objective of increasing accuracy and precision (Malhotra, 2004:403). A 10% check-back was performed for verification to test if completed questionnaires were correct.

Once the data had been collected in the field it had to be converted to a useable format. This step is discussed in the next section. The results of the personal interviews are discussed in detail in Chapter 5.

4.6 DATA CODING

The next step, as shown in Figure 4.1, is data coding, a technical procedure for converting raw data into symbols. This procedure involves specifying the alternative categories or classes into which the responses should be placed and assigning code numbers to the classes (Churchill & Brown, 2004:518).

A questionnaire is coded to make it possible for a computer to aggregate the responses (Clark, Riley, Wilkie & Wood, 2000:98). Codes can be assigned to various questions either before the respondent completes the questionnaire (pre-coding) or after the respondent has completed the questionnaire (post-coding).

In this study, the coding was done by using numerical codes to combine the pre-coding and post-coding. This allowed the received data to be entered quickly and with few errors. Pre-coding also aided the data analysis by making it straightforward and free of problems.

4.7 DATA CAPTURING AND CLEANING

The last of the three steps concerned with data as shown in Figure 4.1 is the capturing and cleaning of the data. Data capturing in this study was done by making

use of a numerical code to connect the question data with the respondents in the study.

The responses were coded according to a coding template and variable names were given; a consistent pattern was set for coding missing data; the responses were coded numerically in the usual way with digits such as 1 for Male and 2 for Female; and time was spent on detecting and correcting errors.

At this point, the data from questionnaires had been entered into a database and stored electronically. A final check was done for errors before proceeding with the tabulation and statistical analysis of the survey results. One returned questionnaire (File number 152 was the only deleted person) contained missing data where the respondent simply forgot to answer a question and this questionnaire was therefore deleted from the data set. Two others were deleted because their r-squares were below 0,4 (see Section 4.8.5). In total, 377 questionnaires were used in the analysis of the data.

Consulta Research, a research company specialising in conjoint analysis and based in Pretoria, South Africa, captured the data with an in-house programme written in Microsoft Access. An output file was generated to import the data to Microsoft Excel. Once the data had been captured, it was converted to an Excel Spreadsheet. Spreadsheets are a specialised type of database and a convenient and flexible means for entering and viewing data. Data entry on spreadsheets uses numbered rows and alphabetic columns (Cooper & Schindler, 2003:471).

The statistical computer packages STATISTICA and SSPS (Statistical Package for the Social Sciences) as well as Conjoint Value Analysis (CVA), version 2.0 of SawtoothSoftware, Inc. were used to analyse the collected data. These computer programmes are widely used, for example by the Bureau of Market Research at the University of South Africa and by Consulta Research Company, one of the leaders in expertise on conjoint analysis in South Africa. The data analysis is discussed in the next section.

4.8 DATA ANALYSIS

The sixth step shown in Figure 4.1 is the analysis of the data. The data analysis process used in this study consisted of two techniques, namely conjoint analysis and game theory. The conjoint analysis technique was employed to address the secondary research objective of the study, namely to determine which attributes and combination of attributes would drive the best practices of arts festival scenarios. With conjoint analysis (CA), the importance of each attribute as well as the part-worth values of each level of each attribute of the three arts festival scenarios can be assessed by means of a linear regression model using the rating each person gave to each product (a combination of levels of attributes). Such a rating indicates how much a respondent prefers a particular arts festival product.

The independent variables were therefore the various levels of attributes describing the different products. Regression analysis was done for each individual respondent to obtain the value that respondent gave to the various levels (called the *part-worth values*). The attribute importance each respondent gave to each attribute was derived from these part-worth values.

The technique as employed in the present study, is discussed in Section 4.8.3. In addition, two techniques often used as complementary to and in conjunction with conjoint analysis, namely cluster and correspondence analysis, are discussed.

The results of the conjoint analysis were used in the game theory. The game theory technique is employed to address the secondary research objective, namely to compare the different arts festival scenarios with one another and to identify the most successful arts festival presentation as a tourism attraction. The game theory technique is discussed in Section 4.9.

Cluster analysis and correspondence analysis were mainly used to draw the positioning maps contained in the study.

4.8.1 Cluster analysis

Cluster analysis is defined as a multivariate interdependence technique whose primary objective is to classify objects into relatively homogeneous groups based on the set of variables considered (Hair et al., 2000:594). Cluster analysis is a way of categorising a collection of objects, in this case the conjoint respondents, into groups or clusters.

Cluster analysis is used in marketing for a variety of purposes, including the following:

- segmentation and target marketing;
- understanding buyer behaviour;
- identifying new product opportunities;
- selecting test markets;
- reducing data (Malhotra, 2004:584-588);
- positioning (Botha, 2002); and
- branding (Schreuder, 2003).

Cluster analysis, like multidimensional scaling (MDS),¹⁴ is not a statistical inference technique in which parameters from a sample are assessed as possibly being representative of a population. Instead, it is an objective methodology for quantifying the structural characteristics of a set of observations.

As such, it has strong mathematical properties but does not have a statistical foundation (Hair, Anderson, Tatham & Black, 1998:490). It should be mentioned that

¹⁴ *MDS* is a technique that measures attitudes about objects in a multidimensional space on the basis of respondents' similarity judgements of objects (Zinkmund, 1994:590).

most clustering methods are relatively simple procedures which are not supported by an extensive body of statistical reasoning (Malhotra, 2004:588).

The present study made use of a non-hierarchical clustering procedure referred to as K-means clustering, since K-means clustering moves people across clusters in a way that increases the accounted-for variance in the dependent variable (Krieger, Green & Wind, 2004:8). This approach produces only a single cluster solution for a set of clusters. A four-factor solution was conducted for the purposes of this study (see Table 5.7). Cluster analysis classified these results based on the relative attribute importance of the conjoint data. Once the homogenous groups (clusters) had been classified, each cluster was categorised by labelling it as, for example, *brand-sensitive* or *price-sensitive* (see Section 5.3.3). Formal procedures for assessing the reliability and validity of clustering solutions are complex and not fully defensible (Funkhouser, 1983:99). However, the present study employed a procedure of multiple runs using different orders of cases until the solution stabilised to provide adequate checks on the quality of clustering results.

In the present study, cluster analysis was performed on the importance values of the attributes of the three arts festival scenarios. Then the results of the cluster analysis were used in correspondence analysis. Correspondence analysis is an MDS technique for scaling qualitative data in marketing research (Malhotra, 2004:621). MDS is often used in conjunction with cluster analysis or conjoint analysis (Cooper & Schindler, 2003:651). The technique of correspondence analysis is discussed in the next section.

4.8.2 Correspondence analysis

Correspondence analysis is a multidimensional technique for scaling qualitative data, which scales the rows and columns of the input contingency table¹⁵ in corresponding

¹⁵ A *contingency table* is a cross-tabulation of two non-metric or categorical variables in which the entries are the frequencies of responses that fall into each cell of the matrix (Hair et al., 1998:520).

units so that each can be displayed in the same low-dimensional space (Malhotra, 2004:621).

Hair et al. (1998:520) define correspondence analysis as “a compositional approach to perceptual mapping that relates categories of a contingency table. Most applications involve a set of objects and attributes, with the results portraying both objects and attributes in a common perceptual map”.

Perceptual maps are defined as graphical representations of respondents' beliefs about the relationship between objects in respect of two or more dimensions (usually attributes or features of the objects) (Hair et al., 2000:596). These spatial maps give insight into the similarities and differences within the rows of a given column category; similarities and differences within the column categories of a given row category; and relationships among the rows and columns (Malhotra, 2004: 621).

Correspondence analysis is an exploratory technique designed to analyse simple two-way and multi-way tables containing some measure of correspondence between the rows and columns. The results provide information of a similar nature to those produced by factor analysis techniques, allowing a researcher to explore the structure of the categorical variables included in the table. The most commonly used table of this type is the two-way frequency cross-tabulation table (STATISTICA, 1984-2004:1).

In the terminology of correspondence analysis, the row and column totals of the matrix of relative frequencies are called the *row mass* and *column mass inertia* respectively (Greenacre, 1984:35).

The term *inertia* in correspondence analysis is used by analogy with the definition of "moment in inertia," in applied mathematics, which refers to the integral of mass times the squared distance to the centroid (Greenacre, 1984:35). *Inertia* is defined as the total Pearson Chi-square for the two-way divided by the total sum, whereas the eigenvalues are the squared singular values, which will add up to the total inertia

(Greenacre, 1984:35). In simple terms, the closer the inertia total to 1,00, the better the fit of the model.

As regards the statistical significance of correspondence analysis, it should be noted that correspondence analysis is an exploratory technique. This method was developed on the basis of a philosophical orientation, which emphasises the development of models that fit the data, instead of focusing on rejection of the hypotheses on the basis of lack of fit. Benzecri's "second principle" states: "The model must fit the data, not vice versa" (cited in Greenacre, 1984:10). Consequently, no statistical significance tests are customarily applied to the results of a correspondence analysis; since the primary purpose of the technique is to produce a simplified (low-dimensional) representation of the information in a large frequency table (or tables with similar measures of correspondence) (STATISTICA, 1984-2004:1).

In the present study, the results of the cluster analysis were used for the correspondence analysis of the three arts festival scenarios to attribute importance in Figure 5.4, age groups to attribute importance in Figure 5.5, language to arts festival scenarios in Figure 5.6, and arts festival scenarios to clusters in Figure 5.7. In positioning or perceptual mapping, graphical representations were produced by a multidimensional scaling programme, namely correspondence analysis (see Section 5.3.4). These maps give a visual representation of the way the respondents perceived the three arts festival scenarios relative to one another on key attributes such as brand, catering and entertainment activities.

Conjoint analysis, a methodology related to multidimensional scaling techniques, is particularly suited to measuring human perceptions and preferences (Green, Tull & Albaum, 1988:600). These two techniques are complementary, as MDS develops a spatial map depicting the stimuli in a multidimensional perceptual or preference space, whereas conjoint analysis develops the part-worth or utility functions describing the utility customers attached to the levels of each attribute (Green &

Srinivasan, 1990:3). The technique of conjoint analysis is discussed in the next section.

4.8.3 Conjoint analysis

Conjoint analysis is one of the terms used to describe a broad range of techniques for estimating the value people place on the attributes or features that define products and services (Martins, Loubser, & Van Wyk, 1996:30). The first secondary objective of the present study, and for which conjoint analysis (CA) was used, was to determine which combination of attributes festival attendees want from arts festivals.

The concept *conjoint analysis* can be defined in several ways. Hair et al. (2000:601) define it as follows: “conjoint analysis as a multivariate technique that estimates the utility of the levels of various attributes or features of an object, as well as the relative importance of the attributes themselves”. Sudman and Blair (1998:229-230) warn that conjoint analysis is not a data analysis procedure such as factor analysis or cluster analysis; it should rather be regarded as a type of “experiment” designed to show how various elements of products or services (price, brand, style) predict customer preferences for a particular product or service.

In real life, respondents may find it difficult to indicate which attributes they consider of value and how they combine the attributes to form their overall opinion. The value of conjoint analysis is that it estimates how much each of these attributes is valued. Churchill and Iacobucci (2002:748) summarise the concept as “... the word *conjoint* has to do with the notion that the relative values of things considered jointly can be measured when they might not be measurable if taken one at a time”.

A statistical procedure is then used to “decompose” the preferences of respondents, that is, to quantify the value placed on the various features. These “features” and key terms should be addressed in order to gain an understanding of CA:

- *Attribute* is a general feature of a product or service – such as size, colour, speed and delivery time. Each attribute is then made up of specific levels.
- *Level* is a specific value describing a factor (Hair et al., 1998:391). Therefore, for the attribute colour, the levels might be red, green, blue and so on.
- *Factor* is the term used when describing a specific attribute or other characteristic of the product or service (Hair et al., 1998:393).
- *Profile* is the combination of a few attributes.
- *Attribute levels* denote the possible values assigned to the attributes (Malhotra, 2004:684).
- *Utility* is a subjective *judgement* of preference unique to each individual (Hair et al., 1998:392).
- *Part-worth or weighted utility values/scores* describe the utility customers attach to the levels of each attribute (Malhotra, 2004:622) or that represent the importance of each aspect of a product or service in the subjects' overall preference ratings (Cooper & Schindler, 2003:631).
- *Relative attribute importance* is the relative importance attached to each attribute, depending on the relative range between maximum and minimum level utilities within attributes.
- *Conjoint simulators* are directional indicators, which can provide a great deal of information about the importance of relative features and preferences for products. Simulation refers to "what if" situations.

The next section gives a general description of the various conjoint analysis techniques and lists the Conjoint Value Analysis (CVA) technique used for analysing the research results.

4.8.4 Types of conjoint analyses

There are various conjoint analysis methods/techniques that can be used, such as the following (Hair et al., 1998:389):

- *choice-based* conjoint approach – an alternative form of collecting responses and estimating the conjoint model;
- *traditional* conjoint – employs the “classic” principles of conjoint analysis, using an additive model of consumer preference and pair-wise comparison or full-profile methods of presentation; and
- *adaptive* conjoint methodology – conducting a conjoint analysis, which relies on information from the respondents to adapt the conjoint design and to make the task simpler.

The present study employed the traditional conjoint approach, and used the SawtoothSoftware Conjoint Value Analysis (CVA), a PC-based software system for designing and analysing the full-profile conjoint questionnaires, as this approach allows a researcher to create a paper-and-pencil questionnaire, build efficient fixed designs and calculate utilities for full-profile pair-wise conjoint interviews. In the present study, the products were presented to the respondent in a pair-wise fashion (two products at a time), with the request that the respondent should indicate a preference for one of the two products on a nine-point rating scale (see Appendix A4 for an example in questionnaire).

Producing a conjoint design (questionnaire) requires six basic steps, as discussed in the next section.

4.8.5 Basic steps in a conjoint analysis experiment

There are six major steps to be followed in the design of a conjoint study (Churchill & Iacobucci, 2002:753). Figure 4.4 shows these critical steps for a conjoint experiment.

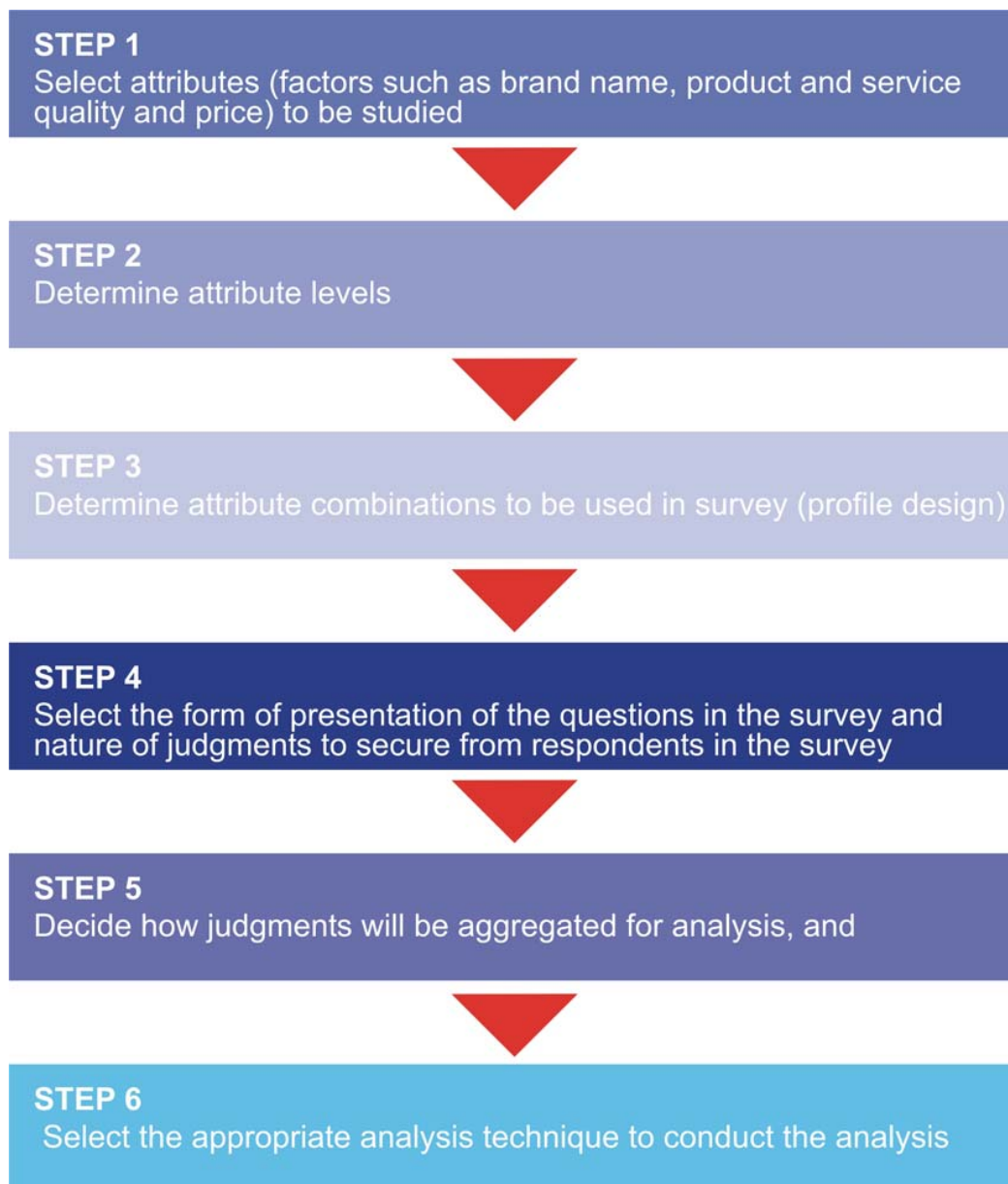


Figure 4.4: Basic steps when conducting a conjoint design (adapted from Churchill & Iacobucci, 2002:753)

The design should be constructed when designing a conjoint analysis experiment. Each of the steps shown in Figure 4.4 (as applied in the study) is discussed next:

Steps 1 and 2: Select attributes and determine attribute levels

The single most important component of carrying out a conjoint study is selecting the conjoint attributes and levels. The attributes used will stem primarily from the objectives of the study (Churchill & Iacobucci, 2002:754). In the present study, attributes describe product features, such as entertainment or festival activities and food and beverages in general. Conjoint analysis also frequently includes the attributes of price and brand. The actual attributes used should follow these guidelines:

- the attributes should all influence real decisions;
- the attributes should be independent; and
- the attributes should measure only one dimension (Market Vision Research, 2002:6).

The levels of attributes should include a wide enough range to allow the current and future markets to be simulated. In general, the extrapolation of utilities to levels not included should be avoided. If, after including a complete range of levels, the researcher finds many unrealistic combinations of levels, the category definition should be revised or the respondents were given customised conjoint studies. The researcher should attempt to include a nearly equal number of levels for each attribute. Recent research has indicated the presence of an artificial number of levels effect that inflates the relative importance of attributes, which have larger numbers of levels (Market Vision Research, 2002:6).

Clearly, the choice of attributes is important, as it would be futile to define a product in terms of irrelevant attributes. The attributes selected in the present study to describe a festival are given in Section 4.4. The reason for considering the attributes (five in total) relevant to a description of an arts festival is discussed next.

The two attributes of festival brands and ticket prices (see Table 4.5) are included in the conjoint analysis since most conjoint studies include the attributes of brand and

price (Market Vision Research, 2002:6). In each case, three respective attribute levels were included (see Table 4.5). The rationale for using the other three attributes, namely *entertainment activities*, *food and beverages* and *transport to venues* as listed in Table 4.5, was based on previous research (Van Zyl, 2002:166-168) and constructed in the manner discussed below.

The first step in a conjoint study is to select the attributes most appropriate to the purchase decision (Cooper & Schindler, 2003:631). This required a brainstorming session between the author and a leading conjoint expert with thorough market knowledge in South Africa, Professor Adré Schreuder (Consulta Research Company, 2003). The conceptual framework or results of the previous master's dissertation (Van Zyl, 2002) was used as the basis for selecting the attributes that festival attendees would regard as most important in their decision-making process. The criteria for selecting attributes were based on the guidelines mentioned beforehand.

The above-mentioned dissertation identified three main attribute dimensions, namely push and pull factors as well as situational inhibitors (Van Zyl, 2002:166-168). These three main attribute dimensions were too many to consider in a conjoint study, as one of the guidelines states that a conjoint analysis can only measure one attribute dimension at a time (Schreuder, 2003). In general, caution should be exercised when constructing a conjoint design, because the researcher may not do a conjoint within a conjoint (Schreuder, 2003). In other words, one main attribute dimension (value proposition) cannot be compared with another main attribute dimension (value proposition). The conjoint design starting with the selecting of attributes should be correct or the "r-squared" value will be too low and lead to an inefficient design.

Therefore, the most important attribute had to be selected from the three main attribute dimensions (push, pull factors and situational inhibitors). After eliminating the less important factors being the push factors and situational inhibitors, the pull factors emerged as the most important attribute dimension. Its major importance in terms of positioning is due to the fact that pull factors are the most important feature in attracting festival attendees to a festival (Van Zyl, 2002:107).

Kotler's (2000:298) definition of positioning states that all things being equal, the customer thinks of only one attribute at a time in a rating order. The customer does not mentally differentiate between objective and subjective positioning.

The other two main attribute dimensions (push factors and situational inhibitors) were incorporated and built into the demographic variables (see questionnaire in Appendix A 3, Section C). The festival organisers have no control over the push factors, but may be able to overcome some of the situational inhibitors (Van Zyl, 2002:111). The push factors were incorporated into the questionnaire in a ranking order (Van Zyl, 2002:113).

An exploratory factor analysis was done by means of Principal Axis Factoring as an extraction method and Promax with Kaizer Normalisation as the rotation method, using the conceptual results of previous research for the master's dissertation (Van Zyl, 2002:127). The present study used the explorative results of factor analysis, taking this analysis one level higher (the higher-level concepts) by only using the constructs (highest mean values). Three of the descriptive statistics on the situational inhibitors with the highest means were selected (Van Zyl, 2002:127), namely:

- time and money (mean=3,07)
- accessibility/ transport (mean = 2,67)
- social problems (mean=2,50).

All four domains of the results from the descriptive statistics on the pull factors with their mean values (Van Zyl, 2002:114) were considered, namely:

- information and marketing (mean = 4,21)
- food and beverages (mean = 4,17)
- entertainment (mean = 4,10)
- transport (mean = 3,94).

As *information and marketing* (highest rating) was regarded as the single most important attribute, this feature was a focus of the present study.

The author decided to single this out to determine which combination of information and marketing (value proposition) a festival should offer. Consequently, only the other three domains – entertainment, food and beverages, and transport to venues – of the pull factors were selected as attributes (see Table 4.5). An equal number of attribute levels was used in the case of each attribute, consisting of the individual items with the highest mean values in each case. It was decided that a minimum attribute level would be retained and only the highest item values would be included in each case. Concerning the levels of an attribute, an equal number (three) of levels was specified per attribute in the present study. The reason is that an attribute with more levels might be weighted as more important than an attribute with fewer levels (Wittink, Krishnamurthi & Reibstein, 1989:113).

The five attributes and the three attribute levels selected are shown in Table 4.5.

Table 4.5: Attributes and attribute levels

Prompt: Which of the following options would you prefer at an arts festival?

Festival brands (Different festivals)	Entertainment activities (productions offered)	Food and beverages (refreshments)	Transport to venues (accessibility)	Price of tickets (ticket prices)
The ... festival	that offers ...	With ...	and having ...	At ...
A	... quality arts (e.g. visual art, exhibitions)	... a wide variety of refreshments of good quality (food and beverages)	...good transport (accessibility) to venues	... more than the current price
B	... quality performances (e.g. performing arts; dance & movement; literature & poetry; children's theatre)	... friendly service with refreshments (food and beverages)	... sufficient parking facilities at venues	... less than the current price
C	... quality music (e.g. classical & opera; choir & ensemble; cabaret & music; blues & jazz; rock)	... value for money refreshments (at food outlets)	... safe and secure parking facilities at venues	... the same as the current price

Step 3: Determine the attribute combinations to be used in the survey and select the form in which the questions in the survey are presented and the nature of the judgements required from the respondents in the survey (Step 4)

Step 3 consists of determining the attribute combinations to be used in the survey (profile design). A particular product is a profile consisting of attributes and their levels. Figure 4.5 explains the relationship between a profile and its attributes and levels.

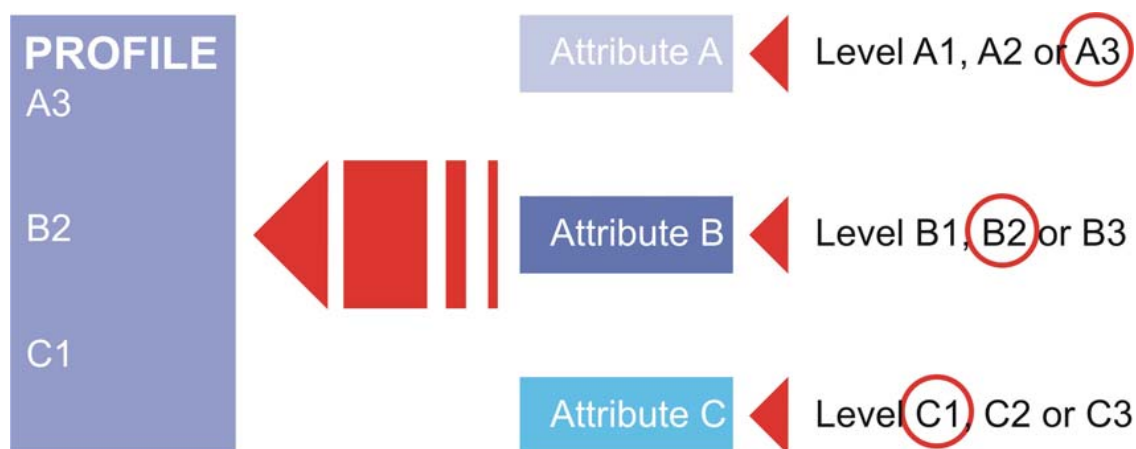


Figure 4.5: The relationship between profiles, attributes and levels (Sambidi, 2003)

When using conjoint analysis, a product is deemed to consist of various “attributes” (Schreuder, 1999:1; CVA, SawtoothSoftware, 1996:2). For instance, the attributes in this example are A, B and C. Each attribute has several possible “levels”, for example, the levels of attribute A are A1, A2 and A3. The combination of several attributes is called a *profile* and in the example, the profile consists of A3, B2 and C1.

In conjoint analysis, product concepts can be shown to respondents one at a time, the single concept popularly called “card-sort”, or it can be presented pair-wise (CVA, SawtoothSoftware, 1996:2). Pair-wise presentation may be more difficult for the respondent, because each question requires an understanding of two concepts instead of only one.

However, the comparative nature of the pair-wise task may allow the respondent to make a finer distinction and could contribute more information than the single concept presentation would.

Pair-wise presentation is useful for most conjoint projects, and especially so for computer-administrated conjoint questionnaires (CVA, SawtoothSoftware, 1996:2). Product concepts that are described for all the attributes being studied are referred to as *full profile*. Most researchers would consider a full profile card-sort conjoint as a traditional conjoint (Market Vision Research, 2002:1). The present study used pair-wise presentation because much more information can be gathered from this presentation. In the present study, these profiles are presented pair wise with a 9-point semantic differential scale, requesting the respondent to indicate his/her preference of the profiles (products) in a pair.

A distinction should be made between a full factorial design and a fractional factorial design. In a full factorial design, all levels of factors are used, leading to many profiles. The present study used five attributes with three levels each. This gave $3 \times 3 \times 3 \times 3 \times 3 = 243$ profiles, which were far too many as this would require a respondent to evaluate 243 profiles or compare about 121 profile pairs of profiles on a 9-point scale. For this reason, a fractional factorial design was used in the present study, as this design required only 16 pairs of profiles to be compared on a 9-point semantic differential rating scale. Such a design enables the estimation of main effects but not the interaction effects. Briefly, the efficiencies refer to the “measure of design goodness” (Xu & Yuan, 2001:1). The design goodness aspect used in this study is discussed in more detail below.

The conjoint design is a critical component in the success of any conjoint project (CVA, SawtoothSoftware, 1996:4). A design with a zero correlation between pairs of attributes is termed *orthogonal*. Balance occurs if each level within an attribute is shown an equal number of times. Design efficiency refers to the degree to which a design matches an orthogonal design. Design efficiency values range from 0 to 100, in which 100 denotes an optimal design (Hair et al., 1998:390).

In real life it may not be possible to create a perfectly balanced orthogonal design for a particular set of attributes. The CVA (1996:5) approach produces a sophisticated algorithm for generating well-balanced, “nearly orthogonal” designs.

CVA generates a pool of potential questions (from which the final design will be chosen) many times greater than the requested number of questions. After creating the pool of potential questions, CVA reduces the pool to the desired number of questions (tasks) in the following steps:

1. the D-efficiency of the design is calculated for the pool, excluding one conjoint question at a time; and
2. CVA then examines every potential 2-way swap of conjoint questions that remain with those that were discarded. CVA swaps any pairs of questions, which results in greater efficiency.

CVA repeats Steps 1 and 2 many times, using different random starting points, and selects the best final solution. Finally, for pair-wise designs, CVA flips left and right concepts to improve the left/right balance of the design.

The CVA iterative designer seeks to maximise the D-efficiency that measures the goodness of the design relative to the hypothetical orthogonal design. A perfect design will be both orthogonal and balanced and will result in an efficiency of 100 (CVA, SawtoothSoftware, 1996:5-6). However, an orthogonal design is not always possible, given the number of attribute levels and requested number of tasks. A final efficiency of less than 100 may still indicate a satisfactory design (CVA, SawtoothSoftware, 1996:5-6). In the present study, a design efficiency of 95% was achieved, indicating a satisfactory design.

The data collection method depends on the specific conjoint technique to be used, as the conjoint literature proposes three different methods of data collection such as pair-wise, full profile and ranking. The suggested data collection method for the pair-wise comparison is personal face-to-face interviews.

In the present study, personal face-to-face interviews were conducted with each respondent, and each interviewer was trained to conduct the interview (see Section 4.4).

Step 5: Decide how judgements will be aggregated for analysis

This step involves deciding whether the responses from customers or groups of customers will be aggregated and if so, how this will be done. If groups are formed, the operational meaning is that of estimating the weighted utilities for the individual-level models and then clustering them into homogeneous groups. According to Churchill and Iacobucci (2002:759), this step highlights an attractive feature of conjoint analysis because it allows market-share predictions for selected product alternatives.

In the present study, the attribute importance and part-worth or weighted utility values of attribute levels were calculated per individual for each of the three arts festival scenarios. Following that, statistical analyses, such as cluster analysis, correspondence analysis and multivariate analysis of variance procedures, were performed on these values. These results are given in Sections 5.3.1 to 5.3.5.

Step 6: Select the appropriate conjoint analysis technique to conduct the analysis

The final step in the design of a conjoint analysis project is to select the technique that will be used to analyse the data. The choice depends largely on the method used for obtaining the input judgements from the respondents. For example, when rank-order data have been obtained, the assumption of a linear relationship may be doubtful, so a non-metric regression model may be substituted to estimate the utilities (Churchill & Iacobucci, 2002:759). The present study did not use ranked data but did require the respondents to rate the importance of one product compared to another on a 9-point semantic differential scale. Ordinary linear regression analysis was used to estimate the part-worth values of levels of attributes.

With CVA (1996:8), either ordinary least squares (OLS) or monotone regression can be used to calculate utilities. OLS is the method of calculation used in most conjoint studies, and which was also used in the present study.

It is comparatively quick and can provide valuable diagnostic information about the quality of the calculated utilities. However, OLS is not appropriate for conjoint data consisting of rank orders. For OLS to be appropriate, the assumption should be that the data are “scaled at the interval level” (CVA, 1996:8). This means that the data are scaled so that real differences in the items being measured are communicated by the arithmetic differences in their values. CVA automatically sets a default in the case of the attribute level *higher than current price*.

Furthermore, it should be mentioned that when CVA (1996:14) calculates utilities using OLS the term *R-squared value* is used. As in a regression analysis, the R-square indicates how well the data fit the model and R-square is therefore a goodness-of-fit measure (Malhotra, 2004:612). R-square shows the proportion of the variance of the customer’s preference that is explained by the combination of the independent variables (attributes and attribute levels). R-square is a squared correlation index, which indicates the proportion of variance of the optimally scaled data that can be accounted for by the MDS procedure (Malhotra, 2004:612). Its values range between 0 to 1, and a high R-square value indicates that the data fit the model well.

By contrast, if the R-square has a low value, this is an indication that the data may not fit the model well, either because there were some errors in the data collection or some inconsistency occurred when customers performed their rating tasks (Xu & Yuan, 2001:1). In this study, any R-squared values below 0,4 were omitted from the study. Individual respondent numbers 210 and 185 were deleted as their R-squares were below the norm. The average of R-squares for this study was 0,83, which indicated a good fit between the data and the model.

Once the conjoint questionnaire had been designed, it was pre-tested and the data were gathered by means of personal face-to-face interviews. The following steps involve the calculations (the weighted utility profiles of 16 attribute combinations) and presentation of the results discussed in Chapter 5. These results of the conjoint technique were used to construct the game theory that is discussed next.

4.9 GAME THEORY

Game theory is a distinct and interdisciplinary approach to the study of human behaviour in which the disciplines of mathematics, economics and other social and behavioural sciences are involved (McCain, 1997:1). Mansfield and Yohe (2004:441) report that “game theory is a tool that has been created to help us study decision-making in situations in which there is a mixture of conflict and cooperation. Oligopoly is thus a perfect context in which to display its power”. Game theory is intended to overcome the problem of semi-competition. “Games” have always been a scientific metaphor for more serious interactions in human society (McCain, 1997:2).

It should be noted that the theory of games is a rather complex mathematical discipline, which falls beyond the scope of this study. Therefore this theory is introduced only as a tool to address a secondary objective of this study, i.e. to compare the three different arts festival scenarios and their attributes with one another. In this case, game theory is used solely as an optimisation technique to determine the best option or optimal arts festival offering.

This way, the researcher can determine the most successful or optimum arts festival presentation as a tourism attraction. The game theory technique “is a tool for telling us where incentives will lead,” but it “does not tell us to maximize utility, it explores what happens when we do” (Eatwell, Milgate & Newman, 1987:479).

Game theory, as applied in the present study, was therefore used solely as a tool to integrate the data, to compare the three different arts festival scenarios and to choose the optimum arts festival presentation. The results were used to develop the market-positioning model discussed in Chapter 6.

Game theory as a discipline recognises fully competitive games, such as Nash equilibrium, and semi-competitive games such as non-price competition (Mansfield, 2003:441). The arts festival scenarios can be regarded as being involved in strictly competitive games against one another, in other words either in direct competition, or not in direct competition, or just in semi-competition, as is the case in the present study. The non-competitive games, as used in this study, are based on the founding theory of Bayes's formula (Mizrahi & Sullivan, 1993:343).

In cases where experiments with sample spaces can be divided into two or more mutually exclusive events, as can the three arts festival scenarios in this study, the use of conditional probability leads to the famous formula of Bayes (Mizrahi & Sullivan, 1993:338). Bayes's formula calculates the probability of an event E of a sample space relative to another event F of the same sample space (Mizrahi & Sullivan, 1993:338). That is, if prior information states that the outcome must be in a set F , this information should be used to reappraise the likelihood that the outcome will also be in E . The reappraised probability is denoted by $P(E|F)$, and is read as: *"the conditional probability of E given F"*. This answers the question, "How probable is E , given that F has occurred?" Bayes's general formula is discussed in the section below (Mizrahi & Sullivan, 1993:343).

Let S be a sample space divided into n events, $A_1, \dots, A_n$. Let E be any event of S for which $P(E) > 0$. The probability of the event A_j ($j=1, 2, \dots, n$), given the event E , is

$$P(A_j | E) = \frac{P(A_j) \cdot P(E | A_j)}{P(E)}$$

$$= \frac{P(A_j) \cdot P(E | A_j)}{P(A_1) \cdot P(E | A_1) + P(A_2) \cdot P(E | A_2) + \dots + P(A_n) \cdot P(E | A_n)}$$

The present study illustrates the use of Bayes's formula when a sample space S is divided into three events $A_1 = A_3$, namely the three arts festival scenarios. It can be accepted that a tourist may evaluate all three arts festival packages, but the question is what will motivate the tourist to make the active involved choice of going to or preferring one particular arts festival package to another? One tourist may prefer music; another may prefer drama or performance. A certain percentage likelihood can be attributed to certain characteristics by means of the game theory technique.

Furthermore, exogenous and endogenous variables are considered in macro-economic theory (Dornbusch & Fischer, 1995:57). For the purpose of this study, a decision was taken to use the endogenous variables in the game, as these variables can be manipulated, and weighted raw utility values can be calculated for each of the variables. *Endogenous variables* are the variables whose values the researcher wishes to determine, as opposed to *exogenous variables*, which are the variables whose values are determined outside the model (Dornbusch & Fisher, 1995:57).

Although exogenous variables such as demographics and behaviour do play a role, they are not the only variables to be considered. The endogenous variables such as price, brand, refreshments and transport are the most significant variables to consider because these variables can be changed and modified: the management of arts festivals can do something about them.

The results of the attribute level importance (weighted raw utility value) for all three festivals were used to design the matrix or scale for the game theory (refer respectively to Tables 5.3 and 5.14 in this regard). A range was designed for each attribute level. This was calculated by using the highest weighted raw utility value, rounded off, as the top end of the scale. This top-end value was divided by three to obtain the other values on the scale. The results of conjoint analysis were used to design the game. A point of -1, 0, or 1 was awarded according to the weighted raw utility value scale that was set for each attribute level.

A value of 1 was awarded to the highest-ranked bundle in the matrix or map, and 0 to the second-highest ranked bundle, whereas a value of -1 was given to the next-largest number on the list (refer to Table 5.15, which indicates the game as set for festivals A, B and C).

The game was set up and a weight per individual attribute level awarded, based on the results of the conjoint study. A percentage was also awarded for each characteristic. The final outcome of the game as a set or “play out” was then displayed (refer to Table 5.16 in this regard). Different games can be played or set up depending on the changes in the endogenous variables.

The outcomes of the games might lead to different results in each of the cases of the five endogenous variables, after making changes to the individual scores for the variables of festival brand, entertainment or festival activities, refreshments (food and beverages), transport and/or ticket price. The outcomes only explore what may happen when changes are made to these scores. Refer to Chapter 5 in Tables 5.17 to 5.25 for an illustration of these outcomes.

The outcomes of these results were used to develop the market-positioning model in Chapter 6.

4.10 METHODOLOGICAL LIMITATIONS

Although it would have been ideal to interview respondents while each of the three selected festivals was being held, an alternative was proposed as conjoint analysis is flexible and accommodates this method. This alternative was considered to be the best option for data collection at the three areas in the scenarios, due to the complexity of administering a conjoint questionnaire and the fatigue such a questionnaire tends to cause.

4.11 CONCLUSION

This chapter discussed the research methodology of the study. Attention was given to the research process pertaining to this study. As this was a scenario-based study, the sampling was based on each of the three arts festival scenarios. These three scenarios, namely Festival A, Festival B and Festival C, operate in a niche market with characteristics unique to each festival scenario. The scenarios do not claim to be representative of the population. A judgemental sample was drawn, using specific criteria to ensure representativeness and homogeneity. The primary data were collected to achieve the secondary research objectives of the study.

Of specific interest is the use of the two techniques, conjoint analysis and game theory, in an arts festival context. The two techniques were used solely as tools to analyse the data. Conjoint analysis was the first technique to be applied and its results are discussed in Chapter 5. These results were used in the second technique, namely the game theory. The outcome of the games in Chapter 5 was in turn used to develop the market-positioning model described in Chapter 6. The next chapter presents and discusses the research findings of the study.

CHAPTER 5

5 ANALYSIS OF ARTS FESTIVAL DATA AND DISCUSSION OF RESULTS

5.1 INTRODUCTION

The primary research objective of the study was to construct a market-positioning model that could be used by South African event co-ordinators to provide guidelines for ensuring a successful arts festival. This primary research objective was achieved by means of secondary research objectives. The first was to determine which attributes and combination of attributes would drive best practices to be offered in arts festival scenarios. The situational inhibitors or constraints that might prevent respondents from attending these scenarios are also addressed.

The next secondary objective was to compare the different arts festival packages and their attributes with one another. Achieving this objective would provide information on the most successful arts festival positioning in terms of a tourism attraction. The third secondary objective was achieved by integrating the data to develop a market-positioning model. This was then used to develop the market-positioning model specifically for arts festivals. This model could add value to the body of knowledge about South African arts festivals. The analysis presented in this chapter is organised to address these objectives and is arranged in three parts.

Firstly in Section 5.2, Table 5.1 lists the demographic, geographic and behaviour criteria of respondents who attend arts festivals, and Section 5.2.1, the situational inhibitors that affect respondents in the three selected arts festival scenarios negatively. These inhibitors provide valuable information about the respondents in the three arts festival scenarios and can add value to the market-positioning model. The inhibitors were incorporated as a demographic variable in the analysis of the data.

Secondly, the conjoint analysis technique was employed to address the first secondary objective of the study. The analysis of the objective is arranged into four sections and is presented in a specific order. In Section 5.3.1, the relative attribute importance is calculated to determine the importance of the attributes of the three arts festival scenarios, and in Section 5.3.2, the level of importance of each relevant attribute is calculated. The results of Section 5.3.2 are used in Section 5.3.3 to conduct cluster analyses that identify homogeneous subgroups or clusters of respondents, irrespective of their current status. The results of these are used in Section 5.3.4 to report on the correspondence analysis that indicates variables, which correlate with each other, thus providing a method of differentiating among respondents.

The results of the correspondence analysis are outlined in the positioning maps. In Section 5.3.5, the attribute simulation tool is presented by using the results of Section 5.3.4. These results make it possible to determine the optimum combination of attributes for each arts festival scenario. In order to take the results to the next level another technique that of “game theory” was used.

The last part of the data analysis uses the results of the conjoint section in the “game theory” technique to compare the different arts festival packages with one another to determine the most successful arts festival package (see Section 5.4). The information gained from the above-mentioned analysis was used to develop a market-positioning model specifically for arts festivals.

Some of the demographic, geographic and behavioural information about the respondents in each of the three arts festival scenarios is discussed below.

5.2 DEMOGRAPHIC, GEOGRAPHIC AND BEHAVIOURAL CRITERIA OF RESPONDENTS AT THE THREE ARTS FESTIVAL SCENARIOS

Certain general information about the respondents in the three arts festival scenarios and some behavioural data were gathered.

The CVA V2 program (1996) merged the ASCII-format segmentation variables of age, gender, home language, will or will not attend arts festival again, educational qualification level, push factors and situational inhibitors in the utility file format (refer to Appendix B1). These segmentation variables provide information about positioning arts festivals in the market and are listed in Table 5.1.

Table 5.1: General information about respondents across the three arts festival scenarios

Variables	Festival A	Festival B	Festival C
Age			
18-30	33%	33%	33%
31-45	34%	34%	34%
46+	33%	33%	33%
Total	100%	100%	100%
Gender			
Male	50%	50%	49%
Female	50%	50%	51%
Total	100%	100%	100%
Home language			
Afrikaans	96%	8%	99%
English	2%	80%	1%
Other	2%	12%	0%
Total	100%	100%	100%
Attend festival again			
Yes	100%	98%	97%
No	0%	2%	3%
Total	100%	100%	100%

Variables	Festival A	Festival B	Festival C
Educational qualification			
Standard 8-9	0%	5,1%	15,1%
Standard 10	34,1%	23,2%	47,4%
Diploma	4,0%	16,2%	21,7%
Higher diploma/degree	37,3%	21,2%	13,2%
Honours degree	10,3%	11,1%	0%
Master's degree	9,5%	12,1%	0,7%
Doctoral degree	4,8%	11,1%	0%
Total	100%	100%	100%
Push factors			
Community pride	29 of 100%	57 of 100%	14 of 100%
Event novelty	34 of 100%	57 of 100%	9 of 100%
Socialisation with friends	52 of 100%	32 of 100%	16 of 100%
Family togetherness	67 of 100%	20 of 100%	13 of 100%

The distribution of the respondents in the sample by gender, age and area was pre-determined by means of quota sampling at the three arts festival scenarios. These three arts festival scenarios were held in different regions of South Africa, and the dominant language and culture of each of these regions might differ.

It was found that Afrikaans was the home language of most of the respondents at Festival A and Festival C, while the home languages of a smaller group at these festivals were English and other languages. This probably reflects the character of the area at Festival A, as the university and other secondary education institutions in the area of Potchefstroom are mainly attended by Afrikaans speakers. Festival C originated in 1994 as an Afrikaans alternative to the mainly English-dominated Festival B and this is probably reflected in the respondent's language preference. English was the most preferred language of 80% of the respondents at Festival B. Interestingly, Festival B originated as a commemoration of the 1820 British Settlers and still has this character today. For that reason, Festival B differs significantly from Festival C and Festival A with regard to the language preference of the respondents at these festivals.

The responses to the question whether the respondents at each of the three arts festival scenarios would attend the particular arts festival again, in future provided useful information about the loyalty of respondents, as repeat attendance would indicate loyalty to arts festivals (Getz, 1997:264). Most of the respondents (more than 97%) at the three arts festival scenarios indicated they would attend the next arts festival again and are regarded as likeminded individuals.

These respondents can probably be regarded as “true festival attendees” as they had attended an arts festival in the past (see Appendix A3, screening question in questionnaire) and they indicated they would attend an arts festival again. If attendees want to return, they have to be fairly satisfied with the previous experience (Crompton & McKay, 1997:425). As a high percentage indicated that they would attend the respective arts festival again, the conclusion can be drawn that the respondents at each of the three arts festivals are relatively satisfied with the festival held in the region.

Furthermore, according to literature, numerous festival surveys have detected a loyal group of repeat attendees (“will go again”), obviously including a high proportion of the residents in the region (Getz, 1997:263). This group of repeat attendees often has a strong “brand loyalty” to a particular event, adding to their desire to support it.

The majority of respondents (75,1%) from Festival A fall in the category of higher diploma or degree and Standard 10 with a smaller group (24,6%) in the top category with honours, master's or doctoral degrees. Apparently there is a higher level of tertiary education qualifications in this region, which might be attributed to the tertiary educational institutions in the Potchefstroom area. However, previous research has shown an association between educational qualification and attendance of arts festivals (Hughes, 2000:16).

More than half of the respondents (55,5%) from Festival B had obtained a higher education diploma, a bachelor's degree, and/or an honours, master's or doctoral degree, and at least 23,2% had a Standard 10 qualification and 16,2% a diploma.

Only 5,1% had an educational level of Standard 9 or lower (Table 5.1). The level of education was quite high among the respondents from the region hosting Festival B. The assumption can be made that the respondents in the vicinity of Grahamstown have a relatively high level of educational qualifications, which might be attributed to the University of Rhodes and various private and other schools in the town and area.

The largest group (84,2%) of the respondents from Festival C fell into the first three lower-level categories of the educational qualification level (Std 8-9, Std 10 and diploma in Table 5.1). A small group of respondents (15,9%) fell in the upper category of the education level, and none of the respondents had a doctoral degree. It should be noted that except for a college and a technical institution, there are no further tertiary education institutions in the area of Oudtshoorn.

This might be a factor contributing to the general level of educational qualifications of respondents from this region. However, as the sample of respondents was fairly small and selective (i.e. non-representative and non-randomised), these results should be interpreted with caution. Whilst, educational qualification level is of significance to this study, the push factors provide valuable information.

The aim of using the four push factors was to determine which factor typically motivates the respondents across the three festival scenarios to attend the arts festivals (Van Zyl, 2002:105). It appears that across the three arts festivals, *community pride (sense of attachment to area)* was the strongest motivator (57%) for Festival B's respondents, whereas 29% of Festival A's respondents and only 14% of Festival C's respondents were motivated by this push factor. Likewise, across the three arts festival scenarios, 57% of the Festival B respondents were motivated by the push factor *event novelty (unique attraction of festival)*, followed by 34% at Festival A and only 9% at Festival C. It appeared that the push factors *community pride* (57%) and *event novelty* (57%) were most likely to motivate Festival B's respondents to attend the arts festival.

Across the three arts festival scenarios, the respondents at Festival A were highly motivated by the push factor *family togetherness* (67%), whereas this push factor only motivates 20% of the respondents at Festival B and 13% at Festival C. Similarly, across the three arts festivals the push factor *socialisation with friends* was the strongest motivator for Festival A respondents (52%) followed by 32% for Festival B and 16% for Festival C.

Apparently the push factors *family togetherness* (67%) and *socialisation with friends* (52%) were both the preferred motivators for respondents to attend Festival A, and *community pride* (57%) and *event novelty* (57%) for respondents at Festival B, whereas the respondents did not mention a specific or dominant motivator for attending Festival C.

The situational inhibitors that might prevent respondents from attending an arts festival are included as general information additional to those reflected in Table 5.1 and is discussed in the next section.

5.2.1 Situational inhibitors of respondents at each of the three arts festival scenarios

The aim of this question (see Appendix A3, Section C of questionnaire) was to determine the respondents' perceptions of the situational inhibitors that might prevent them from attending the respective arts festival scenarios. These inhibitors provide some information supporting the positioning of arts festivals in the market. CVA V2 was used to extract the information. The CVA V2 program automatically converts an 11-point rating scale to a 0-100 score. Conditional formatting or provisional formatting sets ranges between certain index points.

Each arts festival is evaluated individually. Three dimensions or domains, namely *time and money*, *accessibility and transport* and *social problems* with individual items in each were extracted. Only the most prominent figures are highlighted, or colour coded. The CVA menu was used to customise a colour monitor.

The red colour-coded items were extremely likely (higher than the average) to influence respondents negatively, whereas the blue colour-coded items were least likely (less than average to influence person not to go) to influence them negatively. The items in white have a neutral effect. In other words, the higher the red, the stronger the influence and the smaller the blue, the weaker the influence, while white has no real influence. The results are illustrated in Table 5.2.

Table 5.2: Situational inhibitors across the three arts festival scenarios

	Total	Festival A	Festival B	Festival C
Number of respondents	376	126	98	152
Situational inhibitors regarding <i>time and money</i> at an arts festival	58,8	57,7	60,4	58,8
a. The high cost of attractions and entertainment.	65,1	61,7	69,6	64,9
b. Not having enough money to spend on productions.	63,8	58,1	70,2	64,3
c. The higher prices in shops and restaurants.	72,3	64,4	64,9	83,5
d. The lack of time to attend an arts festival.	47,3	52,7	58,7	35,4
e. Willingness to pay for arts, performances and music.	45,8	51,7	38,0	45,7
Situational inhibitors regarding <i>accessibility and transport</i> at an arts festival	44,5	41,4	49,1	44,0
f. The lack of parking facilities at venues.	63,8	60,4	53,0	73,7
g. The lack of transport to get to an arts festival.	34,9	32,6	42,8	31,9
h. The arts festival is too far from home.	34,6	31,3	51,6	26,7
Situational inhibitors regarding <i>social problems</i> at an arts festival	41,6	42,8	37,0	43,6
i. The traffic congestion in the streets during festival time.	62,0	61,2	50,4	70,1
j. Crowded restaurants and shopping centres.	62,0	61,3	45,2	73,6
k. Too much noise during the festival.	34,1	31,3	31,3	38,2
l. Festival attendees who drink too much.	50,9	54,2	39,7	55,3
m. Too many festival attendees.	32,7	41,1	32,5	25,8
n. Too much effort to attend an arts festival.	24,1	24,4	31,4	19,0
o. Disruption of my daily life or routine.	25,4	25,7	28,2	23,4
Overall inhibitor index score	47,9	47,5	47,2	48,7

Scale explanation:

100 = Situational inhibitor that influences very negatively

0 = Situational inhibitor item that does not influence decision

Table 5.2 indicates that, from a global perspective across all three arts festival scenarios, the *higher prices in shops and restaurants* (72%) was the single highest inhibitor item in the dimension of *time and money*.

The inhibitor items *the high cost of attractions and entertainment* (65,1%) and *not having enough money to spend on productions* (63,8%) regarding the dimension of *time and money*, as well as *the lack of parking facilities at venues* (63,8%) regarding the dimension of *accessibility and transport* to an arts festival were among the most prominent inhibitors. The two items in the dimension of social problems were also prominent, namely *the traffic congestion in the streets during festival time* (62%) and *crowded restaurants and shopping centres* (62%) across the three arts festivals scenarios.

The single highest inhibitor item of all dimensions, which negatively influenced respondents at Festival A, was *the higher prices in shops and restaurants* (64,4%). Some of the other most prominent items influencing Festival A's respondents negatively were *the traffic congestion in the streets during festival time* (61,2%) and *crowded restaurants and shopping centres* (61,3%) regarding the dimension of *social problems* as well as *the lack of parking facilities at venues* (60,4%) regarding the dimension of *accessibility and transport* at an arts festival.

The inhibitor item *not having enough money to spend on productions* was the single strongest inhibitor (70,2%) of all the dimensions negatively influencing Festival B's respondents against attending the festival. Some of the other most prominent items regarding the dimension of *time and money* at an arts festival, which negatively influenced Festival B's respondents were *the high cost of attractions and entertainment* (69,6%) and *the higher prices in shops and restaurants* (64,9%) as well as *the lack of time to attend an arts festival* (58,7%). A relatively large number of items had a neutral effect on Festival B's respondents regarding the dimension of *accessibility and transport* or a least likely influence on the dimension of *social problems* at an arts festival.

The respondents at Festival C indicated that the situational inhibitor item, *the higher prices in shops and restaurants* (83,5%) regarding the dimension of *time and money* was the single strongest inhibitor negatively influencing them against attending the festival.

Festival C's respondents also indicated that the items *the lack of parking facilities at venues* (73,7%) regarding the dimension of *accessibility and transport*, *crowded restaurants and shopping centres* (73,6%), *the traffic congestion in the streets during festival time* (70,1%) regarding the dimension of *social problems* influenced them very negatively against attending the festival.

The situational inhibitors can be interpreted as indicating that each of the three festival scenarios is constained by different inhibitors. However, if the overall inhibitor index score is considered, the respondents at Festival C (score of 48,7) were the most likely to be inhibited, followed by Festival A (score of 47,5) and slightly less of a problem at Festival B (score of 47,2). All the scores differ significantly, as different items and dimensions are considered. The inhibitor dimension *time and money* are the most evident inhibitor dimension across all three festivals with a total score ranging from 57,7% to 60,4%.

The next section discusses the use of the conjoint analysis technique for addressing the first secondary objective of the study.

5.3 CONJOINT ANALYSIS

The first secondary objective of the study was to determine which attributes and attribute profiles (composition or packages) would motivate the respondents at the different arts festival scenarios to attend a particular arts festival, in other words which attributes and combination of attributes would drive best practices to be offered in arts festival scenarios. The conjoint analysis technique was employed to achieve this objective.

Conjoint analysis is useful for learning how potential or current arts festival buyers value its various aspects, features or attribute levels (CVA, 1996:7). The CVA V2.0 System conjoint software package from SawtoothSoftware (1996) was used in this research study.

A data file of arts festival respondent answers to the CVA questions has to be provided, and for this paper-and-pencil CVA study an ASCII data file was created (refer to Appendix B1 in this regard).

The attributes selected were based on literature study conducted in previous research (Van Zyl, 2002:166-168). (Also see paragraph 4.4 the design of the research instrument and paragraph 4.8.5 steps 1 and 2 on attributes). The conjoint data analysis is arranged into four different sections and each is discussed in consecutive order. The next section explains how the relative attribute importance was calculated to determine the importance of attributes at the arts festival scenarios.

5.3.1 Relative attribute importance and individual attribute importance for the three arts festivals scenarios

One of the first steps in the conjoint analysis process is to determine the relative attribute importance of each of the three arts festival scenarios as well as the attribute importance per individual respondent. The Ordinary Least Squares (OLS) linear regression calculation method of CVA was used to calculate each arts festival respondent's utilities (strengths of preference) for festival product features. However, it is valuable to use a method to test the quality of the calculated utilities. Correlation is a measure of internal consistency of the respondents' responses to the conjoint questions. This is defined as R-squared if utilities were calculated using OLS. The correlation cut-off point range is between 0 and 1. The average R-square of this study was 0,83 which is a very high as the ideal is 1. Standard errors are provided for each respondent's utility values (CVA, 1996:G9-10) (refer to Appendix B2 in this regard.) The R-squares of two respondents, No. 210 and 185, were too low (below 0,4) and had to be discarded.

Figure 5.1 illustrates the global results of relative attribute importance and the results for each of the three arts festival scenarios, which are the first steps to be taken when employing the conjoint analysis technique. Attribute importance is the average of all the individual respondents' scores.

Figure 5.1 illustrates the relative importance of attributes globally and at each of the three festival scenarios individually.

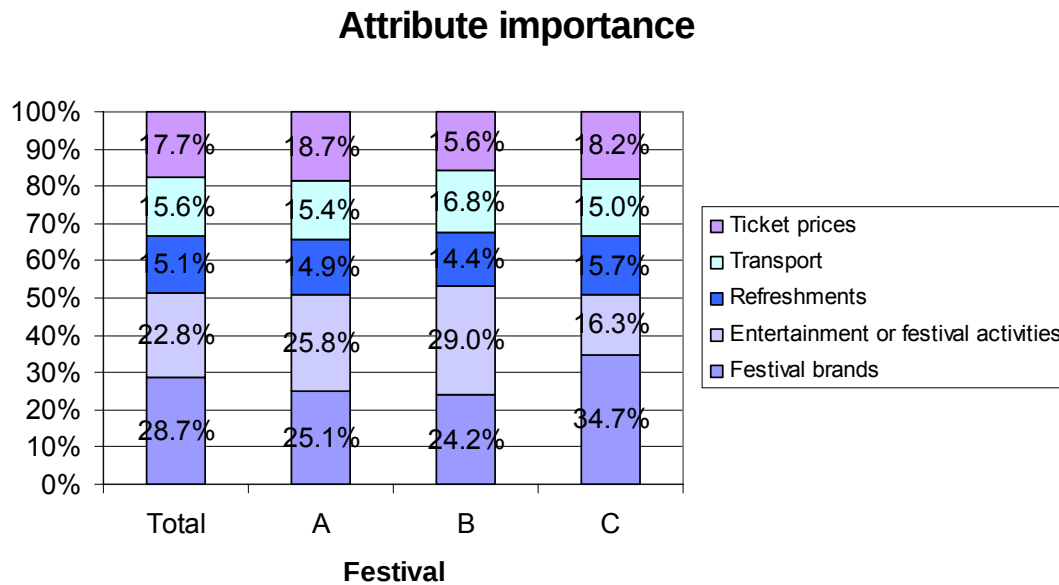


Figure 5.1: Relative importance of attributes at each of the three festival scenarios

Figure 5.1 indicates from a global perspective across all three arts festival scenarios how respondents value the attributes *Festival brands* (28,7%) and *Entertainment or festival activities* (22,8%) as the two most important attributes. These latter two attributes proof of major importance with *festival brands* as being the core attribute at festivals.

Respondents at both Festivals A and B valued the two attributes *Festival brands* and *Entertainment or festival activities* as most important whereas the respondents at Festival C valued *Festival brands* (34,3%) as most important. However, it should be noted that in each of the three arts festival scenarios, the attribute *Refreshments* was least important to respondents, and that the attributes *Transport* and *Ticket prices* were also less important.

Figure 5.2 illustrates the attributes' importance per individual respondent i.e. the number of respondents to whom the attribute was important.

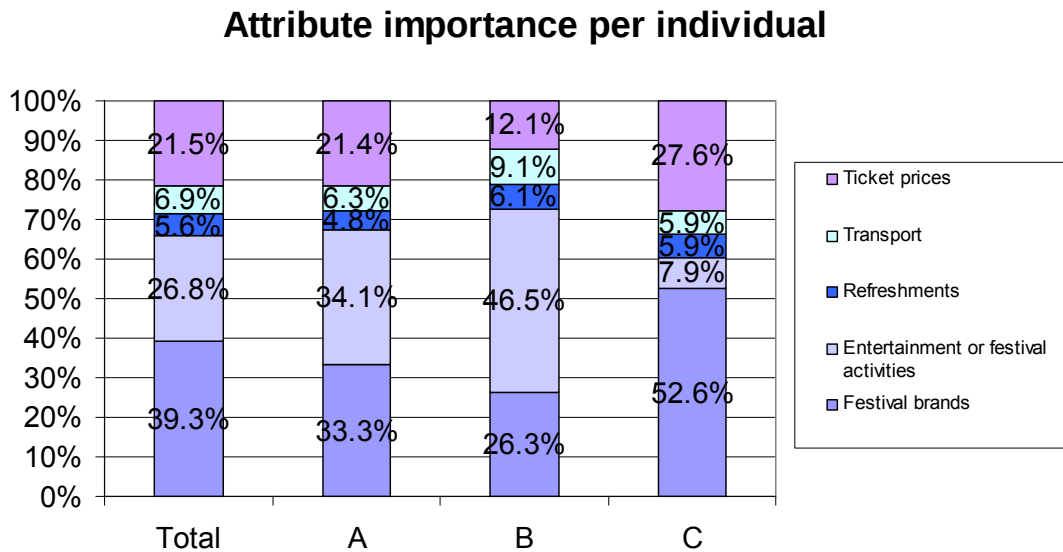


Figure 5.2: Attribute importance per individual respondent across the three festival scenarios

Across the three arts festival scenarios, Festival C had the highest weighted utility value on *brands* (52,6%) whereas Festival B had the highest weighted utility value on *entertainment or festival activities* (46,5%). The weighted utility values of *refreshments* and *transport* were fairly evenly distributed across the three arts festival scenarios. The weighted utility value of Festival C's *ticket prices* was the highest (27,6%).

The next section explains how the relative attributes' level of importance was determined for all three of the arts festival scenarios as well as for each individual arts festival scenario.

5.3.2 Relative attributes' level of importance for the three arts festival scenarios

The relative attributes' level of importance globally and at each individual arts festival scenario individually is illustrated in Tables 5.3 to 5.6.

The CVA programme creates an index score out of 100 (percentage) to indicate an attribute's importance, and a weighted raw utility value indicates the average of the weights.

The importance of the 15 attribute levels is displayed in a 3 by 3 grid (see Appendix B1 for analyses of these results). It is important to interpret the weighted raw utility values only within each attribute level, for example the *Festival brands* with the brand levels. The results of Tables 5.3 to 5.6 were used to set up the range of the game theory matrix and to score each arts festival scenario in the outcome of the game.

Table 5.3 depicts the attributes' level of importance globally, across all three festival scenarios.

Table 5.3: Attributes' level of importance for all three festival scenarios "globally"

	Global	
Number of respondents	377	
Attribute and attribute level	Weighted raw utility value	Importance
Festival brands		
Festival A	41,5	29,8%
Festival C	68,1	48,8%
Festival B	29,9	21,4%
		100,0%
Entertainment or festival activities		
Quality arts	20,6	18,5%
Quality performances	41,5	37,2%
Quality music	49,5	44,3%
		100,0%
Refreshments		
A wide variety of good quality	20,7	27,2%
Friendly service	24,3	31,8%
Value for money	31,3	41,0%
		100,0%
Transport		
Good (accessible) transport	23,1	29,4%
Sufficient parking	21,2	26,8%
Safe and secure parking	34,5	43,8%
		100,0%
Ticket prices		
Lower than current price	59,6	63,7%
The same price	33,9	36,3%
Higher than current price	0,0	0,0%
		100,0%

Table 5.3 indicates that across the three arts festival scenarios globally, the following attribute levels have the highest weighted raw utility values for each attribute:

- *Festival C* with 68,1 (48,8% importance) on *Festival brands*

- *Quality music* with 49,5 (44,3% importance) on *Entertainment or festival activities*
- *Value for money* with 31,3 (41 % importance) on *Refreshments*
- *Safe and secure parking* with 34,5 (43,8% importance) on *Transport*
- *Lower than current price* with 59,6 (63,7 importance) on *Ticket price*.

These scores are important as they were used as a hard code in the simulation tool for the measurements shown in Tables 5.11 to 5.13, and to set up the range of the matrix of the game theory in Table 5.14.

Table 5.4 depicts the attributes' level of importance for Festival A.

Table 5.4: Attributes' level of importance for Festival A

	Festival A	
Number of respondents	126	
Attribute and attribute level	Weighted raw utility value	Importance
Festival brands		
Festival A	67,9	53,8%
Festival C	45,1	35,8%
Festival B	13,1	10,4%
		100,0%
Entertainment or festival activities		
Quality arts	23,4	18,8%
Quality performances	42,6	34,2%
Quality music	58,6	47,0%
		100,0%
Refreshments		
A wide variety of good quality	26,1	36,3%
Friendly service	24,4	33,9%
Value for money	21,5	29,8%
		100,0%
Transport		
Good (accessible) transport	23,3	30,6%
Sufficient parking	23,7	31,2%
Safe and secure parking	29,0	38,2%
		100,0%
Ticket prices		
Lower than current price	62,0	61,2%
The same price	39,3	38,8%
Higher than current price	0,0	0,0%
		100,0%

Table 5.4 indicates that the respondents at Festival A gave the following attribute levels as having the highest weighted raw utility values for each attribute:

- *Festival A* with 67,9 (53,8 importance) on *Festival brands*
- *Quality music* with 58,6 (47,0%) on *Entertainment or festival activities*

- *A wide variety of good quality* with 26,1 (36,3 importance) on *Refreshments*
- *Safe and secure parking* with 29 (38.2 importance) on *Transport*
- *Lower than current price* with 62 (61,2% importance) on *Ticket prices*.

The results shown in this table were used to score Festival A in the game theory shown in Table 5.15.

Table 5.5 depicts the attributes' level of importance for Festival B.

Table 5.5: Attributes' level of importance for Festival B

	Festival B	
Number of respondents	99	
Attribute and attribute level	Weighted raw utility value	Importance
Festival brands		
Festival A	20,4	17,6%
Festival C	27,1	23,5%
Festival B	68,1	58,9%
		100,0%
Entertainment or festival activities		
Quality arts	23,2	16,2%
Quality performances	47,3	33,1%
Quality music	72,7	50,7%
		100,0%
Refreshments		
A wide variety of good quality	22,4	30,4%
Friendly service	21,0	28,5%
Value for money	30,4	41,1%
		100,0%
Transport		
Good (accessible) transport	27,5	32,6%
Sufficient parking	21,9	25,9%
Safe and secure parking	35,0	41,5%
		100,0%
Ticket prices		
Lower than current price	52,8	63,6%
The same price	30,2	36,4%
Higher than current price	0,0	0,0%
		100,0%

Table 5.5 indicates that the respondents at Festival B gave the following attribute levels as having the highest weighted raw utility values for each attribute:

- *Festival B* with 68,1 (58,95) on *Festival brands*

- *Quality music* with 72,2 (50,7 % importance) on *Entertainment or festival activities*
- *Value for money* with 30,4 (41,1 % importance) on *Refreshments*
- *Safe and secure parking* with 35 (41,5 % importance) on *Transport*
- *Lower than current price* with 52,8 (63,6 % importance) on *Ticket prices*.

The results shown in this table were used to score Festival B in the game theory shown in Table 5.15.

Table 5.6 depicts the attributes' level of importance for Festival C.

Table 5.6: Attributes' level of importance for Festival C

	Festival C	
Number of respondents	152	
Attribute and attribute level	Weighted raw utility value	Importance
Festival brands		
Festival A	33,5	20,1%
Festival C	113,9	68,5%
Festival B	19,0	11,4%
		100,0%
Entertainment or festival activities		
Quality arts	16,7	20,8%
Quality performances	36,8	45,8%
Quality music	26,9	33,4%
		100,0%
Refreshments		
A wide variety of good quality	15,1	18,5%
Friendly service	26,4	32,3%
Value for money	40,1	49,2%
		100,0%
Transport		
Good (accessible) transport	20,2	26,0%
Sufficient parking	18,6	24,0%
Safe and secure parking	38,8	50,0%
		100,0%
Ticket prices		
Lower than current price	62,0	66,0%
The same price	31,9	34,0%
Higher than current price	0,0	0,0%
		100,0%

Table 5.6 indicates that the respondents at Festival C gave the following attribute levels as having the highest weighted raw utility values for each attribute:

- *Festival C* with 113,9 (68,5 % importance) on the *Festival brands*

- *Quality performances* with 36,8 (45,8% importance) on *Entertainment or festival activities*
- *Value for money* with 40,1 (49,2 % importance), for *Refreshments*
- *Safe and secure parking* with 38,8 (50 % importance) for *Transport*
- *Lower than current price* with 62 (66% importance) for *Ticket prices*.

The results shown in this table were used to score Festival C in the game theory shown in Table 5.15.

These relative attribute importance and attribute utility values can be used to make predictions about how respondents would choose among festivals (refer to Section 5.3.5 for the attribute simulation tool and Section 5.4 for the game theory).

In other words, by using conjoint analysis a festival's management can determine the optimal features or preferences for a festival; moreover conjoint analysis and game theory will also identify the best advertising message by indicating the most important features considered in the choice of a specific festival.

In this sense, conjoint analysis contributes directly to the formulation of a value proposition. The information can be edited with a text editor for further processing by other analytical software packages, such as the cluster analysis programme of STATISTICA (CVA, 1996:40). The above CVA results were used for cluster analysis as explained in the next section, in order to explore the results further.

5.3.3 Cluster analysis for arts festival scenarios

Cluster analysis is a multivariate technique used to identify homogeneous subgroups of respondents (Cooper & Schindler, 2003:613). Cluster analysis also differs from discriminant analysis in that the latter begins with a well-defined group composed of two or more distinct sets of characteristics, and then searches for a set of variables to separate them (Malhotra, 2004:534). By contrast, cluster analysis begins with an undifferentiated group of people, events or objects and then attempts to reorganise them into homogeneous groups or subgroups.

A K-means clustering programme was used, with seed points found through a preliminary hierarchical clustering method (see Section 4.8.1). Results were obtained for six clusters, and a four-cluster solution was selected, primarily on the basis of interpretability and balanced cluster sizes as illustrated in Table 5.7. Cluster sizes ranged between 22 and 61 respondents. Table 5.7 illustrates the cluster centroids (coded in green) that were computed to aid segment profiling. The highest percentages are colour-coded (green) to simplify comparisons.

Table 5.7: Differences in the relative importance of attributes at arts festival scenarios (cluster analysis process; 4-factor solution)

	Price-sensitive	Activity-sensitive	Transport-sensitive	Branding-sensitive
	Cluster 1	Cluster 2	Cluster 3	Cluster 4
Festival brands	19,23855	12,71853	22,23759	53,83427
Entertainment or festival activities	15,9688	48,37463	20,76463	13,6929
Refreshments	15,22679	13,47901	21,34239	11,73395
Transport	13,37015	13,97021	25,81204	11,69445
Ticket prices	36,19569	11,45754	9,843354	9,044324

Table 5.7 comprises four clusters. The four-cluster extraction is based on the average attribute importance of that grouping, which sorts each of them in a similar group. Each group was given a name or label representing the highest percentage score. The four clusters were extracted as follows:

- Cluster 1: refers to respondents who valued *price* at the festival
- Cluster 2: refers to respondents who valued the *entertainment and festival activities*
- Cluster 3: refers to respondents who valued the *transport and accessibility*, the *brand* as well as *refreshments* at the festival
- Cluster 4: refers to respondents who valued the *branding of the festival*.

The percentages in Table 5.7 indicate to what extent a certain attribute was important to the respondents. For example, in Cluster 1, the highest percentage (36,19%) indicates that the respondents in this group are sensitive to the *ticket prices* at a

festival. The respondents in Cluster 1 therefore attach the highest importance to this factor.

All the respondents with that specific profile are grouped together in Cluster 1 and the cluster is labelled *Price-sensitive*. A grouping of attendees indicated that *Entertainment or festival activities* (48,37%) had the greatest importance to them (Cluster 2), and that the only issue that mattered to them was the entertainment at the festival. They attended arts festivals for the entertainment offered at a festival. Irrespective of whether the festival was Festival A or Festival B or Festival C, they placed the greatest value on the entertainment it offered. This cluster was therefore labelled *Activity-sensitive*. Cluster 3 includes three attributes, namely *Transport*, *Festival brands* and *Refreshments*, with closer values. However, *Transport* has the highest percentage (25,81%), thus the *Transport-sensitive* label. Cluster 4 was labelled *Branding-sensitive* due to the highest percentage (53,83%) score on festival brands.

Once the respondents' behaviour had been grouped (clustered), the clusters were once again categorised labelling them. There were four different groups of respondents at the three arts festival scenarios and by adding those cluster labels to the data it is possible to note for example how many price-sensitive versus brand-sensitive respondents were at Festival A. Figure 5.3 indicates the three arts festival scenarios and the value the respondents gave to each of the four clusters.

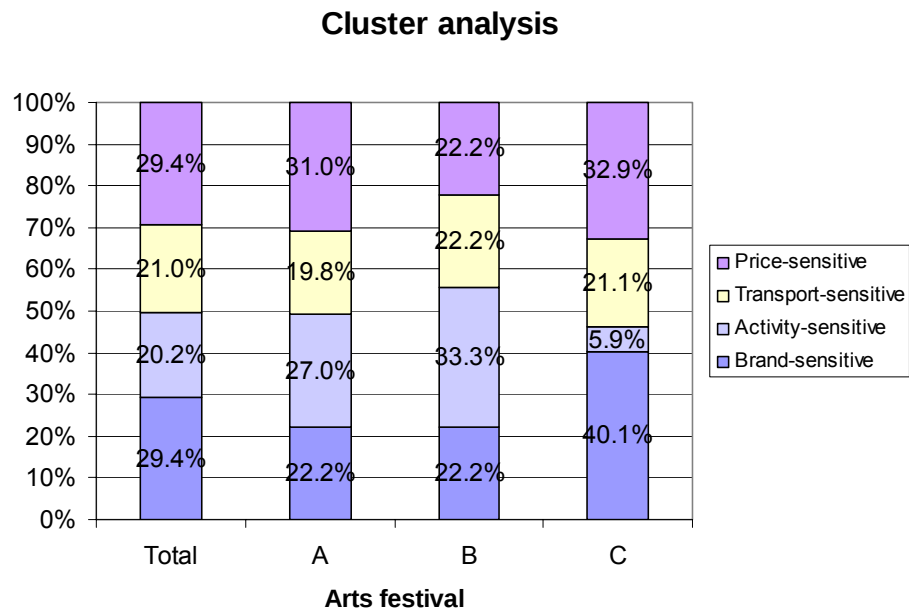


Figure 5.3: The three arts festival scenarios and the four clusters

Figure 5.3 illustrates from a global perspective that the two clusters *Brand-* (29,4%) and *Price-sensitive* (29,4%) are the most important. The cluster *Price-sensitive* (31%) is most important to respondents at Festival A; those at Festival B value the cluster *Activity-sensitive* (33,3%) as most important and those at Festival C value the cluster *Brand-sensitive* as most important (40,1%).

Following that, the cluster analysis results were used in the correspondence analysis, as discussed in the next section (refer to the correlation matrix in Appendix B1 for significance statistical results [P-value is < 0,05]).

5.3.4 Correspondence analysis of arts festival scenarios

The correspondence analysis of this study was performed with the software package STATISTICA. This statistical technique indicates variables, which correlate with one another, thus providing a method for differentiating between respondents.

Inertia indicates how well the model fits – i.e. the closer the total percentage to 100%, the better the fit (see Chapter 4, Section 4.8.2 on correspondence analysis).

5.3.4.1 Analysis of correspondence between arts festival scenarios and attribute importance

Figure 5.4 indicates the relative attribute importance per individual respondent across the three arts festival scenarios in South Africa. The three arts festival scenarios (Festival A, Festival B, Festival C) are mapped and their correspondence with the five attributes is indicated. The inertia of 2,4% versus 97,6% is considered when reading the map. The higher the inertia, the better the fit is. In other words, Dimension 1 (horizontal axis) explains most of the inertia (97,64% of the total solution) and is used. On the vertical level, Dimension 2 explains a mere 2,4%; therefore the best interpretative value will be gained from the horizontal level.

Figure 5.4 depicts the correspondence between the arts festival scenarios and attribute importance – inertia of 97,6%.

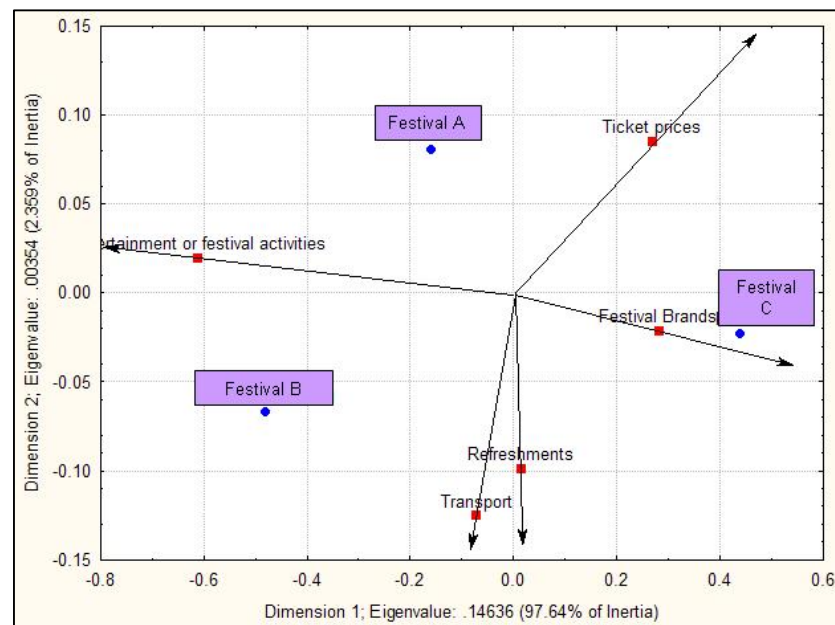


Figure 5.4: Correspondence between arts festival scenarios and attribute importance – inertia of 97,6%

(a) Festival A

The attributes *Ticket prices* and *Entertainment or festival activities* place Festival A in the top quadrant of Figure 5.4. Festival A lies about mid-way in the area of *Entertainment/festival activities* and *Ticket prices*. The attribute *Ticket prices* is of approximately equal importance to Festival A and Festival C. The respondents at Festival A and Festival B gave a higher value to the attribute *Entertainment or festival activities* than the respondents at Festival C.

(b) Festival B

Festival B lies between entertainment/festival activities, transport and refreshments in Figure 5.4. The attribute *Ticket prices* is less important to the respondents at this festival. The respondents at Festival A and Festival B gave a higher value to the attribute *Entertainment or festival activities* than the respondents at Festival C. The attributes *Refreshments* and *Transport* were more important to respondents at Festival B than for respondents interviewed at the other two festival scenarios.

(c) Festival C

The attribute *Festival brands* places Festival C in the bottom right quadrant of Figure 5.4, giving Festival C the top score of all the festival brands as the respondents at Festival C gave this attribute the highest rating. Festival C appears to form a dividing line, separating Festival B in the lower half from Festival A in the upper half. The attribute *Ticket prices* is of relatively equal importance to Festival C and Festival A.

Figure 5.4 indicates that Festival A seems to be in a completely different league compared to the other festivals. The assumption can be made that Festival A and Festival B are furthest apart in their positioning. It is highly unlikely that Festival A's respondents would go to Festival B, and vice versa, but Festival B's respondents might attend Festival C, or Festival C's respondents might attend Festival B.

The respondents stated that they preferred to attend Festival B as a result of the attributes *Refreshments*, *Transport* and to a lesser degree because of the attribute *Entertainment*, whereas they attended Festival A for the attribute *Ticket prices* as these cost less, were within their financial means and were value for money, as well as for the attribute *Entertainment /festival activities*. The respondents stated that they attended Festival C for the attributes *Festival brands* and *Ticket prices*, but valued these to a lesser degree than the attribute *Ticket prices*.

The correspondence is shown only on the horizontal level and the conspicuous attributes are as follows: for Festival B the foremost attribute is *Transport* followed by *Refreshments*. The attributes *Transport* and *Refreshments* came second for Festival C and last for Festival A. The attribute *Festival brands* is foremost for Festival C, and Festival B is slightly better positioned than Festival A for this attribute. The assumption can be made that Festival A should take steps to improve its branding, perhaps by striving for a more exclusive festival.

Festival B has apparently established a strong typical English arts festival brand and Festival C a strong Afrikaans brand, whereas Festival A is somewhere in between and its brand is not as well-established as the brands of the other two festivals. Although the attribute *Entertainment/Festival activities* is on the other side of the horizontal line, it is closer to Festival C and halfway between Festival A and Festival B. The respondents at Festival C indicated that they most appreciated the attribute *Festival activities*, but this attribute was split or divided between Festival A and Festival B. The attribute *Ticket prices* was foremost at Festival A and has the highest association with this festival.

In a vertical direction (2,35%), the attribute *Festival brands* is foremost for Festival C, in second place for Festival A and last for Festival B. However, as the vertical direction provides only the remaining 2,35% of the solution, not much more interpretation can be gained from this axis.

5.3.4.2 Correspondence between age group and attributes

Figure 5.5 below shows the difference between the respondents' three respective age groups (between 18 and 30, between 31 and 45, and older than 45) and the five festival attributes. The horizontal axis in Figure 5.5 explains most of the inertia (80,8%). The vertical axis also appears to explain a significant percentage of the inertia (19,1%). Therefore both the horizontal and vertical distances between attributes and age group should be considered when interpreting the correspondence between attributes and age groups.

Figure 5.5 illustrates the correspondence between age and festival attributes – inertia of 80,7%.

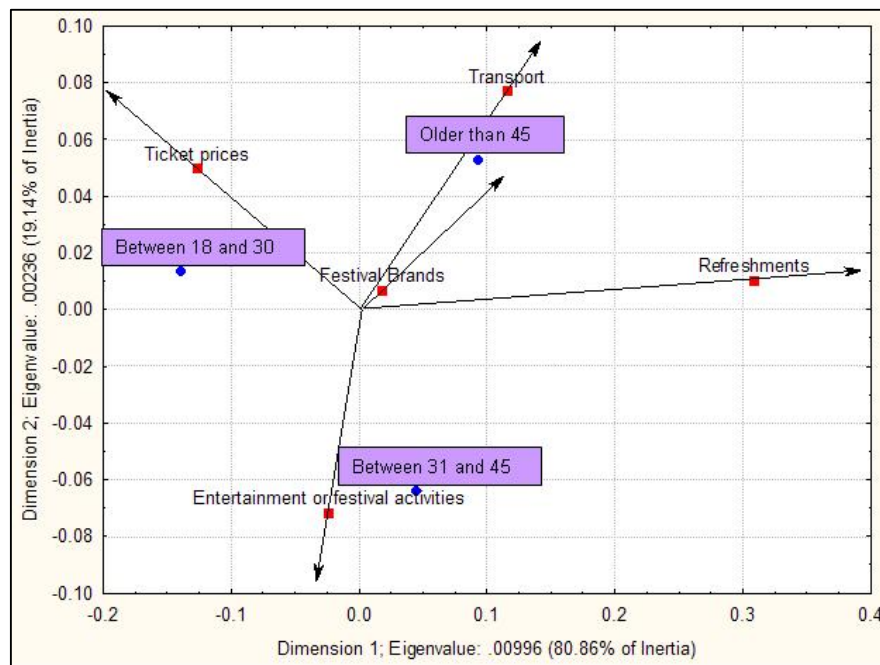


Figure 5.5: Correspondence between age and festival attributes – inertia of 80,7%

The respondents in the younger age group (between 18 to 30 years) rated the attribute *Ticket prices* as most important to them. The respondents in the middle-age group (between 31 to 45 years) stated that the entertainment and activities at the festival were to them the most important aspect of the festival of greater importance.

The attribute *Transport* appeared to be a greater problem and of higher importance for the higher age group (older than 45 years) than for the other groups, because this attribute appears highest in Figure 5.5. The attribute *Refreshments* is shown on the far right of Figure 5.5, far from all the age groups, and was therefore not an issue of importance to the respondents in any of the three age groups.

As far as dimension 1 is concerned, the attribute *Festival brands* lies close to the centroid 0,0 and therefore contributes little to the chi-square. The attribute *Ticket prices* on the left of the horizontal line and the attribute *Refreshments* on the right contributes most to the chi-square. As regards the age group of the respondents, dimension one is mainly defined by the “between 18 and 30” age group on the left and “older than 45” on the right. It appears to indicate that the respondents in the “between 18 and 30” age group were mainly concerned about ticket prices whereas those in the “older than 45” age group were mainly concerned about refreshments.

Dimension 2 is defined by *Transport* at the top and *Entertainment or festival activities* at the bottom, as well as the age group “older than 45” at the top and “between 30 and 45” at the bottom. This may indicate that the older group of respondents is more concerned about transport issues whereas the middle age group (between 30 and 45) is more concerned with entertainment or festival activities.

5.3.4.3 Correspondence between arts festivals and home language

Figure 5.6 indicates the difference between the three arts festival scenarios and the home language of the respondents interviewed at the respective festivals. The three arts festival scenarios are mapped and associated with the home language (Afrikaans, English and other languages). The higher the inertia the better the fit; therefore the inertia of 99,8% is used. The inertia's dimension 1 on the horizontal level is 99,77% of the total solution, but only 2,0% on the vertical level. Consequently most of the interpretative value will be gained from the horizontal level.

Figure 5.6 illustrates the correspondence between the arts festival scenario and home language – inertia of 99,8%.

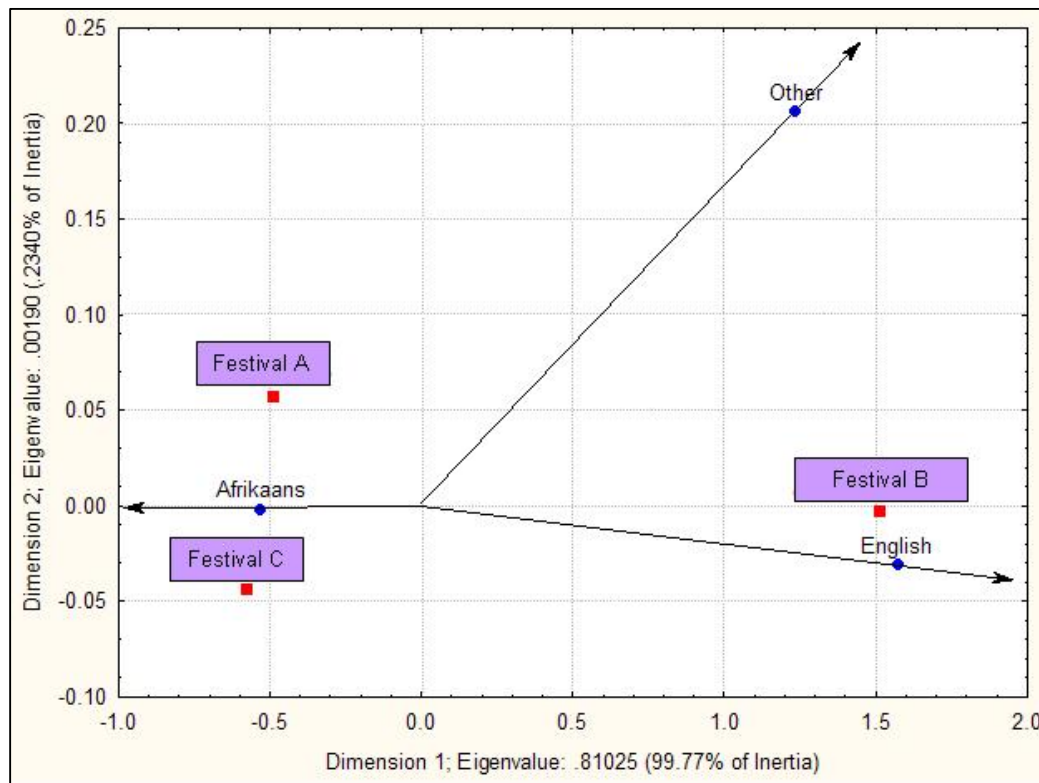


Figure 5.6: Correspondence between arts festival scenario and home language – inertia of 99,8%

Figure 5.6 indicates that the respondents at Festival A and Festival C gave similarly high values to Afrikaans as home language, but those at Festival B differ significantly. English as home language seemed to be the single most important home language for respondents at Festival B. The other language groups are distributed equally as far from the main languages of English and Afrikaans, indicating the relatively less importance of these languages at each of the three festivals.

As Festival B has strong ties with the 1820 British Settlers, it is not surprising that English is of such importance to the respondents of the region. By contrast, Potchefstroom (Festival A) and Oudtshoorn (Festival C) both have strong ties with

the Afrikaans language, as Potchefstroom was the first town of the South African Republic and Oudtshoorn the hometown of the famous Afrikaans poet C.J. Langenhoven. Figure 5.6 indicates that *Language* is a homogenous attribute at each of the three arts festival scenarios.

Positioning concerns the association with the arts festival in respondents' minds. In Figure 5.6, *Language* is 99,8% on the horizontal line, thereby casting the three arts festival scenarios and home languages in three different directions. Afrikaans is on the left-hand side of the horizontal line and English on the right-hand side of the line, whereas other languages are in the top right-hand quadrant. The Afrikaans language figures closest to Festival A and Festival C, and English is closest to Festival B.

5.3.4.4 Correspondence between arts festival scenarios and clusters

Figure 5.7 is similar to Figure 5.5, with the only difference between them the manner in which the clustering has been done. Figure 5.7 indicates the difference between the three festivals and the four clusters – inertia of 96,12%.

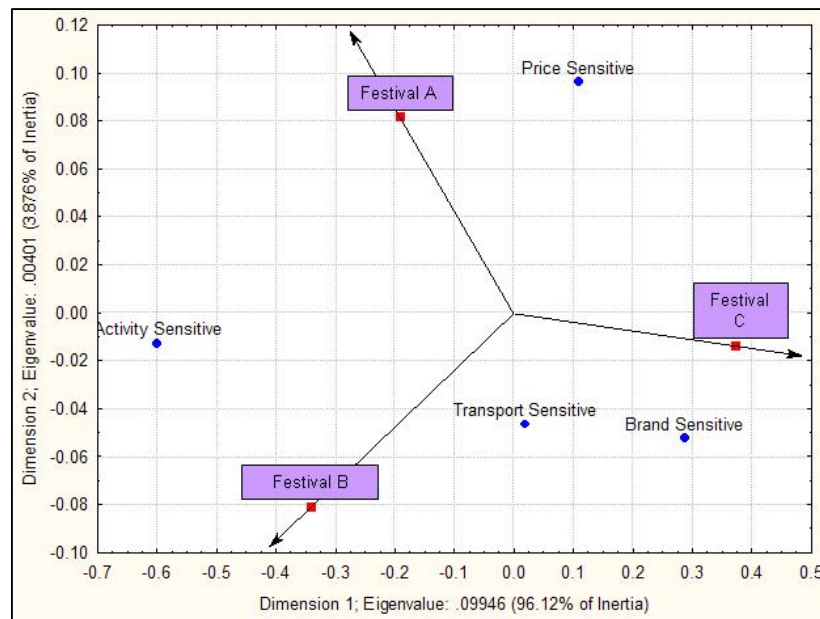


Figure 5.7: Correspondence between arts festival scenarios and clusters – inertia of 96,12%

The respondents at Festival A gave the highest rating to the cluster *price-sensitive* but *transport sensitivity* was of fairly equal importance to the respondents at Festival B and Festival C. *Brand sensitivity* is of more importance to Festival C than for the others. It is therefore important for Festival C's management to continue concentrating on the festival brand, as they are currently doing.

The results of the above are used to conduct the last part of the conjoint analysis, namely the conjoint simulations.

5.3.5 Conjoint simulation analyses for arts festival scenarios

A further advantage of conjoint analysis is that simulations can be done, based on the information obtained from interviews. Therefore, "what if" simulations can be modelled and answers obtained from the simulation. The CVA Market Simulator models a hypothetical "market" by specifying each hypothetical product's level on each attribute. The simulation module prepares and performs product simulations. The results of the attribute's level of importance (see Section 5.3.2) are used as input into the attribute simulation tool, as indicated in this section.

Conjoint simulators are directional indicators, which can provide a great deal of information about the relative importance of features and preferences for products or services (Rice, 1997:1 cited in Schreuder, 1999:3). This tool enables the researcher to simulate anything and therefore indicates where each festival should focus its marketing, although this is based on assumptions only. This tool also enables the researcher to determine the likelihood that the different festival scenarios would be sustainable. In cases of an improvement in any of the weighted utility values, the question can be asked regarding the purchase likelihood for the second simulation. With this tool, the researcher can test alternative product scenarios, as illustrated in Tables 5.8 to 5.10.

Table 5.8 illustrates two simulations based on assumptions made specifically for Festival A (N=126).

Table 5.8: Attribute simulation tool for Festival A – example one

	Simulation1	Simulation2
Festival Brands	Aardklop	Aardklop
Entertainment or festival activities	Quality arts	Quality performances
Refreshments	Value-for-money	A wide variety of good quality
Transport	Good (accessible) transport	Safe and secure parking
Ticket prices	The same price	Lower than current Price

Percentage change Simulation 2 vs. Simulation 1 **29.8%**

Table 5.8 indicates that the profile score obtained from Simulation 2 is 29,8% higher than that of Simulation 1. Only one attribute level, namely Festival A, was similar in both simulations.

The festival management of Festival A can now change the levels for a specific attribute category and see the potential impact of the change. The entertainment or festival activities attribute level is changed in Simulation 2 from *Quality performances* to *Quality music*. Table 5.9 illustrates the effect of change on the simulation (N=126).

Table 5.9: Attribute simulation tool for Festival A – example two

	Simulation 1	Simulation 2
Festival Brands	Aardklop	Aardklop
Entertainment or festival activities	Quality arts	Quality music
Refreshments	Value-for-money	A wide variety of good quality
Transport	Good (accessible) transport	Safe and secure parking
Ticket prices	The same price	Lower than current Price

Percentage change Simulation 2 vs. Simulation 1 **38.9%**

As indicated in Table 5.9, the profile score difference is now 38,9%. The tool therefore indicates to the management that Festival A as simulated in Simulation 2 is valued as more important (38,9%) and has gained a higher preference among festival attendees.

It appears that management of Festival A could conclude that the simulation gives them a strategic direction regarding the level of the attribute that they should present or offer at their specific arts festivals. In our example above, this is *Quality music*, rather than *quality performances* based on the specific profile.

To illustrate the tool further, management could change to *higher ticket pricing* and *Quality music* offered at the festival. Table 5.10 of the simulation indicates the following result for the specific profile (N=126).

Table 5.10: Attribute simulation tool for Festival A – example three

	Simulation 1	Simulation 2
Festival Brands	Aardklop	Aardklop
Entertainment or festival activities	Quality arts	Quality music
Refreshments	Value-for-money	A wide variety of good quality
Transport	Good (accessible) transport	Safe and secure parking
Ticket prices	Lower than current Price	Higher than current Price
Percentage change Simulation 2 vs. Simulation 1		-8.2%

Table 5.10 indicates an 8,2% decrease in the profile score of Simulation 2 versus Simulation 1. The change to a *higher price* and *quality music* is therefore not preferred or more important than having *quality arts* at *lower than the current price*. This indicates that Festival A should definitely not charge a higher price, as this would negatively affect this festival as a tourism attraction.

Management can run various simulations by changing the levels to find the optimum importance and preferences of each profile. Tables 5.11 to 5.13 indicate the best simulation for all three arts festival scenarios.

Table 5.11 indicates the best simulation for Festival A (N=126).

Table 5.11: Attribute simulation tool for Festival A

	Simulation 1	Simulation 2
Festival Brands	Aardklop	Aardklop
Entertainment or festival activities	Quality arts	Quality music
Refreshments	Value-for-money	A wide variety of good quality
Transport	Good (accessible) transport	Safe and secure parking
Ticket prices	The same price	Lower than current Price
Percentage change Simulation 2 vs. Simulation 1		38.9%

Table 5.11 illustrates the best scenario (highest individual scores in Simulation 2 (see Table 5.4), and the worst scenario in Simulation 1 (lowest individual scores are obtained), in this case by offering Festival A with the following attribute levels:

- *quality music* (the attribute *Entertainment activities*) with a weighted raw utility value of 58,6 (47,0% importance);
- *a wide variety of good quality* (the attribute *Food and beverages*) with a weighted raw utility value of 26,1 (36,3% importance);
- *safe and secure parking* (the attribute *Transport to venues*) with a weighted raw utility value of 29 (38,2 % importance); and
- *lower than current price* (the attribute *Ticket prices*) with a weighted raw utility value of 62 (61,2% importance) would offer a 38,9% improvement on Simulation 1.

Simulation 1 indicates that Festival A has the worst scenario with the lowest individual scores (see Table 5.4), presented by the following attribute levels:

- *quality arts* (the attribute *Entertainment activities*) with a weighted raw utility value of 23,4 (18,8% importance);
- *value for money* (the attribute *Food and beverages*) with a weighted raw utility value of 21,5 (29,8% importance);

- *good (accessible) transport* (the attribute *Transport to venues*) with a weighted raw utility value of 23,3 (30,6% importance); and
- *the same price* (the attribute *Ticket prices*) with a weighted raw utility value of 39,3 (38,8% importance) would offer a worst-case scenario for Festival A.

These results illustrate what the management of Festival A could do to improve the festival's positioning and also what they should not do to avoid harming its positioning. Festival A should keep offering these attribute levels as they are, or they should work on improving the other attribute levels:

- *quality music* (of the attribute *Entertainment activities*) should be offered at Festival A, but on the long term Festival A could improve the quality of the performances and arts offered at the festival. The festival management should get better performances and better artists to perform at the festival;
- *a wide variety of good quality* (of the attribute *Food and beverages*) should remain on offer, though the management could work on improving *friendly service* as this attribute level was regarded as of secondary importance;
- *safe and secure parking* (of the attribute *Transport to venues*) has the highest importance, thus is essential for optimal positioning; and
- *lower than current price* (of the attribute *Ticket prices*) should be considered, as the respondents felt that the price might be too high. The festival management should definitely not increase the ticket price, but should strive to keep the prices low.

The simulations were also done for Festival B and Festival C and the optimum importance and preferences of the profiles are listed in Tables 5.12 and Table 5.13.

Table 5.12 indicates the best simulation for Festival B (N=99).

Table 5.12: Attribute simulation tool for Festival B

	Simulation 1	Simulation 2
Festival Brands	Grahamstown	Grahamstown
Entertainment or festival activities	Quality arts	Quality music
Refreshments	Friendly service	Value-for-money
Transport	Sufficient parking	Safe and secure parking
Ticket prices	The same price	Lower than current Price
Percentage change Simulation 2 vs. Simulation 1		57.6%

Table 5.12 illustrates the best scenario in Simulation 2 (highest individual scores – see Table 5.5), but the worst-case scenario is presented in Simulation 1, by offering Festival B with the following attribute levels:

- *quality music (Entertainment activities)* with a weighted raw utility value of 72,7 (50,7% importance);
- *value for money (Food and beverages)* with a weighted raw utility value of 30,4 (41,1% importance);
- *safe and secure parking (Transport to venues)* with a weighted raw utility value of 35 (41,5% importance); and
- *lower than current price (Ticket prices)* with a weighted raw utility value of 52,8 (63,3% importance) would offer a 57,6% improvement on Simulation 1.

Simulation 1 presents the worst-case scenario with the lowest individual scores (see Table 5.5) for the following attribute levels:

- *quality arts (Entertainment activities)* with a weighted raw utility value of 23,2 (16,2% importance),
- *friendly service (Food and beverages)* with a weighted raw utility value of 21 (28,5% importance),
- *sufficient parking (Transport to venues)* with a weighted raw utility value of 21,9 (25,9 % importance),
- *the same price (Ticket prices)* with a weighted raw utility value of 30,2 (36,4% importance) would be the worst-case scenario.

These results illustrate what the management of Festival B could do to improve the festival's positioning and also what they should not do to avoid harming its positioning. Festival B should focus on the attribute levels regarded as important:

- *quality music* (of the attribute *Entertainment activities*) is very important and should be one of the unique selling propositions (USP) for this festival. It is clear that the other 2 attribute levels (quality arts and quality performance) are much lower. The festival management could investigate what aspects will have a positive impact on the quality of music offered at the festival;
- *value for money* (of the attribute *Food and beverages*) is regarded as the most important attribute level. As this concept is rather complex, management should ascertain what elements will most likely influence this in a positive manner for sustained growth;
- *safe and secure parking* (of the attribute *Transport to venues*) is important and should always be offered. *Good (accessible) transport* might be considered in future for added value to this festival; and
- *lower than current price* (of the attribute *Ticket prices*) is once again an important attribute, indicating that respondents felt the prices might be too high and these should therefore definitely not be increased too much.

Table 5.13 indicates the best simulation for Festival C (N=152).

Table 5.13: Attribute simulation tool for Festival C

	Simulation 1	Simulation 2
Festival Brands	KKNK	KKNK
Entertainment or festival activities	Quality arts	Quality performances
Refreshments	A wide variety of good quality	Value-for-money
Transport	Sufficient parking	Safe and secure parking
Ticket prices	The same price	Lower than current Price
Percentage change Simulation 2 vs. Simulation 1		48.6%

Table 5.13 illustrates that Simulation 2 offers the best scenario (highest individual scores) (see Table 5.6), whereas Simulation 1 presents the worst scenario, in this case by offering Festival C with the following attribute levels:

- *quality performances (Entertainment activities)* with a weighted raw utility value of 36,8 (45,8% importance);
- *value for money (Food and beverages)* with a weighted raw utility value of 40,1 (49,2% importance);
- *safe and secure parking (Transport to venues)* with a weighted raw utility value of 38,8 (50% importance); and
- *lower than current price (Ticket prices)* with a weighted raw utility value of 62 (66% importance) offering a 48,6% improvement on Simulation 1.

Simulation 1 presents the worst scenario with the lowest individual scores (see Table 5.6), in this case by offering a Festival B scenario with the following attribute levels:

- *quality arts (Entertainment activities)* with a weighted raw utility value of 16,7 (20,8% importance);
- *a wide variety of good quality (Food and beverages)* with a weighted raw utility value of 15,1 (18,5% importance);
- *sufficient parking (Transport to venues)* with a weighted raw utility value of 18,6 (24% importance);
- *the same price (Ticket prices)* with a weighted raw utility value of 31,9 (34% importance) will demonstrate a worst-case scenario.

These results illustrate what the management of Festival C could do to improve the festival's positioning as well as what they should not do to avoid harming its positioning. The management of Festival C should work on the following attribute levels and/or they should continue providing them as they currently do:

- *quality performances (of the attribute Entertainment activities)* should remain on offer as is currently the case and they should be kept the same.

Management might even consider investigating this offer in more detail as it will most likely have a positive influence on the overall positioning of the festival;

- *value for money* (of the attribute *Food and beverages*) is important for the festival and should remain on offer. As mentioned before, this term is complex and should not be interpreted lightly or in terms of the perception held by management, but rather focuss on the question: “What’s in it for me?”;
- *safe and secure parking* (of the attribute *Transport to venues*) is important and should not be underestimated at this festival. The other two attribute levels; *good (accessible) transport* and *sufficient parking* was of similar importance and should not be ignored in future; and
- *lower than current price* (of the attribute *Ticket prices*) is most important for Festival C, as the respondents interviewed felt the prices might be too high and should definitely not be increased too much.

Although conjoint analysis is a simulation technique, it is not the only technique that can be used to optimise the data. Another technique “to take it to the next level”, which can also be used to optimise the data, is that of “game theory“. This technique takes the semi-competitive nature of arts festival scenarios into account as well as the non-representativeness of the sample. The results obtained from the conjoint analysis were used in the game theory technique. The comparison of the three arts festival scenarios was used to take the interpretation of the data one step further and to add value to the market-positioning model.

5.4 GAME THEORY

The secondary objective is to compare the three different arts festival scenarios and their attributes with one another. This enables the researcher to determine the most successful arts festival presentation as a tourism attraction. The game theory technique is an optimisation tool to determine the optimal arts festival package.

The results obtained from the game theory are then used to develop a market-positioning model, described in Chapter 6.

These arts festival scenarios are semi-competitive. Game theory recognises this semi-competitiveness or in some cases non-competitiveness of these arts festivals. The non-competitive games used to this end are based on the founding theory of Bayes's formula (Mizrahi & Sullivan, 1993:343).

Only the *endogenous variables* (*Brand, Entertainment, Refreshments, Transport, Price*) are considered in setting up the game, as these variables can be manipulated. The weighted raw utility values were calculated for each of these endogenous variables. The results from the conjoint analysis shown in Table 5.3 (i.e. the attribute level importance – weighted raw utility value – for all three festival scenarios globally) were used to design the matrix or scale for the game theory.

A range was designed for each attribute level and calculated by using the highest weighted raw utility value, rounded off, as the top end of the scale. This value was then divided by three to obtain the other values on the scale. As mentioned in Chapter 4, Section 4.9, a point of -1, 0, or 1 is awarded according to the weighted raw utility value scale set up for each attribute level. A value of 1 is awarded to the highest-ranked bundle in the matrix or map, and 0 to the second-highest ranked bundle, whereas -1 is awarded to the next-largest number in the list. Table 5.14 illustrates the design matrix used for scoring the individual attribute levels.

Table 5.14: A matrix with the ranges and attribute levels at arts festivals

Attribute level with highest weighted raw utility value	Score obtained in the game between the ranges		
	-1	0	1
Festival brands:			
Festival C	0-23	24-47	48-70
Entertainment:			
Quality music	0-16	17-33	34-50
Refreshments:			
Value for money	0-11	12-22	23-33
Transport:			
Safe and secure parking	0-12	13-24	25-35
Ticket prices:			
Lower than current price	0-20	21-40	41-60

The above matrix with its ranges was used to set up the game as illustrated in Table 5.15. Each attribute level was scored per festival between the parameters of the scale, ranging from -1, 0 to 1 depending on where the exact value of each festival lay in the range. The weighted raw utility values shown in Table 5.4 were used to score Festival A, those in Table 5.5 to score Festival B and those in Table 5.6 to score Festival C. The results of the scoring of attribute levels are illustrated in Table 5.15.

Table 5.15: The game theory as set up for Festivals A, B and C

Attributes and levels		Festival A	Festival B	Festival C
Festival brand				
Festival A	A1	1	-1	0
Festival B	A2	-1	1	-1
Festival C	A3	0	0	1
Entertainment or festival activities				
Quality arts	A4	0	0	0
Quality performances	A5	1	1	1
Quality music	A6	1	1	0
Refreshments				
A wide variety of good quality	A7	1	1	0
Friendly service	A8	1	0	1
Value for money	A9	1	1	1
Transport				
Good transport	A10	0	1	0
Sufficient parking	A11	0	0	0
Safe and secure parking	A12	1	1	1
Ticket prices				
Lower than current price	A13	1	1	1
The same price	A14	0	0	0
Higher than current price	A15	-1	-1	-1
Total		6	6	4

Table 5.15 indicates the game set up for Festivals A, B and C. If any of the cells (A1 to A15) changes, it will affect the outcome of the game. This game illustrates the result for each festival's game, based on the scores given.

In Table 5.16, the game was set up and a weight per individual attribute level awarded on the basis of the results of the conjoint study. A percentage was awarded for each characteristic.

Table 5.16: Weight and percentage awarded to each attribute level in the game and the outcome of the game for each festival scenario

Attributes and levels	Weight of attribute levels	Percentage of total weight	Festival A	Festival B	Festival C
Festival brands					
Festival A	42	8%	8%	-8%	0%
Festival B	30	6%	-6%	6%	-6%
Festival C	68	14%	0%	0%	14%
Entertainment or festival activities					
Quality arts	21	4%	0%	0%	0%
Quality performances	42	8%	8%	8%	8%
Quality music	50	10%	10%	10%	0%
Refreshments					
A wide variety of good quality	21	4%	4%	4%	0%
Friendly service	24	5%	5%	0%	5%
Value for money	31	6%	6%	6%	6%
Transport					
Good transport	23	5%	0%	5%	0%
Sufficient parking	21	4%	0%	0%	0%
Safe and secure parking	35	7%	7%	7%	7%
Ticket prices					
Lower than current price	60	12%	12%	12%	12%
The same price	34	7%	0%	0%	0%
Higher than current price	0	0%	0%	0%	0%
Total	502	100%	55%	50%	46%

The final results of the game indicate that Festival A has the best results with 55%, followed by Festival B with 50% and Festival C with 46%. On interpreting the outcome of the game it is clear that Festival C's brand is the most important of the three festivals' brands (14%), but not by enough to give the festival the total best score in the outcome of the game. In the attribute level of *Entertainment or festival activities*, the content of the music offered at the festival (10%) apparently carries the

most weight. Festival A and Festival B both have a higher percentage than Festival C for this attribute.

The result indicates that the respondents regarded the content offered at a festival as very important, and the management of arts festivals should regard the content as a valuable indicator of arts festival attendance.

As regards the attribute *Refreshments* offered, the respondents at all three festivals gave equal value to the attribute level *Value for money* with a score of 6%, though the respondents interviewed at Festivals A and C valued *Friendly service* higher than Festival B and those at Festivals A and B a *Wide variety of good-quality refreshments* higher than Festival C. All three festivals scored 7%, the highest score for the attribute level *Safe and secure parking at the festival*, though the respondents gave Festival B a fairly high value for the attribute level *Good transport* with a score of 5%.

For each of the three festivals the attribute *Ticket prices* received similar scores, as all respondents awarded a higher score to the attribute level *Lower than the current price*. It should also be noted that in some cases the venues (church and school halls) in which these productions and shows are held due to quality of sound and acoustic might have influenced the prices that respondents were willing to pay. If productions or musicals were held in proper theatres, the respondents might be willing to pay higher prices.

Tables 5.17 to 5.25 illustrate the probable outcome of the game for each of the five endogenous variables, after changes were made to the individual scores in one of the variables of *Festival brand*, namely *Entertainment or festival activities*, *Refreshments* (food and beverages), *Transport* and/or *Ticket prices*. The game only explores what might happen when changes are made to these scores.

Table 5.17 indicates that changing Festival C's score for *Quality music* (cell A6) from 0 to 1 improves the festival's overall score by 10%.

Table 5.17: Weight and percentage awarded to each attribute level in the game and the outcome of the game if Festival C's score for *Quality music* is improved

Attributes and levels		Weight of attribute levels	Percentage of total weight	Festival A	Festival B	Festival C
Festival brands						
Festival A	A1	42	8%	8%	-8%	0%
Festival B	A2	30	6%	-6%	6%	-6%
Festival C	A3	68	14%	0%	0%	14%
Entertainment or festival activities						
Quality arts	A4	21	4%	0%	0%	0%
Quality performances	A5	42	8%	8%	8%	8%
Quality music	A6	50	10%	10%	10%	10%
Refreshments						
A wide variety of good quality	A7	21	4%	4%	4%	0%
Friendly service	A8	24	5%	5%	0%	5%
Value for money	A9	31	6%	6%	6%	6%
Transport						
Good transport	A10	23	5%	0%	5%	0%
Sufficient parking	A11	21	4%	0%	0%	0%
Safe and secure parking	A12	35	7%	7%	7%	7%
Ticket prices						
Lower than current price	A13	60	12%	12%	12%	12%
The same price	A14	34	7%	0%	0%	0%
Higher than current price	A15	0	0%	0%	0%	0%
Total		502	100%	55%	50%	56%

Table 5.17 indicates that changing Festival C's score for *Quality music* from 0 to 1 improves the festival's total score from 46% to 56%. This might indicate that Festival C could improve the content and quality of the music it offers, i.e. the attribute level could be improved. In this case, Festival C obtained the best overall score of the three of the festivals.

If the attribute level of *Quality music* is improved for Festival C, the total score for this festival would improve too. The assumption can be made that Festival C's management still does not offer the optimum product in music. In this case, Festival C could still optimise the entertainment product, which means there is room for the improvement of the key product. Therefore the management should reconsider its selection of music products, such as ensuring a better quality of bands or singers.

Either the music product at Festival C is not presented effectively or it does not meet the required standard. The festival management should consider specific factors, such as better musicians, bands and sound effects, to ensure that the best music products are offered.

Table 5.18 indicates that changing Festival A's score for Festival Branding (cell A1) from 1 to a weaker 0 decreases the festival's overall score by 9%.

Table 5.18: Weight and percentage awarded to each attribute level in the game and the outcome of the game if Festival A's score for *Festival brands* is weakened

Attributes and levels		Weight of attribute levels	Percentage of total weight	Festival A	Festival B	Festival C
Festival brands						
Festival A	A1	42	8%	0%	-8%	0%
Festival B	A2	30	6%	-6%	6%	-6%
Festival C	A3	68	14%	0%	0%	14%
Entertainment or festival activities						
Quality arts	A4	21	4%	0%	0%	0%
Quality performances	A5	42	8%	8%	8%	8%
Quality music	A6	50	10%	10%	10%	0%
Refreshments						
A wide variety of good quality	A7	21	4%	4%	4%	0%
Friendly service	A8	24	5%	5%	0%	5%
Value for money	A9	31	6%	6%	6%	6%
Transport						
Good transport	A10	23	5%	0%	5%	0%
Sufficient parking	A11	21	4%	0%	0%	0%
Safe and secure parking	A12	35	7%	7%	7%	7%
Ticket prices						
Lower than current price	A13	60	12%	12%	12%	12%
The same price	A14	34	7%	0%	0%	0%
Higher than current price	A15	0	0%	0%	0%	0%
Total		502	100%	46%	50%	46%

Table 5.18 indicates that changing Festival A's score for *Festival brands* from 1 to 0 weakens the festival's total score from 55% to 46%. This might indicate that it would be prudent to keep the branding unchanged at Festival A. The table also illustrates

that branding is important to each of the three festival scenarios. In this case, Festival A and Festival C obtained the lowest overall scores of the three festivals.

Table 5.19 indicates that changing Festival A's score for *Quality arts* (cell A4) from 0 to 1 improves the overall score of the festival by only 4%.

Table 5.19: Weight and percentage awarded to each attribute level in the game and the outcome of the game if Festival A's score for *Quality arts* is improved

Attributes and levels		Weight of attribute levels	Percentage of total weight	Festival A	Festival B	Festival C
Festival brands						
Festival A	A1	42	8%	8%	-8%	0%
Festival B	A2	30	6%	-6%	6%	-6%
Festival C	A3	68	14%	0%	0%	14%
Entertainment or festival activities						
Quality arts	A4	21	4%	4%	0%	0%
Quality performances	A5	42	8%	8%	8%	8%
Quality music	A6	50	10%	10%	10%	0%
Refreshments						
A wide variety of good quality	A7	21	4%	4%	4%	0%
Friendly service	A8	24	5%	5%	0%	5%
Value for money	A9	31	6%	6%	6%	6%
Transport						
Good transport	A10	23	5%	0%	5%	0%
Sufficient parking	A11	21	4%	0%	0%	0%
Safe and secure parking	A12	35	7%	7%	7%	7%
Ticket prices						
Lower than current price	A13	60	12%	12%	12%	12%
The same price	A14	34	7%	0%	0%	0%
Higher than current price	A15	0	0%	0%	0%	0%
Total		502	100%	59%	50%	46%

Table 5.19 indicates that changing Festival A's score for *Quality arts* from 0 to 1 improves the festival's total score only from 55% to 59%. This might indicate that Festival A could improve slightly if it offered better-quality arts. In this case Festival A obtained the best overall score of the three festivals. This might indicate that improving the quality of the arts would not have as large an effect as improving the quality of the music (see Table 5.17 in this regard).

Table 5.20 indicates that changing Festival A's score for *Quality performances* (cell A5) from 1 to 0 weakens this festival's overall score by 9%.

Table 5.20: Weight and percentage awarded to each attribute level in the game and the outcome of the game if Festival A's score for *Quality performances* is weakened

Attributes and levels		Weight of attribute levels	Percentage of total weight	Festival A	Festival B	Festival C
Festival brands						
Festival A	A1	42	8%	8%	-8%	0%
Festival B	A2	30	6%	-6%	6%	-6%
Festival C	A3	68	14%	0%	0%	14%
Entertainment or festival activities						
Quality arts	A4	21	4%	0%	0%	0%
Quality performances	A5	42	8%	0%	8%	8%
Quality music	A6	50	10%	10%	10%	0%
Refreshments						
A wide variety of good quality	A7	21	4%	4%	4%	0%
Friendly service	A8	24	5%	5%	0%	5%
Value for money	A9	31	6%	6%	6%	6%
Transport						
Good transport	A10	23	5%	0%	5%	0%
Sufficient parking	A11	21	4%	0%	0%	0%
Safe and secure parking	A12	35	7%	7%	7%	7%
Ticket prices						
Lower than current price	A13	60	12%	12%	12%	12%
The same price	A14	34	7%	0%	0%	0%
Higher than current price	A15	0	0%	0%	0%	0%
Total		502	100%	46%	50%	46%

Table 5.20 indicates that changing Festival A's score for *Quality performances* from 1 to 0 weakens the festival's total score from 55% to 46%. This might indicate that Festival A should continue to offer quality performances because a lower score for this attribute would weaken the festival's overall score. In this case Festival A and

Festival C obtained the lowest overall scores of the three festivals. This is self-explanatory, as a lower score would produce lower results.

Table 5.21 indicates that changing Festival C's score for a wide variety of good-quality refreshments (cell A7) from 0 to 1 improves the festival's overall score by only 4%.

Table 5.21: Weight and percentage awarded to each attribute level in the game and the outcome of the game if Festival C's score for *Quality refreshments* is improved

Attributes and levels		Weight of attribute levels	Percentage of total weight	Festival A	Festival B	Festival C
Festival brands						
Festival A	A1	42	8%	8%	-8%	0%
Festival B	A2	30	6%	-6%	6%	-6%
Festival C	A3	68	14%	0%	0%	14%
Entertainment or festival activities						
Quality arts	A4	21	4%	0%	0%	0%
Quality performances	A5	42	8%	8%	8%	8%
Quality music	A6	50	10%	10%	10%	0%
Refreshments						
A wide variety of good quality	A7	21	4%	4%	4%	4%
Friendly service	A8	24	5%	5%	0%	5%
Value for money	A9	31	6%	6%	6%	6%
Transport						
Good transport	A10	23	5%	0%	5%	0%
Sufficient parking	A11	21	4%	0%	0%	0%
Safe and secure parking	A12	35	7%	7%	7%	7%
Ticket prices						
Lower than current price	A13	60	12%	12%	12%	12%
The same price	A14	34	7%	0%	0%	0%
Higher than current price	A15	0	0%	0%	0%	0%
Total		502	100%	55%	50%	50%

Table 5.21 indicates that changing Festival C's score for a wide variety of good-quality refreshments from 0 to 1 improves the festival's total score from 46% to 50%. This might indicate that Festival C could improve slightly by providing better refreshments at the festival. Once again, all things being equal, this change would not have as great an effect as improving the music. In this case, Festival B and Festival C obtained the same scores, but their scores were still weaker than that of Festival A score for the quality of refreshments.

Table 5.22 indicates that changing Festival B's score for *Friendly service* (cell A8) from 0 to 1 improves the festival's overall score by 5%.

Table 5.22: Weight and percentage awarded to each attribute level in the game and the outcome of the game if Festival B's score for *Friendly service* is improved

Attributes and levels		Weight of attribute levels	Percentage of total weight	Festival A	Festival B	Festival C
Festival brands						
Festival A	A1	42	8%	8%	-8%	0%
Festival B	A2	30	6%	-6%	6%	-6%
Festival C	A3	68	14%	0%	0%	14%
Entertainment or festival activities						
Quality arts	A4	21	4%	0%	0%	0%
Quality performances	A5	42	8%	8%	8%	8%
Quality music	A6	50	10%	10%	10%	0%
Refreshments						
A wide variety of good quality	A7	21	4%	4%	4%	0%
Friendly service	A8	24	5%	5%	5%	5%
Value for money	A9	31	6%	6%	6%	6%
Transport						
Good transport	A10	23	5%	0%	5%	0%
Sufficient parking	A11	21	4%	0%	0%	0%
Safe and secure parking	A12	35	7%	7%	7%	7%
Ticket prices						
Lower than current price	A13	60	12%	12%	12%	12%
The same price	A14	34	7%	0%	0%	0%
Higher than current price	A15	0	0%	0%	0%	0%
Total		502	100%	55%	55%	46%

Table 5.22 indicates that changing Festival B's score for *Friendly service* from 0 to 1 improves the festival's total score from 50% to only 55%. This might indicate that Festival B can improve only slightly by providing friendly service with refreshments at

the festival. In this case, Festival A and Festival B obtained the same scores, 5% higher than that of Festival C.

If the score for the attribute *Food and beverages* offered at a festival is changed, the outcome does not change as much as it would by changing the score for the attribute *Entertainment* and, more specifically, the attribute level of *Quality music*. The assumption can be made that increasing the scores for the other attributes would not make as great an improvement as increasing the score for music, because improving the quality of music has a much better end result for all the festival scenarios.

Table 5.23 indicates that changing Festival A's score for *Good transport* offered at the festival (cell A10) from 0 to 1 improves the festival's overall score by only 4%.

Table 5.23: Weight and percentage awarded to each attribute level in the game and the outcome of the game if Festival A's score for *Good transport* is improved

Attributes and levels		Weight of attribute levels	Percentage of total weight	Festival A	Festival B	Festival C
Festival brands						
Festival A	A1	42	8%	8%	-8%	0%
Festival B	A2	30	6%	-6%	6%	-6%
Festival C	A3	68	14%	0%	0%	14%
Entertainment or festival activities						
Quality arts	A4	21	4%	0%	0%	0%
Quality performances	A5	42	8%	8%	8%	8%
Quality music	A6	50	10%	10%	10%	0%
Refreshments						
A wide variety of good quality	A7	21	4%	4%	4%	0%
Friendly service	A8	24	5%	5%	0%	5%
Value for money	A9	31	6%	6%	6%	6%
Transport						
Good transport	A10	23	5%	5%	5%	0%
Sufficient parking	A11	21	4%	0%	0%	0%
Safe and secure parking	A12	35	7%	7%	7%	7%
Ticket prices						
Lower than current price	A13	60	12%	12%	12%	12%
The same price	A14	34	7%	0%	0%	0%
Higher than current price	A15	0	0%	0%	0%	0%
Total		502	100%	59%	50%	46%

Table 5.23 indicates that changing Festival A's score for *Good transport* from 0 to 1 improves the total score from 55% to 59%. This might indicate that Festival A can improve slightly in terms of the transport offered at the festival. In this case Festival A obtained the best overall score of all three festivals.

Table 5.24 indicates that changing Festival A's score for *Sufficient parking* (cell A11) from 0 to 1 improves the festival's overall score by 4%.

Table 5.24: Weight and percentage awarded to each attribute level in the game and the outcome of the game if Festival A's score for *Sufficient parking* is improved

Attributes and levels		Weight of attribute levels	Percentage of total weight	Festival A	Festival B	Festival C
Festival brands						
Festival A	A1	42	8%	8%	-8%	0%
Festival B	A2	30	6%	-6%	6%	-6%
Festival C	A3	68	14%	0%	0%	14%
Entertainment or festival activities						
Quality arts	A4	21	4%	0%	0%	0%
Quality performances	A5	42	8%	8%	8%	8%
Quality music	A6	50	10%	10%	10%	0%
Refreshments						
A wide variety of good quality	A7	21	4%	4%	4%	0%
Friendly service	A8	24	5%	5%	0%	5%
Value for money	A9	31	6%	6%	6%	6%
Transport						
Good transport	A10	23	5%	0%	5%	0%
Sufficient parking	A11	21	4%	4%	0%	0%
Safe and secure parking	A12	35	7%	7%	7%	7%
Ticket prices						
Lower than current price	A13	60	12%	12%	12%	12%
The same price	A14	34	7%	0%	0%	0%
Higher than current price	A15	0	0%	0%	0%	0%
Total		502	100%	59%	50%	46%

Table 5.24 indicates that changing Festival A's score for *Sufficient parking* from 0 to 1 improves the festival's total score from 55% to 59%. This might indicate that Festival A can improve only slightly in terms of the attribute *Transport* and the attribute level *Sufficient parking* offered at the festival. In this case, Festival A obtained the best overall score of all three festivals.

Changing the attribute level *Sufficient parking* at the festival, which can be expensive, does not improve the total effect as much as changing the attribute level of *Quality music* would.

Table 5.25 indicates that changing Festival A's score for the same ticket price (cell A14) from 0 to 1 improves the festival's overall score by 7%.

Table 5.25: Weight and percentage awarded to each attribute level in the game and the outcome of the game if Festival A's score on *Ticket prices* is changed to the same price

Attributes and levels		Weight of attribute levels	Percentage of total weight	Festival A	Festival B	Festival C
Festival brands						
Festival A	A1	42	8%	8%	-8%	0%
Festival B	A2	30	6%	-6%	6%	-6%
Festival C	A3	68	14%	0%	0%	14%
Entertainment or festival activities						
Quality arts	A4	21	4%	0%	0%	0%
Quality performances	A5	42	8%	8%	8%	8%
Quality music	A6	50	10%	10%	10%	0%
Refreshments						
A wide variety of good quality	A7	21	4%	4%	4%	0%
Friendly service	A8	24	5%	5%	0%	5%
Value for money	A9	31	6%	6%	6%	6%
Transport						
Good transport	A10	23	5%	0%	5%	0%
Sufficient parking	A11	21	4%	0%	0%	0%
Safe and secure parking	A12	35	7%	7%	7%	7%
Ticket prices						
Lower than current price	A13	60	12%	12%	12%	12%
The same price	A14	34	7%	7%	0%	0%
Higher than current price	A15	0	0%	0%	0%	0%
Total		502	100%	62%	50%	46%

Table 5.25 indicates that changing Festival A's score for a lower ticket price to the same ticket price and from 0 to 1 improves the festival's total score from 55% to 62%. This might indicate that Festival A could attract more attendees if the festival's ticket price remains unchanged. In this case, Festival A obtained the best overall score of the three festivals. However, this would be unreasonable, as festival attendees would always prefer the price to remain unchanged, even though rising costs and inflation would make it necessary to increase the ticket price.

The findings of the game theory clearly indicate the importance of the attribute level *Quality music* in the total arts festival package. It also indicates that certain arts festivals, whose management screens the musicians before letting them perform at the festival, are already on the road to success, and this screening should therefore continue. Generally, a festival's management need not concentrate so much on less important matters, such as food and beverages and sufficient parking, since the game theory indicates that attributes such as *Transport* (sufficient parking), and *Food and beverages* are not as important as *Quality music* to the total presentation of an arts festival.

The above clearly indicates, in the case of each individual variable, the possible outcome of the game when a variable is changed, and that some variables have a stronger or weaker effect on a festival's attractiveness to tourists. Furthermore, the results substantiate the fact that some variables or components (e.g. the quality of the music) do play an important role and that a festival's management should concentrate on improving the most significant variables.

Each of the endogenous variables tested (*Brand*, *Entertainment*, *Refreshments*, *Transport*, *Price*) resulted in a different outcome of the game theory and a different total effect from the other variables. This may indicate that some components do not play a major role, whereas others, such as music, have a stronger effect. The festival's management should therefore concentrate on the presentation of the music offered at the arts festival, and not as much attention to variables such as sufficient parking and transport.

The findings of the study are that one of the key indicators of an arts festival's success is the important attribute of *Quality music* and the festival's management should therefore concentrate most on this attribute; the less important attributes could receive little attention, without endangering the festival's success.

The results obtained from the games shown in Table 5.17 to Table 5.25 were used to develop the market-positioning model intended specifically for arts festivals.

5.5 CONCLUSION

Among the general information listed in Table 5.1, the responses of most of the respondents at all three arts festival scenarios indicated they would attend the festival again in future, reflecting a loyal group of festival attendees. The responses indicate that the two push factors *family togetherness* and *socialisation with friends* were the main motivation for respondents to return to Festival A, and *community pride* and *event novelty* for respondents to return to Festival B, but the responses indicated no specific or dominant motivation to return to Festival C.

The respondents at both Festival A and Festival C indicated that the single highest inhibitor item that negatively influenced them against attending was *the higher prices in shops and restaurants*. The inhibitor item *not having enough money to spend on productions* negatively influenced Festival B's respondents from attending the festival again.

One of the secondary objectives of the study was to determine which combination of attributes offered by arts festivals would assure an optimum market position. The results as indicated in Tables 5.4 to 5.6 of Section 5.3.2 were obtained by using the conjoint analysis technique. Table 5.26 indicates the attribute levels with the highest weighted raw utility values for each attribute.

Table 5.26: A summary of three arts festival scenarios and optimum attribute levels

	Festival A	Festival B	Festival C
Attributes	Attribute levels		
<i>Festival brands</i>	Festival A	Festival B	Festival C
<i>Entertainment or festival activities</i>	Quality music	Quality music	Quality performances
<i>Refreshments or food and beverages</i>	A wide variety of good quality	Value for money	Value for money
<i>Transport</i>	Safe and secure parking	Safe and secure parking	Safe and secure parking
<i>Ticket prices</i>	Lower than current price	Lower than current price	Lower than current price

The three festivals A, B and C reveal some similarities as well as differences regarding the best possible combination of attributes for successful positioning. All the respondents at the three arts festival scenarios preferred the attribute *Festival brands* of the festival held in the region. With regards to the attribute *Entertainment*, the respondents at Festivals A and B preferred the attribute *quality music*.

Those at Festival C differed in that its respondents indicated their preference for *quality performances* – the only festival where this was a major preference. In the case of the attribute *Refreshments* (food and beverages), the respondents at Festivals B and C were similar in preferring the attribute level *value for money*. The respondents at Festival A differed, as they preferred the attribute level *a wide variety of good quality* of the attribute *Refreshments*. There is a similarity among all three arts festival scenarios regarding the attributes *Transport* and *Ticket prices*, as the responses obtained at all three arts festival scenarios indicated preferences for the attribute levels *safe and secure parking* and *the same price*.

Another objective was to compare the different arts festival scenarios and their attributes with one another. In this way, the author could determine what would be the most successful arts festival presentation in terms of a tourism attraction. The game theory technique was employed in the current study to integrate the data and to compare the three different arts festival scenarios. The attribute level importance (weighted raw utility value) for all three festivals scenarios globally, as shown in Table 5.3, was used to design the matrix or scale for the game theory.

Each attribute level was then scored per festival between the parameters of the scale (Table 5.14), ranging from -1, 0, to 1, depending on where the exact value of each festival lay in the range. The weighted raw utility values shown in Table 5.4 were used to score Festival A, those in Table 5.5 to score Festival B and those in Table 5.6 to score Festival C. The results of the scoring of attribute levels are illustrated in Table 5.15. In Table 5.16 the game is set up and a weight awarded to each individual attribute level.

The final results of the game theory indicate that Festival A scored the best results with a total score of 55%, followed by Festival B with 50% and Festival C with 46%. Festival C's brand was the most important of the three festivals' brands (14%), but not strong enough to award a total best score in the outcome of the game.

The attribute *Entertainment or festival activities* and more specifically the *Quality music* (10%) offered at the festival appeared to be extremely important. Festival A and Festival B scored a higher percentage than Festival C on this attribute level.

The result indicates that the respondents give high importance to the music content offered at a festival, which is the reason why the management of arts festivals should regard this as a valuable indicator and take steps to assure better quality in the music offered at an arts festival.

Regarding the attribute *Refreshments offered*, the responses indicated that the attribute level *Value for money* was equally highly valued at the three festivals, with a score of 6%. The responses obtained at Festivals A and C indicate that *Friendly service* was valued and at Festivals A and B, *a wide variety of good quality refreshments* was valued. All three festivals scored 7%, the highest score for the attribute level *Safe and secure parking at the festival*, though Festival B gained a fairly high score of 5% for the attribute level *Good transport*.

The attribute *Ticket prices* for each of the three festivals had an identical score as all respondents awarded the same score to the attribute level *Lower than current price*. Once again due to sound quality of venues (church and school halls) where these productions and shows are held could influence the price that respondents are willing to pay. If productions or musicals were held in proper theatres, festival attendees might be willing to pay higher prices.

The outcomes of the different games, as displayed in Tables 5.17 to 5.25, indicate the following:

- The attribute level *Quality music* improved by 10% in the outcome of a game if the score is improved from 0 to 1;
- the attribute level *Quality arts* improved by 4% in the outcome of a game if the score is improved from 0 to 1;
- the attribute level *a Wide variety of good quality refreshments* improved by 4% in the outcome of a game if the score is improved from 0 to 1;
- the attribute level *Friendly service with refreshments* improved by 5% in the outcome of a game if the score is improved from 0 to 1;
- the attribute level *Good transport offered* improved by 4% in the outcome of a game if the score is improved from 0 to 1;
- the attribute level *Sufficient parking – transport offered* improved by 4% in the outcome of a game if the score is improved from 0 to 1; and
- the attribute level *The same ticket price offered* improved by 7% in the outcome of a game if the score is improved from 0 to 1.

The results of the game theory and conjoint analysis study were used to meet the last secondary objective, namely to develop the market-positioning model, which focuses on the data analysis contained in this chapter. In Chapter 6, the research findings are integrated and interpreted more comprehensively and, resulting from these conclusions and recommendations, a model is developed to assist with positioning an arts festival in the market.

This model may add value to the tourism industry of South Africa by indicating the essential focus of arts festivals. The next chapter concludes with the final recommendations, comments on the limitations of the study and recommendations for future research.

CHAPTER 6

6 CONCLUSIONS AND RECOMMENDATIONS

6.1 INTRODUCTION

Chapter 1 notes the growing number of festivals in South Africa, as new ones are continually being added to the events calendar. Another secondary objective was achieved by refining the numerous festivals forming part of special interest tourism in the South African festival market. The festivals fell into the following seven broad categories: arts festivals, dance, jazz and music festivals; sacred, language and religious festivals; heritage and culture festivals; harvest and food festivals; shows, fairs and festivals; and sport events.

Table 1.2 lists the calendar of festivals and events in South Africa. Chapter 2 reviewed literature relating to the tourism phenomenon, SIT, festivals and events, and more specifically on arts festivals, whilst tourism marketing and the theory of the market positioning thereof are addressed in Chapter 3. The research methodology and design of the questionnaire are reported in Chapter 4, followed by the data analysis and results in Chapter 5.

However, the purpose of this chapter is firstly to provide a summary of the research findings and to make a recommendation on the use of a market-positioning model for arts festivals on that basis. This model was developed from the results obtained from surveys undertaken at the arts festival scenarios and based on the conclusions of the study.

Positioning studies are some of the most useful research studies to marketers and management in the tourism industry, because they provide a clear direction for marketing efforts by comparing tourist products, such as arts festivals, and by describing the position of a festival in the mind of a tourist (Prince, 1990:25).

In selecting an optimum position, a general understanding is necessary regarding what festival attendees think of the attributes and attribute packages. The perceptions of festival attendees at arts festival scenarios were tested to determine the optimum position of each festival in the geographical region where the specific festival was held.

The primary research objective of the study was to construct a market-positioning model that could be used by South African event co-ordinators to provide guidelines on ensuring a successful arts festival. The model, as discussed in this chapter, could add value to the tourism industry and could also contribute to the body of knowledge about South African arts festivals sustainability. The first secondary objective of the study was to determine which attributes and combination of attributes would drive the best practices of the management of arts festival scenarios. The situational inhibitors that might prevent respondents from attending any of the arts festivals in these scenarios were also addressed. The conjoint analysis technique was used to analyse the data in this regard. The technique of conjoint analysis has frequently been used for positioning in marketing but its application to tourism and more specifically arts festivals in South Africa is seldom reported in literature (see Chapter 3, Table 3.4).

Following that, the results from these analyses were used to achieve the second secondary objective, namely to compare the three selected arts festival packages with the attributes and to determine the optimum combination of attributes for each festival. The game theory technique allowed the author to compare the arts festival scenarios with one another and to determine the attributes of the most successful arts festival presentation as a tourism attraction.

The technique of game theory is usually employed in economics, mathematics and other disciplines in the social and behavioural sciences (McCain, 1997:1). The optimisation technique was deemed appropriate in this case as it takes into account the semi-competitive situation of arts festivals as well as the non-representativeness of the sample, as discussed in Section 4.9 of Chapter 4.

In support of this optimisation objective, the designing of a model for the tourism industry of South Africa is explained in Section 6.3. The model was used to test different combinations of the attributes typically related to arts festivals for the three arts festival scenarios. The knowledge gained from testing these combinations of attributes was employed to develop the market-positioning model, specifically for arts festivals. The analysis presented in Chapter 5 has been organised in a way that addressed these objectives.

The present research further employed the techniques of conjoint analysis and game theory to refine the market positioning and optimisation. A structured conjoint analysis questionnaire involving personal interviewing of a sample of respondents was used to gather the data required for this study. This is a scenario-based study and the data collected were based on judgemental and interlocking quota sampling. Conjoint analysis is a widely accepted type of research technique as it measures part-worth utilities for product attributes, typically at the level of the individual respondents, and then estimates preferences for “what if” products through simulations (CVA, 1996:1).

Conjoint analysis is useful for determining how the buyers of a product rate its various characteristics, and is basically a “trade-off” exercise in which customers have to make preference decisions based on the relative importance of one product benefit over another (Botha, 2002:41). In an imaginary scenario, the respondents were asked to compare one arts festival with a combination of attributes to another arts festival with a different combination of attributes, and then to indicate their strongest preference on a 9-point semantic differential rating scale.

Certain demographic, geographic and behavioural information was included in the questionnaire. The situational inhibitors that might prevent respondents from attending an arts festival were also measured on an 11-point interval rating scale and treated as a demographic variable. These situational inhibitors provide additional information about positioning an arts festival in the market.

The results of the attributes' level of importance (weighted raw utility value) indicated that each of the three arts festival scenarios is unique in the combination of attributes that festival attendees look for and the factors that inhibit them from attending such festivals. The game theory technique was employed in the present study to integrate the data and to compare the three different arts festival scenarios. The attributes' level of importance (weighted raw utility value) for all three festivals scenarios globally, shown in Table 5.3, were used to design the matrix or scale for the game theory. The game was set up, and the outcome displayed the optimum position for each festival in the market.

The main conclusions of the study are summarised, and the results are discussed and interpreted in Section 6.2. Where appropriate, recommendations are made for improving the festival scenarios. The findings derived from the analyses are used in the discussion of the recommended market-positioning model in Section 6.3. The last section of this chapter comments on the limitations of the study and identifies areas for future research.

6.2 CONCLUSIONS AND RECOMMENDATIONS OF DATA ANALYSIS

The main conclusions and recommendations from the analysis of the data are discussed in terms of the objectives of the study and presented under subheadings. The model is one of the recommendations of the study and is discussed in Section 6.3.

6.2.1 General information

- The majority of respondents in the three arts festival scenarios indicated that they **would attend** the specific **arts festival again** in future (see Table 5.1). This indicates a group loyal to the brand and or offerings at the festivals of the particular event held in the region and should be used in the future marketing of these arts festivals.

- The level of **educational qualifications** of the respondents at the three arts festival scenarios differed: respondents at Festival A and B had relatively higher qualifications than those attending Festival C (see Table 5.1). These higher qualification levels may be due to the universities in the towns where Festivals A and B are held, whereas the town for Festival C only has colleges. The deduction was that better-educated people tend to go to these arts festivals and correlates with previous finding of Hughes (2000:17). These respondents are perceived to be on a higher level according to Maslow's hierarchy of needs. Maslow explains that people are driven by particular needs at particular times, and these needs are arranged in hierarchical order from the most basic to the most important. Self-actualisation is the highest level of needs, and includes taking an interest in the latest happenings in the art world (cited in Armstrong & Kotler, 2003:155).

6.2.2 Motivating factors at arts festival scenarios

These results provided some valuable supportive information about the internal psychological factors likely to motivate attendees to go to arts festivals.

- Table 5.1 indicates that the dominant **push factor** for respondents at Festival B was *Event novelty* and *Community pride*. This was of such significance to the respondents in the Grahamstown region that it could be regarded as a factor differentiating it from the other two arts festival scenarios. The high score may be due to the fact that Festival B has the longest history of arts festivals in South Africa. These respondents had a more discerning taste as a festival audience and this should be promoted in the festival' marketing material.
- There were apparently two important **push factors** motivating the respondents to attend Festivals A and C, namely *socialisation with friends* and *family togetherness* (see Table 5.1). There was a distinct difference in the push factors of the respondents at the mainly Afrikaans and those at the

mainly English festivals. The two mainly Afrikaans festivals are Afrikaans events and the question that arises, is what would happen to Festivals A and C if the main language is to change. By contrast, the respondents at the mainly English Festival B represent the audience's discerning taste and a preference for *event novelty* and *community pride*. The recommendation is that these festivals should focus on their uniqueness in their marketing. The respondents at Festival A and Festival C showed a similar push-factor pattern, but Festival B is differentiated by the dominant push factors of “*event novelty*” and “*community pride*”. It is recommended that Festival B should regard this as a sustainable competitive advantage for its mainly English niche market. Festival A and C operate in a uniquely Afrikaans niche market. Two niche markets are therefore identified. One is mainly Afrikaans and, as it is predominantly a folk festival, the festival management should focus on culture and language. The other market indicates the more discerning taste of the mainly English audience and the festival management should focus on thought-provoking drama with novelty appeal.

6.2.3 Situational inhibitors at arts festival scenarios

These results met the objective to determine the situational inhibitors that might prevent respondents from attending arts festival scenarios, and contribute further information about positioning.

- Table 5.2 lists the **situational inhibitors** that might prevent respondents at the three arts festival scenarios from attending the respective arts festival. The strongest inhibitor items influencing the respondents overall relate to the combined dimension *time and money*. The situational inhibitors involved in money and prices appear to be the most significant for positioning an arts festival in the market. It is therefore recommended that great care should be taken with pricing and prices should not be raised unnecessarily. The three arts festival scenarios should all note their audiences' price sensitivity and should try to add value for their attendees.

- Table 5.2 indicates that attendees at both Festivals A and C were negatively influenced mainly by the **inhibitor** item *lack of parking facilities at venues*. In the case of Festival B a relatively large number of items had a neutral to least likely effect on the dimension *Accessibility* and *Transport* and the dimension *Social problems* at the arts festival.
- The situational inhibitors can be interpreted as having different inhibitory effects on the three festival scenarios. However, the respondents at Festival C are most likely to be inhibited, followed by those at Festival A, and are least likely to influence the respondents at Festival B. The situational inhibitors all differ significantly from one another and in their relative importance at each of the three festival scenarios. The festival co-ordinators ought to understand these inhibitors fully to ensure the survival and future success of their festivals.

6.2.4 Attributes and attribute composition of arts festival scenarios

These research results achieved the objective of determining the attributes and attribute combination that would drive the success of arts festival scenarios in the market.

- Based on the **relative attribute importance** to arts festival scenarios, shown in Figure 5.1, the deduction is made that Festival C has the strongest branding importance of the three arts festival scenarios, giving Festival C a competitive advantage in the market for this attribute level. It is recommended that Festivals A and B should in the future pay greater attention to the attribute Festival Brand as the power of branding cannot be ignored. The attribute *Entertainment or festival activities* is less important for Festival C than for the other two festivals. It is recommended that the management of Festival C should work on the attribute *Entertainment or festival activities* offered at the festival by including a variety of shows and productions. The management of these festival scenarios should also include this variety in the marketing and promotion of the festival.

- Figure 5.2 indicates the **attribute importance per individual respondent** at arts festival scenarios, revealing that Festival C has the highest weighted utility value on *Festival Brand* and Festival B on *Entertainment or festival activities*. The weighted utility values of *Refreshments* and *Transport* were relatively equally distributed across the three arts festival scenarios. Festival C's *Ticket prices* have the highest weighted utility value across the three festival scenarios. A recommendation can be made that the management of Festival C should focus on branding while improving its entertainment and activities, whereas that of Festivals A and B should improve their branding.

- Figure 5.3 depicts the cluster analysis of the **three arts festival scenarios and the four clusters**, indicating that Festival A is mainly *price-sensitive*, Festival B *activity-sensitive* and Festival C *brand-sensitive*. This should be considered when developing the marketing strategy for these festivals.

- Figure 5.4 depicts the **correspondence between arts festivals and attribute importance** and reveals the following important information about market positioning.
 - o Festivals A and B are furthest apart in terms of positioning, indicating it is highly unlikely that Festival A's respondents would attend Festival B, and vice versa, but Festival B's respondents might attend Festival C, and vice versa. The geographic distance between the three selected arts festivals might be a contributing factor, as Festivals B and C are both held in the Cape Province whereas Festival A is held in the North West Province.
 - o Respondents attend Festival B predominantly for the attributes *Refreshments*, *Transport* and *Entertainment*.
 - o Respondents attend Festival A mainly for the attribute *Ticket prices*, because tickets are cheaper, within their financial means and offer value for money. They also attend the festival for the entertainment value of the festival activities.

- o Respondents attend Festival C for the attributes *Festival brand* and to a lesser degree for the attribute *Ticket prices*.
 - o Festival B is slightly better positioned on *Festival brand* than Festival A. The management of Festival A should therefore improve its branding by striving for a more exclusive festival. Festival B has already established a strong and typical English arts festival view, and Festival C a strong Afrikaans “folk festival” view, whereas Festival A, the newest of the three, is in between and has not yet been firmly established.
- Figure 5.5 depicts the **correspondence between age and festival attributes** at the three arts festival scenarios, revealing information about positioning. Each of the three age groups tends to be associated with a specific festival attribute and the following three subsegments can therefore be identified in the market:
 - o The youngest group, between 18-30 years, gives highest value to the attribute *Ticket prices*. Respondents in this age group do not yet earn high salaries and the younger ones may still be their parents' dependants. It is recommended that this subsegment should be offered special concession prices for students.
 - o The middle age group, between 31 and 45 years, mainly value the attribute *Entertainment or festival activities*. This may indicate the life-cycle stage of the respondents, as they are probably more concerned about family life and other factors. This subsegment should be accommodated in the market, for example by providing baby-sitting and family-care facilities as well as entertainment for primary school pupils during the festival.
 - o The age group older than 45 years mainly value the attribute *Transport*. This group may be less mobile and regard getting to the festival as a struggle if it is too far from home. It is recommended that this subsegment should be catered for in the festival and promotion material by giving greater priority to transport and accessibility to the festival.

This older group should be given preference regarding transport to venues, such as the minibus shuttles offered at venues.

- o The age group older than 45 placed less emphasis on *Ticket prices* than the two younger age groups, as the older group comprises semi-retired people with a relatively high disposable income. It is recommended that the needs of this subsegment should be met as far as possible in future, for example by providing value-added services, such as minibus shuttles, since people in this age group are generally better off financially and would be willing to spend money at a festival.
- Figure 5.6 depicts the **correspondence between arts festival scenario and home language**, revealing that the three arts festival scenarios operate in a unique market and providing valuable information about home-language market positioning.
 - o Festivals A and C are generally associated with Afrikaans as the attendees' home language. The towns of Potchefstroom and Oudtshoorn have strong associations with the Afrikaans language. The question is whether the management of Festivals A and C should attempt to attract attendees who speak English and other languages, or whether they should focus instead on those who speak Afrikaans as their home language. Attendees from the English, Tswana, Xhosa, Sotho and Tsonga groups could be targeted and attracted to Festivals A and C by presenting shows in these languages, and in this way, if borne out by market research, such festivals might fill a gap in the market. However, it is recommended that Festivals A and C should not change the mainly Afrikaans character of the festival, and that an effort should be made to cater also for the Afrikaans-speaking coloured people in the community.
 - o Festival B differs from Festivals A and C, as English and other languages are the main home language of attendees. Grahamstown is linked historically with the 1820 British Settlers and celebrates these cultural ties, which is why the respondents regard English as of great

importance. Few attendees who speak Afrikaans and other languages as their home language attend Festival B, leading to the same question that was raised for Festivals A and C, i.e. whether the management of Festival B should continue to concentrate on the English exclusiveness that makes the festival unique. It is recommended that management should continue to focus on and promote English as the preferred language, and in this way keep the unique English character of the festival. It is noted that most Afrikaans people in the LSM 8-10 groups seldom understand English well.

- The **attribute simulation tool** enabled the simulation of the best possible combination of attributes for each arts festival scenario. A summary of Tables 5.4 to 5.6 indicates that the following attribute levels have the highest weighted raw utility values for each festival scenario, as illustrated below.

Table 6.1: The three arts festival scenarios summarised

	Festival A	Festival B	Festival C
Attributes	Attribute levels		
Festival brands	Festival A	Festival B	Festival C
<i>Entertainment /festival activities</i>	Quality music	Quality music	Quality performances
<i>Refreshments/food and beverages</i>	A wide variety of good quality	Value for money	Value for money
<i>Transport</i>	Safe and secure parking	Safe and secure parking	Safe and secure parking
<i>Ticket prices</i>	Lower than current price	Lower than current price	Lower than current price

6.2.5 Comparison of the three arts festival scenarios

The game theory results meet the objective of comparing each arts festival's attributes with one another to determine the optimum arts festival presentation as a tourism attraction.

- Table 5.16 shows a comparison of the three arts festival scenarios and the attributes using game theory. The outcome of the game indicates that Festival A has the highest score, followed by Festival B and lastly by Festival C.
- Festival C's brand was the most important of the three festivals' brands, but was still not strong enough to award it a total best score in the outcome of the game.
- The attribute *Entertainment or festival activities* and more specifically *Quality music* offered at the festival appears to be very important. Festivals A and B both scored a higher percentage than Festival C on this attribute level. The result indicates the great importance of the music content offered at a festival to their attendees, and the management of arts festivals should regard this as a valuable indicator for the success of a festival.
- Regarding the attribute *Refreshments offered*, the responses indicate that the attribute level *Value for money* had an equal score for all three festivals, though the responses for Festivals A and C indicate that *Friendly service* is rated higher, and those for Festivals A and B indicate a higher rating for a *Wide variety of good quality refreshments*.
- The three festivals all have a high score for the attribute level *Safe and secure parking at the festival*, though Festival B scored relatively higher for the attribute level *Good transport*.
- The attribute *Ticket prices* was the same for each of the three festivals as all respondents awarded the highest score to the attribute level *Lower than current price*.
- The outcomes of the different games in Tables 5.17 to 5.25 indicate the attribute levels and percentage improvement in the outcome of games if the

score is changed. It is recommended that the management of festivals should take note of the following results:

- **Quality music** gained 10%;
- **The same ticket price** gained 7%;
- **Friendly service** gained 5%;
- **Quality arts, a Wide variety of good quality refreshments, Good transport** offered, **Safe and sufficient parking** gained 4%.

A summary of these results is shown in Figure 6.1.

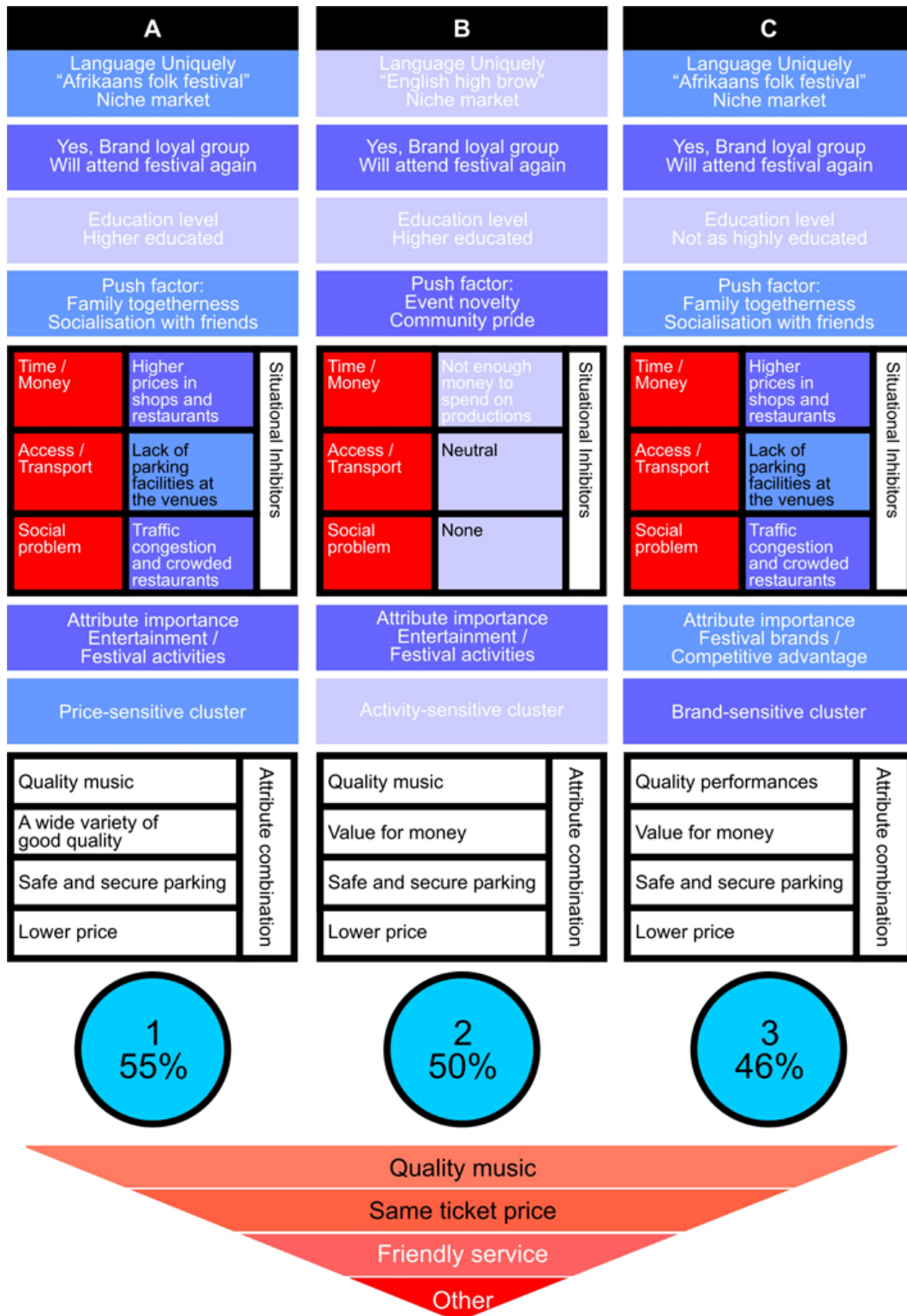


Figure 6.1: The most prominent differences and similarities between the three arts festival scenarios

6.3 PROPOSED MARKET-POSITIONING MODEL FOR ARTS FESTIVALS

The proposed market-positioning optimisation model for arts festivals, as discussed below, is based on the conclusions of the study and forms an integral part of the recommendations emanating from the study.

The top level of Figure 6.2 indicates that there are basically three main components, which should be combined and integrated before obtaining the end result. These ingredients are the body of knowledge on arts festivals (Chapter 2), marketing and market positioning (Chapter 3) and the results of the cluster analysis, correspondence analysis, conjoint analysis and game theory (Chapter 4). Along the centre of Figure 6.2 are the eight steps of the model showing the way that conjoint analysis is employed to determine the most preferred combination of attributes for each of the three arts festival scenarios.

The lowest part of Figure 6.2 shows how these results of the conjoint are used, and compares the three arts festivals by means of the game theory. The outcome of the various games indicates the optimum position for each festival, which is illustrated by the findings derived from the data reported in Chapter 5. The flow diagram of the market-positioning model (Figure 6.2) illustrates how the findings could be utilised to determine an optimum combination of attributes and a market position that would ensure the sustainability of the festival.

Arts festival knowledge	Target marketing (segmentation) and market positioning	Various techniques used in data analysis
▶ Tourism growth ▶ Changing needs of tourists ▶ The "new" tourist ▶ Special interest tourism ▶ Festival and event tourism ▶ Arts festivals	▶ Marketing as the golden thread ▶ Marketing mix ▶ Segmenting festival and event customers ▶ Market positioning and branding in marketing, tourism, festivals and events ▶ Models of market positioning (Boyd & Walker, 1990)	▶ Cluster analysis ▶ Correspondence analysis ▶ Conjoint analysis ▶ Game theory
Chapter 2	Chapter 3	Chapter 4



STEPS IN DESIGNING THE POSITIONING MODEL
1. Design the conjoint analysis. Determine the attributes and levels. The results produce the conjoint questionnaire section.
2. Test the conjoint questionnaire section and gather the data.
3. Analyse the data and calculate the relative attribute importance and weighted utility values.
4. Use the attribute importance to perform the cluster analysis.
5. Use the cluster analysis to perform the labelling of domains.
6. The clusters with labels are employed to do the correspondence analysis.
7. Correspondence analysis is employed to determine positioning maps.
8. Set up and run market simulation tool that allows alternative scenarios to be tested. Determine the optimum combination of attributes for each festival.



Festival brand	A	B	C
Entertainment or festival activities	Quality music	Quality music	Quality performances
Refreshments (Food and beverages)	A wide variety of good quality	Value for money	Value for money
Transport	Safe and secure parking	Safe and secure parking	Safe and secure parking
Ticket prices	Lower than the current price	Lower than the current price	Lower than the current price

Figure 6.2: An optimum market-positioning model for arts festivals

6.3.1 Flow of the model

The first column of the top row in Figure 6.2 refers to the body of knowledge on arts festivals, i.e. the flow process of the tourism phenomenon as addressed in Chapter 2 and illustrated in Figure 2.1. The phenomenal growth of tourism has contributed to maturity in the market and the changing needs in this sector (see Section 2.3.1.2). These changing needs manifest in an international interest in developing niche markets to cater for specific interests and activities to which the “new, more streetwise tourist” might want to devote leisure time (Page, 2003; Douglas et al., 2001; Weiler & Hall, 1992). One of these specialised new tourism trends is identified as special interest tourism (SIT). The different types of SIT opportunities available to the “new tourist” are identified in Table 2.1 in Section 2.4. One of these subcategories of SIT associated with the culture and heritage of an area, is festivals and events tourism.

This subcategory has had strong growth and is now a worldwide tourism phenomenon (Prentice & Andersen, 2003). Festivals and events have been identified as one of the fastest-growing categories of these new types of tourism offerings (see Section 2.5). This is also being seen in South Africa where tourists/customers can choose from an average of four festivals a month or one a week; and new festivals are continually being added to the events calendar. The successful development of these niche products not only benefits the South African tourism industry, but also poses major challenges to tourism management. Tassiopoulos (2005:26) notes that, although the benefits of festival and event tourism are increasingly being recognised in South Africa, little research has been done in this area so far.

It is ironic that the very popularity and growth of the festival industry in South Africa might threaten its future. Festivals and events are discussed in Section 2.5, which also contains a classification of festivals in the South African context. Through creative marketing and the effective market positioning of festivals this classification could be used to create and maintain positive images in the minds of festival attendees.

As festival and event tourism is an emerging industry, literature on research in this field is growing but still limited, especially in the more specialised field of arts festivals. Arts festivals are selected and presented in this thesis as scenarios for the purpose of research, for reasons including the following:

- this is currently one of the fastest-growing sectors of tourism (Allen et al., 2000);
- previous research done by the author that identified the gap (Van Zyl, 2002)
- three prominent arts festivals in South Africa, namely Aardklop Festival (Festival A) in Potchefstroom, National Arts Festival (Festival B) in Grahamstown, and KKNK (Festival C) in Oudtshoorn were previously classified as hallmark tourist events¹⁶ (Van Zyl, 2002);
- the South African government regarded the arts as important and that everybody in the community should have access to arts festivals.

If the management of arts festivals wants to sustain a festival in such an overcrowded environment, the importance of sound marketing and positioning becomes obvious. This is addressed in the second column of the top row in Figure 6.2, indicating the body of knowledge on marketing and market positioning in the arts festival context, as addressed in Chapter 3.

Marketing is the golden thread running through all the activities which lead to a successful festival or event (Hall, 1992). A festival or event will not succeed unless it can fulfil the expectations and needs of the participants (often from the local community) and the visitors (Shone & Perry, 2004; Hall, 1997). No festival or event can be all things to all people, because of the diverse market it attracts (Yeoman et al., 2004). A marketer can rarely satisfy everyone in a market, but should try to satisfy most. That is why it is important to select a target group.

¹⁶ *Hallmark events* are events that become so strongly identified with the spirit or ethos of a town, city or region that they become synonymous with the name of the place, and gain widespread recognition and awareness (Bowdin et al., 2001:17).

The festival and event customer, at the core of the market, is introduced through market segmentation where the focus is on grouping together those customers with similar requirements and buying characteristics (see Table 3.2 of Section 3.4).

Market positioning is central to marketing, and the topic is defined in various contexts, such as the marketing context where it had its origins, in the tourism context where it spread during the early 1980s, and in a festival and event context where nominal coverage is reported in the secondary literature (see Section 3.5.5). This lack of empirical research on the market positioning of arts festivals, specifically in the South African scenario, is identified and reported (see Table 3.4. of Section 3.5.5).

Familiarity with the features of market positioning in the festival context means that the different positioning models of various authors can be used to determine an optimum position in the market, as reported in Section 3.6. To address this secondary objective of the study six positioning models were selected based on their marketing orientation and the significance of their contribution to the topic of positioning in the present study. These six models were selected for the following reasons:

- The models developed by Ries and Trout (2001), Kotler (2003, 2000), Boyd and Walker (1990) – prominent authors of market positioning – have been adopted and employed in the tourism literature. These models have also received a considerable amount of attention in marketing (consumer behaviour) and tourism literature.
- Lovelock (2003) recognises that positioning applies to the services-marketing business, and continues to list the pitfalls if businesses do not position themselves effectively.
- Aaker and Shansby (1982) draw conclusions on developing a positioning strategy in marketing and are frequently cited in tourism literature.
- Reich (1999, 1997) introduced and applied the topic to hospitality and tourism marketing as well as tourism destinations.

The present study uses the model by Boyd and Walker, as a result of the extensive research done on the topic among the six positioning models examined. Boyd and Walker (1990) present some of the most thorough coverage of positioning and begin by offering definitions of the two terms, namely *market targeting* and *market positioning*. They give a detailed description of the process to be followed in each of these two cases as well as the eight steps to be followed when determining existing perceptions and the positioning decision for a new product or the repositioning of a current product. As illustrated in Figure 3.3, this model is workable for the present study because of the ease with which the model (the steps in the positioning process) could be adapted to the needs of the present research.

The third and last column of the top row in Figure 6.2 refers to various techniques used in data analysis. Various scholars' theories on cluster analysis in Section 4.8.1, correspondence analysis in Section 4.8.2, conjoint analysis in Section 4.8.3 and game theory in Section 4.9 are acknowledged throughout this study.

The first two columns indicate the secondary research chapters (Chapters 2 & 3) of the present study, and are combined with the last column (Chapters 4 & 5), namely the primary research chapters. By integrating these three columns, i.e. secondary literature on tourism, SIT (Chapter 2) and market positioning (Chapter 3) with the empirical results/primary research of this study (Chapters 4 & 5), the author developed a new model for positioning.

A model is available for the employment of conjoint analysis to determine the optimum combination of attributes which festival attendees seek, and the results are listed in the middle column of the second row in Figure 6.2. Following that, these results were used in the game theory to compare the three arts festivals. The outcome of the games indicated the optimum position for each festival in the market. This model for employing conjoint analysis and game theory to position arts festivals in the market is based on the body of knowledge about arts festivals and the market-positioning models of various authors (Kotler, 2000; Boyd & Walker, 1990).

The author integrated literature on arts festivals and market positioning with the empirical results of the study and concluded by developing a model to aid market positioning. In other words, the work of various authors such as Greenacre (1984) on correspondence analysis, Green (1975) on cluster analysis and Krieger, Green and Wind (2004) on conjoint analysis, Von Neumann and Morgenstern (1947) on the game theory as well as the body of knowledge on arts festivals and market positioning were combined, leading to the model on conduct positioning. This research is unique as literature from another discipline was adapted and applied to develop the market-positioning model described in this chapter.

The position that the arts festival scenarios hold in the market are illustrated in the following four positioning maps.

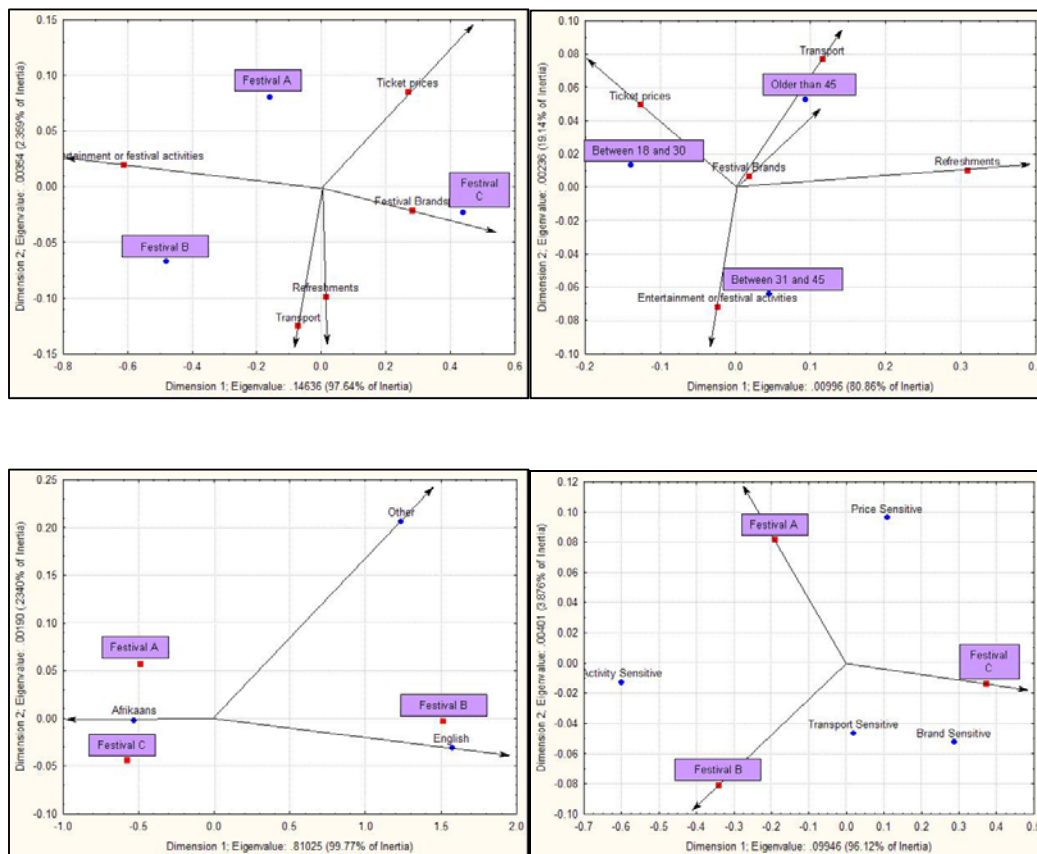


Figure 6.3: Positioning maps of the three arts festival scenarios

The steps to be followed in the market-positioning model are shown in the flow chart in Figure 6.4.

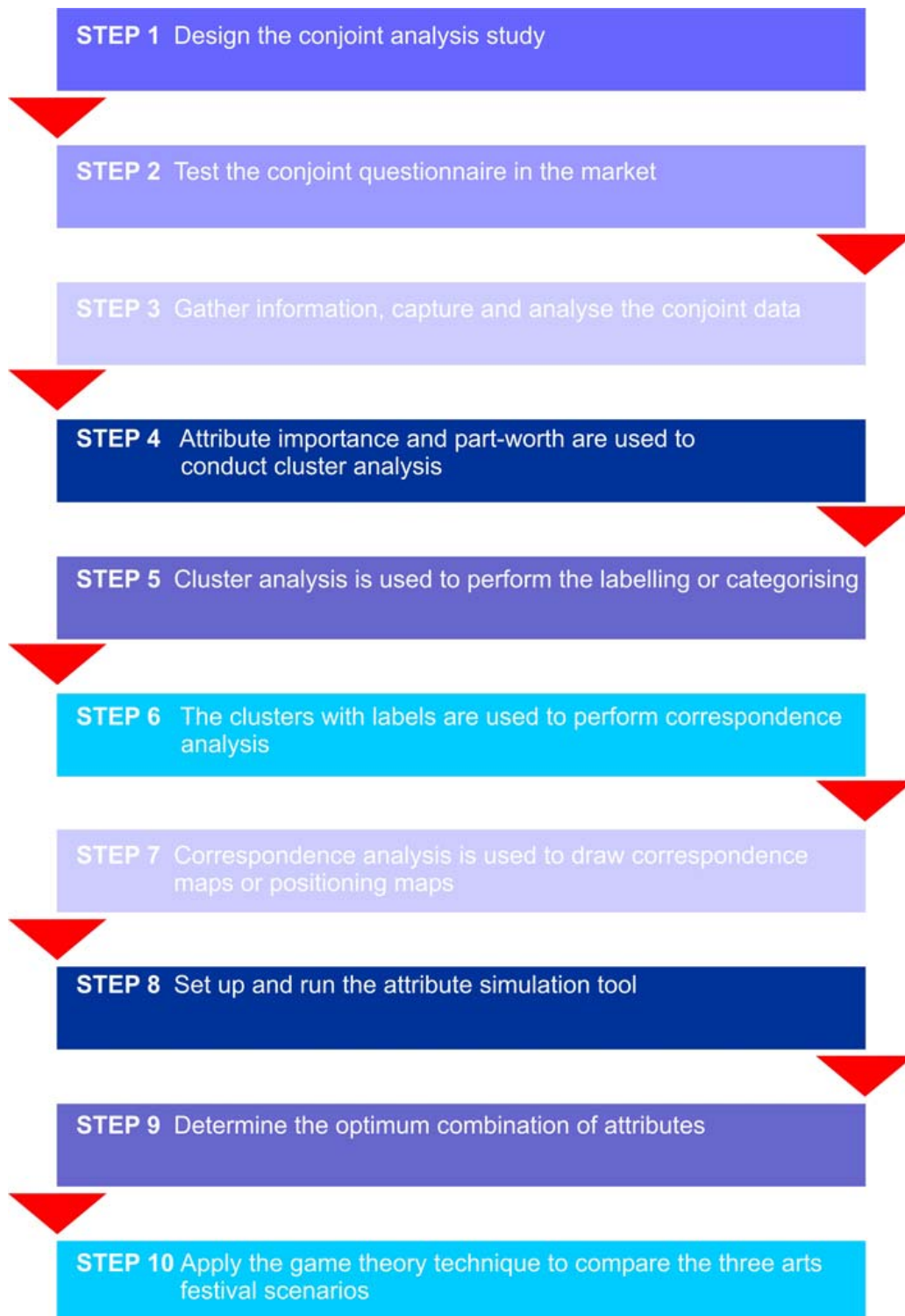


Figure 6.4: Steps in the market-positioning model

Each of these steps is discussed as employed in the present study:

Step 1 is to design the conjoint analysis study. The selection of attributes and levels is regarded as the single most important component of a conjoint analysis and depends on the objectives of the study (see Section 4.8.5 in Chapter 4). The conjoint design is a critical component in the success of any conjoint project (CVA, SawtoothSoftware:1996).

The attributes and attribute levels were deconstructed in order to grasp which variables segmented the market. The attributes describing a festival, which were selected for the present study, are discussed in Section 4.8.5 in Chapter 4. The reason for regarding these attributes (five in total) relevant to a description of an arts festival is discussed next.

The two attributes *Festival brands* and *Ticket prices* (see Table 4.5) are included in the conjoint as most conjoint studies include the attributes brand and price (Market Vision Research, 2002:6). In each case, three attribute levels were determined for each of the five attributes (see Table 4.5). Previous research was the rationale for selecting the other three attributes, namely *Entertainment or festival activities activities*, *Food and beverages* and *Transport to venues* (Van Zyl, 2002).

Furthermore, the behavioural, geographic and demographic segmentation variables were considered jointly with the five main attributes and levels (see Table 3.2 in Section 3.4). The behavioural component is determined by conjoint analysis, and the demographic and geographic variables by classification. Following that, these two are combined in the conjoint questionnaire. The situational inhibitors are included as a variable that will most likely provide additional information about market positioning.

Step 2 is to administer the conjoint questionnaire to a quota sample of respondents drawn from attendees at each of the three selected festival scenarios, and to gather the data obtained from the face-to-face interviews based on the questionnaire.

Step 3 is to capture and analyse the conjoint data. One of the first analyses is aimed at determining the relative importance of attributes and some part-worth or weighted utility values of attributes. In the present study, the attribute importance and part-worth or weighted utility values of the levels of attributes were calculated per individual for each of the three arts festival scenarios (Sections 5.3.1 and 5.3.2).

Step 4 is to use the attribute importance and part-worth values to perform cluster analysis. A cluster groups the respondents with the same behavioural pattern together. Four clusters namely *Price-*, *Entertainment or activity-*, *Brand-* and *Transport-sensitive* were identified in the present study (Section 5.3.3).

Step 5 is to use the cluster analysis to label or categorise the respondents into groups with the same behavioural profiles. Once similar behaviour has been identified, each group is given a label. Four groups namely, *price-sensitive*, *activity- or entertainment-sensitive*, *brand-sensitive* and *transport-sensitive* were identified, as shown in Figure 6.5.

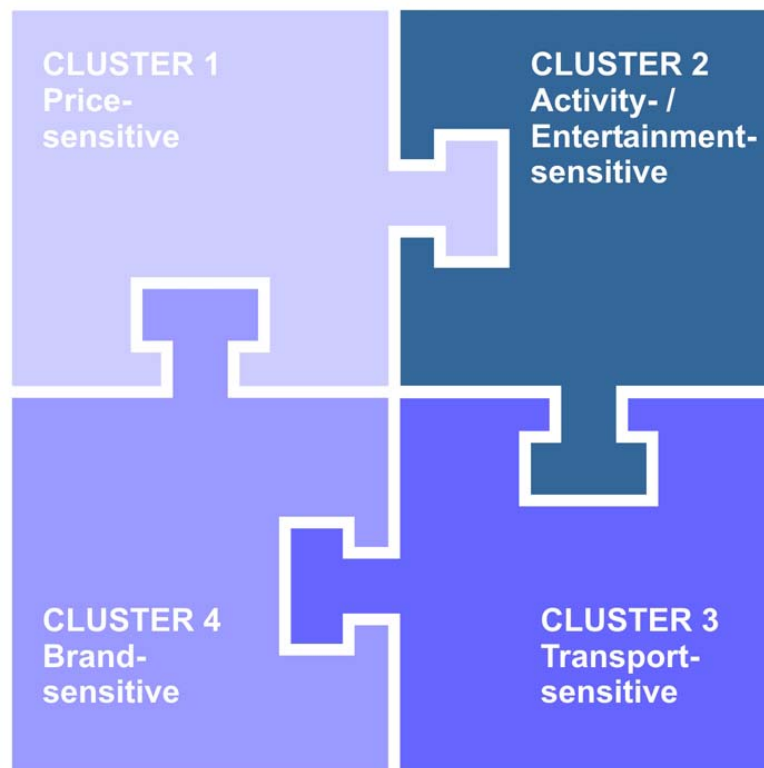


Figure 6.5: The four clusters of the groups of respondents at the arts festival scenarios

It should be noted that a price-sensitive festival attendee differs from a brand-sensitive attendee. This is where positioning is valuable, because all respondents with similar behaviour are grouped in a cluster and then labelled. This clustering of the respondents enabled the author to determine respondents' past behaviour, however, this was outside the scope of this thesis. The research done in the past identified the gender, residential area and home language as well as the income of festival attendees, but did not reveal anything about their behaviour (Saayman & Saayman, 2004; Van Zyl, 2002). However, the present study has bridged this gap in the body of knowledge about arts festivals.

Step 6 uses the clusters with labels to perform the correspondence analysis.

Step 7 uses the results of the correspondence analyses to draw correspondence maps or positioning maps (Section 5.3.4). The concept of market positioning concerns the way in which the different attributes (such as brand, price, etc.) feature in the mind of a prospective festival attendee, but does not indicate how a festival should be positioned in the market. These maps only illustrate these findings visually.

Step 8 is to set up and run the attribute simulation tool. This tool allows the researcher to make assumptions used for predicting and changing the respondents' behaviour. A change in their behaviour changes the positioning map accordingly. This property is unique to the positioning methodology, as no other methodology is capable of performing this function.

Step 9 resulted in the best combination of attributes (value propositions) unique to each arts festival scenario (Section 5.3.5), as illustrated in Figure 6.6.

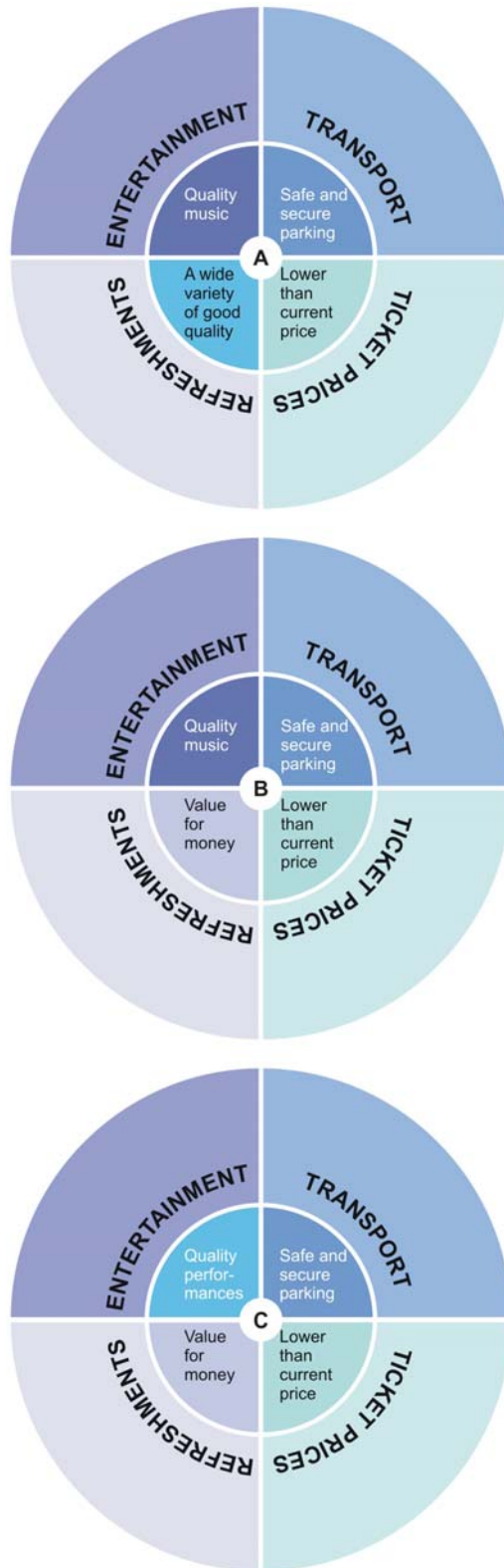


Figure 6.6: The optimum combination of the attribute marketing package per festival scenario

Step 10, the final step, uses the results obtained from the combination of attributes and applies the game theory technique to compare the three arts festival scenarios with one another to determine the most successful or optimum arts festival package (see Section 5.4). The outcome of the game indicates that Festival A has the best positioning overall, Festival B the second best and Festival C the third best positioning. However, the present study explores what may happen when changes are made to individual scores in either of the five endogenous variables, as shown in Tables 5.17 to 5.25. A summary of the results indicates the importance of the following attributes:

- **Quality music** produced a 10% improvement;
- The **same Ticket price** offered produced a 7% improvement;
- **Friendly service** with refreshments produced a 5% improvement;
- **Quality arts, A wide variety of good quality refreshments, Good transport and Sufficient parking** produced a 4% improvement in the outcome of a game if the score is improved from 0 to 1.

An optimum market-positioning model was developed for each arts festival scenario based on the outcome of the conjoint analysis and game theory. Figure 6.7 indicates the optimum market position for Festival A.

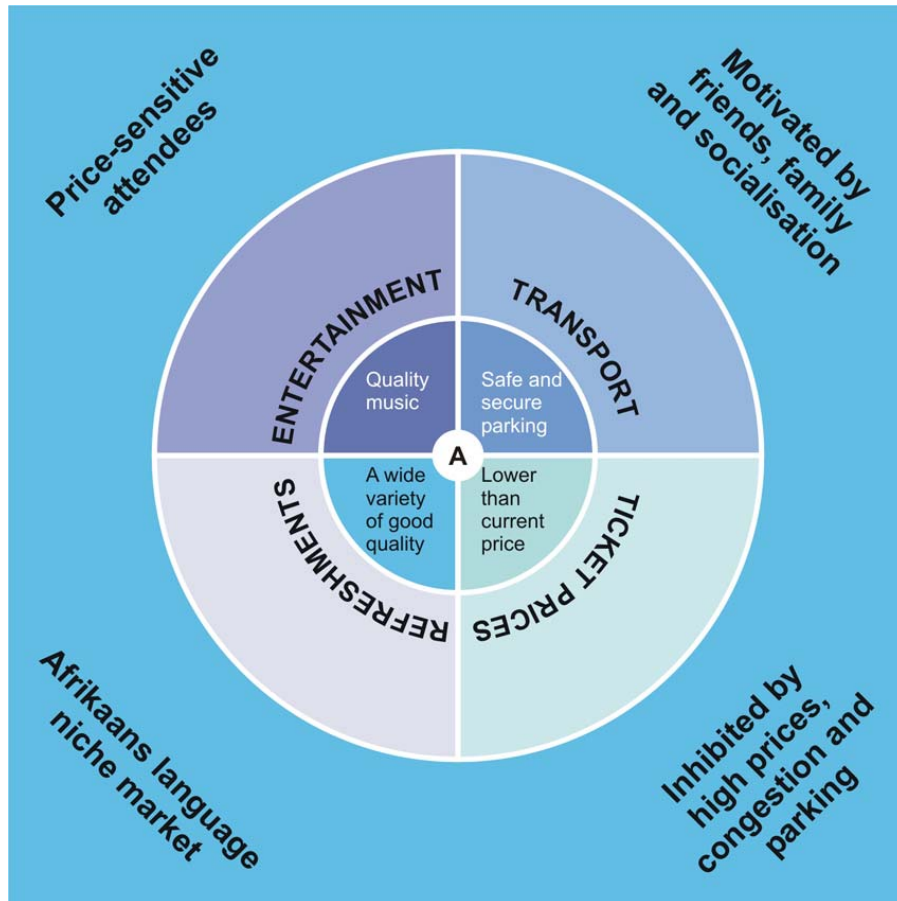


Figure 6.7: An optimum market position for Festival A

The author identified the following unique features regarding the market position of Festival A:

- The festival management could improve the attribute *Festival brand*
- The festival is not yet firmly established in terms of its branding
- The festival is the most recent of the three arts festival scenarios researched
- The festival operates in a niche of its own
- Attendees come to the festival mainly for the attribute *Ticket prices*
- The festival is the furthest removed from Festival B in terms of its positioning.

A market-positioning model was developed for arts festival scenario B, based on the outcome of the conjoint and game theory, as shown in Figure 6.8.

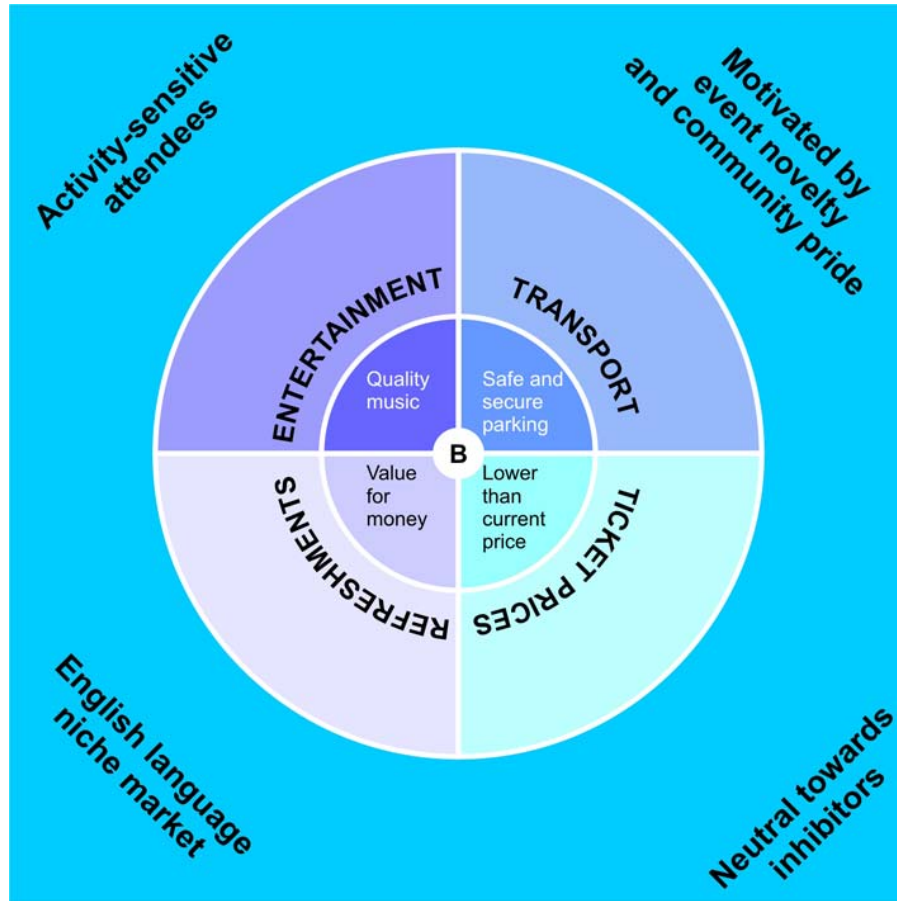


Figure 6.8: An optimum market position for Festival B

The author identified the following unique features regarding the market position of Festival B:

- Attendees are least inhibited by constraining dimension factors such as accessibility and *Transport to venues* and *Social problems at the festival*
- *Event novelty* and *Community pride* differentiates festival scenario B strongly from A and C
- The festival is the oldest of the three arts festival scenarios researched
- There is a firmly established perception of the festival in the market
- Festival scenario B is closer to Festival C in terms of its positioning.

A market-positioning model was developed for arts festival scenario C, based on the outcome of the conjoint and game theory, as shown in Figure 6.9.

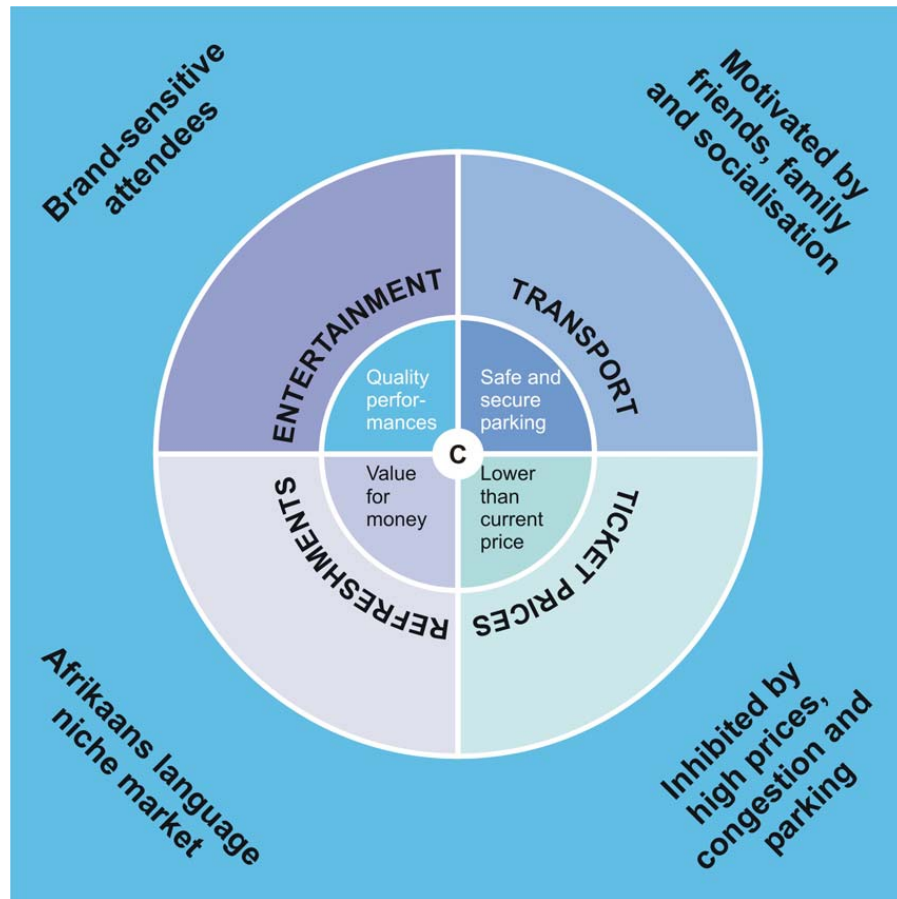


Figure 6.9: An optimum market position for Festival C

The author identified the following unique features regarding the market position of Festival C:

- The festival management could improve the entertainment/festival activities offered at the festival
- This festival has the strongest brand identity of the three arts festival scenarios researched
- *Festival brand* strongly differentiates this festival from the other two festivals

- Attendees at the festival tend to be inhibited mainly by factors such as high ticket prices, traffic congestion and insufficient parking at venues.

The market position of the arts festival scenarios in Figure 6.6 could improve by taking optimisation into account. The arts festival scenarios are firmly established in terms of market positioning, but if the management of the respective festivals wants to improve or optimise the specific festival's market position, there is still room for improvement. The greatest improvement could be achieved by improving the attribute *Quality music offered at the festival* and slightly less by keeping *Ticket prices unchanged at festivals*. However, the assumption can be made that little or no improvement is needed in the attributes *Quality arts*, *Friendly service*, and *A wide variety of good quality refreshments* as well as *Good and sufficient parking at venues*, as improvements will probably have a minor outcome and it is costly to improve the infrastructure.

The quota sampling selected respondents at each festival scenario in the following three subsegments in terms of age groups:

1. The younger group (between 18-30 years), who are mainly sensitive to ticket prices. To counter this price sensitivity, the festival management could offer special rates or concessions to students.
2. The middle group (between 31-45 years) is mostly associated with and sensitive to the *Entertainment offered at the festival*. To encourage this group to attend a festival, the management could offer baby-care facilities or supervised care of younger children.
3. The older group (older than 45 years) is sensitive to *Transport* and *Accessibility*. The festival management could give members of this group preference in transport by minibus and shuttle services to venues. As this group has more disposable income to spend at the festival, management should endeavour to meet the needs of this segment.

The arts festival management should cater for these subsegments at the following year's festivals.

It should be noted that the ideal model for each festival merely illustrates the optimum market position, rather than suggesting a definite strategy as there may be other attributes worth considering in the conjoint design and a different segmentation or classification of data from those used in the present research.

6.4 CONTRIBUTIONS, CONFIRMATIONS, LIMITATIONS OF THE STUDY

The contribution of this study was the development of a market-positioning model for arts festivals, based on the body of knowledge about tourism and arts festivals, conjoint analysis, correspondence analysis and game theory; and positioning attributes. Using the model and its elements, the author was able to illustrate an optimum market position for each of the three selected arts festival scenarios in terms of the combination of attributes that would assure the best position and the successful future of a particular festival scenario. This model could be applied to other industries in the economy, such as banking and insurance, as well as motor manufacturing.

Confirmations and disconfirmations by previous studies include:

- Nickerson and Moisey (1999:218) who report that in theory much of the research (from branding to positioning) completed to date has analysed the psychological contributions of destination image (positioning), motivation and the travel decisions of visitors. The analysis by these authors has provided a great many conference proceedings and academic papers, but has done little as far as its application is concerned. By contrast, the present study applied positioning research to the South African festivals and events industry.

- Most of the respondents interviewed at the three arts festival scenarios indicated that they would attend the next arts festival also. The respondents could probably be regarded as “true festival attendees” as they had attended an arts festival in the past (see Appendix A3, screening question in questionnaire) and they indicated they would attend an arts festival again in future. If visitors wish to return, they have to be fairly satisfied with the previous experience (Crompton & McKay, 1997:125). As a high percentage of the respondents indicated that they would attend the respective arts festivals again, the assumption can be made that the respondents at each arts festival scenario are relatively satisfied with the festival held in the respective region.
- Furthermore, numerous festival surveys have detected a loyal group of repeat visitors (will go again), obviously including a high proportion of the residents in the region (Getz, 1997:263). This group of repeat visitors often have a strong “brand loyalty” to a particular event, adding to their desire to support it.
- The findings of the study confirm that arts festival attendees fall mainly in the higher income group with a high level of tertiary education qualifications.
- As these demographic variables are probably a general trend among arts festival attendees in South Africa, their distribution would differ from the variables typical of the general characteristics of the population (Hughes, 2000:16). Moreover, it may be of interest to and useful for the festival management to know where the arts festival audiences come from, who they are and what they value in order to target their marketing and positioning activity accordingly (see Section 2.5.5.3).
- The higher the level of education, the greater a person's propensity to participate in cultural activities, including arts and community festivals (Torkildsen, 1983). Morgan (1996:103) observes that the age at which individuals completes their formal education (16 or 18 years, or after higher education, at 21 years) may indicate their aspirations, intelligence and,

significantly for event managers, their curiosity about the world in which they live. For the management of festivals and events associated with the arts and cultural elements, the target market is an educated one (Allen et al., 2002:173).

- Knowledge about household type and size, as well as race and ethnicity, are potentially useful. Multicultural festivals are often aimed at fostering better communication and understanding among diverse groups. Management should determine whether certain groups are under-represented at a festival or event (Getz, 1997:262). The shift to a multicultural and diverse society in South Africa creates many challenges and tremendous opportunities for researchers in particular for festivals.
- Getz (1997:260) observes that most visits to festivals and events are generated in the local or regional area.

Limitations and potential consequences include

- A limitation of the study might be the quota sample drawn from the population since this is a scenario-based study, which only included likeminded individuals in the region of each festival scenario. Consequently, the data might be biased in some cases
- The current study used attendance figures of 2002 as the year 2003's attendance figures for all the festivals in the scenarios were not available at the time in 2003, when the actual fieldwork was conducted.

6.5 RECOMMENDATIONS FOR FUTURE RESEARCH

- The research indicated that no large groups speaking other languages and belonging to other cultural groups are present at the arts festival scenarios. It is recommended that festival managements should research this market

segment in future, to determine why these people (whose home languages differ from that of the respondents at the three festival scenarios) and who are in demographic terms a large part of the total population, do not attend the arts festivals. In view of the shift to multicultural diversity and inclusivity, it is important to determine the needs and wants of those whose home languages are not English or Afrikaans in relation to an arts festival held in their region.

- In terms of brand positioning, the findings of the present study are that arts festival attendees are loyal to the brand of the festival held in their region. Future research could attempt to identify arts festival attendees who go to all of the three selected arts festival scenarios to determine each festival's brand positioning. The concept of brand loyalty and equity should be researched in more detail for each festival, as the attribute *Festival brands* proved significant in the findings of the present study.
- The explorative nature of this study requires further research into the combination of attributes that would determine the optimum market position for an arts festival in the South African context. Research into the following issues would provide the management of South African arts festivals with a great deal of useful data on which to base future decisions about the festival's market position.
 - the attribute *Ticket price* could be researched in detailed values, for example R75 or R100 per show to ascertain the sequel curve and level of price sensitivity;
 - the attribute *Music* could be subdivided into various categories and kinds of performers e.g. Jazz, Classic, Kwaito etc;
 - the attribute *Branding* could be researched to determine brand equity and attendee loyalty;
 - the attribute *Accommodation* could be added to future research if a different kind of sample is drawn from the population;

- the choice of attributes might differ for each arts festival and future research could determine the attributes of each arts festival respectively.

6.6 CONCLUSION

The contribution of the study is its focus on determining the ideal attribute package that would drive best practices at an arts festival to make it sustainable in the long term. This positioning strategy may serve as a guide to the marketers and management of such festivals. To this end, a market-positioning model has been developed specifically for arts festivals and for use by the tourism industry. The value added is that such a model may also be applied to other business sectors in the economy.

In terms of tourism management, the value added by the study is the finding that the three selected hallmark arts festival scenarios each holds a strong but unique position in the market. Therefore each of the three arts festivals can continue operating in the same way. However, if the management of these arts festivals want to optimise their position in the market, the attribute *Quality music* should receive more attention, either by offering mixed genres or a single genre, for example many different kinds of music, or only jazz.

The arts festivals should stage shows with the top performers and musicians in the particular field. These performers, such as well-established golden oldies as well as new up-and-coming musicians, should be auditioned and screened before being allowed to perform. The venues where performances are held, including sound and lightning, should be approved in advance. The findings further indicate that the attributes *Transport*, *Food and beverages* and *Ticket prices* were of slightly lesser importance to the respondents, and that the attribute *Entertainment offered at the festival* was rated highest. This finding could also add value to the existing body of knowledge on arts festivals in South Africa.

The organisers or management of arts festivals can now decide whether to implement the recommendations on attributes or to focus more on the optimum positioning of a festival in the attendees' minds.

Festival organisers could realign the festival's position in the market either by marketing the attributes that the respondents valued as most important or by reducing the inhibitors preventing them from attending the festival. Changing an existing position is not recommended to the festival management and organisers, since the findings of the study indicate that each of the three festivals has unique characteristics and a sound market positioning in certain niche markets.

There are two main arguments, taking into account the information about the optimum market position for each festival. One is that the festivals could change their identity and language focus to offer an inclusive festival, catering for the cultural and language diversity in the market, which would mean abandoning the unique niche each festival has. The second is that the festivals should continue to focus on the language and culture they currently offer in their respective markets, in other words the festivals should retain their present focus on a particular culture and language, as this perception is currently established in the attendees' minds.

It is recommended that each of the three arts festivals studied should retain its unique characteristics and the position it occupies in the minds of attendees. The two newcomers, namely Festivals A and C – the mainly Afrikaans language and culture festivals – cater for a specific niche market with a unique “folk festival” perception in customer's minds. Attendees perceive Festival B as a mainly English language, highbrow, novel, discerning arts connoisseurs' festival. These festivals therefore differ significantly in their market positioning.

Based on the findings of the study and the market-positioning model, it is therefore recommended that each festival should continue operating as it currently does and retain the niche it currently has in the market. There is a danger that changing a workable and successful market position may make a festival unsustainable. For example, changing a festival to make it too general and inclusive could make it lose its character, causing it to fail to attract audiences. The market positioning of the arts festivals indicates that each of the three selected arts festivals has a unique niche in the market. The final assumption is that the management of each festival should continuously identify the unique selling proposition (USP) that will most likely position them favourably against its perceived competitors and ensure sustainability.

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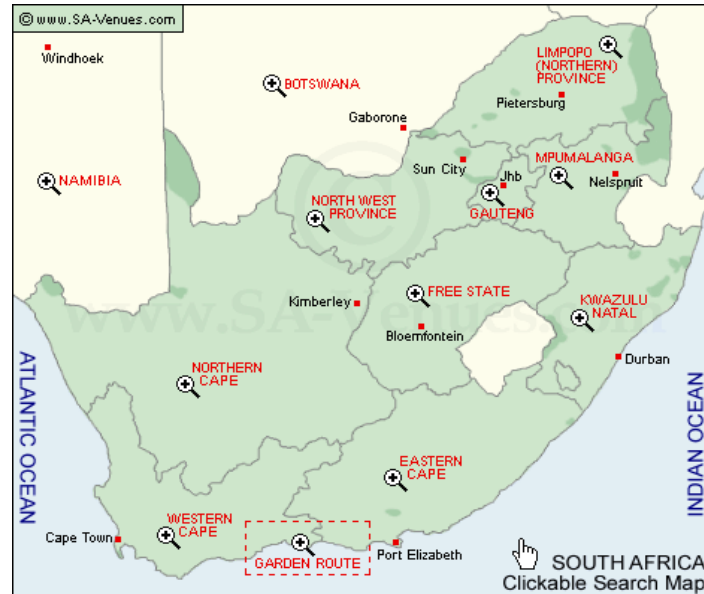
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APPENDICES

APPENDIX A: The data collection instrument

A1: A map of South Africa and the three provinces of the arts festival scenarios



Map of South Africa



Map of North West Province: Potchefstroom demarcated as NW402 (scenario A)



Map of Eastern Cape Province: Grahamstown demarcated as EC104 (Scenario B)



Map of Western Cape Province: Oudtshoorn demarcated as WC045 (Scenario C)

A2: Quota control sheets for the various festivals

- Festival A in Potchefstroom,
- Festival B in Grahamstown and
- Festival C in Oudtshoorn

Quota control sheet of fieldworkers at Festival A in Potchefstroom

Festival A

	18 - 30		31 - 45		46+		Total	Check
Field worker	Male	Female	Male	Female	Male	Female		
1	2	2	2	2	2	2	12	
2	2	2	2	2	2	2	12	
3	2	2	2	2	2	2	12	
4	2	2	2	2	2	2	12	
5	2	2	2	2	2	2	12	
6	2	2	2	2	2	2	12	
7	2	2	2	2	2	2	12	
8	2	2	2	2	2	2	12	
9	2	2	2	2	2	2	12	
10	3	3	3	3	3	3	18	
Total	21	21	21	21	21	21	126	
Total Age group	42		42		42			

Quota control sheet of fieldworkers at Festival B in Grahamstown

Festival B

	18 - 30		31 - 45		46+		Total	Check
Field worker	Male	Female	Male	Female	Male	Female		
1	2	2	2	2	2	1	11	
2	2	2	2	2	1	2	11	
3	2	2	2	2	2	1	11	
4	2	2	1	2	2	2	11	
5	2	1	2	2	2	2	11	
6	1	2	2	2	2	2	11	
7	2	2	2	2	1	2	11	
8	2	2	1	2	2	2	11	
9	2	2	2	1	2	2	11	
Total	17	17	16	17	16	16	99	
Total Age group	34		33		32			

Quota control sheet of fieldworkers at Festival C in Oudtshoorn

Festival C

	18 - 30		31 - 45		46+		Total	Check
Field worker	Male	Female	Male	Female	Male	Female		
1	3	2	2	2	2	2	13	
2	2	3	2	2	2	2	13	
3	2	2	3	2	2	2	13	
4	2	2	2	3	2	2	13	
5	2	3	2	2	2	2	13	
6	2	2	2	2	2	3	13	
7	2	2	2	2	3	2	13	
8	2	2	2	3	2	2	13	
9	2	2	3	2	2	2	13	
10	2	3	2	2	2	2	13	
11	3	2	2	2	2	2	13	
12	2	2	2	2	2	2	12	
Total	26	27	26	26	25	25	155	
Total Age group	53		52		50			

A3: Arts festival questionnaire (Eng. & Afr.)

Questionnaire Number:

001

Arts Festival Questionnaire

SECTION A: Filter questions

Good day, my name is _____ (state your name). I am commissioned by Cina van Zyl, a DCom student at the University of South Africa (UNISA) to conduct this survey. The aim is to gain a better understanding of the best way to position an arts festival. Your participation is very valuable and I only need about 20 minutes of your precious time.

Would you be interested in participating?

Yes	No, Close Interview
-----	---------------------

Thank you for being willing to take part in this survey. I want to assure you that this is a confidential survey, and that all data collected will be used for research purposes only.

Before we proceed, I wish to verify the following important criteria for participation:

Gender:

Age:

Did you attend the following Arts Festival?	Festival A (Aardklop)
	If No – Close interview

Will you attend an arts festival in future?

Yes	No
-----	----

Your answers show that you **do** qualify to participate in the research project. Thank you very much for your willingness to participate.

Section B

Profile number	Profile Preference Score (1-9)	Profile number	Profile Preference Score (1-9)
1		9	
2		10	
3		11	
4		12	
5		13	
6		14	
7		15	
8		16	

SECTION C**- INSTRUCTIONS -**

This section of the questionnaire measures your perception of the constraints (situational inhibitors) that might prevent you from attending an arts festival.

Please use a 0 to 10 scale to evaluate the situational inhibitors that might influence your decision negatively. You should indicate a 10 if a constraint is extremely likely to influence your attendance, or a 0 if it is not at all likely to affect your decision-making process. You may also indicate any appropriate number between 0 and 10 for a less extreme response or a don't know.

Remember that there are no right or wrong answers. We are interested in understanding your perceptions of these situational inhibitors.

	Not at all likely										Extremely likely	
Situational Inhibitors regarding Time and Money at an arts festival												
a. The high cost of attractions and entertainment.	0	1	2	3	4	5	6	7	8	9	10	DK
b. Not having enough money to spend on productions.	0	1	2	3	4	5	6	7	8	9	10	DK
c. The higher prices in shops and restaurants.	0	1	2	3	4	5	6	7	8	9	10	DK
d. The lack of time to attend an arts festival.	0	1	2	3	4	5	6	7	8	9	10	DK
e. My willingness to pay for arts, performances and music.	0	1	2	3	4	5	6	7	8	9	10	DK
Situational Inhibitors regarding Accessibility & Transport at an arts festival												
f. The lack of parking facilities at venues.	0	1	2	3	4	5	6	7	8	9	10	DK
g. The lack of transport to get to an arts festival.	0	1	2	3	4	5	6	7	8	9	10	DK
h. The arts festival is too far from home.	0	1	2	3	4	5	6	7	8	9	10	DK
Situational Inhibitors regarding Social Problems at an arts festival												
i. The traffic congestion in the streets during festival time.	0	1	2	3	4	5	6	7	8	9	10	DK
j. Crowded restaurants and shopping centres.	0	1	2	3	4	5	6	7	8	9	10	DK
k. Too much noise during the festival.	0	1	2	3	4	5	6	7	8	9	10	DK
l. Festival attendees who drink too much.	0	1	2	3	4	5	6	7	8	9	10	DK
m. Too many festival attendees.	0	1	2	3	4	5	6	7	8	9	10	DK
n. Too much effort to attend an arts festival.	0	1	2	3	4	5	6	7	8	9	10	DK
o. Disruption of my daily life or routine.	0	1	2	3	4	5	6	7	8	9	10	DK

SECTION D:

Demographic Information of Respondent:

To which of the following age categories do you belong?

20-30	31-40	41-50	51-60	60+
-------	-------	-------	-------	-----

What is your gender?

Male	Female
------	--------

What is your first language?

English	Afrikaans	Other (please specify):
---------	-----------	-------------------------

Please indicate your highest educational qualification?

Standard 8-9	1
Standard 10	2
Diploma	3
Higher Diploma/Degree	4
Honours degree	5
Master's degree	6
Doctorate	7

To which of the following family life-cycle stages do you belong?

Teenager	1
Young adult	2
Young couple	3
Young couple with baby	4
Growing family	5
Empty nesters	6
Elderly	7

The following aspects typically motivate people to attend an arts festival. Please rank these from most important (rank = 1) to least important (rank = 4).

Motivation to attend	Rank
Community pride (sense of attachment to area)	
Event novelty (unique attraction of festival)	
Family togetherness	
Socialisation with friends	

Are you aware of the following arts festivals?

	Yes	No
Festival A Aardklop		
Festival B Grahamstown		
Festival C KKNK		

I wish to draw your attention to the fact that it is important for my client to follow up the evaluations that individual interviewees give. This is why we wish to share the evaluations that you have given in this questionnaire with Cina van Zyl.

Do you have any objections to disclosing the information?

Yes, I have an objection	Please be assured that your individual information will not be disclosed to anybody.
No, I have no objection	Thank you very much

THANK YOU FOR YOUR KIND CO-OPERATION

FILL IN AT THE END OF THE INTERVIEW – COMPULSORY INFORMATION

Respondent's name and surname: _____

Respondent's Tel Number: _____

Vraelys Nommer:

001

Vraelys oor Kunstefeeste

AFDELING A: Filter vrae

Dagsê, my naam is _____ (meld jou naam). Ek is deur Cina van Zyl, 'n DCom-student aan die Universiteit van Suid-Afrika (UNISA) opdrag gegee om hierdie opname te doen. Die doel daarvan is om 'n beter begrip van die optimale posisionering van 'n kunstefeeste te verkry. U deelname is van besondere waarde en ek sal slegs sowat 20 minute van u kosbare tyd in beslag neem.

Stel u daarin belang om deel te neem?

Ja	Nee, sluit onderhoud af
----	-------------------------

Baie dankie vir u bereidwilligheid om aan hierdie opname deel te neem. Ek wil u graag verseker dat dit 'n vertroulike opname is, en dat alle ingesamelde gegewens slegs vir navorsingsdoeleindes gebruik sal word.

Voordat ons begin, wil ek graag die volgende belangrike kriteria vir deelname nagaan:

Geslag:

Manlik

Ouderdom:

18-30

Het u al die volgende Kunstefeeste bygewoon?	Festival A (Aardklop)
	Indien Nee – Sluit onderhoud

Sal u in die toekoms weer 'n kunstefeeste bywoon?

Ja	Nee
----	-----

U antwoorde dui daarop dat u wel vir deelname in die navorsingsprojek kwalifiseer. Dankie vir u bereidwilligheid om deel te neem.

AFDELING B

Profiel Nommer	Profiel Voorkeur Telling (1-9)	Profiel Nommer	Profiel Voorkeur Telling (1-9)
1		9	
2		10	
3		11	
4		12	
5		13	
6		14	
7		15	
8		16	

AFDELING C

- AANWYSINGS -

Hierdie deel van die vraelys meet u persepsie van die hindernisse of beperkings (situasie-inhibeerders) wat u dalk kan verhoed om 'n kunstefees by te woon.

Gebruik asseblief 'n skaal van 0 tot 10 om die situasie-inhibeerders te evalueer wat u besluit dalk negatief kan beïnvloed. Merk die syfer 10 indien dit hoogs waarskynlik is dat 'n inhibeerder u bywoning kan beïnvloed, of 'n 0 indien daar geen waarskynlikheid bestaan wat u besluitnemingsproses sal beïnvloed nie. U kan ook enige toepaslike syfer tussen 0 en 10 aandui om 'n meer matige antwoord te gee of weet nie.

Hou asseblief in gedagte dat daar geen regte of verkeerde antwoorde is nie. Ons stel slegs daarin belang om u persepsies van hierdie situasie-inhibeerders te verstaan.

	Geen waarskynlikheid											Hoogs waarskynlik
Situasie-inhibeerders met betrekking tot Tyd en Geld by 'n kunstefees												
p. Die hoë koste van aantrekkings en vermaaklikhede.	0	1	2	3	4	5	6	7	8	9	10	WN
q. Te min geld om op produksies uit te gee.	0	1	2	3	4	5	6	7	8	9	10	WN
r. Die hoër pryse in winkels en restaurante.	0	1	2	3	4	5	6	7	8	9	10	WN
s. Gebrek aan tyd om 'n kunstefees by te woon.	0	1	2	3	4	5	6	7	8	9	10	WN
t. My bereidwilligheid om vir die kunste, opvoerings en musiek te betaal.	0	1	2	3	4	5	6	7	8	9	10	WN
Situasie-inhibeerders met betrekking tot Toeganklikheid & Vervoer by 'n kunstefees												
u. Die gebrek aan parkeergeriewe by lokale.	0	1	2	3	4	5	6	7	8	9	10	WN
v. Die gebrek aan vervoer om by 'n kunstefees uit te kom.	0	1	2	3	4	5	6	7	8	9	10	WN
w. Die kunstefees is te ver van die huis geleë.	0	1	2	3	4	5	6	7	8	9	10	WN
Situasie-inhibeerders met betrekking tot Sosiale Probleme by 'n kunstefees												
x. Die verkeersknoppe in die strate gedurende feestye.	0	1	2	3	4	5	6	7	8	9	10	WN
y. Stampvol restaurante en winkelsentrums.	0	1	2	3	4	5	6	7	8	9	10	WN
z. Te veel lawaai gedurende die fees.	0	1	2	3	4	5	6	7	8	9	10	WN
aa. Feesbywoners wat te veel alkohol gebruik.	0	1	2	3	4	5	6	7	8	9	10	WN
bb. Te veel feesbywoners.	0	1	2	3	4	5	6	7	8	9	10	WN
cc. Te veel moeite om 'n kunstefees by te woon.	0	1	2	3	4	5	6	7	8	9	10	WN
dd. Ontwrigting van my daaglikse lewe of roetine.	0	1	2	3	4	5	6	7	8	9	10	WN

AFDELING D

Demografiese Inligting oor Respondent:

In watter van die volgende ouderdomsgroepe behoort u?

20-30	31-40	41-50	51-60	60+
-------	-------	-------	-------	-----

Wat is u geslag?

Manlik	Vroulik
--------	---------

Wat is u eerste taal?

Engels	Afrikaans	Ander (spesifiseer asseblief):
--------	-----------	--------------------------------

Dui asseblief u hoogste onderwyskwalifikasie aan?

Standerd 8-9	1
Standerd 10	2
Diploma	3
Hoër Diploma/Graad	4
Honneursgraad	5
Meestersgraad	6
Doktorsgraad	7

In watter van die volgende fases van die gesinslewensiklus behoort u?

Tiener	1
Jong volwassene	2
Jong paartjie	3
Jong paartjie met baba	4
Groeierende gesin	5
Leënes-ouers (sonder kinders)	6
Bejaarde	7

Die volgende aspekte motiveer mense tipies om 'n kunstefees by te woon. Orden dit asseblief van die belangrikste (rangnommer = 1) tot die onbelangrikste (rangnommer = 4).

Motivering om by te woon	Rangnr.
Gemeenskapstrots (sin van samehorigheid met area)	
Feesnuwigthede (unieke aantrekking van fees)	
Samesyn met gesin	
Sosialisering met vriende	

Is u bewus van die volgende kunstefee?

	Ja	Nee
Fees A Aardklop		
Fees B Grahamstad		
Fees C KKNK		

Ek vestig graag u aandag daarop dat dit vir my kliënt belangrik is om die evaluering wat individuele respondente gegee het, op te volg. Daarom wil ons graag die evaluering wat u in hierdie vraelys voorsien het met Cina van Zyl deel.

Het u enige beswaar teen die openbaring van die inligting?

Ja, ek maak beswaar daarteen	Wees asseblief verseker dat u individuele inligting nie aan enigeen openbaar sal word nie.
Nee, ek maak geen beswaar daarteen nie	Baie dankie

BAIE DANKIE VIR U VRIENDELIKE SAMEWERKING

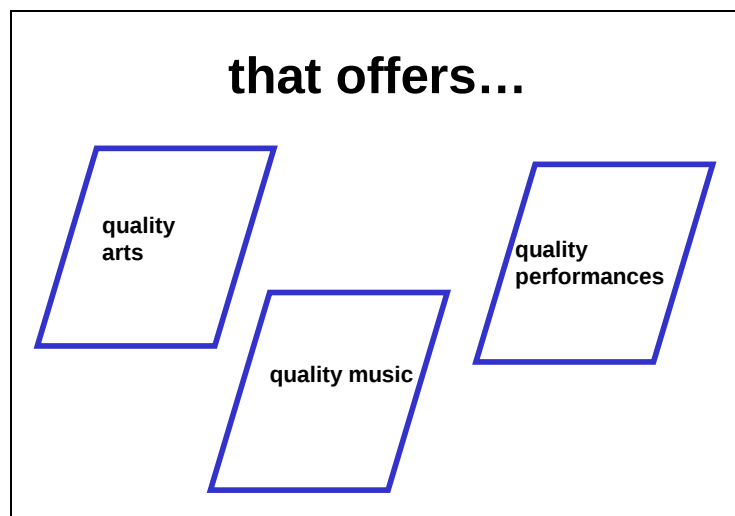
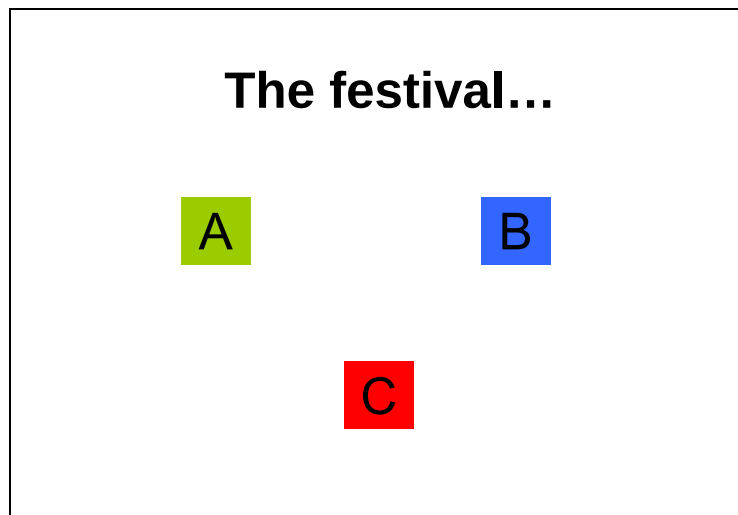
VOLTOOI AAN DIE EINDE VAN DIE ONDERHOUD – VERPLIGTE INLIGTING

Naam en van van respondent: _____

Kontak no. van respondent: _____

A4: Arts festival scenario conjoint show-cards, instructions and profiles in Eng. & Afr.

English conjoint show-cards:



with...

a wide variety of
good quality
refreshments

friendly service with
refreshments

value-for-money
refreshments

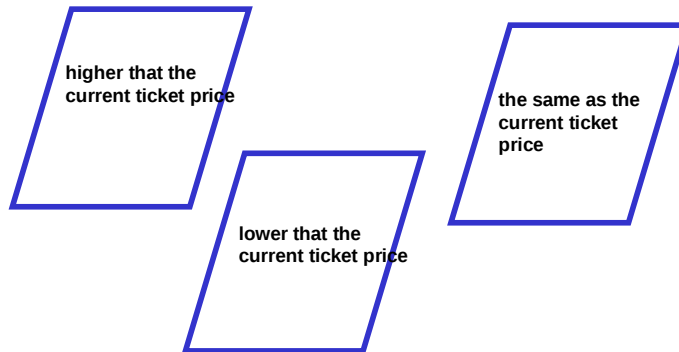
and has...

good (accessible)
transport

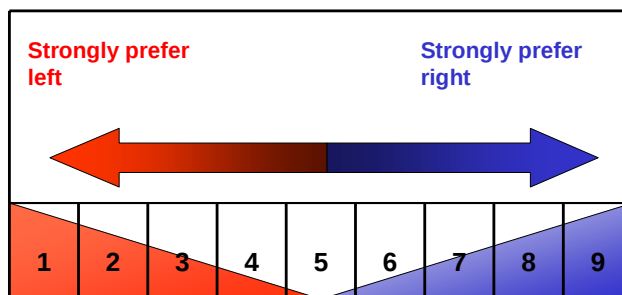
sufficient parking
facilities

safe and secure
parking

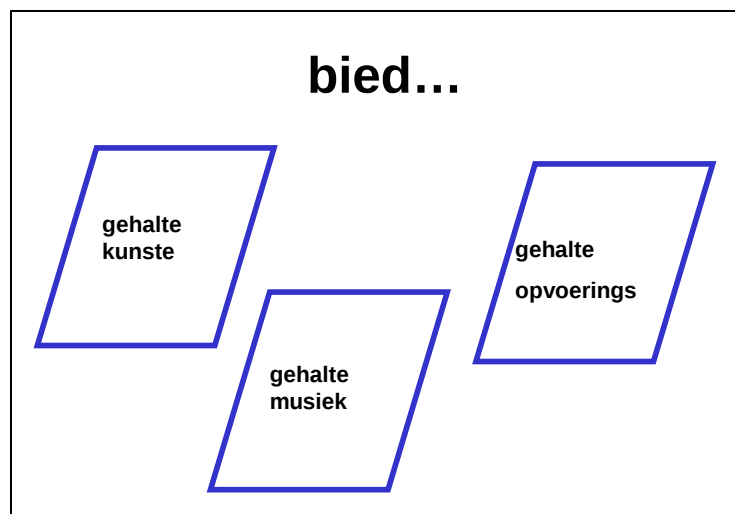
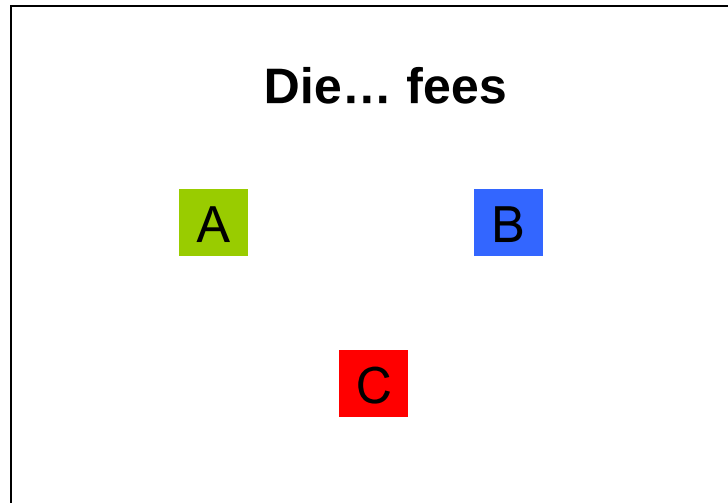
at...

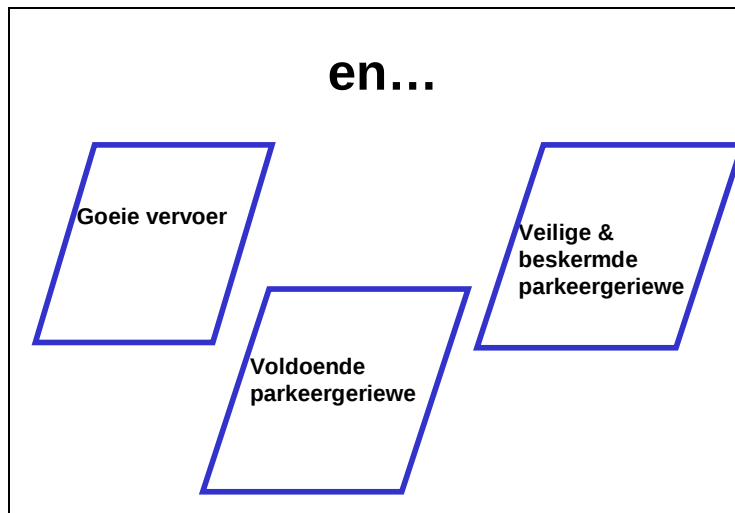
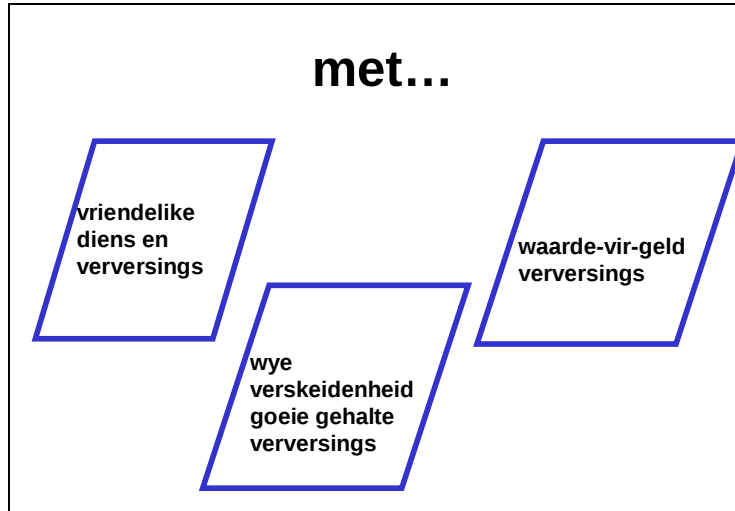


Conjoint scale



Afrikaans conjoint vertoonkaarte





teen...

meer as die
huidige
kaartjieprys

minder as die
huidige
kaartjieprys

dieselfde as die
huidige
kaartjieprys

Conjoint skaal

Sterk voorkeur
links

Sterk voorkeur
regs



1

2

3

4

5

6

7

8

9

Arts festival scenario conjoint analysis

English instructions and profiles

- CONJOINT INSTRUCTIONS -

In the first section of the questionnaire, you will be given an imaginary scenario that you might experience at an arts festival. In total there are 16 questions – each containing a different set of Benefit Packages. Please consider these packages against the scenario below and indicate your strongest preference in each question.

The scenario: “Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem.”

Just follow these easy steps:

- o EACH set of questions comprises a left-side Benefit Package and a right-side Benefit Package.
- o The left-side Benefit Package and right-side Benefit Package contain 5 benefit items each, which make up a benefit package.
- o Please read both the left-side Benefit Package and the right-side Benefit Package.
- o Compare the two packages as a whole.
- o Then, select the Benefit Package that you prefer best (either left-side or right-side) by marking the appropriate number (e.g. if you prefer the left-side Benefit Package the most, mark number 1 – but if you prefer the right-side Benefit Package the most, mark the number 9).
- o If you do not have a stronger preference for either of the Benefit Packages, mark the middle value – 5 (Neutral) to show your lack of preference.
- o Please repeat these steps for the remaining 16 Benefit Package questions, each time indicating your preference for that combination of Benefit Packages.

The options will always consist of five items (called attributes), which I will quickly explain before we begin with the interview:

- o **Festival Brands:**
 - o This refers to the different arts festivals. Your options are:
 - o **Festival A** held in Potchefstroom
 - o **Festival B** held in Grahamstown
 - o **Festival C** held in Oudtshoorn

- o **Entertainment or festival activities:**
 - o This refers to the different productions offered at the arts festivals. Your options are:
 - o **Quality arts** such as visual art and exhibitions
 - o **Quality music** such as classical and opera; choir and ensemble; cabaret and music; blues, jazz and rock
 - o **Quality performances** such as the performing arts; dance and movement; literature and poetry; children's theatre

- o **Refreshments (Food and beverages):**
 - o This refers to the food and beverages available at food outlets and restaurants at the festival. Your options are:
 - o A wide **variety of good quality** refreshments (food and beverages)
 - o **Friendly service** with refreshments (food and beverages)
 - o **Value-for-money** refreshments (food and beverages)

- o **Transport:**
 - o This refers to the accessibility of transport, as well as transport to and at the festival. Your options are:
 - o **Good (accessible) transport** to venues
 - o **Sufficient parking** facilities at venues
 - o **Safe and secure parking** facilities at venues

- o **Ticket prices:**
 - o This refers to the ticket prices of the shows at the festival . Your options are:
 - o **Higher than** the current ticket price
 - o **Lower than** the current ticket price
 - o **The same** as the current ticket price

EXAMPLE QUESTION:

“Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem.”

Example of Profile

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	C	A
that offers ...	...quality arts (e.g. visual art, exhibitions)	...quality music (e.g. classical & opera, choir & ensemble, cabaret & music, blues & jazz, rock)
with ...	...friendly service and refreshments (food and beverages)	...wide variety of good quality refreshments (food and beverages)
and has ...	...safe and secure parking facilities at venues	...good transport (accessibility) to venues
at ...	...the same as the current price	...higher than the current price

Strongly Prefer Left									Strongly Prefer Right		
1	2	3	4	5	6	7	8	9			

"Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem."

Profile 1

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	C	A
that offers ...	...quality arts (e.g. visual art, exhibitions)	...quality music (e.g. classical & opera, choir & ensemble, cabaret & music, blues & jazz, rock)
with ...	...friendly service and refreshments (food and beverages)	...wide variety of good quality refreshments (food and beverages)
and has ...	...safe and secure parking facilities at venues	...good transport (accessibility) to venues
at ...	...the same as the current price	...higher than the current price

Strongly Prefer Left					Strongly Prefer Right				
1	2	3	4	5	6	7	8	9	

"Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem."

Profile 2

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	A	B
that offers ...	...quality performances (e.g. performing arts, dance & movement, literature & poetry)	...quality arts (e.g. visual art, exhibitions)
with ...	...friendly service and refreshments (food and beverages)	...value-for-money refreshments (at food outlets)
and has ...	...safe and secure parking facilities at venues	...sufficient parking facilities at venues
at ...	...lower than the current price	...higher than the current price

Strongly Prefer Left					Strongly Prefer Right			
1	2	3	4	5	6	7	8	9

“Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem.”

Profile 3

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	C	A
that offers ...	...quality performances (e.g. performing arts, dance & movement, literature & poetry)	...quality arts (e.g. visual art, exhibitions)
with ...	...value-for-money refreshments (at food outlets)	...wide variety of good quality refreshments (food and beverages)
and has ...	...sufficient parking facilities at venues	...good transport (accessibility) to venues
at ...	...higher than the current price	...the same as the current price

Strongly Prefer Left					Strongly Prefer Right				
1	2	3	4	5	6	7	8	9	

“Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem.”

Profile 4

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	B	C
that offers ...	...quality arts (e.g. visual art, exhibitions)	...quality performances (e.g. performing arts, dance & movement, literature & poetry)
with ...	...value-for-money refreshments (at food outlets)	...wide variety of good quality refreshments (food and beverages)
and has ...	...safe and secure parking facilities at venues	...sufficient parking facilities at venues
at ...	...higher than the current price	...the same as the current price

Strongly Prefer Left					Strongly Prefer Right				
1	2	3	4	5	6	7	8	9	

"Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem."

Profile 5

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	A	B
that offers ...	...quality music (e.g. classical & opera, choir & ensemble, cabaret & music, blues & jazz, rock)	...quality performances (e.g. performing arts, dance & movement, literature & poetry)
with ...	...wide variety of good quality refreshments (food and beverages)	...value-for-money refreshments (at food outlets)
and has ...	...sufficient parking facilities at venues	...good transport (accessibility) to venues
at ...	...the same as the current price	...lower than the current price

Strongly Prefer Left					Strongly Prefer Right				
1	2	3	4	5	6	7	8	9	

"Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem."

Profile 6

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	A	C
that offers ...	...quality performances (e.g. performing arts, dance & movement, literature & poetry)	...quality arts (e.g. visual art, exhibitions)
with ...	...friendly service and refreshments (food and beverages)	...value-for-money refreshments (at food outlets)
and has ...	...sufficient parking facilities at venues	...safe and secure parking facilities at venues
at ...	...higher than the current price	...lower than the current price

Strongly Prefer Left					Strongly Prefer Right			
1	2	3	4	5	6	7	8	9

“Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem.”

Profile 7

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	C	A
that offers ...	...quality music (e.g. classical & opera, choir & ensemble, cabaret & music, blues & jazz, rock)	...quality arts (e.g. visual art, exhibitions)
with ...	...wide variety of good quality refreshments (food and beverages)	...friendly service with refreshments (food and beverages)
and has ...	...good transport (accessibility) to venues	...safe and secure parking facilities at venues
at ...	...the same as the current price	...lower than the current price

Strongly Prefer Left					Strongly Prefer Right			
1	2	3	4	5	6	7	8	9

"Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem."

Profile 8

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	A	B
that offers ...	...quality arts (e.g. visual art, exhibitions)	...quality performances (e.g. performing arts, dance & movement, literature & poetry)
with ...	...value-for-money refreshments (at food outlets)	...friendly service with refreshments (food and beverages)
and has ...	...good transport (accessibility) to venues	...safe and secure parking facilities at venues
at ...	...higher than the current price	...the same as the current price

Strongly Prefer Left					Strongly Prefer Right			
1	2	3	4	5	6	7	8	9

"Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem."

Profile 9

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	B	C
that offers ...	...quality performances (e.g. performing arts, dance & movement, literature & poetry)	...quality music (e.g. classical & opera, choir & ensemble, cabaret & music, blues & jazz, rock)
with ...	...wide variety of good quality refreshments (food and beverages)	...friendly service with refreshments (food and beverages)
and has ...	...sufficient parking facilities at venues	...safe and secure parking facilities at venues
at ...	...lower than the current price	...the same as the current price

Strongly Prefer Left					Strongly Prefer Right			
1	2	3	4	5	6	7	8	9

“Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem.”

Profile 10

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	A	C
that offers ...	...quality music (e.g. classical & opera, choir & ensemble, cabaret & music, blues & jazz, rock)	...quality arts (e.g. visual art, exhibitions)
with ...	...value-for-money refreshments (at food outlets)	...wide variety of good quality refreshments (food and beverages)
and has ...	...good transport (accessibility) to venues	...sufficient parking facilities at venues
at ...	...lower than the current price	...higher than the current price

Strongly Prefer Left					Strongly Prefer Right				
1	2	3	4	5	6	7	8	9	

“Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem.”

Profile 11

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	B	A
that offers ...	...quality music (e.g. classical & opera, choir & ensemble, cabaret & music, blues & jazz, rock)	...quality performances (e.g. performing arts, dance & movement, literature & poetry)
with ...	...friendly service with refreshments (food and beverages)	...value-for-money refreshments (at food outlets)
and has ...	...good transport (accessibility) to venues	...safe and secure parking facilities at venues
at ...	...lower than the current price	...higher than the current price

Strongly Prefer Left					Strongly Prefer Right				
1	2	3	4	5	6	7	8	9	

"Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem."

Profile 12

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	C	A
that offers ...	...quality music (e.g. classical & opera, choir & ensemble, cabaret & music, blues & jazz, rock)	...quality arts (e.g. visual art, exhibitions)
with ...	...value-for-money refreshments (at food outlets)	...friendly service and refreshments (food and beverages)
and has ...	...safe and secure parking facilities at venues	...good transport (accessibility) to venues
at ...	...lower than the current price	...the same as the current price

Strongly Prefer Left					Strongly Prefer Right				
1	2	3	4	5	6	7	8	9	

"Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem."

Profile 13

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	A	B
that offers ...	...quality arts (e.g. visual art, exhibitions)	...quality performances (e.g. performing arts, dance & movement, literature & poetry)
with ...	...wide variety of good quality refreshments (food and beverages)	...friendly service and refreshments (food and beverages)
and has ...	...sufficient parking facilities at venues	...good transport (accessibility) to venues
at ...	...lower than the current price	...higher than the current price

Strongly Prefer Left					Strongly Prefer Right				
1	2	3	4	5	6	7	8	9	

"Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem."

Profile 14

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	C	B
that offers ...	...quality performances (e.g. performing arts, dance & movement, literature & poetry)	...quality music (e.g. classical & opera, choir & ensemble, cabaret & music, blues & jazz, rock)
with ...	...value-for-money refreshments (at food outlets)	...wide variety of good quality refreshments (food and beverages)
and has ...	...good transport (accessibility) to venues	...safe and secure parking facilities at venues
at ...	...the same as the current price	...higher than the current price

Strongly Prefer Left					Strongly Prefer Right			
1	2	3	4	5	6	7	8	9

“Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem.”

Profile 15

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	C	B
that offers ...	...quality arts (e.g. visual art, exhibitions)	...quality music (e.g. classical & opera, choir & ensemble, cabaret & music, blues & jazz, rock)
with ...	...wide variety of good quality refreshments (food and beverages)	...value-for-money refreshments (at food outlets)
and has ...	...good transport (accessibility) to venues	...sufficient parking facilities at venues
at ...	...higher than the current price	...the same as the current price

Strongly Prefer Left					Strongly Prefer Right			
1	2	3	4	5	6	7	8	9

“Suppose you can attend only one arts festival in a year and that distance (geographical region) and time of the year is not a problem.”

Profile 16

Considering the scenario, which one of the following arts festivals do you prefer?

The ... festival	B	C
that offers ...	...quality performances (e.g. performing arts, dance & movement, literature & poetry)	...quality music (e.g. classical & opera, choir & ensemble, cabaret & music, blues & jazz, rock)
with ...	...wide variety of good quality refreshments (food and beverages)	...friendly service and refreshments (food and beverages)
and has ...	...safe and secure parking facilities at venues	...sufficient parking facilities at venues
at ...	...the same as the current price	...lower than the current price

Strongly Prefer Left					Strongly Prefer Right				
1	2	3	4	5	6	7	8	9	

Aanwysings en profiele in Afrikaans

Conjoint Kunstefeeste Scenario Ontleding

- CONJOINT AANWYSINGS -

In hierdie deel van die vraelys word 'n denkbeeldige scenario aan u voorgehou, wat u dalk by 'n kunstefees sal ondervind. Daar is 'n totaal van 16 vrae – elkeen bevat 'n verskillende stel Voordelepakkette. Oorweeg asseblief hierdie pakkette teen die scenario hieronder op, en dui u sterkste voorkeur in elke vraag aan.

Die scenario: “Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Volg net hierdie maklike stappe:

- o ELKE stel vrae behels 'n Voordelepakket links en 'n Voordelepakket regs.
- o Die Voordelepakket aan die linkerkant en die Voordelepakket aan die regterkant bevat elk 5 voordeelitems wat saam 'n voordelepakket uitmaak.
- o U moet asseblief beide die Voordelepakket aan die linkerkant én die Voordelepakket aan die regterkant lees.
- o Vergelyk die twee pakkette as geheel.
- o Dan word u versoek om die Voordelepakket waarvoor u die sterkste voorkeur het (of linkerkant of regterkant) te kies deur die toepaslike nommer te merk (bv. as u die sterkste voorkeur vir die linkerkant Voordelepakket het, merk nommer 1 – maar as u die sterkste voorkeur vir die regterkant Voordelepakket het, merk die nommer 9).
- o As u nie 'n sterker voorkeur vir enigiens van die Voordelepakket het nie, merk asseblief die waarde in die middel – 5 (Neutraal) om die afwesigheid van voorkeur aan te dui.
- o Herhaal asseblief hierdie stappe vir die vrae oor die res van die 16 Voordelepakkette, en dui elke keer u voorkeur vir daardie kombinasie van Voordelepakkette aan.

Die opsies sal altyd uit vyf items (genoem kenmerke of attribute) bestaan, wat ek gou aan u sal verduidelik voordat ons met die onderhoud begin:

- o **Handelsmerk van fees:**
- o Dit het betrekking op die verskillende kunstefeeste. U opsies is:
 - o **Fees A** wat in Potchefstroom gehou word
 - o **Fees B** wat in Grahamstad gehou word
 - o **Fees C** wat in Oudtshoorn gehou word

- o **Vermaaklikhede of feesaktiwiteite:**
- o Dit het betrekking op die verskillende produksies wat by die kunstefeeste aangebied word. U opsies is:
 - o **Gehalte kunste** soos visuele kuns en uitstallings
 - o **Gehalte musiek** soos klassieke musiek en opera; koor- en ensemble-musiek; kabaret en musiek; "blues" rock en jazz
 - o **Gehalte opvoerings** soos die uitvoerende kunste; dans en beweging; letterkunde en poësie; kinderteater
- o **Verversings (Voedsel en drank):**
- o Dit het betrekking op die voedsel en drank wat by voedselverkooppunte en restaurante by die fees beskikbaar is. U opsies is:
 - o 'n **Wye verskeidenheid** verversings (voedsel en drank) van goeie gehalte
 - o **Vriendelike diens** met verversings (voedsel en drank)
 - o Verversings (voedsel en drank) bied **waarde vir geld**
- o **Vervoer:**
- o Dit het betrekking op die toeganklikheid van vervoer asook vervoer na en by die fees. U opsies is:
 - o **Goeie vervoer** (toeganklikheid) na lokale
 - o **Voldoende** parkeergeriewe by lokale
 - o **Veilige** en beskermde parkeergeriewe by lokale
- o **Kaartjiepryse:**
- o Dit het betrekking op die pryse van kaartjies vir die op-en of uitvoerings by die fees. U opsies is:
 - o **Meer** as die huidige kaartjieprys
 - o **Minder** as die huidige kaartjieprys
 - o **Dieselfde** as die huidige kaartjieprys

VOORBEELD VAN PROFIEL:

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Voorbeeld van Profiel

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	C	A
wat...	...gehalte kunste (bv. visuele kuns, uitstallings)	...gehalte musiek (bv. klassieke & opera, koor & ensemble, kabaret & musiek, “blues”, rock & jazz)
met ...	...vriendelike diens en verversings (voedsel en drank)	...wye verskeidenheid goeie gehalte verversings (voedsel en drank)
en...	...veilige en beskermde parkeergeriewe by lokale	...goeie vervoer (toeganklikheid) na lokale
teen ...	...dieselfde as die huidige prys	...meer as die huidige prys

Sterk Voorkeur Links					Sterk Voorkeur Regs				
1	2	X	4	5	6	7	8	9	

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 1

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	C	A
wat ...	...gehalte kunste(bv. visuele kuns, uitstallings)	...gehalte musiek (bv. klassieke & opera, koor & ensemble, kabaret & musiek, “blues”, rock & jazz)
met ...	...vriendelike diens en verversings (voedsel en drank)	...wye verskeidenheid goeie gehalte verversings (voedsel en drank)
en ...	...veilige en beskermde parkeergeriewe by lokale	...goeie vervoer (toeganklikheid) na lokale
teen ...	...dieselfde as die huidige prys	...meer as die huidige prys

Sterk Voorkeur Links					Sterk Voorkeur Regs			
1	2	3	4	5	6	7	8	9

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 2

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	A	B
wat ...	...gehalte opvoerings (bv. uitvoerende kunste, dans & beweging, letterkunde & poësie)	...gehalte kunste(bv. visuele kuns, uitstallings)
met ...	...vriendelike diens en verversings (voedsel en drank)	...waarde-vir-geld-verversings (by voedselverkooppunte)
en ...	...veilige en beskermde parkeergeriewe by lokale	...voldoende parkeergeriewe by lokale
teen ...	...minder as die huidige prys	...meer as die huidige prys

Sterk Voorkeur					Sterk Voorkeur			
Links					Regs			
1	2	3	4	5	6	7	8	9

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 3

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	C	A
wat ...	...gehalte opvoerings (bv. uitvoerende kunste, dans & beweging, letterkunde & poësie)	...gehalte kunste(bv. visuele kuns, uitstallings)
met ...	...waarde-vir-geld-verversings (by voedselverkooppunte)	...wye verskeidenheid goeie gehalte verversings (voedsel en drank)
en ...	...voldoende parkeergeriewe by lokale	...goeie vervoer (toeganklikheid) na lokale
teen ...	...meer as die huidige prys	...dieselfde as die huidige prys

Sterk Voorkeur					Sterk Voorkeur			
Links					Regs			
1	2	3	4	5	6	7	8	9

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 4

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	B	C
wat ...	gehalte kunste(bv. visuele kuns, uitstallings)	...gehalte opvoerings (bv. uitvoerende kunste, dans & beweging, letterkunde & poësie)
met ...	...waarde-vir-geld-verversings (by voedselverkooppunte)	...wye verskeidenheid goeie gehalte verversings (voedsel en drank)
en ...	...veilige en beskermde parkeergeriewe by lokale	...voldoende parkeergeriewe by lokale
teen ...	...meer as die huidige prys	...dieselfde as die huidige prys

Sterk Voorkeur					Sterk Voorkeur				
Links					Regs				
1	2	3	4	5	6	7	8	9	

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 5

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	A	B
wat ...	...gehalte musiek (bv. klassieke & opera, koor & ensemble, kabaret & musiek, “blues”, rock & jazz)	...gehalte opvoerings (bv. uitvoerende kunste, dans & beweging, letterkunde & poësie)
met ...	...wye verskeidenheid goeie gehalte verversings (voedsel en drank)	...waarde-vir-geld-verversings (by voedselverkooppunte)
en ...	...voldoende parkeergeriewe by lokale	...goeie vervoer (toeganklikheid) na lokale
teen ...	...dieselfde as die huidige prys	...minder as die huidige prys

Sterk Voorkeur					Sterk Voorkeur			
Links					Regs			
1	2	3	4	5	6	7	8	9

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 6

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	A	C
wat ...	...gehalte opvoerings (bv. uitvoerende kunste, dans & beweging, letterkunde & poësie)	gehalte kunste(bv. visuele kuns, uitstallings)
met ...	...vriendelike diens en verversings (voedsel en drank)	...waarde-vir-geld-verversings (by voedselverkooppunte)
en ...	...voldoende parkeergeriewe by lokale	...veilige en beskermde parkeergeriewe by lokale
teen ...	...meer as die huidige prys	...minder as die huidige prys

Sterk Voorkeur Links					Sterk Voorkeur Regs			
1	2	3	4	5	6	7	8	9

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 7

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	C	A
wat ...	...gehalte musiek (bv. klassieke & opera, koor & ensemble, kabaret & musiek, “blues”, rock & jazz)	gehalte kunste(bv. visuele kuns, uitstallings)
met ...	...wye verskeidenheid goeie gehalte verversings (voedsel en drank)	...vriendelike diens en verversings (voedsel en drank)
en ...	...goeie vervoer (toeganklikheid) na lokale	...veilige en beskermde parkeergeriewe by lokale
teen ...	...dieselfde as die huidige prys	...minder as die huidige prys

Sterk Voorkeur					Sterk Voorkeur			
Links					Regs			
1	2	3	4	5	6	7	8	9

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 8

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	A	B
wat ...	gehalte kunste(bv. visuele kuns, uitstallings)	...gehalte opvoerings (bv. uitvoerende kunste, dans & beweging, letterkunde & poësie)
met ...	...waarde-vir-geld-verversings (by voedselverkooppunte)	...vriendelike diens en verversings (voedsel en drank)
en ...	...goeie vervoer (toeganklikheid) na lokale	...veilige en beskermde parkeergeriewe by lokale
teen ...	...meer as die huidige prys	...dieselfde as die huidige prys

Sterk Voorkeur Links					Sterk Voorkeur Regs			
1	2	3	4	5	6	7	8	9

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 9

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	B	C
wat ...	...gehalte opvoerings (bv. uitvoerende kunste, dans & beweging, letterkunde & poësie)	...gehalte musiek (bv. klassieke & opera, koor & ensemble, kabaret & musiek, “blues”, rock & jazz)
met ...	...wye verskeidenheid goeie gehalte verversings (voedsel en drank)	...vriendelike diens en verversings (voedsel en drank)
en ...	...voldoende parkeergeriewe by lokale	...veilige en beskermde parkeergeriewe by lokale
teen ...	...minder as die huidige prys	...dieselfde as die huidige prys

Sterk Voorkeur Links					Sterk Voorkeur Regs			
1	2	3	4	5	6	7	8	9

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 10

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	A	C
wat ...	...gehalte musiek (bv. klassieke & opera, koor & ensemble, kabaret & musiek, “blues”, rock & jazz)	gehalte kunste(bv. visuele kuns, uitstallings)
met ...	...waarde-vir-geld-verversings (by voedselverkooppunte)	...wye verskeidenheid goeie gehalte verversings (voedsel en drank)
en ...	...goeie vervoer (toeganklikheid) na lokale	...voldoende parkeergeriewe by lokale
teen ...	...minder as die huidige prys	...meer as die huidige prys

Sterk Voorkeur Links					Sterk Voorkeur Regs			
1	2	3	4	5	6	7	8	9

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 11

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	B	C
wat ...	...gehalte musiek (bv. klassieke & opera, koor & ensemble, kabaret & musiek, “blues”, rock & jazz)	...gehalte opvoerings (bv. uitvoerende kunste, dans & beweging, letterkunde & poësie)
met ...	...vriendelike diens en verversings (voedsel en drank	...waarde-vir-geld-verversings (by voedselverkooppunte)
en ...	...goeie vervoer (toeganklikheid) na lokale	...veilige en beskermde parkeergeriewe by lokale
teen ...	...minder as die huidige prys	...meer as die huidige prys

Sterk Voorkeur Links					Sterk Voorkeur Regs			
1	2	3	4	5	6	7	8	9

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 12

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	C	A
wat ...	...gehalte musiek (bv. klassieke & opera, koor & ensemble, kabaret & musiek, “blues”, rock & jazz)	gehalte kunste(bv. visuele kuns, uitstallings)
met ...	...waarde-vir-geld-verversings (by voedselverkooppunte)	...vriendelike diens en verversings (voedsel en drank)
en ...	...veilige en beskermde parkeergeriewe by lokale	...goeie vervoer (toeganklikheid) na lokale
teen ...	...minder as die huidige prys	...dieselfde as die huidige prys

Sterk Voorkeur Links					Sterk Voorkeur Regs				
1	2	3	4	5	6	7	8	9	

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 13

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	A	B
wat ...	gehalte kunste(bv. visuele kuns, uitstallings)	...gehalte opvoerings (bv. uitvoerende kunste, dans & beweging, letterkunde & poësie)
met ...	...wye verskeidenheid goeie gehalte verversings (voedsel en drank)	...vriendelike diens en verversings (voedsel en drank)
en ...	...voldoende parkeergeriewe by lokale	...goeie vervoer (toeganklikheid) na lokale
teen ...	...minder as die huidige prys	...meer as die huidige prys

Sterk Voorkeur					Sterk Voorkeur			
Links					Regs			
1	2	3	4	5	6	7	8	9

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 14

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	C	B
wat ...	...gehalte opvoerings (bv. uitvoerende kunste, dans & beweging, letterkunde & poësie)	...gehalte musiek (bv. klassieke & opera, koor & ensemble, kabaret & musiek, “blues”, rock & jazz)
met ...	...waarde-vir-geld-verversings (by voedselverkooppunte)	...wye verskeidenheid goeie gehalte verversings (voedsel en drank)
en ...	...goeie vervoer (toeganklikheid) na lokale	...veilige en beskermde parkeergeriewe by lokale
teen ...	...dieselfde as die huidige prys	...meer as die huidige prys

Sterk Voorkeur					Sterk Voorkeur			
Links					Regs			
1	2	3	4	5	6	7	8	9

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 15

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	C	B
wat ...	gehalte kunste(bv. visuele kuns, uitstallings)	...gehalte musiek (bv. klassieke & opera, koor & ensemble, kabaret & musiek, “blues”, rock & jazz)
met ...	...wye verskeidenheid goeie gehalte verversings (voedsel en drank)	...waarde-vir-geld-verversings (by voedselverkooppunte)
en ...	...goeie vervoer (toeganklikheid) na lokale	...voldoende parkeergeriewe by lokale
teen ...	...meer as die huidige prys	...dieselfde as die huidige prys

Sterk Voorkeur Links					Sterk Voorkeur Regs			
1	2	3	4	5	6	7	8	9

“Veronderstel u kan slegs een kunstefees per jaar bywoon en dat afstand (geografiese gebied) en die tyd van die jaar geen probleem is nie.”

Profiel 16

Met inagneming van die scenario, watter een van die volgende kunstefeeste verkies u?

Die ... fees	B					C			
wat ...	...gehalte opvoerings (bv. uitvoerende kunste, dans & beweging, letterkunde & poësie)					...gehalte musiek (bv. klassieke & opera, koor & ensemble, kabaret & musiek, “blues”, rock & jazz)			
met ...	...wye verskeidenheid goeie gehalte verversings (voedsel en drank)					...vriendelike diens en verversings (voedsel en drank)			
en ...	...veilige en beskermde parkeergeriewe by lokale					...voldoende parkeergeriewe by lokale			
teen ...	...dieselfde as die huidige prys					...minder as die huidige prys			
	Sterk Voorkeur Links					Sterk Voorkeur Regs			
	1	2	3	4	5	6	7	8	9

APPENDIX B: Conjoint analysis raw data

B1: Example of conjoint analysis raw data for 10 respondents
(Compact disk of raw data available from author)

Respondent number	TakePart	Gender	Age	Art Festival	Language	Go Again	SecB_1	SecB_2	SecB_3	SecB_4	SecB_5	SecB_6	SecB_7
1		11: Male	1: Between 18 and 30	AARDKLOP	Afrikaans	1	3	3	6	7	8	6	7
2		11: Male	1: Between 18 and 30	AARDKLOP	Afrikaans	1	8	2	2	8	7	3	3
3		11: Male	1: Between 18 and 30	AARDKLOP	Afrikaans	1	8	3	6	8	1	8	9
4		11: Male	1: Between 18 and 30	AARDKLOP	Afrikaans	1	4	3	4	7	2	4	8
5		11: Male	1: Between 18 and 30	AARDKLOP	Afrikaans	1	2	7	6	3	6	7	1
6		11: Male	1: Between 18 and 30	AARDKLOP	Afrikaans	1	8	2	3	6	2	4	3
7		11: Male	1: Between 18 and 30	AARDKLOP	Afrikaans	1	9	7	8	2	2	2	2
8		11: Male	1: Between 18 and 30	AARDKLOP	Afrikaans	1	7	4	7	8	2	8	3
9		11: Male	1: Between 18 and 30	AARDKLOP	Afrikaans	1	9	6	8	7	2	8	8
10		11: Male	1: Between 18 and 30	AARDKLOP	Afrikaans	1	6	2	8	7	3	9	9

Respondent number	SecB_8	SecB_9	SecB_10	SecB_11	SecB_12	SecB_13	SecB_14	SecB_15	SecB_16	SecC_A	SecC_B	SecC_C	SecC_D	SecC_E
1	6	7	4	2	4	2	2	3	6	70	70	100	70	50
2	4	3	2	2	2	1	6	7	1	100	50	80	100	50
3	8	7	6	2	9	7	8	3	9	100	100	80	20	60
4	7	5	1	2	6	2	2	6	8	100	100	70	50	70
5	8	3	2	3	3	6	2	8	2	70	20	80	60	80
6	2	7	6	7	3	3	3	2	7	50	80	90	90	60
7	7	2	3	3	8	3	3	2	1	80	40	100	50	50
8	7	3	3	1	4	1	2	6	4	70	30	40	70	10
9	8	7	1	3	6	2	2	7	8	30	70	90	0	40
10	7	1	2	1	8	2	3	8	9	60	70	100	0	80

Respondent number	SecC_F	SecC_G	SecC_H	SecC_I	SecC_J	SecC_K	SecC_L	SecC_M	SecC_N	SecC_O	Qualification	Family Life Cycle
1	70	10	10	70	80	0	10	60	10	10	4: Higher Diploma / Degree	2: Young Adult
2	10	0	0	30	10	0	0	0	90	0	4: Higher Diploma / Degree	3: Young Couple
3	100	30	60	100	100	40	20	10	0	0	2: Standard 10	2: Young Adult
4	20	50	20	40	40	30	70	40	50	10	4: Higher Diploma / Degree	2: Young Adult
5	20	20	20	90	50	0	0	0	0	80	2: Standard 10	2: Young Adult
6	100	0	0	60	100	40	50	40	40	80	2: Standard 10	2: Young Adult
7	50	20	90	80	80	20	20	70	20	20	4: Higher Diploma / Degree	2: Young Adult
8	80	100	100	70	80	40	10	90	30	10	4: Higher Diploma / Degree	2: Young Adult
9	30	20	50	100	70	80	90	0	60	40	2: Standard 10	2: Young Adult
10	80	0	30	100	100	100	90	10	0	100	2: Standard 10	2: Young Adult

Respondent number	Community Pride	Event Novelty	Family Togetherness	Socialisation with friends	Push Factor	Objection
1	4	2	3	1	Socialisation with friends	2
2	4	2	1	3	Family Togetherness	2
3	4	2	3	1	Socialisation with friends	2
4	2	4	3	1	Socialisation with friends	2
5	3	1	4	2	Event Novelty	2
6	4	2	3	1	Socialisation with friends	2
7	3	2	4	1	Socialisation with friends	2
8	3	2	4	1	Socialisation with friends	2
9	3	2	4	1	Socialisation with friends	2
10	4	3	2	1	Socialisation with friends	2

Respondent number	Know Aardklop	Know KKNK	Know Grahamstown	R-Square	Aardklop	KKNK	Grahamstown	Quality arts	Quality performances	Quality music	A wide variety of good quality
1	1	1	2	78	23.346	76.452	0	50.223	32.497	0	7.062
2	1	2	1	64	30.032	0	37.859	0	99.589	90.596	82.491
3	1	1	1	65	40.408	42.318	0	27.814	0	58.792	107.915
4	1	1	1	85	68.16	19.202	0	0	1.534	19.08	0
5	1	1	1	92	0	39.732	127.655	0	5.601	10.443	23.571
6	1	1	1	93	151.212	170.003	0	0	40.782	67.266	38.058
7	1	1	1	68	103.033	0	134.615	25.797	0	6.879	95.294
8	1	1	1	86	0	4.614	4.333	0	2.757	35.336	91.605
9	1	1	1	66	72.875	12.516	0	29.127	0	73.273	0
10	1	1	1	84	56.334	0	27.832	25.736	0	8.385	11.686

Respondent number	Friendly service	Value-for- money	Good (accessible) transport	Sufficient parking	Safe and secure parking	Lower than current Price	The same price	Higher than current Price	Festival Brands	Entertainment or festival activities	Refreshments	Transport	Ticket prices
1	49.359	0	39.775	0	16.501	141.879	62.905	0	21.374	14.041	13.799	11.12	39.666
2	0	45.298	4.996	15.044	0	76.218	17.875	0	12.166	32.001	26.507	4.834	24.492
3	152.202	0	11.878	0	8.177	49.302	1.194	0	13.456	18.694	48.396	3.777	15.677
4	91.963	29.08	9.509	73.313	0	111.902	76.258	0	18.704	5.236	25.236	20.118	30.707
5	0	80.455	26.604	0	11.027	88.04	86.873	0	38.312	3.134	24.146	7.985	26.423
6	0	13.685	9.191	0	6.944	1.498	1.362	0	59.438	23.518	13.306	3.214	0.524
7	0	2.111	101.861	27.283	0	1.563	1.563	0	37.484	7.183	26.535	28.363	0.435
8	0	35.055	35.336	34.999	0	132.118	123.846	0	1.543	11.818	30.636	11.818	44.185
9	3.527	23.552	31.517	35.783	0	116.339	101.49	0	22.645	22.768	7.318	11.119	36.15
10	27.386	0	32.649	59.857	0	163.292	86.842	0	16.937	7.738	8.234	17.997	49.095

Respondent number	Highest Attribute	Cluster Distance	Cluster Number	Cluster Name
1	Ticket prices	2.341853	Cluster 4	Price Sensitive
2	Entertainment or festival activities	11.35022	Cluster 4	Price Sensitive
3	Refreshments	16.422	Cluster 2	Transport Sensitive
4	Ticket prices	7.633115	Cluster 4	Price Sensitive
5	Festival Brands	12.10443	Cluster 4	Price Sensitive
6	Festival Brands	7.415115	Cluster 1	Brand Sensitive
7	Festival Brands	10.31132	Cluster 2	Transport Sensitive
8	Ticket prices	11.26094	Cluster 4	Price Sensitive
9	Ticket prices	5.009027	Cluster 4	Price Sensitive
10	Ticket prices	7.870733	Cluster 4	Price Sensitive

B2: R-squares of conjoint data

Respondent number	R-Square	Respondent number	R-Square	Respondent number	R-Square	Respondent number	R-Square	Respondent number	R-Square
1	78	41	87	81	70	121	94	162	86
2	64	42	68	82	99	122	86	163	83
3	65	43	90	83	80	123	78	164	97
4	85	44	77	84	84	124	97	165	98
5	92	45	94	85	56	125	67	166	72
6	93	46	92	86	54	126	79	167	83
7	68	47	97	87	96	127	79	168	94
8	86	48	60	88	94	128	95	169	78
9	66	49	95	89	93	129	99	170	96
10	84	50	74	90	67	130	63	171	91
11	92	51	92	91	58	131	69	172	81
12	70	52	99	92	90	132	82	173	84
13	95	53	92	93	54	133	62	174	83
14	79	54	82	94	80	134	71	175	98
15	74	55	87	95	87	135	97	176	99
16	86	56	91	96	97	136	96	177	85
17	79	57	81	97	88	137	89	178	97
18	93	58	48	98	91	138	86	179	87
19	93	59	85	99	99	139	87	180	90
20	54	60	89	100	85	140	82	181	71
21	61	61	74	101	85	141	74	182	72
22	98	62	95	102	98	142	94	183	67
23	48	63	71	103	55	143	87	184	47
24	94	64	90	104	86	144	45	186	78
25	86	65	88	105	59	145	69	187	97
26	94	66	96	106	98	146	97	188	94
27	97	67	93	107	85	147	86	189	90
28	95	68	96	108	78	148	98	190	97
29	95	69	86	109	72	149	92	191	77
30	66	70	98	110	79	150	94	192	81
31	91	71	86	111	74	151	83	193	52
32	89	72	91	112	82	153	82	194	88
33	86	73	96	113	78	154	97	195	91
34	87	74	87	114	78	155	84	196	94
35	89	75	96	115	95	156	85	197	85
36	93	76	84	116	96	157	86	198	90
37	74	77	95	117	94	158	60	199	73
38	94	78	85	118	73	159	63	200	97
39	68	79	97	119	63	160	97	201	95
40	98	80	95	120	64	161	93	202	85

Respondent number	R-Square	Respondent number	R-Square	Respondent number	R-Square	Respondent number	R-Square
203	88	244	50	284	92	324	78
204	96	245	63	285	96	325	69
205	91	246	84	286	76	326	88
206	90	247	78	287	87	327	79
207	80	248	66	288	91	328	92
208	76	249	96	289	98	329	87
209	54	250	89	290	86	330	74
211	91	251	84	291	83	331	86
212	72	252	80	292	97	332	98
213	99	253	97	293	88	333	64
214	93	254	97	294	84	334	89
215	94	255	88	295	92	335	98
216	90	256	91	296	91	336	96
217	92	257	99	297	94	337	94
218	70	258	94	298	93	338	93
219	82	259	75	299	90	339	82
220	59	260	94	300	96	340	75
221	47	261	64	301	90	341	81
222	89	262	55	302	83	342	75
223	48	263	98	303	90	343	56
224	91	264	72	304	87	344	85
225	94	265	81	305	89	345	82
226	93	266	94	306	94	346	94
227	99	267	54	307	63	347	87
228	85	268	96	308	81	348	99
229	85	269	95	309	82	349	96
230	95	270	55	310	90	350	99
231	86	271	59	311	78	351	79
232	95	272	98	312	86	352	82
233	87	273	80	313	95	353	86
234	83	274	95	314	73	354	94
235	85	275	93	315	98	355	68
236	62	276	97	316	65	356	78
237	86	277	86	317	95	357	78
238	97	278	90	318	98	358	55
239	91	279	94	319	88	359	94
240	92	280	64	320	85	360	99
241	88	281	92	321	69	361	86
242	90	282	89	322	96	362	89
243	93	283	78	323	90	363	79

Respondent number	R- Square
364	87
365	85
366	44
367	95
368	91
369	90
370	83
371	78
372	84
373	95
374	79
375	98
376	86
377	84
378	75
379	91
380	80