# MEASURING SUCCESS OF A WINE FESTIVAL: IS IT REALLY THAT SIMPLE?

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# **ABSTRACT**

One of the country's largest wine festivals, the Wacky Wine Festival, is held annually in Robertson, South Africa. Forty-eight wine farms participate actively in the Robertson Valley that forms part of the wine route and festival, which makes this wine festival unique. This paper presents the results of a survey that was conducted during the festival in June 2009, where visitors completed 424 questionnaires. The questionnaire consisted of three sections, namely (A) socio-demographic information, (B) travel behaviour and (C) statements pertaining to the management aspects of the event. The aim was to conduct a management appraisal based on the premise that different markets have different requirements. To achieve this aim, a factor analysis and an ANOVA were used to determine the significance of each visitor group (market) in relation to the key success factors of the event. Crosstabulation identified the visitors' factor scores for each key success factor, where the Anderson-Rubin method was used to generate a score with a zero mean. A contrast test was used where the significance did not assume equal variances. The findings indicated that different visitor groups or markets had different perceptions of the key success factors contributing to the success of the wine festival. The implication is that a general evaluation by visitors gives a distorted view of the success of the event, since different markets have different requirements.

**Key words:** Wacky Wine Festival; Management; Key success factors;

Factor analysis; Wine tourism

# INTRODUCTION

Wine tourism has emerged as a strong and growing area of special interest tourism and can be seen as an increasingly important component of the tourism product of most wine-producing countries and regions (Hoeksema, 2009). Tourism trends are changing and are fuelled by changes in the needs of tourists. Although some wineries have had meaningful results, the South African wine industry, in general, has not been too successful in fully optimising tourism opportunities (Loubser, 2004). The problem with wine tourism in South Africa, according to Loubser (2004), is that wine makers are interested in cellar door sales, whereas visitors are looking for a total experience, also referred to as a new experience. The total or new experience consists of a combination of interactions at the attractions, in restaurants, and with local people. It furthermore also includes an event programme that offers visitors a variety of entertainment and activities.

Additionally, wine tourism has grown rapidly in recent years as visitors search for the opportunity to experience wine products at the cellars (Getz, 2000). According to Hoeksema (2009), wineries combine their wine products with various other products to offer the new experience. Some wineries, for example Spier, Skilpadvlei and Fairview in the Western Cape, have moved away from producing and selling wine only. Their new approach entails, in the case of Spier, a wide variety of tourism products that include different restaurants, a five-star hotel, a hotel school, an amphitheatre (drama or opera), a country club and a cheetah park (Loubser, 2004). Fairview, on the other hand, combines food – especially cheeses and wine – while Skilpadvlei combines accommodation, a restaurant and wine tasting. These are just a few examples to indicate a change in the way business is conducted in the wine industry. Other wineries combine spas, game farms and conferencing to remain competitive. Hoeksema (2009) posits that the tourism industry, and therefore wine farms, can no longer afford to offer the ordinary, especially in a very competitive world. The latter has prompted the Robertson Valley to host a wine festival with a difference.

The Wacky Wine Festival at Robertson in the Western Cape is one of the country's largest wine festivals. The Festival started in 2004 with just 2 500 visitors and grew to 16 049 visitors by 2008 (Anon, 2009). This festival is unique in the sense that the festival takes place along the Robertson Wine Route. This Route shows the complexity of wine tourism as it consists of 48 wine farms, each producing their own wine and taking part in the wine festival. For the Festival, each wine farm hosts its own entertainment programme and all wine farms offer wine tasting. Most other wine festivals are held in a confined venue or location. Activities offered by the different wine farms, include food tasting, stalls selling arts and crafts, musical performances, bottling of the tourists' own wine, children's activities and even adventure activities, such as skydiving (Saayman & Krugell, 2010). In support of the latter, the number of activities has grown from 57 in 2004 to more than 600 in 2008 (Anon., 2009).

The Wacky Wine Festival takes place over a large geographical area involving and depending on many role-players (wineries) for its success. Hence the aim of this study is to conduct a management appraisal based on the premise that different markets have different requirements.

### LITERATURE REVIEW

The tourism industry is an extremely competitive environment and includes the event and festival sectors. The competitive environment is created by an increase in tourism products (events) and markets. Additionally, visitors also expect quality services and attend festivals and attractions for different reasons (Kruger, 2009). In general, visitors visiting a festival want to meet new people, to socialise, to be interactive, to relax and to be entertained (Pissoort, 2007). In addition, the most basic goals of event and festival tourism are the creation of tourist attractions and the ability to generate travel demand and satisfy tourists' needs (such as escape, relaxation and curiosity). Therefore, event organisers need to take these aspects into consideration when hosting an event.

Most events have a selection of products or services, all of which are used to create an experience for the visitor (Bowdin *et al.*, 2001). The hosting of a successful event such as a wine festival requires the effective and efficient management of various aspects that include

friendly and competent staff, adequate parking at wine farms, adequate information being available, an effective programme, high levels of hygiene, quality products and services, a variety of entertainment and activities and wine farms that are easily accessible (Saayman, 2006; Van der Westhuizen, 2003; De Witt, 2006). Kreitner (1989) defines management as the process of working through and with others to achieve organisational objectives in a changing environment. The goal of the Wacky Wine Festival is to position the event as South Africa's leading wine tourism event and to provide the visitors with a quality wine and lifestyle experience to increase wine sales and knowledge of the Robertson Valley (Anon., 2009).

The organisers of the Wacky Wine Festival must therefore focus on management skills to achieve the goal mentioned above. Key to the success of any event is the managers' or organising committees' ability to measure or evaluate (Cronje *et al.*, 2004; Saayman, 2006). Evaluation or control is defined by Certo and Certo (2009) as ensuring that an event occurs as it was planned to occur. Reasons for evaluation are therefore to determine the success of the event based on the goals that have been achieved, ensure quality services, remain competitive, determine whether the visitors' needs are met and whether the event programme satisfies all role-players involved. Also to determine the overall satisfaction of the visitors, and whether there are gaps and how these gaps will be addressed (Van der Westhuizen, 2003; De Witt, 2006; Goodman *et al.*, 2007; Daft & Marcic, 2009).

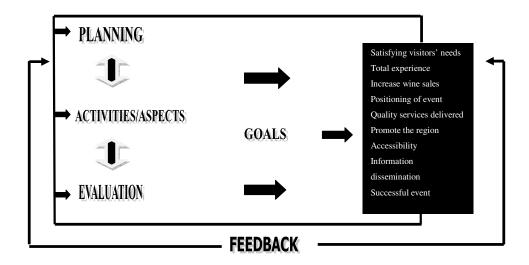


FIGURE 1. RELATIONSHIP BETWEEN PLANNING AND EVALUATION

Cronje *et al.* (2004) state that control (evaluation) is the final step in the management process. However, it is also seen as feedback for a new cycle of management activities and is therefore a very important part of the management cycle. Based on the relationship indicated in Figure 1, it is clear that managers' plans have to be evaluated based on their achievements (Saayman, 2006). The feedback from visitors is vital in determining the level of success as well as giving input to organising the following year's events. However, the literature review recognises that visitors differ in their needs, tastes, lifestyles, motives and requirements.

These aspects therefore have to be taken in consideration when determining the success of the event.

Slabbert (2002) stresses that tourists and visitors are becoming highly involved in making travel decisions based on the expectation of experiencing quality services. In this context, the author supports the notion that evaluation should be applied to better understand visitors. Information concerning visitors and their needs and requirements will help to determine target markets. Target markets usually include the identification and assessment of different tourist characteristics, such as demographics, geographic location, socio-economic factors and psychographic characteristics (Moutinho, 2000; Bloom, 2005). Attitudes have changed, and motivation research into festival attendance is now seen as invaluable to the success of the wine tourism industry, helping to provide event organisers with a better understanding of consumers' behaviour (Weiler et al., 2004). Therefore, each target market has its individual needs, expectations and requirements – which is the premise for this research. The reason for this is that most tourism products and events apply some form of survey to get feedback from visitors and tourists. Examples of this are to be found in all sectors of the tourism industry – in accommodation establishments, at filling stations, in restaurant and conference venues. The results, however, are seldom or never analysed based on the fact that while some visitors or tourists might be satisfied with one aspect of the event, others might differ significantly due to different requirements. Results in most cases are generalised, which could give a distorted view. It might even create a perception that all is well when, in fact, there may be serious management issues that need to be addressed concerning certain markets. To offer quality services and to remain competitive, it is important to ensure visitors' needs and requirements are catered for in an effective and efficient manner.

Various management studies have been conducted in event tourism. These include research by Getz (1997), Bowdin *et al.* (2001), Van der Westhuizen (2003), Shone and Parry (2004), Van der Wagen (2005), De Witt (2006), Kruger (2006), and Hoeksema (2009). These studies focused on management aspects that contribute to the success of an event and were done primarily from a supply side. If one does an analysis of research related to the managing of wine festivals, only a few were found (see Table 1).

The literature study revealed that although an array of studies was conducted in the wine industry, none addressed the issue of the success of events related to the wine industry. This study attempts to address this gap.

# METHOD OF RESEARCH

#### Research design

Exploratory research was conducted by means of a structured questionnaire that was completed by visitors during the Wacky Wine Festival in the Robertson Valley. In total, 450 questionnaires were distributed over a period of four days (4 June 2009 - 7 June 2009) of which 424 were used for statistical analyses.

Hall	2000	Wine tourism around the world: development, management and
		markets
Weiler et al.	2004	Visitor profiles and motivations for visiting an Australian wine
		festival
Tassiopoulos, Nuntsu &	2004	Wine tourists in South Africa: A demographic and psychographic
Haydam		study
Alant & Bruwer	2004	Wine tourism behaviour in the context of a motivational
		framework for wine regions and cellar doors
Galloway, Mitchell, Getz,	2008	Sensation seeking and the prediction of attitudes and behaviours of
Crouch & Ong		wine tourists
Hall & Sharples	2008	Food and wine festivals and events around the world:

development, management and markets

A marketing strategy for the Northern Free State Wine Route

TABLE 1: MANAGEMENT RESEARCH IN WINE TOURISM

2009

# Sampling method

Hoeksema

Availability or convenience sampling was applied to determine the sample size (N=450). The survey comprised a self-administered questionnaire. According to Cooper and Emory (1995), for any population of 100 000 (N), the recommended sample size (S) is 384. Since a total of 16 000 visitors attended the Wacky Wine Festival in 2009 (Anon, 2009), the number of completed questionnaires (424) was found to be acceptable. In order to ensure that one gets 384 properly completed, it was decided to increase the survey to 450 questionnaires. The sample was distributed over the four days where 80 questionnaires were distributed on day one and this was gradually increased, since more visitors visited the festival over the weekend (Day 2: 100, Day 3: 120, Day 4: 150).

#### Questionnaire and survey

The questionnaire was based primarily on questions used by Van der Westhuizen (2003), De Witt (2006) and Kruger (2006). The questionnaire was divided into three sections, where Section A included the demographic profile of the wine visitor; Section B included questions about the travel behaviour of visitors. Section C consisted of key success factors for managing a festival. Both open-ended and closed-ended questions were used in the questionnaire. A five-point Likert scale was used where Totally disagree; 2= Partially Disagree; 3=Neutral; 4=Agree and 5=Totally agree.

The survey took place at several wine farms that formed part of the Festival. Fieldworkers distributed questionnaires based on the recommendation of the event organisers. The following wine farms were selected since more than 90% of visitors visit at least one of these wine farms. These are: Graham Beck, Bon Courage, Cloverfield and Van Loveren. The questionnaires were completed by the festival attendees themselves and did not contain any questions that could identify a specific respondent.

# Data analysis

Data from 424 usable questionnaires were captured on Microsoft Excel. Statistical Package for the Social Sciences (SPSS) in full 16.0 (SPSS Inc, 2007) was used to analyse data. Two factor analyses were carried out to determine the key success factors and, to determine the three different markets or visitor groups attending the wine festival.

A cross-tabulation was done to determine the way that different markets or visitor groups rate the managerial aspects of the Festival in terms of agreement and disagreement. As mentioned above, the managerial aspects were identified by means of a factor analysis. Thereafter, an ANOVA was applied. An ANOVA, called an *F*-test, is closely related to the *t*-test. The major difference is that, where the *t*-test assesses the difference between the means of two groups, an ANOVA assesses the difference between the means of two or more groups. The purpose of an ANOVA is therefore to test whether there is a statistically significant difference in the population means of more than two groups (Eiselen *et al.*, 2005). The ANOVA was carried out to determine whether there are significant differences between the different visitor groups and the key success factors. The contrast test also indicates whether there are significant differences between the different visitor groups. Results of the cross-tabulation, the ANOVA and the contrast test of the Wacky Wine Festival are given in the section below.

# **RESULTS**

#### **Profile of visitors**

Results indicate that approximately 41% of visitors were male and 59% were female. Some 60% of the respondents were Afrikaans speaking and 38% were English speaking. The age distribution shows that 40% of the respondents are between 19 and 30 years of age and another 23% between 31 and 40 years of age. In terms of occupation, most of the respondents were either professionals (30%), in management (16%), self-employed (13%) or students (10%).

Approximately 12% of the visitors were residents of Robertson and the rest were from the Western Cape, followed by those from Gauteng and those from the Eastern Cape. Seven key success factors were identified from the factor analysis, namely quality and good management, wine farm attributes, effective marketing, route development, festival attractiveness, entertainment and activities and accessibility. The seven factors accounted for 64% of the total variance. All factors had relatively high mean values ranging between 3.81 (the lowest) and 4.22 (the highest). Moreover, all items loaded onto a factor with a loading greater than 0.3. The Cronbach values vary from 0.62 to 0.8, which is acceptable since they have a value higher than 0.5. The Cronbach value per factor is as follows:

Factor 1: Quality and good management (0.8720, Factor 2: Wine farm attributes (0.895), Factor 3: Effective marketing (0.846), Factor 4: Route development (0.871), Factor 5: Festival attractiveness (0.843), Factor 6: Entertainment and activities (0.623) and Factor 7: Accessibility (0.852).

An exploratory factor analysis was done on the motives visitors have for attending the Wacky Wine Festival. Three factors were found that allowed the identification of three types of visitor groups based on their reasons for attending the Wacky Wine Festival. The three groups (festinos, epicureans and the social adventurers) were identified. The 'festinos' motive is a satisfying lifestyle with the experience of good wine. Their reasons for attending the Festival focus on the social elements, relaxing, spending time with friends, meeting new people and value of quality products. The 'epicureans' are the connoisseurs who attend mainly for the wine and food offered at the Festival. The third visitor group identified is the

'social adventurers'. Their motives include spending time with family and benefits for children combined with the good food and wine (Saayman & Krugell, 2010:6). Their mean values are as follows: the *festinos* (1.576.05), the *epicureans* (1.661.85) and the *social adventurers* (1.204.14).

Table 2 presents a cross-tabulation of the three types of visitor groups and their views on the key success factors in the management of the Festival. To determine whether, for example, the *festinos* agree that wine farm attributes are a key success factor, the factor scores were recorded to a simple agree or disagree measure and cross-tabulated with the respondent's type category. The factor scores were calculated using the Anderson-Rubin method, which produces a score with a zero mean. Positive scores indicate agreement and negative scores disagreement.

**TABLE 2: CROSS-TABULATION** 

3 Groups	Quality & good management		Wine farm attributes		Effective marketing		Route development	
	Agree	Disagree	Agree	Disagree	Agree	Disagree	Agree	Disagree
Festinos	63.2%	36.8%	55.9%	44.1%	39.7%	60.3%	51.5%	48.5%
Epicureans	53.1%	46.9%	49.9%	51.0%	51.0%	49.0%	44.9%	55.1%
Social adventurers	42.9%	57.1%	61.2%	38.8%	67.3%	32.7%	67.3%	32.7%
3 Groups	Fest	ival	Entertainment &		Accessibility			
	attract	iveness	activities			-		
	Agree	Disagree	Agree	Disagree	Agree	Disagree		
Festinos	51.5%	48.5%	45.6%	54.4%	57.49	6 42.6%		
Epicureans	51.0%	49.0%	65.3%	34.7%	36.79	63.3%		
Social adventurers	71.4%	28.6%	55.1%	44.9%	71.49	6 28.6%		

The cross-tabulation (Table 2) identified that each of these three groups has different perceptions regarding the seven key success factors that need to be managed at the Wacky Wine Festival.

Festinos rated quality and good management, wine farm attributes and accessibility as important. The *epicureans* also identified quality and good management, entertainment and activities as more important The *social adventurers* identified the key success factors as wine farm attributes, effective marketing, route development, festival attractiveness, entertainment, activities and accessibility.

From the above, the *epicureans* can be seen as a specialist market. Their main motive to attend the Wacky Wine Festival is to taste wine and combine it with different foods. The *social adventurers* are more demanding and they focus on a greater variety of managerial aspects. The managers need to take this into consideration to satisfy each visitor group's needs analysis of variance (ANOVA) was then carried out to determine whether there are significant differences between the different wine festival visitor markets (*festinos*, *epicureans*, *and the social adventurers*) and the seven key success factors. Using SPSS, a one-way ANOVA was applied as indicated in Table 3.

TABLE 3: ANOVA ANALYSIS OF THE WACKY WINE FESTIVAL

Success factors		Sig.	Mean square	F
Quality and good	Combined	.004	5.468	5.842
management	Unweighted	.001	10.892	11.636
	Weighted	.001	10.930	11.677
	Deviation	.932	.007	.007
	Within groups		.936	
Wine farm attributes	(Combined)	.193	1.658	1.664
	Unweighted	.558	.294	.295
	Weighted	.700	.148	.149
	Deviation	.076	3.168	3.180
	Within groups		.996	
Effective marketing	(Combined)	.021	3.559	3.949
	Unweighted	.019	5.134	5.634
	Weighted	.013	5.687	6.341
	Deviation	.200	1.511	1.658
	Within groups		.911	
Route development	(Combined)	.137	1.982	2.014
_	Unweighted	.090	2.868	2.914
	Weighted	.110	2.540	2.580
	Deviation	.231	1.425	1.448
	Within groups		.984	
Festival attractiveness	(Combined)	.169	1.600	1.794
	Unweighted	.158	1.796	2.014
	Weighted	.195	1.511	1.695
	Deviation	.171	1.689	1.894
	Within groups		.892	
Entertainment and	(Combined)	.010	3.542	4.789
activities	Unweighted	.014	4.560	6.166
	Weighted	.009	5.145	6.958
	Deviation	.107	1.938	2.621
	Within groups		.740	
Accessibility	(Combined)	.152	1.917	1.904
_	Unweighted	.332	.953	.947
	Weighted	.414	.674	.670
	Deviation	.078	3.159	3.139
	Within groups		1.006	

The seven key success factors, their significance, mean square and F-values are reported. The between-group effect is labelled *Combined* and indicates whether there are overall differences between the three types of visitor groups' view on whether, for example, quality and good management is a key success factor of the Festival. Values smaller than 0.05 indicate significant differences at the 5% level.

Quality and good management, effective marketing and entertainment and activities were significant. At this stage, it is not clear how the success factor differed between the groups of visitors. Tables 4 to 5 present the contrasts tests used to examine such differences. Contrast tests are undertaken after conducting an ANOVA to find out which groups differ (Field, 2005:325).

TABLE 4: CONTRASTS COEFFICIENTS

	Type of festivalgoer by reason for visit	Type of festivalgoer by reason for visit	Type of festivalgoer by reason for visit
CONTRAST	FESTINOS	EPICUREANS	SOCIAL ADVENTURERS
1	-2	1	1
2	0	-1	1

Table 4 indicates the way the contrasts between the groups are set up. Contrast 1 is between the *festinos*, the *epicureans* and *social adventurers*. Contrast 2 is only between the *epicureans* and *social adventurers*. To draw conclusions from the contrasts, it is necessary to first conduct Levene's test, which tests the hypothesis that the variances in the groups are equal.

TABLE 5: TEST OF HOMOGENEITY OF VARIANCES

Key success factors	Levene statistic	df1	df2	Sig
Quality and good management	.559	2	163	.551
Wine farm attributes	1.611	2	163	.203
Effective marketing	1.352	2	163	.262
Route development	.258	2	163	.773
Festival attractiveness	.904	2	163	.407
Entertainment and activities	.897	2	163	.410
Accessibility	2.650	2	163	.074

Table 5 shows the results of Levene's test of the homogeneity of variance. The null hypothesis is one of the homogeneity of variance of the three types of visitor groups' views of the key success factors. The significance values in excess of 0.05 indicate that one cannot reject the null hypothesis. In Table 6 (below), the contrasts should thus be interpreted assuming equal variances.

Table 6 shows the following results: Assuming equal variances, contrast 1 indicates a significant difference between festinos' and the other two groups' agreement that Quality and good management are key success factors in managing the Festival. Contrast 2 shows that there is no significant difference between how epicureans and social adventurers regard Quality and good management. In the case of Wine farm attributes, there is not a significant difference between the festinos and the rest, but the difference between epicureans and social adventurers is significant at the 10% level. For social adventurers, wine farm attributes are clearly important. Effective marketing is significant for the festinos, but was not found to be significant for the epicureans and the social adventurers. In the case of Route development, there is no significant difference between the festinos and the two other groups, but there is a significant difference between the epicureans and social adventurers. Festival attractiveness is a significant success factor for the epicureans compared to the social adventurers. There is also a significant difference for Entertainment and activities between the festinos and the rest of the groups. The last factor, Accessibility, showed no significant difference between the festinos and the rest, but the difference between the epicureans and the social adventurers is significant. Therefore, Accessibility is important for the epicureans, when compared to the social adventurers.

TABLE 6: CONTRAST TEST OF KEY SUCCESS FACTORS AND VISITOR GROUPS

Key success factors		Contrast	Value of contrast	Significance
				(two-tailed)
Quality and good	Assumes equal	1	9135587	.003
management	variances	2	3232904	.100
	Does not assume	1	9135587	.003
	equal variances	2	3232904	.115
Wine farm attributes	Assumes equal	1	1517256	.631
	variances	2	3548855	.080
	Does not assume	1	1517256	.638
	equal variances	2	3548855	.068
Effective marketing	Assumes equal	1	.8468787	.006
	variances	2	.0023097	.990
	Does not assume	1	.8468787	.007
	equal variances	2	.0023097	.990
Route development	Assumes equal	1	.2721047	.386
	variances	2	.3626010	.072
	Does not assume	1	.2721047	.394
	equal variances	2	.3626010	.063
Festival attractiveness	Assumes equal	1	.1547092	.604
	variances	2	.3475640	.070
	Does not assume	1	.1547092	.607
	equal variances	2	.3475640	.067
Entertainment and	Assumes equal	1	.8380337	.002
activities	variances	2	0377667	.828
	Does not assume	1	.8380337	.003
	equal variances	2	0377667	.825
Accessibility	Assumes equal	1	0292311	.927
-	variances	2	.3951101	.053
	Does not assume	1	0292311	.993
	equal variances	2	.3951101	.008

# FINDINGS AND IMPLICATIONS

From the results a few implications are evident. Firstly, the analysis indicated that the three different visitor groups or markets (festinos, the epicureans and the social adventurers) had different ratings regarding the key success factors of managing a wine festival. Therefore, this research confirms the notion that different markets have different needs and therefore have different requirements as to what is important from a managerial point of view to host a successful event. In fact, there were significant differences between the three markets. The implication is that results from a typical visitor survey cannot and should not be generalised. It therefore implies a more in-depth analysis is needed to ensure that the needs of different markets are catered for. This also has a serious implication for the instrument used in the evaluation. The instrument may require more detailed information from visitors.

Secondly, niche markets such as the *epicureans*, are more critical of the key success factors that affect their need to taste and experience food and wines. Therefore, their concern with issues related to food and wine supersedes all other key success factors, such as accessibility and effective marketing. Hence, the more specialised the market, the less concerned it is with the general aspects of the event and *vice versa*. The implication is that, firstly,

organisers/managers need to understand the main needs or motives of visitors attending an event and, secondly, they need to understand the requirements of different markets. This can be achieved by conducting proper visitor surveys and implies that the so-called quick service surveys would not suffice in this regard.

#### CONCLUSIONS AND RECOMMENDATIONS

The aim of this study was to determine whether different markets have different requirements in terms of the key success factors of the Wacky Wine Festival. Seven key success factors were identified by means of a visitor survey applying a factor analysis. The visitors rated each of the key success factors based on their own requirements of a successful event.

Three different visitors groups were identified in this study, the festinos, epicureans and the social adventurers. This innovative approach, which entailed a factor analysis and an ANOVA of travel motives as well as key success factors, revealed that each group or market rated the key success factors differently. Hence, this research confirms that different markets have different requirements. Therefore, it is important for event organisers to know how visitors experienced the event and how to satisfy their needs and meet their expectations and requirements. The research also highlights the fact that evaluation is an important management activity and managers and event organisers need to understand visitors' reasons for attending an event. Managers also need to understand visitor requirements, which prove that determining the success of an event, especially through the eyes of the visitor, is not as simplistic as it seems. The research clearly indicated that this approach should be applied regularly, because if organisers used the data as is, it would give them a distorted view of the reality. Evaluation of the success of an event should thus be seen in a more serious light, since it gives input to next year's event and management cycle. Results from this and similar research will assist event organisers to address gaps, which is vital in order to remain competitive.

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