



Audience Development Research 9 Tweed Shire Festivals Final Report

Prepared for the
Tweed Shire Council
as part of the

Tweed Shire City of the Arts 2003-2005 Audience
Development Program

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EXECUTIVE SUMMARY

The purpose of this report is to provide a summary of the findings from the research performed for the Tweed Shire Council, as part of the Tweed Shire City of the Arts 2003-2005 Audience Development Program funded by NSW Ministry for the Arts. The report provides an overview of the contribution of the festivals to the Shire and to the region. The report examines the value of the events to the community and the value of events to the development of tourism to the Shire.

In previous stages of the research, nine festivals were examined through data collected at the festival sites. The findings were then reported back to the festival organisers and the Tweed Shire's Festival and Events Liaison Officer. Nine individual reports have thus far been produced, collating and analysing data from the festivals. The festivals selected for this study by the Tweed Shire Council included;

- Wintersun
- Tyalgum Diggers Rodeo & Sports Day
- Kingscliff Art Food & all that Jazz
- Banana Festival & Harvest Week
- Tyalgum Festival of Classical Music
- Speed on the Tweed
- Wollumbin Festival
- Tweed River Agricultural Show
- Tweed River Festival

The aim of this report is to compare the data across the festivals and to provide an overall Shire perspective of the data. The report details the profiles of current market segments for the events, examining their demographic and lifestyle profiles and examines the marketing implications of these findings. Additionally the report examines responses to numerous management issues identified by the research data under the categories of food, safety, venue, entertainment and parking.

Finally, the report suggests how action may be taken to respond to this research in exploring methods of cooperation between festival organisers and other strategic partners in the community.

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1.0 INTRODUCTION

The study of nine festivals across the Tweed Shire (referred to as “the Shire”) within an identified timeframe has allowed observations to be made concerning the management and marketing of events, as well as the overall image of events in the Shire. The following report provides a discussion of some of the important issues that have developed as a result of this study. Of primary interest is the issue of continued development of local and visiting audiences- in effect examining the development and impact of community and tourist events to the region.

Secondly, the report aims to identify current profiles of the audiences in terms of their market segmentation, and compare these segments across the events. This is achieved by looking at the various characteristics of audiences revealed by this study; those being demographic, behavioural and expenditure patterns.

The third section of the report examines some of the issues for event management that have arisen at the events and identifies where audiences are most, and least, satisfied and where improvements can be made as a joint initiative.

Finally the report summarises the findings of the research in terms of opportunities for cooperative activity between events in order to more effectively share the resources of the region and provide for sustainable growth in the future.

2.0 TOURISM AND COMMUNITY EVENTS

The research has found that the Shire currently offers a diversity of events that all have a unique offering to both the community and to visitors. While each festival offers a unique experience there are also some common elements that are important to the local community, to local government and to the other regional stakeholders. These elements are explored further below.

Community events

The research demonstrated a significant amount of support for the festivals in the Shire from the local community. The high numbers of people who indicated they would attend more than one event in the Shire in any one year highlights this result. Tweed Shire residents appear to be active festival audiences who enjoy the opportunity to participate in social activities.

Repeatedly high percentages of patrons indicated that their primary reason to attend the events was related to **social reasons**. This is a significant result demonstrating the high value that the community places on the opportunity to interact with others in the community. Other research indicates that events offer an opportunity to reinforce this interaction and further intensify high levels of community well-being and neighbourliness. Observations made at the festivals in this study highlighted situations where local families and couples could simply meet in an event setting and communally enjoy the entertainment. Others engaged in social activities such as dancing and eating as well as shopping at markets. These observations were noted in the research reports of all of the festivals and especially at Wollumbin, and the Banana Festival.

Community-based events also play an important role in maintaining and enhancing **heritage values**, where the local community is able to enjoy seeing, and interacting with, things from the past. Similarly, community-based events allow a sharing of experiences related to **cultural activities** such as art and performance. This was especially true of the Wollumbin festival but also present at Kingscliff, Wintersun and others. There is often an **educational** factor to be considered in these activities, where opportunities are provided to educate all audience segments during some part of the event. Evidence suggests that exposure to cultural activities encourages audience members to

learn new music and try new crafts, arts and performance styles. This type of cultural enlightenment and education was observed throughout the research, but particularly at Wintersun where classes were offered in dancing techniques.

Events that focus on a theme often allow groups of people to identify with that theme. This is especially useful for marketing an event, but also allows community members an outlet for pursuing their own special interests.

The opportunity to **compete** has been shown to be an important reason for the community to come together. Many of the events created this opportunity, from the traditional competitions of the Tyalgum Diggers Festival, Tweed Agricultural Show and the Tweed Banana Festival to the more innovative competitions at Wintersun, the opportunity to compete and compare is an important reason for social interaction and activity. The establishment of an element of competition provides the audience with exposure to arts practice and an opportunity to see the region's most innovative arts (or agricultural) practice. Similarly, many events provide opportunities for children (and adults) to **perform** on stages and arenas, providing an essential outlet for their own personal development as well as providing entertainment for the audiences. The element of competition was observed to be very strong throughout most of the festivals, with high interest and participation from the audiences.

The demographic profiles indicate that the festivals engage **all segments** of the community, from the very young to the elderly and all in-between. Important opportunities for sharing values and knowledge between generations were observed at a number of events. For example, observations were made where fathers can share car experiences with their children and mothers can share their joy of art and culture.

There is strong evidence that active communities are strong communities. The opportunities provided in the Tweed Shire for repeated community involvement across a diversity of festivals is an indicator of a strong community for the Shire. This was further evidenced by the number of **volunteers** participating at the events. Formal community groups such as the Rural Fire Service and the SLSC were prominent as were other individuals who were actively involved in assisting with the events. The willingness of community members to contribute to the quality and success of all the events is a further indicator of the strength of the community in the Shire and of the propensity for social activism.

Tourist events

The examination of demographic data for each festival allowed an analysis of the percentage of visitors from areas outside the shire and as such demonstrated a wide variety of responses. The table below shows the top three regions from which audiences are drawn. It demonstrates the high attraction of events to local audiences, however it also demonstrates the ability for all events to attract visitors from outside the region.

Wintersun	Kingscliff	Tyalgum Diggers	Banana Festival	Speed	Tyalgum Classical	Wollumbin	Tweed Ag Show	Tweed River
Brisbane	Tweed Shire	Tweed Shire	Mur/bah	Tweed Shire	Tweed Shire	Tweed Shire	Tweed Shire	Tweed Shire
Gold Coast	Gold Coast	Gold Coast	Other Tweed area	Gold coast	Brisbane	Northern Rivers	Gold Coast	Gold Coast
Local QLD & Tweed	Brisbane	Other NSW	Brisbane and SE Qld	Brisbane	Gold Coast	Gold Coast	Northern Rivers	Brisbane

Interestingly, many events attract visitors from great distances such as VIC and WA. The percentages of those from over 500kms away are shown in the table below.

	Wintersun	Kingscliff	Tyalgum Diggers	Banana Festival	Speed	Tyalgum Classical	Wollumbin	Tweed Ag Show	Tweed River
Other NSW	11.96%	6.8%	2.1%	0.97%	8.7%	9.3%	5.5%	2.5%	1.7%
Other QLD (beyond Brisbane)	5.13%	2.0%	2.1%	0%	7.5%	5.6%	1.4%	0.83%	1.7%
Other Australia	5.55%	8.8%	2.1%	0.97%	2.5%	7.4%	2.7%	0.83%	4.2%

The reasons for some events attracting tourists are many and could still require further investigation, however the indications are that a mix of a number of factors is evident:

- The theme of the festival attracts strong “enthusiast” markets. (e.g. car enthusiasts that will travel across Australia)
- Marketing through established “enthusiast” networks
- Local community members encourage VFR (visiting friends and relatives) to come to the event
- The opportunity to compete in activities and events from the more traditional events such as horse riding to car racing and car displays.

The positive impact of tourists attending events is often seen as bringing new money into the town, however unless properly managed these positive impacts are not often maximised. Events can seek to make the best opportunities from tourism in three ways;

1. entice them to stay longer and in paid accommodation,
2. entice them to make use of other businesses and attractions in the area,
3. and therefore - entice them to spend as much money as possible.

These three issues are discussed further below in relation to the Tweed festivals.

The study collected data on expenditure patterns and use of accommodation from visitors to the region. It demonstrated that those events that are actively targeting tourists such as Wintersun and Tyalgum Festival of Classical Music are likely to be generating a greater economic impact, with a high use of paid accommodation and high levels of expenditure noted. It was observed that all events have the opportunity to make more connections between events and tourism. Notably there is room for more cooperative activity with other tourist providers that may increase the numbers and yield from tourists. These could be in the areas of

- developing pre-paid packages with local and inter-regional tourists providers
- developing more effective means of information distribution with the local and inter-regional tourist information centres and networks
- developing relationships with local tourist attractions to extend the stay of visitors
- developing other partnerships with non-tourist businesses such as taxis, supermarkets, banks and newsagents.

Combining tourists and the community

Evidence from the research indicates that there are currently no major issues with the influx of tourists to local events and that there are no outstanding issues of conflict between the two groups. Research and texts by authors such as John Allen ¹ suggest that there can be significant social and environmental issues with the impact of events on the local community, especially as events grow in size and scale. While the current balance appears quite harmonious, it may be prudent for festival organisers to be aware of the potential risks of negative social impacts and to devise strategies to negate these.

3.0 PROFILES OF CURRENT MARKET SEGMENTS

The selection of market segments to target in marketing is a process of a) understanding what the event is trying to achieve and b) identifying and studying available segments - and deciding if they match the objectives of the event. Effective segmentation can help the organisers by:

- Attracting high yield audiences,
- Attracting audiences that will most appreciate the entertainment/experience,
- Attracting audiences who will participate actively (or passively) as required,
- Attracting audience segments that will complement and not conflict with each other.

Selecting the wrong targets can be costly in wastage of advertising materials, but also costly in attracting the wrong type of audience.

This research has attempted to profile the current market segments of each festival in the study. In the following sections, some common findings are discussed.

Demographic profiles

As previously discussed, the events appeal to a broad range of demographic groups, however it has also been apparent that there are some common market segments that the studied events appeal to. As indicated in the following table, for most festivals strong segments exist in the age groups between 40 and 59. Market researchers often refer to this segment as the baby boomers, and have often examined their needs and behaviours in an effort to more fully understand their expectations and requirements. So too can festival organisers seek to further understand their motivations and expectations from the festival. While it is important to meet the needs of all audience segments, this is not always possible, and selecting the main segments of your audience may assist in targeting the use of your resources.

Age group	Segment name	Wintersun	Kingscliff	Tyalgum Diggers	Banana Festival	Speed	Tyalgum Classical	Wollumbin	Tweed Ag Show	Tweed River
Under 18		0.84%	1.4%	2.13%	4.9%	1.9%	0%	16.4%	6.67%	3.3%
18- 29		17.23%	16.3%	15.96%	24.3%	14.3%	0%	12.3%	10.83%	16.7%
30-39	Generation Xers	12.18%	11.6%	22.34%	18.4%	16.8%	5.6%	32.9%	21.67%	22.5%
40-49	Baby boomers	20.17%	21.1%	23.40%	28.2%	18.6%	11.1%	30.1%	17.50%	21.7%
50-59	Baby boomers/empty nesters	34.03%	19.0%	26.60%	9.7%	28.6%	27.8%	2.7%	15.00%	16.7%
60-69	Empty nesters	7.98%	14.3%	6.38%	7.8%	11.8%	35.2%	2.7%	11.67%	11.7%
70 +		2.52%	9.5%	3.19%	2.9%	0.6%	18.5%	2.7%	5.00%	5.8%
(blank)		5.04%	6.8%	0%	3.9%	7.5%	1.9%	0%	11.66%	1.7%
Grand Total		100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100%	100.00%	100.00%

¹ Allen J, William O, McDonnell I and Harris R. 2002. *Festival and Special Event Management*. Wiley Australia.

Identification of age-based segments was supported by data on **occupation**. Comparisons of data show some common trends, especially toward retired people and professionals. As demonstrated in the following table of top 3 responses, retired persons featured in all festival audiences. Professionals featured in 5 of the 9 festivals.

Wintersun	Kingscliff	Tyalgum Diggers	Banana Festival	Speed on Tweed	Tyalgum Classical	Wollumbin	Tweed Ag Show	Tweed River
Retired	Retired	Other	Sales	Trade/Transport	Retired	Professional	Retired	Professional
Admin/Production	Other	Sales	Retired	Retired	Professional	Student	Professional	Retired
Sales/Clerical/Service	Sales/service	Retired	Other	Professional	Other	Retired	Other	Unemployed

The identification of accurate market segments is useful for festival organisers and regional planners in the development of marketing strategies. The information can be used in numerous ways including:

1. to further target these markets in advertising and promotion
2. to use images that are attractive to these segments
3. to use the correct media mix that these people read/see
4. to provide information about the events activities that these segments expect
5. to provide facilities that are useful and often expected by these segments
6. to programme entertainment with activities for these segments
7. to ensure facilities in the local community are adequate for these segments

Tourism Queensland provides one of the best resources for understanding different tourism market segments (see their website for details) but other organisations also produce useful FREE documents (see below) such as, “Not over the Hill- Just enjoying the view”².

Lifestyle and behaviour profiles

The research attempted to gauge the “types” of people attracted to the festivals by asking a number of questions related to the audiences’ lifestyle choices. These questions were primarily interested in their event attendance, such as number and type of other events attended, and other activities undertaken around the event.

The results were surprising, in establishing the high levels of patronage to other events. At least 50% of all audiences responded that they have attended other events in recent years. The result was even higher for Tweed Shire residents who showed a particular passion for attending other events in the Tweed Shire.

There were higher results (60%+) for music based events such as the Tyalgum Festival of Classical Music, Wollumbin and Wintersun. These audiences also showed a trend to identify specific other events that they attend such as “Splendour in the Grass, “Woodford” etc. Similarly, events such as Speed on Tweed demonstrated the preponderance of audiences to attend events that are directed to special interest groups, with audiences preferring to attend “other motor sport events” as opposed to other community events. Conversely, audiences at community based events such as the Banana Festival and the Tweed Ag Show showed a trend toward attending other community-based events. Their responses were more generic such as “other shows” or “other festivals”. These results indicate that event-based behaviour may be useful for developing cooperative marketing strategies and for developing an understanding of the motivations of audiences.

² See the research section of the Tourism Queensland website <http://www.tq.com.au/research/>
www.communities.qld.gov.au/seniors/publications/documents/pdf/notoverthehill.pdf
<http://atc.australia.com/Research>

What audiences most enjoy

The festivals under study offer an extensive and diverse range of activities, programmes, entertainment and events. As such it is not practical to compare these activities, however it is possible to examine the more broad categories of enjoyment. This analysis assists in understanding the expectations of the audience and therefore assists in designing programmes that meet the needs of the audiences. It is also useful in defining elements of a Shire brand. The following table has ranked the top three responses for this question, with discussion following.

Wintersun	Kingscliff	Tyalgum Diggers	Banana Festival	Speed on Tweed	Tyalgum Classical	Wollumbin	Tweed Ag Show	Tweed River
Car	Music	Rodeo	Parade	N/a *	Music	Entertainment/music	Animals and competition	Entertainment/music
Music	art work	Specific activities	Kids involvement	N/a *	Specific events	Kids activities	Atmosphere	Kids activities (rides, animals)
Atmosphere	Atmosphere	Atmosphere	Music	N/a *	Everything/atmosphere	Indigenous programme	Entertainment/rides	Indigenous programme

* data for this question not collected at this event

It is significant (and expected) that all audiences rated their most enjoyed feature as related to the theme or attraction of the event. However other common responses also emerged. The high response to kids entertainment may reflect the need to consider the needs and expectations of children and their families in event planning. It is obviously an expectation that children will be welcomed and entertained at most events.

It is also significant that “atmosphere” rated highly in many events. Again this response points to the value of the events to the community in creating the right atmosphere for social interaction, however further comments from those surveyed indicated that the creation of an “atmosphere” relies on a number of combining factors including;

- the venue itself,
- the use of space to make the event “feel” busy or quiet and relaxed.
- a feeling of safety by the presence of security devices and people
- location (relative to town or other scenic attractions)
- the presence (or absence) of queues and crowds
- comfort (heat, rain, mud, seating etc)
- the like-mindedness of the crowd (e.g “laid-back” atmosphere at Wollumbin or “excitement” at Speed on Tweed)
- familiarity of the event (“been coming here for years” at Tweed Ag Show)

4.0 MANAGEMENT ISSUES

Management Aspect	Average Rating
venue	3.72
Organisation	3.49
Cleanliness	3.49
Entertainment	3.47
Safety	3.45
Food	3.23
Parking	3.15

The research asked respondents to rate their opinion of certain aspects of the event between 1 for poor and 5 for excellent. The overall results for the levels of satisfaction with the management of the festivals were quite good. The following table shows the average response for all festivals in the study. As indicated in the following table, the aggregated results for all festivals indicate the highest average response for venue and the lowest for parking and food.

Each aspect is discussed below.

Food

Further analysis of these issues highlighted the following concerns with these two areas. With regard to **food**, many of the respondents pointed to a lack of variety in the food offerings, and a lack of healthy food choices. Others requested more opportunities to taste local regional produce.

Parking

In relation to **parking**, larger crowds appeared to correlate with more parking issues. As events become larger, park and ride systems may need to be implemented, along with more structured parking facilities.

Safety

Safety was perceived quite positively in most events, with some concerns for road closures and the marshalling of pedestrian traffic.

Entertainment

Entertainment was also perceived quite well overall, with most issues relating to accurate programming and the continual provision of entertainment without “holes” in the programme. There were also comments made in relation to providing children’s entertainment at some events, reflecting the need to understand the audience profiles and their expectations.

Cleanliness and organisation

Cleanliness and organisation were rated quite well with some events recording excellent results in this area.

Venue

The highest response was for **venue**, with many positive comments received about all individual venues. Many positive responses were received about the Murwillumbah Showground, which continues to be an asset to the Shire, providing an excellent space for a diversity of events. From car racing to equestrian events, the showground offers an excellent venue for competitors, audiences and other event stakeholders. The condition of some of the infrastructure is aging and may be in need of replacement in the near future, however, any modifications to the event space would need to be in strong consultation with the community and all the event organisers and should reflect the heritage value of the area.

The size and location of the venue allows easy access for audiences as well as providing a link to the town and its services. The scenic mountains offer a unique backdrop to the events which could be used more to promote the image of the events held here.

Similarly, Tyalgum showgrounds offer a spectacular and truly unique venue for the events held there. For many respondents the venue at Tyalgum was the best part of the event experience. Again, this is an asset to the Shire that needs to be well conserved and appreciated.

Other street venues such as those used by Wintersun and Kingscliff Art Food and all that Jazz, were also well received, but have more issues with parking, safety and access. This is an expected issue with venues that are not purpose built, but may need further consideration from council and

organisers. The two street venues did however receive high ratings for the venue reflecting the good management of the event space and the appropriate choice of venue for the event.

These findings can be used when prioritising issues for future improvements, both from an individual perspective and from a Shire perspective.

Programming

The results indicate that over 89% of audiences intend to return to future festivals. This is an excellent indicator of the success of the festivals, however it also has implications for the development of programmes that have elements of both “the old and the new”. The research has identified some issues in programming for some festivals, however the decision to change is not always easy. Event organisers may need to reflect on a number of questions that will assist in their decision making;

- Are festival audiences expecting the same thing next year?
- Which elements should stay the same and which should change?
- Will new elements assist in achieving the core objectives of the event?
- Are new elements compatible with the community and its values?
- Is there a sense of contentedness with familiarity?
- Is the success of a festival related to its ability to change or to stay the same – or both?

Each event will have different answers to these questions, reflecting their different audiences and their expectations.

5.0 OPPORTUNITIES FOR COOPERATION

Opportunities for cooperation exist on a number of levels, at the individual festival level with the community, at a level between festival organisers, and with other strategic partners. The study has identified examples of cooperative activity that have resulted in successful outcomes for festival organisers and exceptional experiences for audiences. These examples are provided below, along with some ideas for future development of cooperative activities – developed from other events around Australia and internationally where successful cooperation has been observed;

Cooperation with stakeholders

At the **individual level**, festival organisers have been observed to cooperate with a **network** of stakeholders who can forge on-going relationships. When this network is optimised, resources are shared, trust is strengthened and the festival experience is heightened. The network of stakeholders shown in the diagram below allows for the development of ideas and the shared use of resources between stakeholders as well as between the festival organiser and stakeholders.

In this study many situations were observed where festival organisers have made excellent use of the surrounding networks; at the Tyalgum Festival of Classical Music “Friends of the Festival” appears to encourage the local audience to assist in the development of the event. At the Kingscliff Art, Food & All That Jazz Festival local artists became further involved in the design of festival logos and branding images - using local suppliers for materials, and local media for promotion. T-Shirts with these images were for sale in local shops.

Cooperation with strategic partners

Opportunities for cooperation with the local council and other **strategic partners** assists in sharing physical and human resources as well as providing better services for visitors. There are numerous areas where strategic partners can become involved in the provision of services and activities for the festivals. This assists them in raising their own profile, as well as contributing to the development of the event.

- Recycling stations

On-site recycling stations demonstrate a commitment to sustainable environmental management by the local council, waste managers and the festival coordinator. Prominent recycling stations demonstrate the capacity of the Shire to manage waste effectively. There are also excellent opportunities for council to educate and inform audiences of other issues such as waste, health and environmental management. Similarly other organisations involved in health and energy education can use these public events as an opportunity for education.

- Tourist information and booking services

As previously discussed, the effective servicing of tourists will assist in increasing the economic benefit to the community. A highly visible tourist information booth on-site will provide a much-needed service for visitors and may assist in making them stay longer in the Shire. Cooperative arrangements with TACTIC should be made at all events to distribute information to visitors.

- Central information stations

Central information stations will provide information on programs, toilets, shaded areas, eating areas, venue layout and other emergency contacts. This could be in the form of a generic booth that is available to all Shire events. Local business, council and other partners may sponsor the costs of its development.

- Cooperative marketing initiatives

Marketing initiatives can be investigated that will pull a number of similar cultural products together to produce cooperative advertising which targets specific niche audiences, e.g. galleries, B&B's and events. This can be organised in conjunction with TACTIC activities or separate from it.

- Event support program

An Event Assistance Program sponsored by Council and other State partners such as DSRD and Federally NRACC can provide targeted support for specific desirable event activities such as inter-regional marketing, media and PR activities. The highly successful Tweed Shire City of the Arts 2003-2005 Audience Development Program is an excellent example of this.

6.0 CONCLUSION

The research has identified some important **indicators** of the strength and popularity of the festivals in the study. The primary indicator of the success of an event is the willingness of audiences to return. In this respect over 89% of audiences intend to return to future festivals. This is an excellent indicator of the success of the festivals.

Secondly, the overall high levels of satisfaction with aspects of **organisation, venue and entertainment** indicate that the strength and skills of current event managers. Many of those surveyed had various positive comments and stories to tell of their festival experience. Similarly, the survey team also observed the diversity of cultural experiences offered by the unique festivals of the Tweed Shire.

The third indicator is the high **support of the community** shown in the high participation of community members as volunteers and participants, but also as patriots of the many events of the Shire.

These indicators point to continued success of festivals in the Shire – and potential for growth in audience numbers. With this growth comes the responsibility for all stakeholders to ensure sustainable development and monitoring. The growth of tourism to the events is also highly probable and as such needs coordinated planning and management to ensure that there are adequate services and products to meet their needs. This report has provided some guidance towards cooperative planning and management that may assist in devising strategies to manage these changes. However, the management of these issues is an on-going process that will require continued research and management.