

Market segmentation of triathletes participating in Ironman South Africa

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Declaration with regard to independent work

I, Esmarie Myburgh, identity number 90070190088084 and student number 21704724, hereby declare that this research submitted to the North West University, for the Master study: ***Market segmentation of triathletes participating in Ironman South Africa***, is my own independent work; and complier with the Code of Academic Integrity, as well as other relevant policies, procedures, rules and regulations of the North West University; and has not been submitted before to any institution by myself or any other person in fulfilment of the requirements for the attainment of any qualification.

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“What lies behind us and what lies before us are tiny matters compared to what lies within us” – Ralph Waldo Emerson

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*I dedicate this study to each athlete who participates in Ironman South Africa -
you are the true celebrities in the world.*

Abstract

Market segmentation of triathletes participating in Ironman South Africa

A triathlon can be described as the combination of the three athletic competencies swimming, cycling and running where each of the items is performed in a specific order and vary in distance. A triathlon is a very select sport that only attracts specific participants, seeing that constant training is necessary in order to improve fitness and skill in the three different disciplines. Being a triathlete involves a substantial amount of physical and psychological stress over several hours of continuous activity.

Therefore the key aspects that drive this study are the following:

- The uniqueness of triathlons and triathletes makes it important to research certain aspects such as: Who these participants are? Why they participate in triathlons? And why do they return to the event each year?
- Currently most triathlon research is done in countries such as United States of America, Australia, Germany and Japan. There are also numerous studies done on triathletes, although most of these studies focus on physiological and medical aspects of these athletes.
- To the best of the author's knowledge no other study in South Africa has focused on profiling triathletes and gaining knowledge on what differentiates these participants from other endurance sport athletes.
- As there is currently a deficiency of information regarding triathletes in South Africa it becomes imperative to research this market through market segmentation.

With the latter in mind, the main purpose of this study was to apply market segmentation on triathletes that participate in Ironman South Africa, the only full-length Ironman held on the African continent. In order to achieve this goal a destination-based survey took place during the registration process of participants at The Boardwalk Convention Centre and Spa in Port Elizabeth. A total of 425 completed questionnaires were used in the study. An in-depth literature study was also done to review different aspects of triathlons and triathletes, including the unique nature of the sport and participants as well as analysing previous literature concerning the characteristics of triathletes. Literature also explored market segmentation and the different variables used to segment triathletes and other endurance sport athletes. From literature it

became clear that motives to participate and frequency of participation could be useful in segmenting sport participants. These two variables were applied to Ironman South Africa in two separate articles.

In Article 1 motives to participate was applied as a market segmentation variable. It was found that triathletes were motivated by seven motivational factors including: *Challenge, Inner vie, Health and fitness, Intrinsic achievement and control, Event novelty, Group affiliation and socialisation* and lastly, *Respect and risk*. Based on these motives three distinct clusters of triathlon participants were identified: *Devotees, Enthusiasts* and *Aspirationals*. The participants in each cluster showed statistical significant differences with regard to their motives, while age was the only variable with significant socio-demographic differences between the clusters.

In Article 2, frequency of participation was used to segment Ironman South Africa participants. Significant differences were found between first time and repeat participants based on the variables: demographic, behaviour and motives to participate. Four segments were identified at Ironman South Africa based on the number of times they have previously participated in the event. The frequent flyer concept was applied which resulted in the dividing of the four participant segments into different loyalty segments. The segments were the *Bronze, Silver, Gold* and *Platinum segment*. Three marketing strategies were developed, firstly for the *Bronze* and *Silver segments* (these two segments shared similar characteristics), secondly for the *Gold* and *Platinum segments* also sharing corresponding characteristics and lastly, a marketing strategy to expand triathlons in South Africa.

The information obtained from the two market segmentation variables led to an array of recommendations to attract and retain participants to Ironman South Africa events. Also recommendations focus on how to expand triathlon events in South Africa. Significant contributions were made to literature regarding the profile of the Ironman South Africa participants and how these triathletes compare to other endurance sport athlete.

Key words: *Triathlons, Ironman South Africa, market segmentation, motives to participate and frequency of participation*

Uittreksel

Marksegmentering van driekampatlete wat deelneem aan Ysterman Suid-Afrika

'n Driekamp kan beskryf word as die kombinasie van drie sportsoorte naamlik swem, fietsry en wedlope. Elk van hierdie items behels verskillende afstande en word in 'n spesifieke volgorde voltooi. 'n Driekamp is 'n selektiewe sport wat spesifieke atlete lok en werf. Een van die redes hiervoor is dat hierdie sportsoort konstante oefening vereis om fiksheid en vaardigheid in al drie die dissiplines te bereik en te verbeter. Dit verg voortdurende hoë fisiese en psigologiese inspanning en langdurige oefening ten einde tot 'n driekamp atleet te ontwikkel.

Spesifieke sleutelaspekte moes dus in ag geneem word ten einde hierdie studie te dryf wat die volgende insluit:

- Die uniekheid van driekampe en driekampatlete noodsaak navorsing aangaande die profiel van hierdie deelnemers. Verder moet die redes vir deelname en die terugkeer na driekampkompetisies vasgestel word. Tans blyk dit dat die meeste navorsing betreffende driekampe in lande soos die Verenigde State van Amerika, Australië, Duitsland en Japan geloods word. Hoewel daar vele studies oor driekampatlete uitgevoer is, fokus hierdie studies hoofsaaklik op die fisiologiese en mediese aspekte van die driekampatleet.
- Sover die outeur se kennis strek, is geen studie voorheen in Suid-Afrika geloods wat op die profiel van driekampatlete fokus nie. Geen literatuur bestaan wat dui op die inwinning van kennis omtrent die aspekte wat driekampatlete van ander uithouvermoë-sportatlete onderskei nie.
- Aangesien daar tans 'n gebrek aan inligting rakende driekampatlete in Suid-Afrika is, is dit noodsaaklik om hierdie mark op grond van marksegmentering na te vors.

Met die bogenoemde in gedagte, het hierdie studie hoofsaaklik gefokus op die toepassing van marksegmentering op driekampatlete wat aan die Ysterman Suid-Afrika kompetisie deelneem. Hierdie kompetisie is die enigste volledige Ysterman wat op die Afrika kontinent gebied word. Ten einde die hoofdoel van die studie te bereik, is 'n ondersoek geloods wat op kompetisiebestemming gebaseer is. Die ondersoek is tydens die registrasieproses van die Ysterman Suid-Afrika kompetisie uitgevoer wat by die Boardwalk Convention Centre and Spa in Port Elizabeth plaasgevind het. 'n Totaal van 425 voltooide vraelyste is ingewin en analiseer. 'n In-

diepte literatuurstudie is uitgevoer om verskillende aspekte van driekampe en driekampatlete te ondersoek. Die unieke aard van Ysterman en Ysterman-deelnemers is ondersoek. 'n Analise van vorige studies en literatuur betreffende die eienskappe van driekampatlete oor die algemeen, is ook uitgevoer. Literatuur is bestudeer aangaande marksegmentering en die verskillende veranderlikes wat toegepas kan word om driekampatlete en ander uithouvermoë-sportatlete in groepe te verdeel. Dit is duidelik uit die beskikbare literatuur oor uithouvermoë-sportdeelnemers se motiewe vir deelname en motiewe vir herhalende deelname dat hierdie twee veranderlikes betekenisvol en bruikbaar is vir segmentering tot unieke groepe. Hierdie twee veranderlikes is dan ook toegepas op die Ysterman Suid-Afrika kompetisie waarvan die besonderhede in twee afsonderlike artikels vervat is.

Artikel 1 bespreek die toepassing van die twee marksegmentering veranderlikes, naamlik driekampatlete se motiewe tot deelname en motiewe vir herhalende deelname. Daar is bevind dat driekampatlete deur sewe motiveringsfaktore tot deelname en terugkeer na kompetisie gemotiveer word. Hierdie faktore is: *Uitdaging (oftewel Challenge)*, *Inner vie*, *Gesondheid en fiksheid (Health and fitness)*, *Intrinsieke bereiking en beheer (Intrinsic achievement and control)*, *Kompetisie nuutheid (Event novelty)*, *Groepaffilasie en sosialisering (Group affiliation and socialisation)* asook *Respek en risiko (Respect and risk)*. Drie onderskeidelike groepe driekampdeelnemers kon identifiseer word op grond van die motiveringsfaktore. Die groepe is *Toegewydes (Devotees)*, *Entoesiaste (Enthusiasts)* en *Voortstrewendes (Aspirationalists)*. Die deelnemers in elk van hierdie groepe het statisties betekenisvolle verskille getoon betreffende hul motiewe vir deelname terwyl ouderdom die enigste veranderlike was wat betekenisvolle sosio-demografiese verskille tussen die groepe getoon het.

In Artikel 2 is die aantal driekampdeelnemers deur atlete as veranderlike gebruik om die deelnemers van Ysterman Suid-Afrika te segmenteer. Betekenisvolle verskille is tussen driekampatlete met eerste deelname en herhalende deelname gevind. Die verskille wat voorgekom het was ten opsigte van die volgende veranderlikes: demografie, gedrag en motiewe vir deelname. Verder is vier segmente by Ysterman Suid-Afrika geïdentifiseer wat op die aantal kere wat driekampatlete voorheen aan die kompetisie deelgeneem het, gebaseer is. Die "*frequent flyer*" konsep is toegepas wat tot die verdeling van vier deelnemer-segmente gelei het. Hierdie segmente is in verskillende lojaliteitsgroepe verdeel, naamlik *Brons*, *Silwer*, *Goud* en *Platinum*. Drie bemarkingstrategieë is ontwikkel om die lojaliteitsgroepe te teiken. Die eerste bemarkingstrategie was vir die *Brons* en *Silwer* segmente (twee segmente wat soortgelyke eienskappe deel). Tweedens is 'n bemarkingstrategie ontwikkel wat fokus op die *Goud* and *Platinum* segmente (wat ook korresponderende eienskappe vertoon). Laastens is 'n algemene bemarkingstrategie daargestel om driekampe in Suid Afrika uit te brei.

Die inligting wat verkry is vanuit die twee marksegmentering veranderlikes het 'n verskeidenheid aanbevelings tot gevolg wat daarop gemik is om deelnemers vir Ysterman Suid-Afrika te werf en te behou. Die aanbevelings fokus ook op wyses waarop driekamp kompetisies in Suid Afrika verder uitgebrei kan word. Betekenisvolle bydraes is gemaak tot bestaande literatuur betreffende die profiel van Ysterman Suid-Afrika deelnemers en hoe hierdie driekampatlete met ander uithouvermoë-sportatlete vergelyk.

Sleutelwoorde: *Driekamp, Ysterman Suid-Afrika, marksegmentering, motiewe tot deelname, aantal deelname*

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CHAPTER1:

INTRODUCTION, PROBLEM STATEMENT OBJECTIVES AND METHOD OF RESEARCH

Ironman: “placing oneself in a difficult position and attempting to succeed in spite of that difficulty”

1.1 Introduction

Sport events play a fundamental role in the South African tourism industry. The popularity of sport in the country is growing and contribute more than R6 billion to the South African tourism industry, with more than 10% of foreign visitors coming to South Africa to support or participate in sport events (Department of Sport and Recreation, 2012:5). Saayman, Rossouw and Saayman (2008:102) suggest that South African tourism can use sport events as a vehicle to market the country and thus ensure more sport participants. South Africa has played host to many sport events since 1994 and an event like the 2010 FIFA World Cup earned the country an estimated R7.6 billion (Saayman & Rossouw 2008:12). It also created thousands of jobs, permitting construction of new venues and upgrading the existing infrastructure, especially within the transport sector. This job creation assisted in the increasing and sustaining of the Gross Domestic Product (GDP) of South Africa (Bohlmann & Van Heerden, 2005:12).

With these benefits of sport events in mind it is not surprising that many countries, including South Africa, host these events. South Africa's climate and contrasting landscape offer an ideal setting for especially endurance sport (Morgan, 2013:1). South Africans have also started to enjoy testing their endurance abilities, thus leading to more sport consumers travelling to participate in the large number of endurance sport events (Eliot, 2005:3; Morgan, 2013:1). Endurance sports can be defined as: “a sports activity by individual, non-team athletes in which key muscles are exercised at sub maximal intensity for prolonged periods of time - for example swimming, cycling, running and canoeing” (Medical online dictionary, 2013:1). In South Africa four of the most popular endurance categories include events on foot (for example the Comrades Marathon), on wheels (like the Pick and Pay Cape Argus Cycle Tour), on water (the Unlimited Dusi Canoe Marathon) and in water (for example the aQuallé Midmar Mile).

Triathlons is seen as the ideal endurance sport because it includes the three disciplines of swimming, cycling and running (Wicker, Hallmann, Prinz & Weimer, 2012:2) and the event has become increasingly popular in recent years. In fact, it is the fastest growing sport in the world according to Love (2009:1). The Spec-Savers Ironman South Africa (hereafter referred to as Ironman South Africa and also the study focus of this research) is one of the world's most gruelling one-day endurance events. It requires athletes to complete a 3.8km sea swim followed by a 180km cycle and end with a 42.2km run. All participants must complete these items in less than 17hours. Ironman South Africa is the only Ironman on the African continent and takes place annually during April in Nelson Mandela Bay with nearly 2 000 athletes participating (Ironman South Africa, 2013:1).

Although triathlons, such as Ironman South Africa, are popular events and draw a large number of participants, there is still little research on the event in general. Specifically, very little research has been done on the nature and features of participants, how to attract different market segments of participants and retain these participants especially in a South African endurance sport context. Sheard and Veldtman (2003:2) has indicated that in South Africa most of the research is superficial and does not give insights into different sub-sectors or niche markets within the sport tourism industry. However it now becomes crucial for endurance sport event organisers to broaden their knowledge and understanding of the participants that take part in endurance events (Streicher & Saayman, 2010:122). Knowing the nature of participants and creating profiles through the process of market segmentation will help organisers and destinations to create products and services that complement the participants' desires. Market segmentation is done through categorising participants according to information about their expenditure behaviour, their characteristics as athletes, their own and family's travel behaviour and how they differ from each other (Streicher & Saayman, 2010:125). This will create benefits including attracting more people to the region which will help with seasonal fluctuations, thus generating more revenue for the event or area as well as giving that area a competitive advantage over other areas or event destinations (Seaton & Bennett, 2004:28; Saayman & Rossouw, 2010:255).

With these benefits in mind, Phelps and Dickson (2010:5) highlight the fact that there is still a lack of research on the subjects of endurance sport participants in general. They emphasise that it is surprising that there is little knowledge available on endurance sport, especially regarding those taking part in triathlons – arguably one of the toughest endurance sports. Arnott (2008:3) offers a possible explanation for the lack of current research in that people do not understand triathlon consumers and the motivating factors that attract them to the gruelling but

enjoyable multi-sport event. This emphasises the importance of comprehensive market segmentation of triathletes participating in Ironman South Africa.

This chapter discusses the research process that was followed in this study. It starts off with a background to the study and analysis of the problem statement. Hereafter the goals and objectives of the study are specified, followed by the research methodology and definitions of key concepts. Lastly, a chapter classification of the dissertation is presented.

1.2 Background to the study

The background to the study consists of two parts: firstly endurance sport events are defined and explained, focusing specifically on triathlons. The section also includes specific characteristics that differentiate these events and their participants from other sport events. Secondly, the background focuses on market segmentation and the importance of applying the process to endurance sport participants.

1.2.1 Endurance sport events and triathlons

Endurance sport events can be defined as “the ability to withstand longer strain, because the distance, time and level of anaerobic fitness/intensity requirements for successful completions are considerably higher when compared to other sport events” (Brook, 1987:93; Mann & Schaad, 2001:264; Kellmann, 2002:25). Endurance sports include marathon running, cycling, canoeing, open-water swimming and triathlons. These events differ from other types of sport events, because participants need to test their physical and mental abilities to withstand the extreme conditions for which endurance events are famous (O’Neil & Steyn, 2007:100). Endurance sports can also be differentiated from other sport events because amateur as well as professional participants need to yield a great share of leisure time for preparation and training (McCarville, 2007:160; Lamont & Kennelly, 2011:85; Lamont, Kennelly & Wilson, 2012:1068). The popularity of endurance sports can be attributed to a number of factors. Hallmann and Breuer (2010:215) explain that these sport events are all authentic and satisfy participants craving for a true experience. The participation of most endurance sport athletes extends well beyond participating in events. The sport is integrated into their lifestyle and is mostly the central part of their social identity (Lovett, 2011:5). Thus endurance participants adjust their lifestyle to accommodate their participation in endurance sport events (Hill & Robinson, 1991:80). It is also clear that each type of event area consists of a unique blend of setting, duration, management and participants (Getz, 1997:4).

This is especially evident within triathlon events where participants have the extra challenge of relying on weather and geographical conditions as well as the design of the route (Pan, 2012:5).

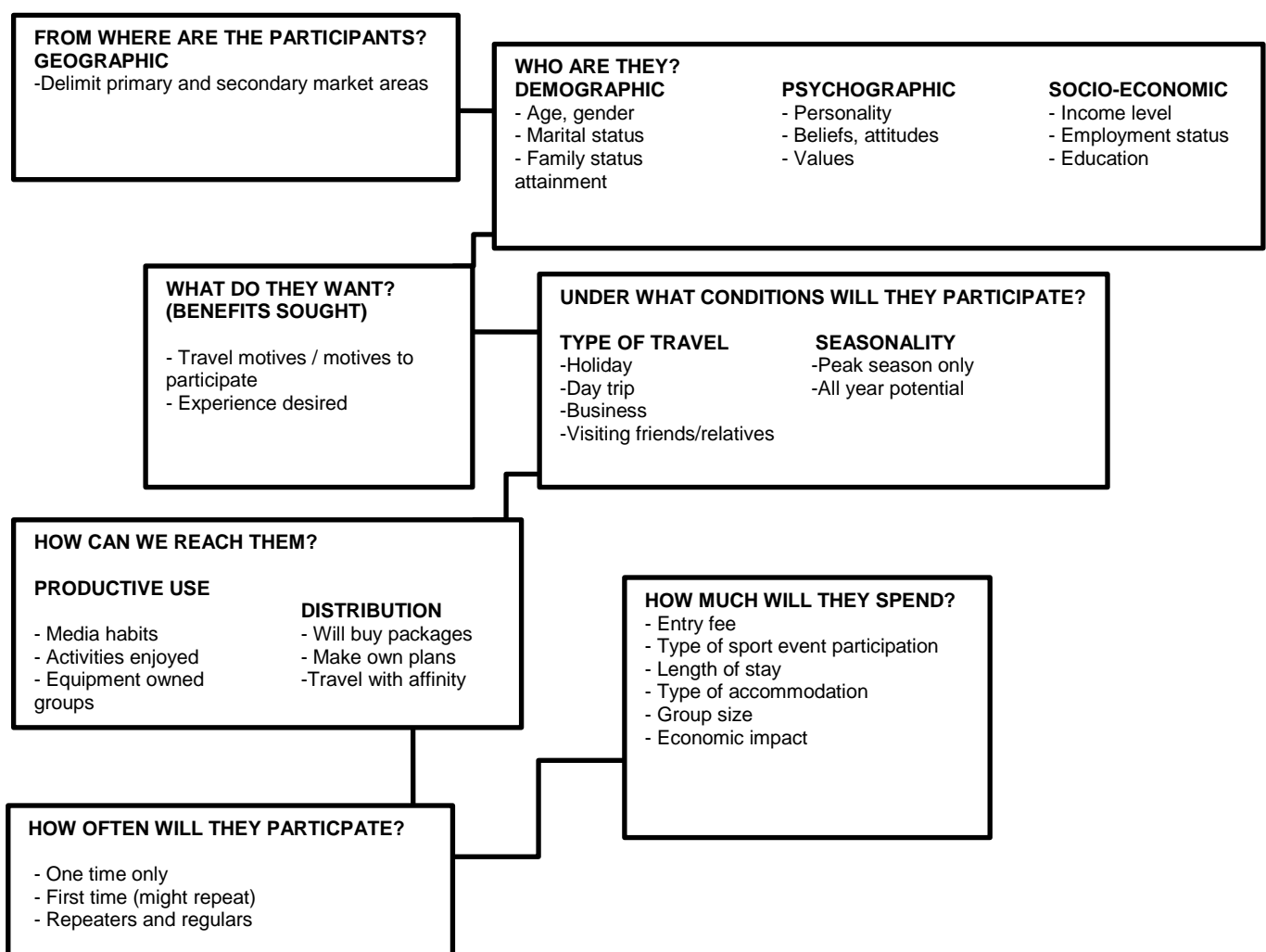
A triathlon can be described as the combination of the three athletic competencies: swimming, cycling and running where each of the items is performed in a specific order and vary in distance (Lovett, 2011:2). According to Triathlon New Zealand (2011:1-72) and USA Triathlon (2011:1) the demographic profile of triathlon participants suggests that they are from different age groups and that the characteristics of participants is of great interest given the nature of the sport. Previous research shows that most triathletes participate for the personal challenge and to stay fit (Lamont & Kennelly, 2012:238). These characteristics show that the participants are willing to spend lots of money and travel long distances to participate in a triathlon (Tribe Group, 2009:9, 12). The physical benefits of exercise are also seen as a strong theme within the literature on factors that motivate triathlon participation (Ogles & Masters, 2000:131; Smith, 2000:187; Bond & Batey, 2005:190; LaChausse, 2006:308). Grand'Maison (2004:87) also identified that triathletes want to test their physical and mental limits as well as opposing themselves against others to reach certain goals (Ogles & Masters, 2000:132). It is important to note that in a South African context it is still unclear who the typical triathlon participants are and what motivates them to participate in Ironman South African. Smith (1998:174; 2000:188) remarks that there are great variations among participants that take part in endurance events such as triathlons, especially in terms of first-time triathletes at a particular event and repeat triathletes at the same race. It is important to study these differences as it will help understand repeat participation in the subsequent year or in subsequent years (Hallmann & Wicker, 2012:172). This heterogeneous nature of endurance sport participants leads to the need for market segmentation. The next section will discuss market segmentation and the importance thereof in an endurance sport context.

1.2.2 Optimal market segmentation of endurance sport participants

Mok and Iverson (2000:300), Tsiotsou (2006:15) as well as Mullin, Hardy and Sutton (2007:140) define market segmentation as the procedure used to separate a heterogeneous market into homogeneous sub-groups. Each of these sub-groups has very different, but specific needs and desires. Thus, the members of a certain group of endurance competitors have one or more traits in common and form individual market segments. Researchers have experimented with different market segmentation applications to try to define the profile of their target markets (Hsu & Crotts, 2006:280). The four most popular variables for profiling a (participant) segment include the following characteristics: geographic (countries, cities, nations, regions, provinces or neighbourhoods); demographic (race, occupation, marital status, education, income and social class); psychographic (personality traits, lifestyle, motives or values) and lastly, behaviour (visitor expenditure, attitude, buyer readiness stage, user status, occasions and benefits). The following authors, to name but a few, support these segmentation applications: Burke and Resnick, (2000:41); Cooper and Wahab (2001:89); Armstrong and Kotler (2005:54); Hanlan,

Fuller and Wilde (2006b:17); Fill (2006:329); Swarbrooke and Horner (2007:159) as well as Bothma and Burgess (2007:37). The size and purchasing power of each market segment can be measured through the extent to which the specific target market is reached and served (Tsiotsou, 2006:16). Considering the sustainability of a market segment and the way in which the different variables regarding participants' were applied, i.e. demographic variables (Tsiotsou, 2006:15), psychographic variables, media preference, purchasing behaviour, travel motivations, the rewards they desire (Blann & Armstrong, 2003:190; Saayman & Uys, 2003:293) and expenditure variables (Chhabra, Sills & Rea, 2002:223), will determine the size and profitability of a specific target market.

Figure 1.1: Segmentation variables/bases for events



(Source: Adapted from Getz, 1997:261; Kruger, 2010:128).

To improve the understanding of segmentation variables, Getz (1997:260) designed a segmentation bases specifically for events (as shown in Figure 1.1). This has been adapted to

suit an endurance sport context. The figure displays different groups of variables categorised according to the outcomes of main segmentation questions. These questions include: from where will they come? Who exactly are they? What do they want? Under what conditions will they participate in the event? How can they be reached? And how often will they participate? The current study will only focus on two of these questions, namely what do participants want (their motives)? and how often will they participate (frequency of participation)?. These are the leading variables for the study as previous research (see Streicher & Saayman, 2010:128; Kruger, Saayman & Ellis, 2011:59; Kruger & Saayman, 2013b:71) indicates that motives for participating in a event differ according to the type of event and thus the need arises to segment participants in terms of their profiles and reasons for competing in the event. Also, Lamont and Kennelly (2012:250) state that a triathlete's motivation to participate in an endurance event will vary according to his/her time-span of involvement. It is also important to recognise that a triathlete's initial motives may change over time. The frequency of participation variable is thus important to research as it will help to better understand the stability or instability of triathletes' profiles and their motivation as they progress in their sporting career (Smith, 2010:31).

Traditionally, segmentation was only conducted using demographic and socio-economic variables. This lead to a large amount of criticism, since researchers felt that segmentation needs to be based on different attributes as it will present more effective findings (Liu, Taylor & Shibli, 2008:189). Therefore, researchers seem to agree that no single segmentation base or variable is ideal or is the most effective segmentation criterion for a specific situation (Jang, Morrison & O'Leary, 2002:367; Morrison, 2002:178). Thus, it becomes imperative for the endurance event organiser to attempt different segmentation variables, individually or in combination. This will result in detecting the best way to view the market structure of their events (Kruger, 2010:7). Also, the future of segmentation is based on the grounds that markets are accurately defined. If classification is too broad, the specific sport endurance market will not easily be targeted for promotional purposes (Deery, Jago & Fredline, 2004:244). Expansive definitions will lead to an exaggeration of the size of the sector and contribute to inaccurate characteristics of the sport sector (Deery *et al.*, 2004:244).

Research carried out in South Africa that focus specifically on endurance sport participants, includes motives to participate in an open-water swimming event (Kruger *et al.*, 2011:59-79), participants in a road cycling event (Streicher & Saayman, 2010:121-131) as well as marathon runners competing in the Comrades marathon (Kruger & Saayman, 2013b:71-92). Previous studies also focused on the relationship between spending behaviour and repeat participation at a marathon (Kruger, Botha & Saayman, 2012:108-122), spending determinants and economic impact of participants at the Two Oceans marathon, Cape Argus Cycle Tour and the Midmar

Mile (Saayman & Saayman, 2011:124-138; Kruger, Saayman & Ellis, 2012:1203-1227). These studies collectively show that: (1) participants' reasons (motives) for participating differ for each event; (2) the majority of endurance sport participants are mostly motivated by intrinsic motives; (3) predominantly socio-demographic variables influence travel behaviour and (4) participants' spending behaviour is influenced by socio-demographic, behavioural and motivational factors. Each of these studies focused on one specific variable to segment participants for the specific endurance sport event. However, none of the studies examined the different ways in which participants can be segmented for the respective events. In addition, none of these studies focused on one sport event that combines similar endurance events including swimming, running and cycling (for example Ironman South Africa). Furthermore, no previous endurance sport study has investigated different segmenting variables within one sport event. It is thus clear that there is still a gap in current literature to find the ideal segmenting variables for endurance sport participants and, in this case, to segment triathletes participating in Ironman South Africa.

Target segmentation is also imperative as it will help ensure a sustainable event that will lead to the following potential benefits for the South African endurance sport industry (Ogles & Masters, 2003:70; Robinson & Trail, 2005:58; LaChausse, 2006:304; Scott & Turco, 2007:41):

- A customise event endeavour will meet the needs of a target market, ensuring a long term participant relationship resulting in participants that are more committed to the event (Getz, 1997:272; Burke & Resnick, 2000:39; Ali-Knight, Drummond, McMahon-Beattie, Robertson & Yeoman, 2004:136; Kastenholz, 2005:556; Casper & Stellino, 2008:95);
- Creating “the overall event package” will reach other segments of triathlon participants (Tribe Group, 2009:21; Getz & Andersson, 2010:470);
- Adequately targeting each target group with customised marketing strategies (Green, 2003:128; Casper & Stellino, 2008:93; Hallmann, Feiler & Breuer, 2012:4);
- The improvement and development of new infrastructure and sport facilities (Hinch & Higham, 2004:88; Brown, O'Connor & Barkatsas, 2009:211);
- Stimulation of spending leading to long-term economic benefits (Gratton, Dobson & Shibli, 2000:18; Kruger, 2010:17);
- Tourism growth and higher demand for tourism (Saayman, Saayman & Du Plessis, 2005:212; Preuss, Seguin & O'Reilly, 2007:6);
- Enhancing bidding capability of South Africa as host and sport destination (Kotze, 2006:285; Markland & Ingledew, 2007:25);

- Increased community pride and support for sport and sport events in South Africa (Saayman *et al.*, 2005:212; Kotze, 2006:285); and
- The promotion of a healthy lifestyle for the general public that includes regular exercise (Ogles & Masters, 2003:70; LaChausse, 2006:304; Markland & Ingledew, 2007:25; Brown *et al.*, 2009:211).

1.3 Problem statement

From the discussion above, five key challenges are evident regarding researching triathletes. First there is a lack of research in general and especially in South Africa regarding market segmentation of triathletes (Arnott, 2008:3; Phelps and Dickson, 2010:5). To the researchers' knowledge no other study to date has focused on analysing these athletes in the country. Second, the current body of research regarding sport participants and, more specifically, endurance sport participants suggests that there is a variety of variables (socio-demographic, geographic, behavioural and motives to participate) available to segment the sport participant. Therefore it is fundamental to determine the most appropriate segmentation variable or the correct combination of variables for a triathlon event (Tribe Group, 2009:19; Shilbury, Westerbeek, Quick & Funk, 2009:10; Kruger, 2010:7). Third at present, triathletes are regarded as a homogenous segment of endurance participants and therefore the potential for growth into different markets in the future is essential (Rohm, Milne & McDonald, 2006:36). The triathlon participant has a complex mind-set where one deals with rational (motives that can be defended by reasoning or logical argument) and emotional (motivation occurring when a person has accomplished something) as well as intrinsic (motivation that arises from within an individual) and extrinsic (motivations that arise from outside of the individual and often involves rewards) motivation. Thus the fourth challenge, namely to find the best way to segment these participants as it becomes vital for a sustainable and profitable sport event (Rohm *et al.*, 2006:36). Lastly the retention of participants and the establishment of loyal participation are essential as these participants spend money in the host destination/area (Daniels & Norman, 2003:214; Gratton, 2004:40; Hallmann & Wicker, 2012:173).

It is clear that, in the research regarding sport tourism, a gap still exists in finding the ideal way of segmenting endurance sport participants. This study attempted to meet the five key challenges as mentioned above. This was done through focusing on a triathlon (that combines different endurance sports and determining the motives of these triathletes to participate and then contemplating the differences between first and repeat participants. Literature shows that these are leading ways of segmenting endurance sport participants and will help event organisers and marketers make their event a profitable and sustainable one (Arnott, 2008:11; Streicher & Saayman, 2010:121; Kruger *et al.*, 2011:60). This study will therefore help

accurately profile the different triathlete segments and will consequently benefit the sport and provide a greater level of truth for policy and planning purposes. However, Frochot and Morrison (2000:22), Andrews and Currim (2003:190) as well as Xia, Evans, Spilsbury, Ciesielski, Arrowsmith and Wright (2009:465) advise that each market segmentation strategy must be clearly defined in order to select the most appropriate variable or variables to segment the market. With the previous statement and the problem in mind, considering the South African endurance sport context, the primary aim of event organisers and marketers must be to ensure reoccurrence of participation and a sustainable, lucrative event. The main standards that were used to evaluate the variables/bases applied in this study included greater participation and demonstrable economical sustainability that will contribute to an improved economic impact for the host destination. Within the research there are many unanswered questions for researchers and leisure scientists. These questions are: What are the profiles and characteristics of triathletes? What are triathlon participants' motives to take part? Are there differences between first and repeat participants? **With these questions in mind, this research segmented triathletes participating in Ironman South Africa.**

1.4 Goal of the study

1.4.1 Goal

The goal of this study was to segment triathletes that participate in Ironman South Africa.

1.4.2 Objectives

In order to achieve the overall goal, the study relied on accomplishing the following objectives:

Objective 1

To give a comprehensive overview of triathlons and triathletes by means of a thorough literature review.

Sub-objective 1.1: To review the unique nature and background of triathlons by focusing on Ironman triathlons, especially Ironman South Africa.

Sub-objective 1.2: To examine triathletes in terms of their profile, behaviour, motives and unique nature as well as sport participation theories relevant to endurance sports.

Objective 2

To conduct an extensive analysis of market segmentation and its application in an endurance sport context through a comprehensive literature review.

Objective 3

To segment participants at the Ironman South Africa event based on their travel motives with an empirical analysis.

Objective 4

To segment participants of the Ironman South Africa event based on the frequency of participation and to distinguish between first-time participants and repeat participants via an empirical analysis.

Objective 5

To draw conclusions and make recommendations concerning the variables/approaches applied in this study to design the optimum segmentation approach for triathletes in South Africa.

1.5.1 Method of Research

The study was executed according to a quantitative approach. Primary data on the topic was collected from existing sources and a self-administered questionnaire was used to collect problem-specific data (primary data).

Literature Study

The literature study was based on the following specific keywords: *market segmentation*, *endurance sport participants*, *triathlons*, *Ironman* and *sport tourism*. The theoretical framework of market segmentation mainly focused on endurance sport participants. The literature study was done through articles, theses, dissertations, newspaper articles, books and other tourism-related literature as well as sources on the Spec-Savers Ironman South Africa and other endurance sport events. Information searches were conducted mainly through library catalogues and indexes, as well as the Internet. Scientific databases such as Google Scholar, Ebscohost, Sabinet and SA ePublications were utilised to search for the most recent, relevant publications and information. Through these sources, a complete analysis of market segmentation was carried out by ascertaining the importance and benefits of identifying the optimal way to segment endurance sport participants. Both primary and secondary data was used as intensive literature studies was implemented as well as an empirical survey (which was facilitated through a self-administered questionnaire).

Empirical survey

The following section highlights the methods that were used to conduct the empirical analysis.

1.5.2 Research design and method of collecting data

This research was based on a quantitative approach and quantitative methods were applied to gather information. A quantitative method is descriptive in nature and determines the relative relationships between variables (Bruner, James & Hensel, 2005:931). It is suitable for collecting demographic information (Slabbert, 2004:63). In this approach, the researcher was interested in the different segmentation variables of the endurance triathlon participant at the Spec-Savers Ironman South Africa event. In order to gather the needed information, self-administrated questionnaires were handed out in a causal manner at the 2012 Spec-Savers Ironman SA event. The study determined the motives, spending behaviour and the difference between triathletes that are first-time and frequent participants in Ironman South Africa. For the purpose of the study, the Ironman survey took place from 11 to 13 April 2013. During this period, TREES (Tourism Research in Economic, Environment and Society) at the North-West University, Potchefstroom Campus conducted a destination based survey. The data that was obtained was then used to compile graphs and tables. These graphs and tables were interpreted to establish the participants' motives, behaviour and socio-demographic differences. The survey followed a non-probability sampling approach. Therefore a convenience or availability sample was applied to gather data from participants while they were registering for the event at The Boardwalk Convention Centre and Spa in Port Elizabeth. The questionnaires were handed out by seven fieldworkers including one senior lecturer, a masters student and five tourism and events students from Nelson Mandela Metropolitan University (NMMU). The field workers were divided into groups of two and worked in shifts of two hours over three days. During these shifts, they had to distribute as many questionnaires as possible. The field workers were trained in the manner in which to approach the participants. This included being polite and giving a brief overview of the purpose and importance of the survey. Certain quotas had to be filled including international, national, local, professional, male and female participants in order to ensure a representative sample.

1.5.3 Sampling

Krejcie and Morgan (1970:608) used the following formula to calculate the sample sizes:

$$s = X^2 * N * P * (1 - P) / d^2 * (N - 1) + X^2 * P * (1 - P).$$

s = required sample size.

X^2 = the table value of chi-square for 1 degree of freedom at the desired confidence level (3.841).

N = the population size.

P = the population proportion (assumed to be .50 since this would provide the maximum sample size).

d = the degree of accuracy expressed as a proportion (.05).

In 2012, a total of 1 744 triathletes participated in Ironman. When using the formula suggested by Krejcie and Morgan (1970:608), the appropriate sample size was calculated at 313. The sample size was, however, increased to 450 to take into account the importance of precision and completeness. A total of 425 questionnaires were administered for Ironman South Africa. It therefore encompassed more than the required number of questionnaires according to the formula given by Krejcie and Morgan (1970:608) and applied for this study.

1.5.4 Development of the questionnaire

The questionnaire (see Appendix A) used to survey participants at Ironman South Africa was based on the work of McCarville (2007:159-173), Smith (2010:1-77), Streicher and Saayman (2010:121-131), Kruger *et al.* (2011:59-79), Lovett (2011:1-114), Lamont *et al.* (2012:236-255) and Wicker *et al.* (2012:1-28). It was also developed in collaboration with the event organisers. The questionnaire measured the following:

- Section A: **Socio-demographic information** (gender, age, home language, gross annual income, home province, country of residence, highest level of education, marital status and mode of transport) as well as spending behaviour (number of people in travelling group, number of participants/spectators paid for, length of stay and visitor spending on different spending components). The spending components were detailed via different categories including: entry fee, accommodation, transport, gear/equipment, meals, medicine, souvenirs and other expenses.
- Section B: **Entry details and motives to participate.** A five-point Likert scale was used to determine participants' motives to compete. A total of 24 statements were given which participants could be marked as: not at all important (1) to extremely important (5). Entry details included: the participant's entry details, how many times he/she has participated in Ironman South Africa, how many times he/she finished the Ironman South Africa triathlon, how many times he/she participated in Ironman internationally, in how many sporting events does he/she participate annually, their overhead sport category, age exposed to triathlons, person who exposed him/her to triathlons, other sport events previously participated in, other sport events in 2013 in which participants would take part, will they visit other tourism attractions while at the sport event destination, who initiated their participation and how did they hear about the event.

1.5.5 Data analysis

Microsoft Excel was used for data capturing and basic data analysis. The Statistical Services at the North-West University, Potchefstroom Campus, assisted in the processing of the data and SPSS software (SPSS Inc., 2013:1) was used to process the information. The data analysis involved initial data analysis (descriptive statistics) and focused on the demographic profile of the participants at the Ironman event. Using SPSS, a factor analysis, cluster analysis and ANOVA analysis were carried out. The factor analysis was performed to determine the leading motives for participating in the Ironman competition. A cluster analysis was applied to cluster participants at Ironman South Africa based according to the identified motives to participate. ANOVAs were implemented to determine the difference between first-time participants and frequent participants. In the next section a brief description of each of the statistical techniques that were used follows.

Factor analysis

A factor analysis can be described as a multivariate technique that identifies whether there are correlations between a set of observed variables. These variables stem from the relationship with one or more latent variables in the data gathered (Field, 2005:371; Pallant, 2007:179). A principal axis factor analysis, using an Oblimin rotation with Kaiser normalisation was done on the motivation factors of the participants.

Cluster analysis

According to Hair, Bush and Ortinau (2000:594) a cluster analysis can be defined as: “a multivariate interdependence technique whose primary objective is to classify objects into relatively homogeneous groups based on the set of variables considered and is mostly an exploratory technique”. When using hierarchical clustering no assumptions are made about the number of groups or group structure, instead the members are grouped based on their natural similarity (Johnson & Wichern, 1988:477). The cluster analysis, using Ward’s method with Euclidean distances, grouped the different participants into clusters based on their motivation to participate in Ironman.

ANOVA analysis

The other name for ANOVA is the *f-test* and it shares many similarities with the *t-test*. However, the significant difference between these analyses is the fact that *t-test* assesses the difference between the means of two groups, whereas ANOVAs measure the difference between more than two groups. Thus the ANOVA analysis can be described as the analysis that tests whether there are significant differences in the specific population means of more than two groups (Eiselen, Uys & Potgieter, 2005:119). ANOVAs together with effect sizes and chi-squares were

used to determine the differences between the identified motivational clusters as well as first time versus repeat participants at Ironman South Africa.

1.6 Defining the concepts

Certain key concepts that were found throughout the study are defined in order to give a better understanding on the context of the study.

1.6.1 Sport tourism

Sport is regarded as the world's largest social phenomenon, while tourism is predicted to become the world's biggest industry in the next century (Kurtzman & Zauhar, 2003:41). Standeven and De Knop (1999:12) define sport tourism as "all forms of active and passive involvement in sporting activity, participated in casually or in an organised way for non-commercial or business/commercial reasons, that necessitates travel away from the home and work locality". Hall (1992:10) also notes that sport tourism consists of two categories, firstly to travel to participate in sport and secondly to travel to observe sport. Kurtzman (2005:15) uses this information to define sport tourism as "the use of sport as a vehicle for tourism endeavours". He goes further by explaining that the primary determinant of sport tourism is that tourists are attending or participating in a particular sport activity (Kurtzman, 2005:16).

1.6.2 Endurance sport

According to Gastelu (2006:1) endurance can be defined as "the ability to continue physical activity without undue discomfort", while endurance sport can be defined as "a sport that requires the ability to perform for long periods of time at low intensities, such as triathlons" (Gastelu, 2006). The uniqueness of an endurance event is settled in the physical and mental challenges it presents, the great deal of preparation it requires and the necessity that the participant overcome extreme challenges to the body and mind to finish (O'Neil & Steyn, 2007:99, 100). Extreme environmental conditions also contribute to the physical and mental pressures on the athlete (Dettweiler, 1991:10; Anthony, 1996:25; Mann & Schaad, 2001:5).

1.6.3 Triathlons

A triathlon is a long distance sport event that covers three different sport categories including: swimming, running and cycling (ITU, 2008:1; Ehritz, 2003-2004:1). The individual legs of a triathlon, and the transitions between these legs are used to calculate the participants total time, which ranges from under an hour to up to 17 hours. This is dependent on the distance of the event. The now-standardised sequence of a triathlon begins with swimming, followed by cycling and ends with running (Smith, 2010:1). Triathlon events are high impact events that test a participant's motivation, willingness, hard work, mental toughness and discipline (ITU, 2008:1).

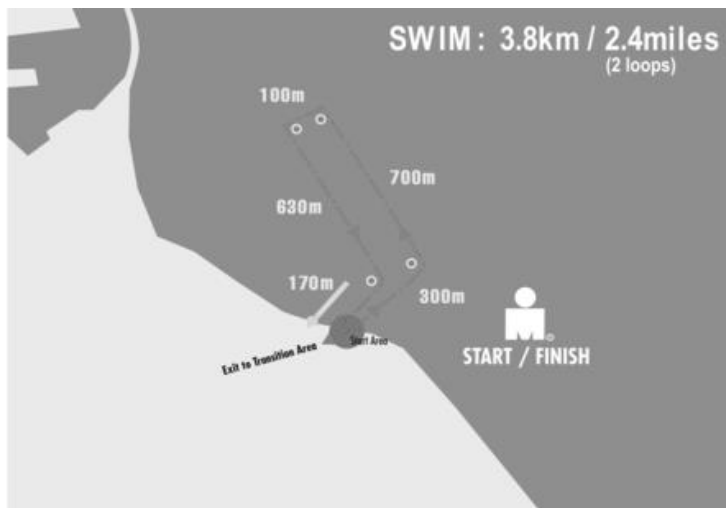
The first triathlon was held on 25 September 1974 at Mission Bay in San Diego. Since this first triathlon, it is seen as a sport-related tourism event that has grown rapidly (Ehriz, 2003-2004:1). In the late 1980s, triathlon events developed into set races that are known as sprint, Olympic, half ironman and ironman (Croft, Gray & Duncan, 2007:2).

1.6.4 Market segmentation

Market segmentation came from the notion that most organisations struggle to serve all customers equally in their respective markets (Hallmann & Wicker, 2012:171). Vyncke (2002:446) explains that these “customers” are too widely scattered and heterogeneous when it comes to their needs and wants. This is when segmentation was introduced and can be defined as “a tool to identify targetable groups that share similar demographic, psychographic, geographic and behavioural characteristics” (Shilbury, *et al.*, 2009:13). Normally a (sport) marketer uses these different segmentation variables in combination or alone, hoping to find the best way to view the market configuration. However, Bowen *et al.* (1996:246) emphasises that there is no single way to segment a market.

1.6.5 Ironman and Ironman South Africa

Every year, hundreds of thousands of triathletes compete in triathlons around the world. To date there are 26 Ironman events (WTC accredited) held around the world with the Ironman World Championships which takes place each year in Kona, Hawaii (Ironman South Africa, 2013:1). The Spec-Savers Ironman South Africa event takes place in Port Elizabeth which is ideal for the event because of the clean beaches and warm water. The Spec-Savers Ironman South Africa race starts with a swim at Hobie Beach comprising two loops of 1.9km each (Map 1). Then the cycling course, as seen in Map 2, consists of three loops starting out along the coast towards the city. The last leg is the run, which is a very fast flat route which takes the participants out and through the bottom gate of the Nelson Mandela Metropolitan University. The race then end at midnight at Hobie beach as seen on Map 3 (Ironman South Africa, 2013).



Map 1: Swim course for the Ironman event (3.8km)



Map 2: Cycling route (180.2km)



Map 3: Running route for participants (42.2km)
(Source: Ironman South Africa, 2013:1).

1.7 Chapter classification

This study consists of six chapters. The following section gives a brief outline of what can be expected from each of the chapters.

Chapter 1 Introduction: This chapter includes the introduction (to set a background), problem statement, aims and objectives, method of research and definitions of key concepts. The aim of this chapter is to give an overview of endurance sport, specifically focusing on triathlons as well as a broader understanding of market segmentation.

Chapter 2 - Literature review: This chapter comprises a review of previous research regarding triathlons and triathletes. The triathlons section discusses the background and unique nature of triathlons, focusing on Ironman triathlons with emphasis on Ironman South Africa. The next part of the chapter presents the analysis of the profile, behaviour, motives and unique nature of triathletes. A comparison was also made between triathletes and other endurance athletes. Lastly, sport participation theories were used to describe why triathletes are distinctive endurance participants.

Chapter 3 Literature review: This chapter reveals the analysis that was done of market segmentation in an endurance sport context. Literature on what market segmentation entails was reviewed. Further literature review was done on how market segmentation is applied in tourism and why it is important for sport events. An assessment of the market segmentation process was done focusing on different segmentation variables and applying it on sport events. The chapter also considered previous South African endurance studies that applied different segmentation variables. Lastly the chapter highlights the benefits of market segmentation for endurance sport events.

Chapter 4 - Article 1: This article establishes the motives of participants in Ironman. It shows the viability of identifying the motives for participating in the Ironman triathlon. These motives were used to cluster the participants into different groups, making it simple for marketers to develop specific marketing messages for different market segments. This can help sustain the event by increasing the number of entrants.

Chapter 5 - Article 2: This article segments participants in Ironman based on the number of times they have participated in the event to distinguish between first-time and repeat participants. This article shows the importance of both first-time and repeat participant markets as well as ways that event management and marketing strategies can be adapted to attract more participants.

Chapter 6 - Conclusions and recommendations: Chapter 6 consists of conclusions drawn from the discussion in the previous chapters. The results of the two segmentation variables used to segment triathletes is emphasised and how it can be applied in an endurance sport context. Recommendations are presented to assist event organisers and marketers to understand their markets, for the effective planning and marketing of the event as well as recommendation for future triathlon events and research.



CHAPTER 2:

A REVIEW OF TRIATHLONS AND TRIATHLETES

Ironman: “where the finish line is a place of celebration in every sense of the word”

2.1 Introduction

Triathlons are multi-sport endurance events that comprise of swimming, cycling and running. The sport began at the San Diego Track Club in 1974 and roots back to Mission Bay, Southern California, where a group of friends began training together (Smith, 2010:10; Lamont & Kennelly, 2012:241). Amongst them were runners, swimmers and cyclists and soon their training turned into informal races (Ehritz, 2003-2004:1). This led to Jack Johnstone and Don Shanahan organising the first Mission Bay Triathlon that was held on 25 September 1974 with 46 athletes competing (Ehritz, 2003-2004:1). The San Diego Track Club sponsored the event which made up of a ten kilometre run, eight kilometre cycle and 500 meter swim (Athnet, 2001-2013:1). In 1989 the International Triathlon Union (ITU) was found in Avignon, France where, in only five years, they succeeded to receive recognition of this new event as an Olympic sport (Phelps & Kent, 2010:278; Knechtle, Knechtle & Lepers, 2011:83; Athnet, 2001-2013:1). In 1989 the sport was awarded Olympic status and was featured for the first time at the 2000 Sydney Olympics in Australia (Athnet, 2001-2013:1).

The demand to host triathlon events has risen considerably over the last five years (Arnott 2008:4; Hoffman & Wegelin, 2009:2191; Hoffman, 2010:32; Lepers, Sultana, Bernard, Hausswirth & Brisswalter, 2010:251; Knechtle *et al.*, 2011:82). This growth in triathlons is apparently due to the increased club membership. Other reasons for the fast growth in popularity include that triathlon events sell out faster than other events and because of the large number of full-year triathlon licenses that are sold, especially in Germany (Wicker, Hallmann, Prinz & Weimar, 2012:2), New Zealand (Triathlon New Zealand, 2011:1), The United States of America (USA Triathlon, 2011:1), Australia (Chang & Johnson, 1995:25) and Japan (Harada, Onishi, Koijima & Ishiii, 2010:2). Several scholars have also mentioned the rapid growth of triathlons throughout the world and therefore triathlons received increased attention in academic literature (for example Chang & Johnson, 1995:25-28; Case & Branch, 2001:118-127; Devine, Bolan & Devine, 2010:58-75). Most of these studies focused on the analysis of performance (for example Sowell & Mounts, 2005:78-97), physiology (O'Toole, Douglas & Hiller, 1989:201-225),

and the medical aspects of triathlons (Hiller, O'Toole, Fortess, Laird, Imbert & Sisk, 1987:164-167). The growth of triathlons is also evident in the increased media attention. More events are covered on television stations, especially the Ironman Hawaii World Championship (Friedrich, 2008:1; Triathlon New Zealand, 2011:1; Ironman, 2011:1). The popularity of triathlons is also shown by the increase in information and stories regarding triathlons as well as the number of subscribers to triathlon magazines (e.g., Triathlete Magazine, 2011:1; Wicker *et al.*, 2012:2). Therefore the triathlon market is very competitive and in order to continue expanding the sport, a more professional approach is required to meet the needs of the increasingly more observing triathlon participant (Arnott, 2008:4). In order to get a clear understanding of whom exactly the triathlete is, the aim of this chapter is to give an in-depth analysis of triathlons and then focus on the participants taking part in triathlons. This chapter consist of two sections. Section one will highlight the unique nature of triathlons, which will be followed by background information regarding triathlons. Thereafter, an overview will be given regarding Ironman, and then especially Ironman South Africa. Section two will evaluate the triathletes competing in these triathlons in terms of their demographic profile, behaviour, motives to participate, differences between these triathletes and other endurance sport athletes, unique characteristics of triathletes and theories that contribute to the unique nature of triathletes.

2.2 Unique nature of triathlons

A triathlon is seen as a lifestyle sport. There is not a set age at which a triathlete must start to participate or compete. There is also no required sport background needed (Smith, 2010:27). Triathlons are not traditional high school or university sport, which imply that an athlete can only participate in the sport for a limited number of years (Smith, 2010:28). Triathlons further gives participants a certain challenge of either conquering their fears (for example of open water swimming) or just participating in an event that overcomes the tedium of a single disciplinary sport (for example running) (Hilliard, 1988:311; Smith, 2010:28). Although each participant competes independently, triathlons give participants with different abilities the opportunity to participate with other triathletes on the same race course (Hilliard, 1988:311). Triathlons also tend to draw participants as it offers risk taking to the athletes, control their actions and lastly the credit for accomplishment by finishing the triathlon (Hilliard, 1988:312).

There is an assortment of aspects that contribute to the uniqueness of triathlons, including:

- The range of formats allows for progression in the sport (Getz 2007:373, 2008:416). Harada *et al.* (2010:2) concur that a triathlon has a broad base and no boundaries, allowing athletes to transfer freely from other sporting activities.

- Triathlons offer different times in which the sport should be finished. It can vary from short “sprint” triathlons that take approximately one hour to ultra-distance triathlons varying from eight to 17 hours to finish, depending on the triathletes ability and fitness level (Lamont, Kennelly & Wilson, 2012:1069).
- Differences with regard to the course and difficulty of the race, where the terrain and weather conditions contribute to the challenge of the event also distinguish it from other events (Unrah, 1980:271; Lamont *et al.*, 2012:1069).
- Varying prestige levels within the different triathlon events that lead to a loyal participant basis (Unrah, 1980:272).
- The sport grants triathletes a scope to travel to a variety of event destinations, seeing that the event spans many developed nations (World Triathlon Corporation, 2011:1).
- The World Championships in Hawaii also illustrates the commitment of athletes as they first have to qualify to take part in the event. This qualification is gained through competing in other Ironman events (World Triathlon Corporation, 2011:1).
- The limited supply of events requires triathletes to travel away from the home region if an individual wishes to compete regularly (Lamont & Kennelly, 2011:86).
- To live the event as a career requires a great deal of training and travelling year after year (Lamont *et al.*, 2012:1069).

It is clear from the aspects above, that a triathlon is a very select sport that only attracts specific participants. It is therefore important to understand features a triathlon is known for (Smith, 2010:1). This will consequently be discussed.

2.3 Background information regarding triathlons

Depending on the distance of the event a triathlon can range from one to 17 hours to complete, with each leg of the race having certain transitions that are included in the participant’s total time (Frimmel, 2012:6). A triathlon is currently standardised as a sequence that starts with swimming, followed by cycling and concludes with running. There are different distances of triathlons, including the sprint, Olympic distances long or half Ironman 70.3, Ironman and Ultra-Ironman as seen in Table 2.1 (Lamont & Kennelly, 2012:241). Since the first triathlon World Championships, in Avignon (France) 1989, the popularity of the sprint (short) and Olympic distance have increased immensely (Lepers, Knechtle & Stepley, 2013:852). Ultra-triathlons involves greater distances than the Ironman event and appeared during the 1980s, with the first double Ironman triathlon held in 1985 in Huntsville (United States) (Lehmann, Huonker, Dimeo, Heinz, Gastman, Treis, Steinacker, Keul, Kajewski & Ha’ussinger, 1995:155; Gastmann, Dimeo, Huonker, Bo’cker, Steinacker, Petersen, Wieland, Keul & Lehmann, 1998:18). More recently in

addition with the traditional road-based triathlons, off-road triathlons, that combine swimming, mountain biking and trail running has been established as a new form of endurance sport and is growing in popularity (Leapers *et al.*, 2013:851).

Table 2.1: Typology of triathlon events

DISTANCE	SWIM	CYCLE	RUN	EXAMPLES OF EVENTS
Sprint Distance	750 m	20 km	5 km	Luke Harrop Memorial
Olympic Distance	1500 m	40 km	10 km	Noosa Triathlon
Half Ironman/ Ironman 70.3	1900 m	90 km	21.1 km	Ironman South Africa 70.3
Ironman/Iron-distance	3800 m	180 km	42.2 km	Ironman South Africa
Double Ironman triathlons (2IMT)	7600 m	360 km	84 km	Florida Double ANVIL
Triple Ironman triathlon (3IMT)	11.4 km	540 km	126.6 km	Vingina Triple ANVIL
Deca-Ironman triathlons (10IMT)	38 km	1800 km	420 km	The Deca-Ironman in Monterrey, Mexico

(Source: Knechtle, Knechtle, Andonie & Kohler, 2007:645; Leapers, 2008:1830; Knechtle & Kohler, 2009:437; Lamont & Kennelly, 2011:89).

The Ironman distance (Table 2.1) is the most popular long distance triathlon (Leapers *et al.*, 2013:852). Since the event began, participation has increased and these days thousands of triathletes compete in about 28 Ironman races all over the world. It is therefore important to have a clear conception of what an Ironman triathlon exactly entails (Knechtle *et al.*, 2011:82).

2.4 The Ironman event

During an awards banquet for the Waikiki Swim Club, John Collins, a Naval Officer stationed in Hawaii, and his wife Judy, started brainstorming to combine the three toughest endurance races on the island into one race. They decided to issue a challenge to see who the toughest athletes were: swimmers, cyclists or runners (Ironman, 2013:1). On 18 February 1978, 15 competitors including Collins, went to the shores of Waikiki to take on the first-ever Ironman challenge. The race combined three existing race items to be completed. The events included the Waikiki Roughwater Swim (3000 m), the Around-Oahu Cycle Race (180 km) (originally a two day event)

and lastly the Honolulu Marathon (42.2 km) (Lamont & Kennelly, 2012:241). Collins then concluded that whoever finished the race first will receive the title “Ironman”. By 1982 the Hawaii Ironman got coverage on ABC World Wide Sport which resulted in participation levels increasing to 580 competitors (Ehritz, 2003-2004:1). Today there are 28 Ironman branded events held worldwide as well as numerous other non-Ironman events that cover the same or similar distances (World Triathlon Corporation, 2011:1). Ironman triathlons are growing at a rapid pace. There are triathlon clubs in almost every main city and thousands of events are held across the world each year (Ehritz, 2003-2004:1). Currently more than 1700 triathletes, most of who have qualified at one of the 28 Ironman triathlons worldwide, participate in Hawaii Ironman World Championships (Leper, 2008:1829; Leper *et al.*, 2010:251; Leper *et al.*, 2013:852).

McCarville (2007:160) emphasises that every triathlon holds international standards and are extremely difficult, particularly the Ironman of which each component of the race was created to be a stand-alone event to test the limits of human endurance. The current participation in Ironman triathlons shows that not only can people survive the race, but also that they can enjoy the challenge. This is clear in the fact that each Ironman event draws nearly 2000 participants and registration is usually completed within hours. Ironman events are held throughout the world including the United States, Canada, Germany, Austria, New Zealand, the United Kingdom, France and Australia. An Ironman event typically involves dozens of communities, thousands of volunteers and essentially dominates the lives of participants and their families (McCarville, 2007:160). Ironman South Africa is one of the 28 World Triathlon Corporation (WTC) accredited races and is the only long distance triathlon event held on the African continent (Ironman South Africa, 2013:1). The next section gives a background on the event.

2.5 Ironman South Africa

Ironman South Africa is a full distance triathlon consisting out of a 3.8 kilometre swim, followed by a 180 kilometre cycle and then finishing with a 42.2 kilometre run. The event takes place each April in Nelson Mandela Bay, Port Elizabeth, where 50 nations are represented. Approximately 2000 triathletes compete in the race that employs 1500 volunteers to help that the race runs smoothly (Ironman South Africa, 2013:1). The growth of Ironman South Africa is evident in the fact that in 2005 only 804 triathletes participated, while in 2013 the participant numbers has increased to 1783 triathletes (Ironman South Africa, 2013:1).

Ironman South Africa according to the marketing manager of Ironman South Africa, Marieka Barnard (2013:1) was created by the Triangle Event Brand as a licensed event from the World Triathlon Corporation’s IRONMAN series. The Austrian founders of Triangle Events partnered with locals Keith Bowler, Paul Wolff and Mandla Madwara. They started up the race as a half-

Ironman in 2004 in Port Elizabeth. The following year the race expanded to a full distance Ironman event and is celebrating its 10th year anniversary in 2014. In 2010 the World triathlon corporation re-acquired all their international licensed events and World Endurance Africa Holdings was formed with the local directors. World Endurance Africa Holdings, formerly known as Triangle Events South Africa, is a specialist triathlon event organisation that brings world class events to South Africa and the African continent. Owned by the United States-based World Triathlon Corporation, the company has been staging events in South Africa since 2004, starting with the half-Ironman in Port Elizabeth. Today the company hosts nothing less than eight events including the top three biggest triathlons in South Africa, which attracted over 12 000 athletes this year alone. World Endurance Africa Holdings' portfolio currently includes: Ironman South Africa, Ironman 70.3 South Africa, 5150 Bela-Bela Triathlon, Ekurhuleni 5150 African Championship, The Corporate Triathlon Challenge, Iron Girl South Africa and IronKids South Africa (Barnard, 2013:1).

It is clear from the previous section that triathlons are expanding as an endurance sport. This, however, is only possible if a triathlon organiser appreciate and include of participants in the decision making process. Only this inclusion of the participants' needs will result in a sustainable competitive event (Arnott, 2008:4). This will improve the events marketing strategies and communications and attract more participants to the event (Arnott, 2008:4). Therefore it is important to know who the triathlete is that participates in an event.

2.6 The triathlete

The next section will examine previous literature to determine and analyse the profile of a triathlete.

2.6.1 Profile of a triathlete

Firstly, the triathlete will be analysed by considering: (1) their socio-demographic profile, (2) their behaviour, (3) what motivates them to participate, (4) how triathletes differ from other endurance athletes competing in the three disciplines of a triathlon (especially in a South African context), (5) comparing triathlons with other endurance sports in a South African context, (6) triathletes' unique characteristics, and (7) theories that highlight the reasons for triathletes being so different.

The next section will focus on previous literatures' findings regarding the demographic details of a triathlete, and is summarised in Table 2.2

Table 2.2: Socio-demographic characteristics of triathletes

DEMOGRAPHIC VARIABLE	FINDING/S	AUTHOR/S
Age	Triathletes are in their late 30's or early 40's.	Reese (2008:3)
	Triathletes are on average 36.7 years old.	Wicker <i>et al.</i> (2012:13)
	Mid-thirties.	Clingman and Hilliard (1987:130), Chang and Johnson (1995:25), Case and Branch, (2001:118), Devine <i>et al.</i> (2010:60), Martin and Pancoska (2010:32)
	Average age of triathlete is 38 years of age.	Tribe Group (2009:20)
Race	Triathletes are mostly Caucasian males.	Reese (2008:3)
Gender	Only 21% of participants were female.	Wicker <i>et al.</i> (2012:13)
	Female participation in Ironman triathlons remains slightly lower than in traditional endurance events.	Lepers <i>et al.</i> (2013:851)
	Two-thirds of triathletes are male, the more a triathlete has participated, fewer females participated.	Tribe Group (2009:20)
Country from origin	Many foreign countries including: Australia, Brazil, Austria, New Zealand, South Africa, Spain etc.	Reese (2008:3)
	Triathlons appeal geographic to a wide spread of athletes, especially in coastal regions.	Tribe Group (2009:5)
Education level	Well-educated.	Reese (2008:3)

	Well-educated and have on average A-levels.	Wicker <i>et al.</i> (2012:13)
	Well-educated, affluent males.	Clingman and Hilliard (1987:130), Chang and Johnson (1995:25), Case and Branch, (2001:118) Devine <i>et al.</i> (2010:60), Martin and Pancoska, (2010:32)
Income level *	High household income above \$ 75 000- (R7 58 249).	Reese (2008:3)
	Net income amounts on average between €2000- (R27294) to €2500- (R 34119) per month.	Wicker <i>et al.</i> (2012:13)
	Average income of triathletes is reasonably high, \$ 126 000 per year. This is much higher than the average income of the population.	Tribe Group (2009:9)
Length of stay	Seven nights at the event destination.	Reese (2008:3)
Travelling group size	Travelling in groups of three people.	Reese (2008:3)
Distance of travel in order to participate	On average 7000 miles (11263 kilometres) was travelled in order to participate.	Reese (2008:3)
	Triathletes are willing to travel long distances in order to participate.	Wicker <i>et al.</i> (2012:13)
	Searches for a bigger challenge, therefore will travel long distances for the challenge.	Tribe Group (2009:12)

Spending*	Participants spend the most money on lodging, (\$ 1355 (R 13 699) per respondent; food and beverages, \$ 161 (R1628) and lastly retail shopping, \$ 100 (R 1010).	Reese (2008:3)
	Triathletes are expected to increase their spending on and during triathlons.	Wicker <i>et al.</i> (2012:13)
	Highest spending for triathletes is on cycling bikes, then on wheels, bike-seats, race entry fees, fitness clothing and athletic shoes.	Tribe Group (2009:35)
Total spending on the sport*	On average € 2 745 (R 37460) per year.	Wicker <i>et al.</i> (2012:13)
	Triathletes are not price sensitive.	Tribe Group (2009:39)
Marital status	Three-quarters of triathletes are married or in a committed relationship, half of these triathletes have children. The number of single, divorced and widowed triathletes is lower than the average population.	Tribe Group (2009:20)
Occupation	More than half of triathletes have “white-collar” jobs, including professional occupations for example executive managers, consultants and entrepreneurs.	Tribe Group (2009:23)

*Currencies (1€ = R13.65); (1\$ = R 10.11) (Converted on 30 September 2013).

From Table 2.2 it is clear that triathletes are mostly male Caucasians (white), in their late thirties to early forties, with an average age of 38 years. Most triathletes originate from a range of countries around the world including Australia, Brazil, Austria, New Zealand, South Africa and Spain to name a few. Thus triathlons appeal geographically to a wide spread of athletes. Triathletes are well-educated individuals in white-collar jobs, mostly in professions which then

lead to a high average household income. Triathletes therefore have a very high spending on and during triathlons annually. They spend most of their money on lodging, food and beverages as well as retail shopping for the duration of the event. Triathletes are also said to increase their preparation spending and will most likely spend most of their money on triathlon equipment, entry fees and fitness clothing. Most triathletes are married with children or in a committed relationship. It is clear that triathletes will travel long distances in order to participate, they normally stay for seven nights in the event destination and travel in groups of three people. With the profile of a triathlete in mind, it is also important to take into account the specific behaviour of triathletes.

2.6.2 Triathlete behaviour

In order to have a better understanding of triathletes, it is also important to explore their behaviour. Triathletes' specific behaviour found in previous literature is displayed in Table 2.3.

Table 2.3: Behaviour of triathletes as seen in previous literature

BEHAVIOUR PATTERNS	FINDING/S	AUTHOR/S
Previous participation	On average practised triathlon for 7.4 years.	Wicker <i>et al.</i> (2012:13)
Practice hours per week	On average 9.1 hours a week.	Wicker <i>et al.</i> (2012:13)
	The more events they participate in, the more practice hours per week.	Tribe Group (2009:16)
Number of races per year	Average number of 4.4 races per year.	Wicker <i>et al.</i> (2012:13)
	Most triathletes participate in an average of five or more triathlons per year.	Tribe Group (2009:13)
Sport clubs	Three out of four sport participants are members of a sports club.	Wicker <i>et al.</i> (2012:13)
Leisure time	Mainly spend leisure time at the computer, followed by meeting friends, watching sports on television and lastly undertaking cultural activities.	Wicker <i>et al.</i> (2012:13)
Level of performance	2% of respondents consider themselves occasional sportsmen*	Wicker <i>et al.</i> (2012:13)

	<p>7% leisure sportsmen*</p> <p>67% mass sportsmen*</p> <p>22% competitive athletes*</p> <p>2% top-level athletes*.</p>	
Type of triathlon	<p>Most triathletes participate in sprint-distance triathlons.</p> <p>Only one out of six triathletes participates in Ironman triathlons.</p>	Tribe Group (2009:2)
Other endurance sports	Participates in other endurance events, mostly marathon running.	Tribe Group (2009:2)
The use of a coach	One-third of triathletes make use of a coach, but the demand for coaching services is increasing.	Tribe Group (2009:16)
Health and body shape	<p>75% of triathletes are only 10 pounds (approximately 4 kilograms) from their ideal weight.</p> <p>Most triathletes train throughout the year and follow a strict training programme.</p> <p>Most triathletes are willing to spend money on health and well-being products.</p>	Tribe Group (2009:22)
Media	<p>Triathletes show a high magazine membership as well as a high interest in other sport-specific magazines.</p> <p>Triathletes do not read business and social magazines.</p>	Tribe Group (2009:38)
Factors influencing decision to participate	The proximity of the event to the triathlete's home; the time of year; past experience; friends and relatives as well as word-of-mouth recommendations. The cost of	Tribe Group (2009:6)

	the event has little influence on the decision to participate.	
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- *Occasional sportsmen (criterion: non regular practice, no competitions)
- *Leisure sportsmen (regular practise, no competitions)
- * Mass sportsmen (competitions, but low on performance)
- *Competitive athletes (competitions, ambitious sport practice)
- * Top-level athletes (high performance participation in international competitions)

As seen in Table 2.3 triathletes have very specific behaviours that distinguish them from other athletes. The most notable behaviour is the high average years of previous participation, but also the high average number of hours a triathlete trains per week. Most triathletes form part of a sport club, while fewer triathletes make use of a coach. Triathletes participate in at least four triathlon races during the year, although most triathletes can be characterised as mass sportsmen. Most triathletes participate in short distance triathlons and only one out of six triathletes competes in long distance Ironman races. Triathletes spend most of their leisure time on the computer or spend time with family or friends. Furthermore most triathletes will participate in marathon running when they are not competing in triathlons. Almost all triathletes follow a strict training programme as well as a specific diet and lifestyle. When examining the media usage of triathletes, they mostly get their triathlon information from magazines and normally choose an event according to the proximity of this event to their homes.

It is clear from the triathletes' behaviour that they are very dedicated in their training and it is therefore important to take into account the motives that drive these participants to go through rigorous training and mental preparation in order to compete. The next section will highlight motives to participate as found through previous research and noted in recent literature.

2.6.3 Motives to participate in triathlons

Understanding what motivates triathletes to participate is vital information seeing that this gives insight into the mind-set of the triathlete. Previous research found an array of motives as displayed in Table 2.4.

Table 2.4: Motives to participate in triathlons

MOTIVES	FINDING/S	AUTHOR/S
<ul style="list-style-type: none"> • Goal setting • Development • Travelling • Community development • Sightseeing 	The motives of triathlon trail running and rock climbing athletes.	Matsui and Harada (2011:1)
<ul style="list-style-type: none"> • Relaxation and safety 	The notion is that when	Getz and McConnell

<ul style="list-style-type: none"> • Fulfilment 	<p>a traveller (triathlete) becomes more experienced, their motives shift from lower level motives (Relaxation and safety) to higher order motives (Fulfilment a person gets from participating in an event).</p>	<p>(2011:328)</p>
<ul style="list-style-type: none"> • Test one's skill against nature, others and oneself 	<p>The main motives for off-road triathlon participants.</p>	<p>Case and Branch (2001:120)</p>
<ul style="list-style-type: none"> • To escape and distance oneself from everyday living • Novelty and requiring skill 	<p>The author's motives to participate include personal leisure and journey while visiting the destination area of an Ironman triathlon.</p>	<p>McCarville (2007:172)</p>
<ul style="list-style-type: none"> • Testing the limits of one's body 	<p>Motives of Iron-distance triathlons.</p>	<p>Grand'Maison (2004:86)</p>
<ul style="list-style-type: none"> • Competence • Enjoyment • Wellbeing • Ego involvement • External awards • Sociability • Self-transformation • Enduring commitment • Consolidation 	<p>Different intrinsic and extrinsic motives of triathletes.</p>	<p>Lamont and Kennelly, (2012:244)</p>
<ul style="list-style-type: none"> • Challenging oneself • Progression in challenge • Living a healthy lifestyle • Lifestyle enhancement 	<p>The length of involvement and level of ambition influences the motives of participants. Thus these motives are normally for participants that are new to the sport.</p>	<p>Lamont and Kennelly (2012:245)</p>
<ul style="list-style-type: none"> • Pursuing measurable 	<p>These are the motives of</p>	<p>Lamont and Kennelly</p>

<p>improvements</p> <ul style="list-style-type: none"> • Testing physical limits • Achieving increasingly challenging goals • Competition • Participating in events that leverage personal strengths over time 	<p>established and ambitious participants.</p>	<p>(2012:245)</p>
<ul style="list-style-type: none"> • Challenges • Love of the sport • Togetherness 	<p>A study conducted on elite-female triathletes showed that they were competitive from a younger age, they felt passionately about the sport and their families support drives them.</p>	<p>Smith (2010:4)</p>
<ul style="list-style-type: none"> • Personal challenge • Get and stay in shape • Meeting personal expectations • Challenge other participants • Enjoying training as much as racing • Be inspired by other triathletes 	<p>The most important motives of 15 000 USA triathletes that formed part of the Tribe Group “Mind of the Triathlete” study.</p>	<p>Tribe Group (2009:9)</p>
<ul style="list-style-type: none"> • Intrinsic motivation • Understanding and growth • Accomplishment • Stimulation and experience • Victory • Extrinsic motivation • Exogenous control and assimilation • Tourism • Aesthetics 	<p>The study was conducted at the Choshi International Triathlon where eight motivational factors were divided into intrinsic and extrinsic motives. These motives were then used to cluster triathletes into four distinct clusters.</p>	<p>Harada <i>et al.</i> (2010:2)</p>

The motives of triathletes have been researched in a few previous studies and there are clear resemblances in the different studies according to the motives that drive triathletes to compete. Personal challenge, challenge and challenging oneself are seen as the most important motives in most of the previous literature. The theme of self-esteem and the improving thereof as well as motives such as getting and staying in shape, living a healthy lifestyle, lifestyle enhancement and improving self-esteem were highlighted in previous studies. Intrinsic achievement was also a clear motive for participation as it formed part of most of the previous studies. Looking at the previous literature regarding the different aspects of triathletes, it is clear that there is a lack of research done in South Africa on this topic. Previous literature done in a South African context relating to endurance sport was done on an array of endurance athletes except triathletes. Therefore it is important to analyse how endurance athletes that participate in the individual disciplines of a triathlon (swimming, cycling and running) differ from triathletes participating in other items to better understand the triathlete market.

2.7 Differences between triathlons and the specific disciplines a triathlon consist of (swimming, cycling and running)

Due to the lack of research regarding triathletes in South Africa, previous literature regarding endurance athletes in South Africa will be investigated in terms of their demographic profiles and behaviour, followed by the identification of the differences between these endurance athletes and triathletes. Firstly open water swimmers who competed in the Midmar Mile will be assessed.

2.7.1 Demographic profile and behaviour of open water swimmers

The most popular and successful open water swimming event in South Africa is the Halfway Telkom (previous sponsor) Midmar Mile (Kruger, Saayman & Ellis, 2011:60). The event draws 13755 finishers and was officially recognised by the Guinness Book of World Record as the World's Largest Open Water Swimming event. The event has been held for 37 years at the Midmar Dam located north of Pietermaritzburg in KwaZulu-Natal (Kruger *et al.*, 2011:60). When considering the size of the event it gives a good representation of the open water swim market in South Africa. The demographic profile and motives of these swimmers will be discussed in Table 2.5.

Table 2.5: Profile and motives of open water swimmers competing in the Midmar Mile

SWIMMERS COMPETING IN THE HALFWAY TELKOM MIDMAR MILE DONE BY Kruger *et al.* (2011:70).

DEMOGRAPHIC PROFILE AND BEHAVIOUR

Gender/Age

Male (59%); Female (41%); Age: 32 years

Marital status	Not married (47%); Married (43%)
Language	English (79%)
Province of residence	KwaZulu-Natal (59%); Gauteng (30%)
Level of education	Diploma/Degree (30%)
Occupation	Student (31%) and Professional (26%)
Average number of people in travelling group	Six people
Times participated in the Midmar Mile	33% first-time participants; Average of four previous times
Average spending	R1 506.33
Initiator of participation	46% initiated participation themselves
Other sports events participated in	<ul style="list-style-type: none"> • Comrades Marathon • Old Mutual Two Oceans Marathon • Pick n Pay Cape Argus cycle tour • Unlimited Dusi Canoe Marathon
MOTIVES FOR PARTICIPATION	
Participants of the Midmar Mile are mostly motivated by <i>Intrinsic achievement</i> followed by <i>Socialisation and escape</i> , while <i>Fun and entertainment</i> was a less important motive to participate.	
COMPARISONS AND DIFFERENCES WHEN COMPARED TO PREVIOUS LITERATURE	
<ul style="list-style-type: none"> • The above mentioned profile and motives are supported by die following authors: Weiss and Duncan (1992:178), Croft, Grey and Duncan (2007:305), Jamber (1999:353), McDonald, Milne and Hong (2002:105), Gillett and Kelly (2006:239) and LaChausse (2006:305). • Brodtkin and Weiss (1990:260) and Gillett and Kelly (2006:241) found that <i>Fun and entertainment</i> was an important motive for endurance athletes. However, the swimmers participating in The Midmar Mile saw this as a less important motive to participate. • The swimmers viewed <i>Intrinsic achievement</i> as the most important motive to participate and this was supported by Gill, Gross and Huddleston. (1983:5) and Streicher and Saayman (2010:128). 	

2.7.1.1 Difference between open water swimmers and triathletes

Although the demographic profile of the open water swimmers and triathletes are similar, there are also clear differences as summarised below:

- Most triathletes are male, while the Midmar Mile participants are evenly split in female and male participants.

- The average age of the triathlete is also much higher than that of an open water swimmer.
- Triathlons attract more international participants, where the Midmar Mile has a smaller percentage of international participants. This is clear from the language spoken as well as the province of residence.
- The average spending of a triathlete is much higher, although they travel in smaller groups and spend less nights in the event destination, when compared with the swimming participants.
- It is clear that *Challenge* is not an important motive to participate in this open water swimming event, although *Intrinsic achievement* is a corresponding motive for both events. *Socialisation and escape* is seen as less important motives for triathletes to compete.

Cycling is the second discipline a triathlete needs to complete during a triathlon. It is therefore important to investigate cyclists that compete in events in South Africa and how they differ from triathletes.

2.7.2 Demographic profile and behaviour of road cyclists

The Pick and Pay Cape Argus Cycle Challenge is hosted in Cape Town and is South Africa's largest cycling event as well as the largest individually timed cycle race in the world. The event attracts approximately 32000 cyclists from around the world (Streicher & Saayman, 2010:121). The race consists of amateur and professional cyclists while the number of foreign cyclist is increasing. The large number of cyclists gives a good representation of road cyclists in South Africa. The next section will give an overview of the demographic profile, behaviour and motives of these cyclists.

Table 2.6: Demographic information regarding road cyclists

CYCLISTS COMPETING IN THE PICK N PAY CAPE ARGUS CYCLE TOUR CHALLENGE BY Streicher and Saayman (2010:126)	
DEMOGRAPHIC PROFILE AND BEHAVIOUR	
Gender/Age	Male (68%); Age: 35 years
Marital status	Married
Language	Afrikaans/English
Province of residence	Gauteng (39%); Western Cape (32%)
Average number of people in travelling group	4.8 persons

Average night spend in the event destination	1-6 nights
Times participated in the Cape Argus	1-4 times
Average spending	R3959.67
MOTIVES TO PARTICIPATE	
Cyclists were mostly motivated by <i>Event attractiveness</i> , <i>Personal motivation</i> and <i>Escape and relaxation</i> .	
SIMILARITIES AND DIFFERENCES WHEN EXAMINING OTHER CYCLING LITERATURE	
<ul style="list-style-type: none"> • Motives such as <i>Socialisation</i> and <i>Escape and relaxation</i> were confirmed by Schneider and Backman (1996:140), Kim, Borges and Chon (2006:961) as well as Lee, Graefe and Li (2007:358). • Travel motives of cyclist at the Cape Argus differed in terms of <i>Event attractiveness</i> and <i>Personal motivation</i> that was not found in any other cycling literature according to Streicher and Saayman (2010:128). 	

2.7.2.1 Difference between road cyclists and triathletes

The demographic profile of road cyclists is similar to those of triathletes. There are also differences between these two types of athletes that will be discussed below.

- More male athletes participate in triathlons when compared to the cycling event. It is also clear that more international participants take part in Ironman, than in the Cape Argus.
- Looking at the province of origin, road cyclists will travel shorter distances in order to compete, while triathletes search for a greater challenge and therefore they are willing to travel longer distances in order to compete.
- Triathletes have a much higher spending, are older than cyclists, travel in smaller groups and spend more nights at the event destination.
- The motive of *Event attractiveness* has not been found as dominant in any previous triathlon literature.
- *Escape and relaxation* is not seen as an important motive to participate in a triathlon.
- *Personal motivation* is the only similar motive that occurs within literature that discusses both triathlon and cycling competitors' motives to participate.

The last leg of a triathlon race is a 42.2 kilometre run. Thus a discussion of the profile of the marathon running participants in South Africa, and how they compare to triathletes, follows below.

2.7.3 Demographic profile and behaviour of marathon runners

The Comrades marathon is a world-renowned ultra-marathon of 86 kilometres (56 miles) and takes place in KwaZulu-Natal between the cities of Pietermaritzburg and Durban (Kruger & Saayman, 2013b:71). The Comrades marathon is seen as a South African national treasure and attracts thousands of runners, spectators and television viewers each year (Kruger & Saayman, 2013b:71). The Old Mutual Two Oceans Marathon on the other hand is known as the most beautiful marathon in the world. This race takes place during the Easter weekend in the Western Cape (Kotze, 2006:287). The event attracts over 15 000 participants each year, thereby providing a considerable economic injection for the economy of Cape Town (Kotze, 2006:291). In Table 2.7 the demographic profile and motives of these marathon runners are displayed.

Table 2.7: Profile and motive of marathon runners to participate

RUNNERS COMPETING IN THE OLD MUTUAL TWO OCEANS MARATHON DONE by Saayman and Kruger (2013:8) AND ALSO MARATHON RUNNERS COMPETING IN THE COMRADES MARATHON by Kruger & Saayman (2013b:83)		
SOCIO-DEMOGRAPHIC AND BEHAVIOUR		
	Two Oceans Marathon	Comrades Marathon
Gender	Female (49%); Male (51%)	Female (27%); Male (73%)
Home language	English (58%), Afrikaans (28%)	English (37%); Afrikaans (46%); other foreign and African languages (18%)
Age	Average age: 38 years	Average age: 42 years
Province of residence	Western Cape (38%); Gauteng (24%)	KwaZulu-Natal (16%); Gauteng (40%)
Occupation	Professional (30%), Management (11%) and Self-employed (11%)	Not applicable
Number of nights stayed in event destination	Average 5 nights	Average 4.30 nights
Size of travelling group	4 people	8 people
Number of times previously participated	Average 3 times	Average 5 times
Spending	R3927.00	R7520.30
Category participated in	Ultra-marathon (50%); Half-marathon (49%)	Not applicable
MOTIVES TO PARTICIPATE		

Intrinsic achievement, Escape as well as Socialisation and affiliation are the motives of marathon runners participating in the Two Oceans Marathon. Comrades Marathon runners were mostly motivated by Intrinsic achievement, Exploration and competitiveness, Family togetherness and escape, Socialisation and Commitment.

SIMILARITIES AND DIFFERENCES COMPARED TO PREVIOUS MARATHON LITERATURE

- The profile of Two Oceans and Comrades marathon runners and motive *intrinsic achievement* share similarities with research done by Masters and Ogles (1995:5) on veteran marathon runners.
- *Escape as well as Socialisation and affiliation* was not found in previous marathon literature.

2.7.3.1 Differences between marathon runners and triathletes

When taking into account the characteristics of marathon participants, it is the most similar with triathletes characteristics compared to swimmers and cyclists. This corresponds with Tribe Group (2009:2) who found that triathletes participate in other endurance events, but mostly marathon running. It is also clear from Table 2.7 that participants from Two Oceans and Comrades marathons are not the same in terms of profiles and motivations. This shows that one event is different from another event, which means that what attract participants to one event, will not necessarily work for another event (Kruger & Saayman 2013b:88). The similarities and differences of these two types of athletes are listed below:

- Gender of marathon runners are spread evenly between male and female participants taking part in the Two Oceans whereas triathletes are mostly male, similar to participants in the Comrades Marathon.
- The average spending of a triathlete is much higher in comparison with marathon runners in both the Two Oceans and Comrades marathons. This could be due to the fact that more international participants take part in a triathlon. The Comrades Marathon attracts more international participants as seen in the relatively high percentage of participants speaking foreign or African languages.
- *Intrinsic achievement* is a motive which is present in both triathlon and marathon running literature. *Escape as well as Socialisation and affiliation* have not been found as prominent motives according to literature on triathlons.

When investigating the endurance research done in South Africa it is clear that there are similarities between triathletes and open water swimmers, road cyclists and marathon runners. However these different endurance athletes should not be considered as a homogenous market as there are specific characteristics making each of these athletes unique.

2.8 Comparison between triathletes and other endurance sports

It is important to also analyse other endurance sport athletes that do not participate in one of the three individual disciplines of the triathlon. This will highlight the specific characteristics of a triathlete. In the next section, triathletes will be compared with mountain bikers and canoeists.

2.8.1 Demographic profile and motives of mountain bikers

The Absa Cape Epic is one of South Africa's biggest endurance mountain bike events attracting over 1200 participants (Cape Epic, 2012:1). The race is held over an eight day period and includes a trail prologue. The route is approximately 800 kilometres that consist mostly out of gravel paths, rocky uphill, river crossings, technical downhill and routes in the forest (Cape Epic, 2012:1). These are very specific endurance athletes as shown in Table 2.8.

Table 2.8: Mountain bikers' profile and motives to participate

MOUNTAIN BIKERS PARTICIPATING IN THE ABSA CAPE EPIC RESEARCHED BY Kruger and Saayman (2013a:14)	
SOCIO-DEMOGRAPHICS AND BEHAVIOUR	
Gender	Female 11%; Male 89%
Home language	English (44%), Afrikaans (25%) and Other (31%)
Age	Average age: 39 years
Province of residence	Outside RSA borders (43%); Gauteng (25%)
Occupation	Professional (30%), Management (11%) and Self-employment (11%)
Education	Postgraduate (32%); Professional (29%)
Number of nights stayed in the event destination	Average 8 nights
Size of travelling group	3.34 people
Number of times previously participated	Average 1.52 times
Spending	R20 181.32
The highest spending is on:	Sport equipment, entry fee and accommodation
MOTIVES TO PARTICIPATE	
Mountain bikers are motivated more by <i>Event novelty</i> , <i>Achievement</i> , and unsurprisingly more by <i>Team work</i>	
DIFFERENCES AND SIMILARITIES WHEN COMPARING THE CURRENT STUDY WITH PREVIOUS LITERATURE	
<ul style="list-style-type: none"> The profile found in the Cape Epic study corresponds with the mountain biker profile compiled by Cessford (1995:12) and Getz and McConnell (2011:327). 	

- Similar results obtained by Rauter and Topič (2010:37) and Getz and McConnell (2011:328) found that mountain bikers are motivated significantly more by *Event novelty*, *Achievement*, and *Team work*. This finding however contradicts LaChausse (2006:306).

2.8.1.1 Differences between mountain bikers and triathletes

When comparing a mountain biker with a triathlete it is found that there are more similarities between these two types of athletes than compared with the swimmers, cyclists and runners as previously discussed. The similarities as well as differences follow in the next section:

- The similarities include that more males participate compared to females; that a high percentage of participants speak other languages and originate from foreign countries. This is similar to previous triathlon literature. The average age of triathletes and mountain bikers are similar. Both mountain bikers and triathletes are well-educated and are mostly working in a professional occupation. Mountain bikers extend their stay with only one night at the event destination. Both types of athletes travel mostly in groups of three people. The average high spending of mountain bikers correspond with triathletes and both types of participants tend to spend the most money on accommodation, sport equipment and race entry fees.
- The *Event novelty* motive was found as the most important motive for mountain bikers, but was not evident in any previous research on triathlons.
- *Team work* is not seen as an important motive to participate in a triathlon. This could be due to the fact that a triathlon is an individual sport.
- The only corresponding motive for both triathletes and mountain bikers is *Achievement*, which is also evident in most previous triathlon literature.

2.8.2 Demographic profile and motives of canoeist

Canoeing is popular in South Africa and led to the formation of the Unlimited Dusi Canoe Marathon which is arguably the world's most prestigious canoe (or rather, kayak) three-day race, held between Pietermaritzburg and Durban in KwaZulu-Natal (Kruger & Saayman, 2013c:3). Canoe participants' profiles and motives to participate are outlined in Table 2.9.

Table 2.9: Profile and motives of participants, taking part in the Dusi Canoe marathon

CANOE PARTICIPANTS TAKING PART IN THE UNLIMITED DUSI CANOE MARATHON DONE
by Kruger and Saayman (2013c:17)

SOCIO-DEMOGRAPHICS AND BEHAVIOUR

Gender	Male (85%)
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Home language	English (59%)
Age	Average age: 35 years
Province of residence	KwaZulu-Natal (75%); Gauteng (14%)
Occupation	Professional (30%), Management (11%) and Self-employment (11%)
Education	Diploma/Degree
Number of nights stayed at the event destination	Average 1 night
Size of travelling group	4 people
Number of times previously participated	Average 6 times
Spending	R6772 per person
Media	Word-of-mouth recommendations or television
MOTIVES TO PARTICIPATE	
Participants in Dusi Canoe were mostly motivated by <i>Enjoyment and Adventure, Intrinsic achievements and Event Attractiveness</i>	
SIMILARITIES AND DIFFERENCES COMPARING DUSI CANOE STUDY WITH PREVIOUS LITERATURE	
<ul style="list-style-type: none"> Examining the profile and motives, similarities exist especially in terms of <i>Intrinsic achievement, Socialisation and group identity</i>, supporting the results found by Lee <i>et al.</i> (2007:360), Galloway (2010:523), O'Connell (2010:53), Buckley (2012:961) and Galloway (2012:260). However the combination and importance of the motives differ significantly. 	

2.8.2.1 Differences between canoeist and triathletes

When exploring the demographic variables there are more differences between canoe participants and triathletes, than there are similarities as seen in the next section.

- The similarities include the fact that more male than female participants, take part in canoe events as well as triathlons and that both types of athletes are well-educated.
- The average age of a canoeist is younger when compared to a triathlete's average age.
- There are less international participants that participate in this specific canoe event, while most triathlon literature shows that the participants travel from different countries to take part in triathlons.
- When reviewing triathlon literature it is clear that triathletes have a higher average spending, spend more nights at the event destination, but travel in smaller groups than canoeists.
- Investigating the media usage show that magazines, that were prominent in triathlon literature, was not found in this Dusi Canoe study.
- The combination of *Enjoyment and Adventure* has not been found as a motive in previous triathlon literature, although *Enjoyment* occurs as motive in many previous studies.

- *Intrinsic achievement* was found under both triathlete and canoeist motivation literature, as is evident in many other endurance sport literature.
- Looking at triathlon literature, *Event attractiveness* has not been found in any previous studies.

The abovementioned socio-demographic characteristics, behaviour, motives to participate and differences from other endurance athletes have been used in specific studies in order to cluster the triathlon consumer market into smaller target markets. These triathlon clusters will be discussed in the next section.

2.9 Different triathlon clusters

Previous literature used different variables to segment triathlon participants into smaller clusters, these clusters are listed in Table 2.10.

Table 2.10: Different participant clusters identified in previous literature

STUDY	CLUSTERS	DESCRIPTION OF CLUSTERS
CLUSTERS SEGMENTED ACCORDING TO MOTIVES TO PARTICIPATE		
Harada et al. (2010:2) Motives as listed in Table 2.4	Maniacal Triathletes	Motivated both intrinsically and extrinsically.
	Triathletes with hidden potential	These triathletes have a relatively short history in the event and have hidden potential of becoming maniacal triathletes.
	Triathletes with unclear motivation	These triathletes have unclear motivation for participating in a triathlon and will potentially quit the event if they find another means for fulfilling their wants and needs. It is important to provide new meaning to the sport as this will help enhance their motivation to continue their participation.
	Experienced triathletes	These are triathletes with a relatively long history with the sport, and to participate in

		triathlons have become a routine and thus their motivation is starting to decline.
Tribe group (2009:25-26) Motives as listed in Table 2.4	Enthusiastics	These triathletes enjoy everything about a triathlon. They enjoy every part of a triathlon and more than any of the other cluster, do they enjoy the social aspect of being part of the triathlon community. They get significant personal benefit from participating, and also want to see all their peers succeed.
	Dedicated triathletes	Like <i>Enthusiastics</i> , the <i>Dedicated triathletes</i> garner great worth from their participation and view it as the central part of their lifestyle. However for them the focus is on their own accomplishments. They too are not focused on their performance, but rather compete because that is what they do. The social aspect of a triathlon is less important for these triathletes.
	Aspirationals	They are totally focused on their own accomplishments in their own races. Their main goal is to improve on previous personal performances and how this compares to their peers. Therefore they will rather reject the social aspects of a triathlon and focus on accomplishment.
	Competitives	Members of this cluster are mostly concerned with their

		rankings in the race. They are determined to improve each time and are very mindful of the expectations they have for themselves. These participants want to finish ahead of others and simply do not care in what position the other competitors finish.
	Power trainers	For this segment, finishing the races is its own reward. These triathletes do not focus on their previous performance or how well others performed. These triathletes get inspired by others, but for them personal satisfaction is the most important motivation. These triathletes see training as just as important as racing and focuses on weight control and fitness.
	Emotionals	This segment truly appreciates being part of the triathlon community and experience a personal “high” when they finish a race. They are also inspired by the performance of others and put great value on the social aspects of a triathlon. Currently, triathlons are not the central part of these participants' lives.
	Dabblers	This cluster is secured by the member's commitment to the personal challenge of a triathlon and its ability to help them get and stay in shape. Most of these triathletes are new to the sport and thus their

		engagement in the sport is not all encompassing.
LIFESTYLE SEGMENTATION AND DEMOGRAPHIC VARIABLES		
Wicker <i>et al.</i> (2012:1) Demographic profile and behaviour as listed in Table 2.2 and 2.3	Serious pursuers	<p>These triathletes train more than 12 hours a week and are older than the other two clusters (older than 32 years). These triathletes practised the sport for longer than 16 years. They also have the highest spending. This cluster demonstrates lower levels of activity and is thus less interested in lifestyle activities than the other two clusters. Given this fact it is suggested that they pursue the triathlons more seriously.</p>
	Sport lovers	<p>These triathletes have been participating less than four years and practise less than five hours a week. This cluster is represented mostly out of younger triathletes (younger than 32 years). More male participants were identified in this cluster. The triathletes in this cluster display a higher interest level for many lifestyle indicators. These triathletes show high levels of active and passive sport consumption. In terms of passive sport consumption, they also watch sports on television and attend triathlons as well as other sport events. With regard to active sport consumption, they also participate in other sports.</p>
	Socialisers	A higher percentage of women

		were represented in this cluster. These triathletes spend most of their leisure time meeting with friends and family members, participating in cultural activities, dining in restaurants and using the computer. For these triathletes social activities and staying in contact with friends are much more important in comparison with the other two clusters.
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The current body of research suggests using a variety of variables to segment the sport consumer to determine sport consumption and participation (Funk & James, 2001:142; Rohm, Milne & McDonald, 2006:29). As seen in Table 2.10 triathletes were mostly clustered using their motives to participate (Tribe Group, 2009:25; Harada *et al.*, 2010:2) and also their lifestyle and demographic variables (Wicker *et al.*, 2012:13). A closer investigation of these clusters shows that the triathlete market can be divided into smaller, more marketable groups. In a Japanese study, Harada *et al.* (2010:2) segmented triathletes into four clusters, while The Tribe group, operating under an exclusive arrangement with USA Triathlon, clustered 15000 triathletes into seven distinct clusters also according to their motives for participation. The seven clusters also indicated significant differences regarding their intention to participate in longer distance triathlons, training year round, gender, age and average household income (Tribe Group, 2009:10). Wicker *et al.* (2012:1) used lifestyle segmentation to divide 786 triathletes in Germany based on interests and activities that are part of their leisure time. Significant diversity revealed that there were differences between these clusters in terms of age, gender, years of participation, time of practice as well as expenditure.

After examining the profile of triathletes, the way in which they differ from other endurance athletes and how they can form different clusters, the importance of knowing the factors that differentiate these unique athletes from other endurance athletes, turned out to be an important consideration in market segmentation.

2.10 What makes triathletes different?

Furst, Ferr and Megginson (1993:404) state that training and competing in a triathlon takes a great deal of personal commitment. Mallett and Hanrahan (2004:195) concur by affirming that triathletes have a “compromised social life” because of intense training and racing schedules

that comes with pursuing a triathlon career. Many of the triathletes' social activities are sacrificed. Therefore, it is necessary for coaches as well as other athletes to examine how triathletes at such a high level of participation, remain motivated year in and year out (Mallet & Hanrahan, 2004:195). Atkinson (2008:165) states that being a triathlete “involves a substantial amount of physical and psychological stress over several hours of continuous activity” Consistent training is necessary in order to improve fitness and skill in the three different disciplines of swimming, cycling and running. Therefore ongoing participation in triathlon events will consume significant personal resources (Atkinson, 2008:165; Lamont & Kennelly, 2011:87). A triathlon can thus be a dominant influence over how a triathlete and his family live their lives (McCarville, 2007:170).

According to research done by the Tribe Group (2009:1-31), triathletes have a higher engagement in their sport, and therefore will spend more money on the participation and preparation. As triathletes are also very devoted to the sport, they are willing to increase their spending despite the economic climate. Thus it is worth targeting these consumers from an economic perspective. Quality is the most important aspect for a triathlete when choosing what product to purchase, followed by personal experience and price. Lastly triathletes consider articles and reviews about certain products. Triathletes are not likely to be supporters of the brands that sponsor the triathlon events. Triathletes' proportion of races they take part in, increases significantly with each year of a participant's triathlon experience. The challenge of a triathlon is long lasting and participants remain engaged in the sport over a long period of time. This coincides with triathlons being “popular among mature adults”, thus having a staying power under athletes. The average age of participants is also higher than the average age of other endurance athletes. The desire to participate in the most challenging triathlon events seem to increase steadily with experience. Thus there is a high demand for long-distance races.

The concept of athlete engagement is defined as “a positive fulfilling, sport related state of mind”, rather than having a specific momentary feeling. This engagement suggests a more persistent involvement for a period of time (Lonsdale, Hodge & Raedeke, 2007:457). The majority of triathletes can be identified by three key characteristics: confidence, dedication and vigour. Confidence was defined by Lonsdale *et al.* (2007:464) as a “belief in one’s ability to attain a high level of performance and achieve desired goals”. Dedication was defined as “a desire to invest effort and time towards achieving the goals one holds as important” (Lonsdale *et al.*, 2007:465). Vigour was characterised as an athlete’s engagement and a persistent positive and cognitive experience. Thus a triathlete can be characterised by their confidence, dedication and vigour. There are also certain theories in sport tourism literature that give insight into the reasons that triathletes are viewed as distinctive endurance athletes.

2.11 Theories that contribute to the unique nature of triathletes

Four theories namely *Serious leisure*, *Event Travel Career*, *Self-determination Theory* and the *Flow theory*, from different authors illustrate the reason that necessitates triathletes to adapt their lifestyle to compete in triathlons. These four theories are briefly discussed in the next section.

2.11.1 Serious leisure

Participants in endurance sport, such as triathletes, may be engaged in what Stebbins (1992:6) refers to as *Serious leisure* that is when the involvement in a triathlon extends well beyond just taking part in the sport. Participation in triathlon may become integrated with the daily lives of triathletes and may be the central part of their social identity (Lamont & Kennelly, 2012:237). Therefore these triathletes need to make significant lifestyle adjustments in a way to accommodate their sporting endeavours (Hill & Robinson, 1991:80). It is also apparent that not all triathletes (for example amateurs) get remunerated for their efforts, yet most of these athletes treat a triathlon as their second job (Lamont & Kennelly, 2012:237).

2.11.2 Event Travel Career

Getz (2007:181, 2008:412) conceptualised *ETCs* (*Event Travel Careers*) as characterised by the progression of motivations from lower order needs to higher order needs as experience in travel to events accrues. Getz (2008:411) proposed that there are five criteria to measure if an athlete has an *ETC*: (1) an athlete (triathlete) has intrinsic desire to travel in order to participate in a triathlon; (2) there is a progression in events travel and the benefits sought from this event; (3) there must be a progression over time in the scale of events travel (e.g. from local events to events overseas); (4) evolution of the athletes preferences relating to the events characteristics (e.g. in terms of the completion that the event offers); and (5) athletes must make modifications to their behaviour (e.g. organising their holiday in combination with the event). Lamont and Kennelly (2011:85-90) suggested that triathletes pursue an *ETC* as they are willing to accept significant opportunity costs in order to pursue their ambitious leisure goals. These opportunity cost is observed within family and social relationships, domestic responsibilities, financial costs, diet, career, health and their border leisure participation. Triathletes that pursue an *ETC* have three different competing priorities, namely intrapersonal, interpersonal and structural competing priorities.

Lamont and Kennelly (2011:90) furthermore found that three dominant themes relating to constraints were found through competing priorities of triathletes. Competing priorities can be seen as the conflict between day-to-day needs and desires, and then those relating to the

triathletes' *ETC*. In an attempt to overcome the constraints that these competing priorities involve, triathletes make decisions within the three domains. This resulted in opportunity costs (where one set of needs and desires are met at the expense of another), or situations where a triathlete's resources would either be allocated towards his/her *ETC* or their day-to-day needs and desires or vice versa.

Intrapersonal competing priorities refer to the priorities where an individual has a complete or almost complete control over the amount of influence an outside factor has on their pursuit of an *ETC*. The intrapersonal competing priorities include: diet, leisure activities and personal health. In the left-hand hemisphere as depicted in Figure 2.1, day-to-day needs and desires are represented, while the right-hand hemisphere illustrates the opposing *ETC* needs and desires (The same rule is applied in Figure 2.2 and 2.3).



Figure 2.1: Intrapersonal competing priorities experienced by non-elite triathlon participants
(Source: Adapted from Quinn, Faerman, Thompson, McGrath & St Clair, 2007:16, Lamont & Kennelly, 2011:90).

The first competing priority was labelled “dietary preference”. This involved the freedom of choice of food against the desire to minimise body weight. In doing so, athletic performance is maximised. The research indicated that most of the triathletes make sacrifices by restricting the intake of certain foods, mostly during the preparation phase of a triathlon event. After an event though, the restriction would ease. Choice of leisure activities was the second competing priority. It is clear that a triathlon consisting of three separate sports requires consistent and

extensive effort in order to gain and maintain fitness in all three disciplines. Thus triathletes are restricted in their ability to participate in other leisure activities, because of the extensive time and energy required to improve their performance in swimming, cycling and running. The last intrapersonal priority was labelled “personal health”. This was a strong theme within the research, which suggested that triathletes struggle with maintaining their personal health and remaining free from injury against the desire to achieve their triathlon *ETC* goals. Many triathletes will push themselves to physical limits and can even physically damage their body in order to perform at their best.

Interpersonal competing priorities as shown in Figure 2.2 are constraints that involve the relationships of triathletes with their spouse, family and other social groups. Firstly it is shown that the spouse of a triathlete influences the intensity and frequency at which a triathlete participates in an ETC. The problem can also exist that the triathletes' ETC strains the spousal relationship. The next competing priority is evident within the family relationships of triathletes where triathletes' family members has to make certain sacrifices (e.g. spending less leisure time together as a family) in order to enable their triathlete family member to pursue his/her ETC goals. Lastly strain exists on the relationships with friends where the triathlete spends less time with these friends because of relentless training regimes and constant travelling to events. This is especially evident with friends who do not share an interest in triathlons.

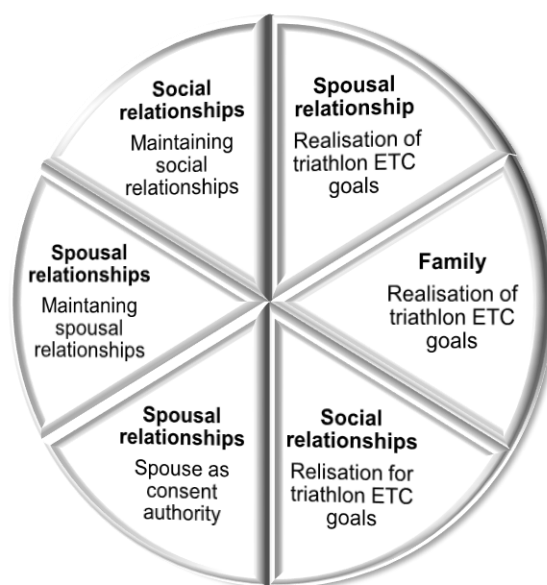


Figure 2.2: Interpersonal competing priorities experienced by non-elite triathlon participants
 (Source: Adapted by Quinn *et al.*, 2007:16; Lamont & Kennelly, 2012:91).

The final domain as seen in Figure 2.3 is known as structural competing priorities. The first competing priority indicates a tension between a triathlete's career and their ETC. The challenge for triathletes is to prioritise their time and energy between competing in a triathlon and performing at work. Financial competing priorities are also popular in triathlon literature. Firstly triathletes struggle to find a selection method for the willingness to travel to an event destination and that will minimise the cost of participation. Other financial issues occurred when triathletes wanted to own advanced equipment in the hope that it will enhance their performance. However, purchasing expensive equipment influences a triathlete's family and spouse (interpersonal competing priorities). Family member's first need to give their approval for the *ETC* related purchases. Finally a competing priority existed relative to triathletes' domestic obligations versus their dedication to pursue their *ETC*. The domestic themes included the neglect of certain responsibilities (such as house chores), as well as parental responsibilities.



Figure 2.3: Structural competing priorities experienced by non-elite triathlon participants
(Source: Adapted from Quinn *et al.*, 2007:16; Lamont & Kennelly, 2012:93).

2.11.3 Self-determination theory

Deci and Ryan (1985:10) developed the self-determination theory (*SDT*), which argue that the concept of self-determination in this theory differs from earlier motivation theories. Self-determination is when extrinsic factors such as rewards or other pressures that ultimately lead to a certain behaviour response, influence a person's choice. Thus choice can be influenced by intrinsically motivated behaviour or through extrinsically driven behaviours (Deci & Ryan,

1985:5). Therefore the core argument of the *SDT* is the fact that humans naturally interact with both their inner and outer environments and will engage in certain activities in the absence of external stimuli (Deci & Ryan, 1985:55). *SDT* has been conceptualised as a continuum of motivational regulations that stimulates human behaviour. This continuum exists out of three conventions: intrinsic motivation, extrinsic motivation and amotivation. In the context of sport and exercise the intrinsic motivation is reported more widespread, although extrinsic motivation can stimulate participation (Ryan & Deci, 2007:2). The *SDT* is used to understand motivations for participation in sport and exercise and may be beneficial because of its link between quality of the experience and motivation (Markland & Ingledew, 2007:25). The *SDT* can be seen as an important theoretical underpinning for examining triathlete motivation (Fortier & Kowal, 2007:115). Literature on participation in triathlons prove that long periods of extrinsically motivated behaviour occur which is followed by short-lived periods of intrinsically driven behaviour during and before the event (Lamont & Kennelly, 2012:239). This supports Ryan, Frederick, Lepes, Rubio & Sheldon (1997:352) in that “initial motives may themselves change over time”. A finding made by Lamont and Kennelly (2012:239) support this notion. Their study found that leisure triathletes tended to be intrinsically motivated, whereas elite triathletes were motivated intrinsically as well as extrinsically.

2.11.4 Flow theory

Csikszentmihalyi (1975:50) conceived the concept of *flow* and is described as an athlete’s mental state. In this mental state correspondence between the challenges of participation and the skills and/or abilities of the participants takes place. Csikszentmihalyi (1975:50) states that “Flow is experienced when people perceive opportunities for action as being evenly matched by their capabilities. If however skills are greater than the opportunities for using them, boredom will follow. It follows that a flow activity is one which provides optimal challenges in relation to the athlete’s skills”. There is also a number of characteristics that is related to the flow experience, this includes (1) the merge of action and awareness (e.g. deep absorption in the activity is needed), (2) an athlete must have a high degree of focused concentration, (3) an altered sense of self-consciousness, (4) a feel of control over personal actions and the environment, (5) congruency between one’s actions and demands and lastly (6) the skill of providing feedback regarding one’s actions. Fortier and Kowal (2007:113) found that researching the flow theory in a sport and exercise context may help athletes strengthen their independent motivation and lead to a more self-directed participation. The flow theory holds this critical concept within triathlon participation as it is an extremely physically demanding activity (Lamont & Kennelly, 2011:241).

2.12 Conclusion

The aim of this chapter was to give an in-depth analysis of triathlons and the participants who participate in these types of endurance sport events. Literature shows that triathlons are a unique endurance sport with specific characteristics that attracts a wide range of athletes. Ironman is the longest one day triathlon event in the world and is growing in popularity in several countries. South Africa hosts the only Ironman triathlon on the African continent and is seen as the hardest multi-discipline endurance event to compete in. It is therefore important to examine triathletes to gain a better understanding of this sport market and how it differentiates from other endurance athletes. The main conclusions from this analysis are: (1) Triathletes average age is older when compared to other endurance athletes; (2) Triathlons attract a wide range of participants from different countries and not just locals; (3) Triathletes have a much higher average spending while preparing for the event as well as during the event. There are also specific behaviours that contribute to the uniqueness of triathletes, namely (4) Triathletes adapt their lifestyle in different areas (training, diet, social relationships and activities) in order to compete in a triathlon. An array of studies focused on determining the motives that drive triathletes to compete. Thus different motives were identified: (5) It was clear that most literature identified *Intrinsic achievement* and *Challenge* as motivating triathletes. (6) There were clear differences between triathletes and open water swimmers, road cyclists and marathon runners and other endurance athletes such as mountain bikers and canoeist. (7) Comparisons revealed that triathletes share the most similarities with mountain bikers or marathon runners when compared with one of the three disciplines. (8) In literature it became clear that there are different variables which marketers can use to segment sport participants. (9) The different clusters found in literature showed that the triathletes can be divided in smaller segments according to specific characteristics (motives, lifestyle and demographics), and (10) Literature also indicates different theories (serious leisure, event travel career, flow theory and self-determination theory) that highlight the reasons for triathletes being so distinctive.

Although previous literature gives a broad idea of the profile of a triathlete, more research is needed in order to identify the ideal variable for segmenting triathletes. Extensive literature in South Africa is needed on the topic of endurance sport athletes as the type of endurance athlete (triathlete) differs when considering the type of event, type of sport, length of event destination of event, climate and race course. In line with suggestions made in triathlon literature, multiple segmentation variables were used as several characteristics that are needed to explain and understand the triathlete (Shilbury, Westerbeek, Quick & Funk, 2009:67). The next chapter will therefore analyse market segmentation and its application in an endurance sport context.



CHAPTER 3:

MARKET SEGMENTATION AND ITS APPLICATION IN AN ENDURANCE SPORT CONTEXT

Ironman: “resembles a great puzzle and the pieces are constantly moving about with changes in weather, courses and fitness levels, the fun is in assembling the puzzle in spite of, or because of the complexity” - McCarville-

3.1 Introduction

Sport tourism can include travel to participate in a *passive sport* holiday (for example sport events and sport museums) or in an *active sport* holiday (for example cycling, golf or gymnastics), thus either sport or tourism is the dominant activity or reason to travel (Novelli, 2008:158). Sport tourism therefore can be defined as: “all forms of active and passive involvement in sporting activity, participated in casually or in an organised way for non-commercial or business/commercial reasons that necessitate travel away from home and work locality” (Standevan & De Knop, 1999:12). Pitts (1999:31) further looked at sport marketing and management and concluded that sport tourism consists of two broad product categories, including: *sport participation travel* (travel for the purpose of *participating* in a form of sports, recreation and leisure or fitness activities) and on the other hand *sport spectatorial travel* (travelling with the main goal of *watching* sports events, recreation, and leisure or fitness activities). However Gibson (2002:111) suggested that there are three overlapping categories of sport tourism, including active sport tourism, event sport tourism and nostalgia sport tourism. Active sport tourism is not only the participation in activities like skiing, bicycle touring, adventure tourism, but also participation in events like a triathlon (Novelli, 2008:159). This concept overlaps with Pitts (1991:31) concept of sport participation travel, where a tourist travels with the main reason to participate in a sport event. This chapter investigates tourists that travel mainly for the reason to participate in a sport event. Thus, sport is the entity for to be analysed for market segmentation.

Every sport participant is different, every sport participant feels attracted by different sport events, like to engage in different activities while at the sport destination, makes use of different entertainment facilities and also complain about different issues during their travel experience (Dolnicar, 2008:130). It is vital that marketers remember that all sport participants differ, although some participants share more similar characteristics than others (Goeldner & Ritchie,

2012:434). Therefore acknowledging the diversity of sport participants and the impossibility for the tourism industry to cater for each individual separately form the foundation for market segmentation (Goeldner & Ritchie, 2012:435). Market segmentation has long been recognised as a useful technique in tourism marketing (Slabbert, 2006:81). Participants are not all the same, they have different needs and a dissimilar picture of their ideal sport experience, therefore the assumption can be made that sport participants are heterogeneous (Dolnicar, 2008:129; Lyu & Lee, 2013:187). Consequently, sport event marketers implement market segmentation as a strategy to strengthen its competitive advantage by selecting the most suitable segment of participants as a target audience (Lyu & Lee, 2013:189). When considering the previous chapter it is clear that a triathlon is a very select sport that attracts a specific participant who pushes their mind and body to extremes and makes lifestyle adjustments in order to compete. Taking into account the unique nature of this sport and the participants it attracts, it becomes important to apply market segmentation as it allows marketers to target the right group of participants. This implies that market segmentation will not only result in attracting more triathletes to the sport, but also in retaining the current participants. Therefore the goal of this chapter is to analyse market segmentation by gaining knowledge of its inception, how it is applied in marketing and tourism, as well as to review the market segmentation process. Reviewing the market segmentation process is done by considering the specific variables and bases that are needed to segment a market. The process will also allow determining the best suited variables for segmenting the triathlons market. Hence the outline of the chapter is as follows: (1) Examination of what market segmentation entails, (2) why market segmentation is important for sport events, (3) a step by step discussion and application of the market segmentation process, (4) a review of different segmentation variables applied in South African endurance sport studies and lastly, (5) the benefits of market segmentation for endurance sport events.

3.2 What is market segmentation?

A market can be defined as any individual, group of individuals or organisations that are willing, able and capable of purchasing a product or service on offer (Simpson, 2005:236; McDaniel, Lamb & Hair, 2008:213). McDonald and Dunbar (2010:49) further state that a market is the aggregation of all the products and services which the consumers see as being capable of satisfying the same need. It becomes important for organisations to note that the needs and wants from a product/service are not the same for everyone in a market (Simpson, 2005:236). The different needs and wants that occur in a group of consumers are called heterogeneous demand (Simpson, 2005:236). The heterogeneous nature of a market then leads to market segmentation which is the separation of markets into distinctive groups based on some similar trait or traits (Simpson, 2005:236; McDaniel, Lamb & Hair, 2008:212; McDaniel, Lamb & Hair,

2013:271). Smith (1956:6) introduced the concept of market segmentation as a strategy and stated: “market segmentation is viewing a heterogeneous market (one characterised by divergent demand) as a number of smaller homogenous markets”. Market segmentation can also be defined as: “the process of dividing a larger market into smaller pieces based on one or more meaningful, shared characteristics (Moss, 2009:214; Cant, Strydom, Jooste & Du Plessis, 2009:103). McDonald and Dunbar (2010:9) further define market segmentation as the process of splitting consumer or potential consumers within a market into different groups or segments. In a strategic context, segmentation is the identification of consumer groups that will respond differently from other consumer groups to competitive strategies (Slabbert, 2006:83; McDaniel *et al.*, 2008:212). Thus the development of a successful segmentation strategy requires the conceptualisation, development and evaluation of a competitive offering (Slabbert, 2006:83). An organisation must focus and understand the needs of these segments and understand the motivations that drive the consumer choices (McDonald & Dunbar, 2010:10). These distinctive groups can be defined as market segments seeing that all individuals in these groups are alike based on some characteristic(s) (Baines, Fill & Page, 2013:171). When segmenting a market, groups of individuals are sorted according to similarities with respect to different personal characteristics (Dolnicar, 2008:2; McDaniel *et al.*, 2013:273). This particular personal characteristic with respect to which similarity is explored is the segmentation criterion or segmentation bases (Dolnicar, 2008:2). After considering the different bases used to segment a market, McDonald and Dunbar (2010:13) further developed an extended definition for segmentation which states: “Market segmentation is the process of splitting customers in a market into different groups, or segments, within which customers share a similar level of interest in the same, or comparable, set of needs satisfied by a distinct marketing proposition”. Marketers must decide on one or more useful segmentation variable(s) which represent dimensions that divide the total market into fairly homogenous groups based on their needs and characteristics (Moss, 2009:215). Organisations should match their specialised marketing mix with the needs and wants of the market segments they chose in order to achieve target marketing (Simpson, 2005:236).

Marketing academics and practitioners have adopted and accepted the concept of market segmentation in both practice and theory as a vital part of marketing (Hanlan, Fuller & Wilde, 2006a:220). The benefits of market segmentation involve the ability of gaining a greater understanding of a particular market, improved skills to better predict consumer behaviour and an enhanced ability to identify and exploit new market opportunities (Hanlan *et al.*, 2006a:220). Market segmentation acknowledges that people have different tastes, needs, lifestyles and motivations. Therefore organisations aim to maximise market demand by directing marketing efforts to the groups of consumers that will have the biggest economic impact (Saayman &

Kruger, 2012:1). Market segmentation is also widely used as it puts the consumer first, helps maximise resources and emphasises the organisation strengths over its competitors (Saayman & Kruger, 2012:2). Other general benefits for market segmentation include that it:

- Presents a clear definition of the consumer (Arrimond & Elfessi, 2001:391);
- Establishes a better understanding of the market, especially in terms of motivation (Getz, 1993:949; Van der Wagen, 2005:80);
- Enables marketers to respond to markets' changing needs (Ferrell, Hartline & Lucas, 2002:74);
- Identifies niche markets (Getz, 1997:260; Keller & Kotler, 2006:242);
- Increases cost effectiveness of marketing (; Hanlan *et al.*, 2006a:220);
- Results in innovative marketing ideas (Van der Wagen, 2005:80);
- Makes the assessment and monitoring of the competition possible (Burke & Resnick, 2000:39; Dibb & Simkin, 2001:610); and
- Results in developing a sustainable product that is positioned in a correct way (Bennet & Strydom, 2001:64; Lee, Lee & Wicks, 2004:1).

With these benefits in mind it is clear that market segmentation is considered to be at the very heart of marketing (Morgan & Pritchard, 2013:152). It is also an indication that markets, and the individuals in these markets are not homogenous and therefore no single marketing effort will satisfy all individuals (Cooper & Wahab, 2001:88; Dibb, Ferrell, Pride & Simkin, 2001:205; Fill, 2006:329). Consequently it becomes essential that tourism entities utilise market segmentation. For this reason the next sections will underline why market segmentation is specifically important for sport events.

3.3 Why is market segmentation important for sport events?

Cook, Yale and Marqua (2010:201) categorise sport participants as a special interest group since they are motivated to participate in a sport event for distinct reasons or interests. Seeing that sport participants are so complex and participate for different reasons, it becomes essential to research sport participant market segments in an attempt to understand these segments and their potential as tourism markets (Ritchie & Adair, 2002:5). Green and Chalip (1998:276) coincide by stating that event planners must gain knowledge of participants' expectations and experiences through market segmentation as a positive experience will continue participation and result in loyal participants who maintain their level of involvement (Casper & Stellino, 2008:93). Previous research indicates that distinct segments may exist according to endurance participants' behaviour (Ritchie & Adair, 2002:5), motives for participating (Kruger, Saayman &

Ellis, 2011:59), lifestyle (Wicker, Hallmann, Prinz & Weimar, 2012:1) and demographic variables (Lepers, Knechtle & Stapley, 2013:851). Whiting, Pawelko, Green and Larson (2011:6) state that marketers must understand what influences participants' behaviour and identify that different outcomes or desired consequences of participation motivate individuals to participate in different sport events. Consequently sport event marketers and event organisers must realise that participants differ from one event to the next and should not be regarded as a standardised group (Hinch & Higham, 2004:50; Weed & Bull, 2004:47). This can also enable sport event organisers to better develop the current marketing communication, through an enhanced experience while participating and identifying the key factors that influence a participant's decision-making process (Funk, Toohey & Bruun, 2007:228). To understand participants becomes even more important with endurance distance events, such as marathons and Ironman triathlons, as these events requires substantial dedication and reflects a high level of enduring involvement in order to compete in a specific endurance sport (Funk *et al.*, 2007:230). In order for the sport marketer to develop different strategies for delivering the sport event product for these unique participants, it can combine several segmentation procedures (variables) (Shilbury, Westerbeek, Quick & Funk, 2009:6).

Sport and sport related events that afore-mentioned participants take part in, have become increasingly important as these events normally take place annually and generate a high economic influx for the event destination and community (Saayman & Kruger, 2013:1). Streicher and Saayman (2010:122) concur by stating that sport has become a high earning sector in the tourism industry. Not only mega events such as the FIFA World Cup Soccer and The Tour de France have a large economic impact, but also smaller South African sport events such as the Pick and Pay Argus Cycling Tour, the Old Mutual Two Oceans Marathon and the Ironman South Africa event add economic value to the event destinations (Saayman & Kruger, 2013:1). This is evident for example in the economic impact of The Pick and Pay Argus Cycling Tour and the Old Mutual Two Oceans Marathon that combined earned an estimated R312 million for the city of Cape Town (Saayman, Saayman & Streicher, 2008:19; Saayman, Rossouw & Saayman, 2008:100).

Sport events are normally held in order to achieve two main objectives. Firstly, to promote a certain cause for example a charity and secondly to contribute and grow the local economy of the event destination (Saayman & Kruger, 2013:1). Therefore, a great deal of competition between different sport events is evident. Hence, sport organisers must gain knowledge of who the participants are what they spend on the event and their main reasons for taking part in the event. This will help to sustain the event as a focused marketing approach can be followed (Streicher & Saayman, 2010:129). A focused marketing approach requires sport organisers to

meet the participant's needs, while only using scarce resources where it is most necessary to grow and sustain event (Saayman & Kruger, 2013:1). Uys (2003:13) found that in order for a sport event to ensure secure long term growth it becomes vital to have knowledge and a clear grasp of the participants. For this reason it is imperative to apply market segmentation. Therefore, the market segmentation process and how it can be applied to sport events need to be examined. The next section will firstly analyse the market segmentation process. Every step will be discussed individually and be practically related to sport events. This section specifically focuses on the different segmentation variables discussed and examined in previous literature.

3.4 Market segmentation process

The market segmentation process was created to select a potential market through segmenting, analysing and profiling to also create a customised marketing mix for the selected market (Simpson, 2005:242). This process needs to be a continuous process as markets are dynamic and constantly changing (Baines *et al*, 2013:186). Therefore it is important for a sport event and sport event destination to revise their marketing efforts in order to meet the segments changing needs, identify new markets or replace dwindling markets (Simpson, 2005:242). Although the segmentation process is continuous, it is important to decide whether it must be a priori or post hoc process. (Baines *et al.*, 2013:170) *Priori* segmentation occurs when the variables for segmentation such as income, age or behaviour are selected first and then afterwards the consumers are classified accordingly (Peter & Donnelly Jr, 2008:66; Morritt & Weinstein, 2012:9). *Post hoc* segmentation ensues research findings is being used to segment consumers into segments based on similarities of these variables (Peter & Donnelly Jr, 2008:66; Morritt & Weinstein, 2012:9). Previous literature shows that there is an array of processes that can be used to segment a market. The process chosen for this study has eight steps and will be discussed in the next section.

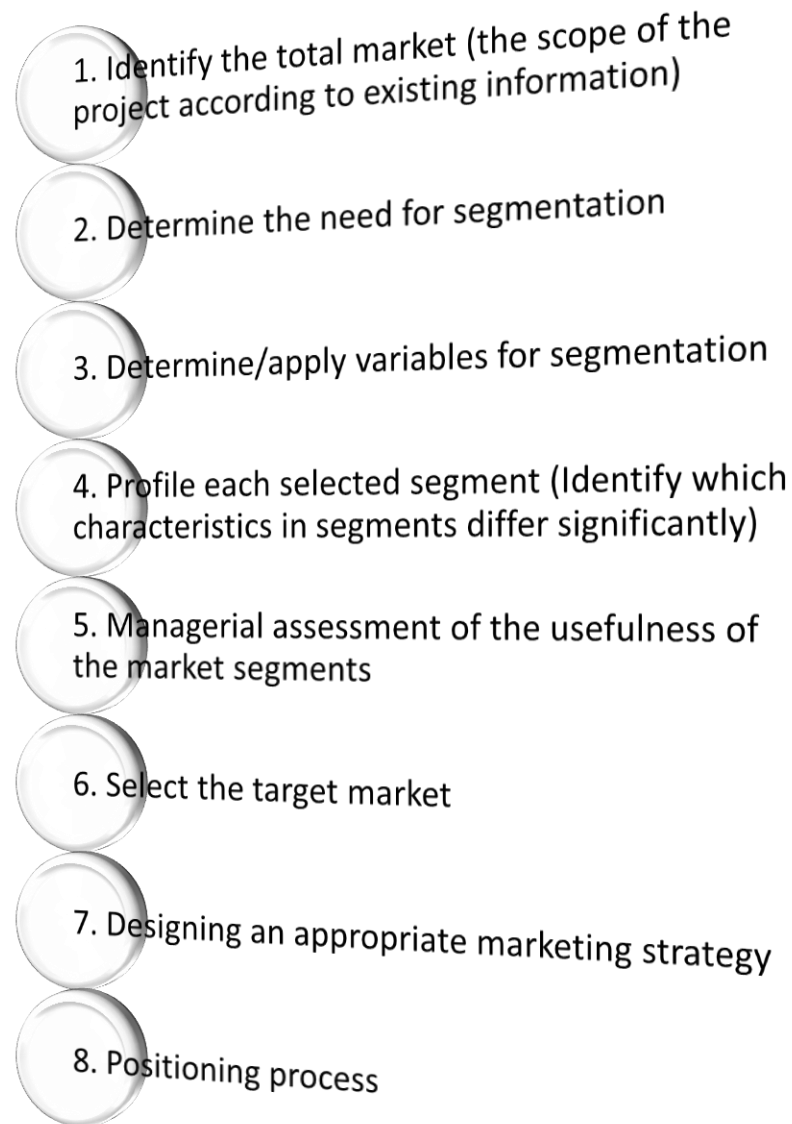


Figure 3.1: Steps in the market segmentation process

(Source: Adapted from Simpson, 2005:243; Slabbert, 2006:86 Dolnicar, 2008:141; McDonald & Dunbar, 2010:15).

In accordance with Figure 3.1 in the next section, each step of the market segmentation process will be discussed separately and each step will be applied to sport events in order to understand the relevance of this process in a sport context.

Step 1: Identifying the total market (The scope of project according to existing information)

The first step in market segmentation is to identify and define the total market including all potential consumers for the specific product/service (Simpson, 2005:243; McDaniel *et al.*,

2008:225). There are also other considerations to take into account when identifying the total market. The behavioural/purchase patterns, whether the product/service user is the person who purchased the product/service, consumers' underlining intentions for entering the market in terms of use and lastly, consumers' purpose in purchasing the organisation's or its competitors' product/service (Simpson, 2005:243; McDonald & Dunbar, 2010:15; McDaniel *et al.*, 2013:285). According to McDonald and Dunbar (2010:15) an organisation must also examine their capabilities and resources before deciding on the scope of the market and an important stage for the first step of market segmentation is market mapping. This entails that the organisation's current market be displayed in a diagram. The market map acts as a flow chart to display how cash flows from the final users to your organisation, your competitors, the suppliers, as well as how the products and services from the suppliers flow to the final users. If the market map is complete the organisation is required to determine at which points decisions will be made about competing products and service and at which of these points segmentation will be required. Slabbert (2006:86) adds that before segmenting a market it is important to determine what information already exists in terms of the market and the product. Therefore a tourism organisation needs to summarise the following: existing information on market, evidence to proof that the information is reliable and correct, the current trends and obstacles in the market (Randall, 2001:123). Slabbert (2006:86) as well as Goeldner and Ritchie (2012:434) concurs by suggesting that in a tourism context, destinations must conduct a market analysis and focus specifically on those factors that influence the tourists' behaviour. The main information needed for a market analysis is (Slabbert, 2006:87):

- Market data: size, structure, trends, listing of all products/services and brands;
- Tourists: who, where, when, what and how do they consume the product of service (behaviour); and
- Segments: what are the current segments that exist in the market;

In this step, sport events should identify all the services they deliver in order to retain participants. Furthermore, they should investigate the resources needed to attract a new market of participants, and if sufficient resources are available to cater for new and existing participants. Sport events should also evaluate existing competition (other sport events) as well as their strategies to attract and retain participants (ensuring that the sport event is unique). With a sport event such as Ironman South Africa it is imperative to identify who the current market is by examining existing information. This can be done through a summary of what is known about the market. When applied to this study, the Ironman South Africa event organisers should determine the number of participants that are attracted by the event each year, the obvious trends of the event (for example the high number of international

participants) and should perform an in-depth analysis of the event's unique offering compared to other events (for example that the event is a qualifying event for the Ironman World Championships). After the event organisers have a clear understanding of the market that is attracted to the event, they need to investigate the characteristics of the athletes that currently participate in the event. This can be done by asking: who are the repeat participants, where do these participants come from, what behaviour is unique to these participants (for example they participate in other sport events before participating in a triathlon), what do these participants want when they take part in the event (for example a well-organised, safe event). Lastly the current segments (if applicable) need to be evaluated (for example local and international participants were two different segments where local marketers specifically focused the marketing messages to apply to local participants, while a different marketing approach was adopted for international participants).

Step 2: Determine the need for segmentation

It is vital to determine if the total market needs to be divided into smaller segments for the purpose of targeting as not all markets need to be segmented (Wedel & Kamakura, 2000:4; Simpson, 2005:244). Segmentation is only necessary if there are differences with respect to consumer needs or demands, to ensure that different variations of the product/service are cost-effective (profitable) and lastly to make the differences in the marketing and the specific product/service clear to the consumer (Wedel & Kamakura, 2000:4; Simpson, 2005:244).

In this step of the process, organisations must look at specific criteria that will help ensure successful segmentation. Therefore, in order to effectively segment a market, the market must have the following characteristics (Wedel & Kamakura, 2000:4; Simpson, 2005:244; McDaniel *et al.*, 2008:213 Morritt & Weinstein, 2012:5; McDaniel *et al.*, 2013:274):

- **Heterogeneous:** Clear differences in consumer preferences for a product/service must exist.
- **Measurable:** Different preferences that consumers have for a product, must be identifiable as well as measurable in order for these preferences to be compared with variables such as age, gender and other specific variables.
- **Substantial:** In order for the organisation to earn a profit and be sustainable in the future, it is vital that the selected target market is substantial enough and has purchasing power.
- **Actionable:** It is important that organisations will be able to respond with the customised marketing mix to the demands of the target market, but that it still stays appropriate and profitable given the existing resources of the organisation.

- **Accessible:** The chosen target market must be readily accessible and within reach for the targeted marketing programme and strategy.

According to Simpson (2005:245) organisations should also take into account all external factors that may affect the success of segmentation. These factors include the product life cycle, profitability of the product/service, market share, competition, the product/service itself as well as the market which can all affect the market strategy. After determining if there is a need for segmentation, it is important that organisations define the general market and eliminate inappropriate or unwanted groups that should not form part of the segmentation process (Slabbert, 2006:91).

Sport event marketers and/or organisers should evaluate the current market and decide if market segmentation is needed. To determine the necessity of market segmentation, the sport event marketers and organisers should determine if the participant market has different needs, profiles and different reasons to participate. With sport events like Ironman South Africa it is important that organisers remember that these types of events attract a wide range of participants all seeking to satisfy their needs and motivation for engagement in different ways. Therefore the sport participant market is not homogeneous and market segmentation is needed to identify different markets that can be more easily and successfully targeted. Market segmentation is also needed as it encourages wider participation since the event provides a more satisfying experience than others. External factors may also lead to not targeting specific groups (for example other Ironman events may be more appealing for professional triathletes because it is in closer proximity to their home country).

Step 3: Determine/apply variables for segmentation

Frochot and Morrison (2000:22), Andrews and Currim (2003:190) as well as Xia, Evans Spilsbury, Ciesielski and Arrowsmith (2009:465) advise that the success of market segmentation techniques are not only dependent on the clear objectives of a segmentation strategy, but also on choosing the most appropriate variable or variables. According to Getz (1997:260), George (2001:112), Dibb *et al.* (2001:210) as well as Keller and Kotler (2006:261), segmentation variables or bases are seen as the aspects or characteristics of individuals (in this case sport participants), that events or organisations use to divide a total market into segments. Segmentation variables need to perform critical functions in the market segmentation process: firstly the variables are used to segment the market in different groups and secondly they help to describe and profile the segments (Baines *et al.*, 2013:173). The task of identifying a segment is especially difficult because of the array of bases that could be applied (Slabbert, 2006:91). Previous segmentation studies were based on an array of consumer characteristics to

participate, and include demographic information, geographic locations, behavioural patterns, personality characteristics, spending, seasonality and motives (Slabbert, 2006:83). Tourism and marketing literature distinguish between four groups of variables that include geographic, demographic, psychographic and behaviour (Burke & Resnick, 2000:41; Cooper & Wahab, 2001:89; Horner & Swarbrooke, 2001:159, Armstrong & Kotler, 2005:54; Slabbert, 2006:91; Fill, 2006:329; Moss, 2009:215; McDonald & Dunhar, 2010:10-13; Baines *et al.*, 2013:173). Consequently, it is important that sport event marketers bear in mind that there is no single way to segment a market and therefore different segmentation variables must be tested separately and in combination with other variables in order to learn the most suitable way to segment the market (Bowen, Kotler & Makens, 1996:246).

The specific base or variable chosen to segment the tourist market depends on the research objectives of the tourism entity (Slabbert, 2006:83). Market segmentation according to Slabbert (2006:83) as well as Woodside and Martin (2008:129) should define the market of a tourism entity, match the products/services to this market and choose media that will most effectively reach the target market (Slabbert, 2006:83). Therefore the ability of the different bases to identify segments needs to be evaluated in order to develop appropriate strategies (McDaniel *et al.*, 2013:274; Baines *et al.*, 2013:171). In order for the organisation to divide the market into segments, they should use different *segmentation variables* that describe the characteristics of the market (Simpson, 2005:245; McDaniel *et al.*, 2013:274). The most prominent variables in tourism literature are shown in Figure 3.2.

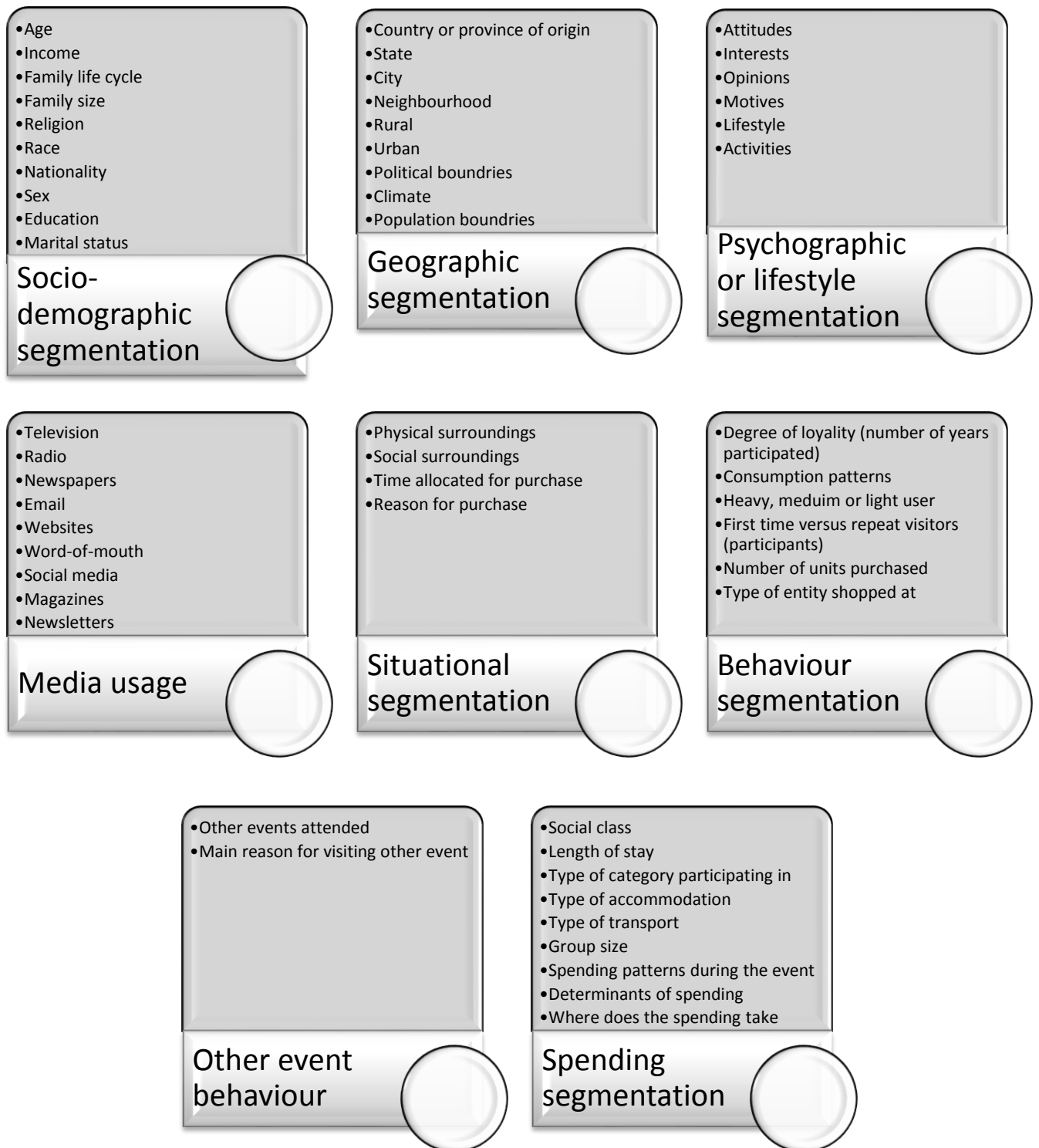


Figure 3.2: Segmentation variables/bases

(Source: Adapted from Getz, 1997:261; Simpson, 2005:246; Goeldner & Ritchie, 2006:538; Slabbert, 2006:91; Baines *et al.*, 2013:173).

The subsequent section will review the main segmentation variables for tourism and marketing literature. Each of the variables will then be applied on a sport event to give insight of how different variables can be applied in a sport context.

Demographic Variables

A market can be divided in groups of people who exhibit similar demographic characteristics such as gender, age, household composition, ethnicity and educational level (Walker & Walker, 2011:81). These demographic details are then applied to define markets for example through predicting that people in the age group 30 to 35 years, will respond to the same proposition (McDaniel *et al.*, 2008:215; McDonald & Dunbar, 2010:11). Although demographics play an important role in market segmentation, it does not define the proposition that is required for a segment and can therefore not be used as a single variable to divide a market. Moss (2009:215) and McDaniel *et al.* (2013:275) concurs by stating that demographics are vital in identifying the best potential customer for a product or service. The demographic characteristics are usually easy to identify and helps the entities to tailor its marketing messages and products to the relevant groups (Moss, 2009:215). If demographic variables are applied to segment the tourist market, which is relatively inexpensive to do, care should be taken not to assume that people of the same age, income or gender prefer the same types of tourism products, or that they enjoy the same types of activities, have the same lifestyles or will respond to the same type of promotional messages (Walker & Walker, 2011:81). The background information attained from demographic information will however help identify profiling characteristics that is associated with the consumers in each segment (McDonald & Dunbar, 2010:11). Churchill and Lacobucci (2009:177) state that demographic information is therefore vital in segmentation as it helps to identify the individuals in each segment. This will increase the knowledge of marketers needed to apply the best method for reaching the specific group.

Relating to this study, the demographic information of Ironman South Africa participants will assist in the profiling of the triathletes that can then be compared to the profiles of other sport participants. It can also be used to segment the sport event market according to other variables. A great selection of essential demographic information on participants is available to collect. This information includes the following:

- Ages of participants (Segmenting participants according to their age or age category). This segmenting variable will give an indication if level of experience influences participants);
- Gender (Dividing male and females in two different segments);

- Home language (This can be used in combination with province or country of origin, and segment participants from different locations. It can also be combined with geographic bases where for example a national participants form a segment, while international participants form the other segment);
- Income (Segmenting participants according to their level of household income or identifying the high spending market and targeting these participants);
- Education and occupation of participants (These variables are difficult to use separately and should be used in combination with the level of income as it will help define the participant segments more clearly); and

Family life cycle (The marital status and number of family members can be used to divide the participants according to the family life cycle. This cycle starts with the bachelor stage and ends with the solitary survivor that is retired. The information gained can also be used to divide participants in the following categories: young single, young married without children, young married with children, middle-aged married with children, middle-aged married without children, older married, older unmarried)

Geographic Variables

Geographic's are identifiable locations of tourists. Therefore, regarding geographic segmentation, the assumption exists that everyone in a predetermined area will be expected to react to a particular offer in exactly the same way (Slabbert, 2006:92; McDonald & Dunbar, 2010:12). Tourism entities, according to Reid and Bojanic (2009:130) and Walker and Walker (2011:81), focus on segmenting the market based on the locality of tourists (for example Rio de Janeiro, Brazil or Johannesburg, South Africa). Geographic variables are applied for segmentation when destination or event marketers decide to operate within one or a few geographical areas, rather than an expanded area (Cant *et al.*, 2009:108). Marketing efforts are then focused on that specific geographical location as well as the needs of individuals residing in that area (Slabbert, 2006:92). Similar to demographic segmentation, geographic areas on their own cannot define propositions required by segments and therefore will not define the segment (McDonald & Dunbar, 2010:12). Walker and Walker (2011:81) as well as Cant *et al.* (2009:109) concur by stating that although this segmentation method is relatively simple and inexpensive people who live in a certain zip code areas are not necessarily similar in their preferences for tourism goods and services. However, geographic segmentation gives vital background information on customers that assists marketers to identify the most likely locations of the target audience. It also assists in determining the best way to reach the identified segments (Reid & Bojanic, 2009:132).

For sport events, geographic information of participants will indicate participants' home towns. This will make it easier to reach these participants in forthcoming marketing efforts. The most notable geographic information gathered by sport event marketers normally includes:

- Country of residence (This is vital information for sport event marketers as it will assist in segmenting participants from different countries or segment international participants and local participants in two different segments. The country of residence overlaps with the demographic information which enables marketers to determine if participants from different countries have different profiles); and
- Permanent residential address, state, city, neighbourhood (Segmenting participants according to these specific areas of residence will narrow down, where participants in a specific country, originate from. One problem that arises is the numerous number of neighbourhoods and cities that could result in too many segments with too little individuals in each segment. Therefore, segmenting participants according to province or a broader area such as a state will ensure more participants in a selected segment).

Psychographics variables

Market segmentation can also make use of psychographic variable where the emphasis is on the attitudes in terms of lifestyle and social orientation (Walker & Walker, 2011:81). Shilbury *et al.* (2009:31) and Churchill and Iacobucci (2009:178) coincide by saying that psychographics places more emphasis on psychological dimensions, thus giving information about the attitudes, interests and opinions and therefore guiding tourists to behave in a certain way. According to Peter and Donnelly Jr (2008:67), Moss (2009:220) as well as Reid and Bojanic (2009:136) psychographics will segment tourists according to their shared activities, interests and opinions (A/Os). Psychographics is the tourist's inner feelings and predisposition to act and behave in a certain way (Cant *et al.*, 2009:118; McDonald & Dunbar, 2010:13). Slabbert (2006:98) agrees by stating that this method of segmentation entails dividing tourists into segments based on their social class, lifestyle and/or personality traits. This segmentation variable assists in giving insight in the tourist as an individual, but cannot define the entirety of a winning tourist proposition (McDaniel *et al.*, 2008:221; McDonald & Dunbar, 2010:13; McDaniel *et al.*, 2013:281). For example if a tourism entity knows that people place high value on spending time with their family and friends, it can develop tourism products that meet those needs and preferences such as adventure trips or family cruise ship holidays (Walker & Walker, 2011:81). Hence this method aids in providing a detailed understanding of tourists in terms of their lifestyle, how time is spent as well as the important factors that contribute to their opinions and attitudes towards events and holidays destinations (Slabbert, 2006:98; McDaniel *et al.*, 2008:221). Also, identifying these internal drivers that leads to specific tourist behaviour will

assist to describe the most appropriate promotional position (Reid & Bojanic, 2009:132). It will not only differentiate the organisation by implementing a strategy that draws attention to the target market, but also provide a means by which the organisation can isolate and reach particular segments (McDonald & Dunbar, 2010:13).

Segmenting sport participants of an event such as Ironman South Africa through psychographic variables can reveal unique characteristics of participants which can bring about valuable information regarding the mind-set of these athletes. The psychographic information will also give insights about the activities and lifestyle the participants engage in, outside their sporting career. The categories that have mostly been researched in the bounds of psychographic variables include:

- Attitudes (Participants can be segmented according to their attitudes towards the event itself. The different attitudes can include a positive or negative attitude towards the event. Participants can also be segmented according to their attitude to return to the event the next year);
- Interests (Segmenting participants portraying their interests, necessitates that the way they choose to spend their leisure time be determined as well as their priorities outside the sporting perspective, for example spending time with friends and family);
- Opinions (This is a difficult category to survey as participants can have a large number of different opinions regarding the event as well as the sport itself. However participants can for example be segmented according to the opinion that the event must improve, thus marketing messages can focus on informing the target audiences on the way in which the event improve each year);
- Motives (This is a segmenting variable that proved to be successfully applied according to previous sport participant literature. The variable involves segmenting participants based on their reason (motivation) for participation. This segmentation variable will most likely form clear segments since most participants are motivated to participate for different reasons. For example, some participants may be motivated by the risk involved with the event, while others participate because they want to improve their health and fitness);
- Lifestyle (Acquiring information about the lifestyle of participants will give a clear profile of participants and show how these participants differ from each other. Segmenting according to lifestyle may include the training, diet requirements as well as other sporting events in which a participant participates); and

- Activities (This involves the segmenting of participants according to different social events, hobbies and entertainment they engage in beyond their sport participation).

Behavioural variables

This segmentation method split a market into groups of tourists that have comparable consumption behaviour such as regular versus first-time visitors (Walker & Walker, 2011:13). Moss (2009:220) explains that in addition to demographic and psychographic information it is useful to study what a tourist actually does with a product or to determine the activities he/she engage in during an event or at a destination. Behavioural variables usually refer to the frequency and complexity of visiting a destination or participating in an event (Shilbury *et al.*, 2009:37). Therefore behavioural segmentation divides tourists on the basis of how they act, feel or use a specific product or service (Kardes, Cronley & Cline, 2010:46). One of the most popular ways in segmenting on behaviour is to divide consumers according to frequency of usage. Thus marketers will attempt to reward current (loyal) tourists and aim to win new infrequent tourists (Moss, 2009:221). Marketers will typically divide their current tourists into different groups of heavy, moderate and light users (Pride & Ferrell, 2010:115). Another behaviour pattern that marketers consider is the occasion(s) at which the product/service is used and when it is used most frequently (Churchill & Iacobucci, 2009:186). Many products and services are associated with a specific occasion that includes the time of day, holidays, business functions or casual get-togethers. Thus an organisation divides tourists according to when and how their product/service offerings are in demand (Reid & Bojanic, 2009:137).

In a sport context, the participant behaviour plays a critical role as it provides an appropriate base for dividing a market. The behavioural characteristics will give a basis and starting point to segment participant markets as well as give information that can be combined with other variables such as demographic information. The most prominent behaviour patterns used in sport events include:

- Frequency of participation (usage) (Participants are segmented according to the number of times they have previously participated in the event. Sport marketers also divide participants into first and repeat (loyal) participant segments. This may present vital information in how to retain existing participants as well as attract new participants to the sport. The participants can also be segmented with regard to weekly times of practice, frequency of participation in sport events per year, the number of times participated in different sport events, the number of times previously participated in or finishing of other similar events, and if they participate in the event annually): and

- Complexity of participation (usage) (This implies that participants are segmented according to them being part of a team/club, because they prefer a certain sport over another, like preferring cycling above running. The level of performance also plays a role as it refers to whether the participant is a leisure or professional athlete).

Apart from main variables mentioned in the previous sections (demographic, geographic, psychographic and behavioural variables), there are various other bases that can be used to segment a market. Two of the most prominent variables found in tourism literature will be discussed in the next section.

Other variables found in tourism literature

The following segmentation variables were found in previous tourism studies and can be used in combination with the other segmentation variables.

Socio-economic variables

Spotts and Mahoney (1991:24) as well as Legohérrel and Wong (2006:16) indicated that expenditure is an important variable for tourism segmentation as it identifies the high spenders at the destination or event and recognises the determinants that influence tourists to increase their spending. There are different factors that influence the socio-economic variables including the length of stay of tourists in the area, the different spending categories, the number of people travelling in the group as well as the number of people paid for during the event or trip (Getz, 1997:261).

Considering sport event participants, expenditure can be a critical way to segment participants. The main goal of most sport events is usually to earn a profit. Therefore it becomes important to identify the amount participants spend during a sport event, on what they spend the most money and how their expenditure can be increased at the event. There are different ways to segment participants according to expenditure, including:

- Expenditure (spending categories) (Participants spend money on different categories during their stay at an event. These categories include entry fees, accommodation, transport, sport equipment, meals, medicine and souvenirs. This is important information for segmentation as it indicates on what categories participants spend the most money. In addition the information also reveals the participants with high spending as well as the category that corresponds to the highest expenditure); and
- Length of stay and group size (These are two very important factors that can influence higher expenditure during the event. The common generalisation exists that the more

years participants live in an event area, the higher his/her spending will be. Also the larger the travelling group, the higher the spending. As the above aspects are not always the case, a comparison of the length of stay and group size with the total expenditure is necessary in order to identify the different segments).

Communication usage variables

It is important that event organisers have sufficient knowledge of all communication methods that could be applied during a sport event. However the communication channels or media cannot define a segment as they are simply means by which customers and organisations connect with each other (Slabbert, 2006:155; McDonald & Dunbar, 2010:13; Baines *et al.*, 2013:182). Different types of promotion methods (communication channels) are available to reach the participants of a sport event. These promotion methods can be divided in above the line promotion and below the line promotion. Above the line promotion requires to buy specific space for a marketing message to be conveyed. Examples of above the line promotion methods include newspapers, radio, magazine, television, radio, interactive media, transit and outdoor advertising and social media (Cant *et al.*, 2009:180; McDaniel *et al.*, 2013:625). Below the line promotion or media does not involve the purchase of media airtime or space and includes direct mail, personal selling, sponsorships, public relations, sales promotions and exhibitions and shows (Cant *et al.*, 2009:180; McDaniel *et al.*, 2013:654). Nevertheless the importance of communication channels should not be underestimated. When organisations understand the motives that underlie the tourists' media choices, communication channels can be developed into an attribute that is easy to compare with other variables (McDonald & Dunbar, 2010:13; Baines *et al.*, 2013:182).

Media or communication channels play a vital role in sport event marketing since it is imperative to know how to reach the targeted markets. If marketers gained knowledge in how to reach participants in the best possible way, the marketing mix and promotions will have a greater chance of success and impact. Two key communication variables need to be considered for sport participants:

- Communication channel(s) (It is important to know how sport participants gain knowledge of the event and stays informed about different events. Media and communication channels such as word-of-mouth, television, magazines, radio, email, club affiliation and websites are all ways through which a participant can be informed on the event and be kept up to date about all aspects of the event. Social media has also become an essential part of marketing. Research in this area is important in order to identify how participants make use of social media, what types of social media they use

and how a sport event can use social media to benefit and market the event. Thus knowing what communication channels the segments use, can promote and grow the sport event as the communication messages reach the right individuals); and

- Initiator of participation (The person or factor that initially persuaded the participant to take part in a sport event can also be applied in combination with other variables. This variable together with the motives of participants to take part in a sport event can be used in marketing messages and strategies).

It is clear from the abovementioned segmentation bases that there are many ways to segment a market. While each of the above approaches can form participant segments and may be administratively convenient, alone it cannot define segments. Separately, they rather provide an insight and thus act as contributors to a successful segmentation process (McDonald & Dunbar, 2010:13; Lyu & Lee, 2013:189). Walker and Walker (2011:81) state that most tourism entities will use a combination of methods (bases) and criteria to segment their sport participant market. Considering the different approaches to market segmentation and understanding participants' needs are viewed as the most appropriate approach for segmentation. This approach will give organisation insights that will enable it to produce a winning marketing proposition (McDonald & Dunbar, 2010:13).

Step 4: Profile each selected segment (Identify which characteristics in the segments differ significantly)

The next step in the market segmentation process is to analyse the information to select target markets successfully (Slabbert, 2006:103; Pride & Ferrell, 2010:113). In conjunction with these variables (characteristics) are different methods that determine the profile of the selected segments (Lyu & Lee, 2013:193). Slabbert (2002:40) examined the various statistical methods for comprehensive market segmentation to have a better understanding of the tourist's needs, motives and expectations. The most accepted methods include the cluster analysis, correspondence analysis, regression analysis, automatic interaction analysis (AID), latent class analysis, judgement based segmentation, factor and component analysis as well as expenditure analysis (Perreault & McCarthy, 1999:83). Sport event marketers need to first choose an appropriate statistical method and then identify a set of practical and profitable segments. A profile need to be generated in order to understand who exactly the segment members are as well as the needs of these members (Moss, 2009:224). The segment profile is a description of the "typical" consumer in that segment (Cant *et al.*, 2009:123). A segment profile can for example include the tourist's demographic details, location, lifestyle information and frequency of product or service use; thus the information from the different segmentation variables (Moss, 2009:224; McDaniel *et al.*, 2008:225; Cant, 2010:101).

A technique very often used in tourist market segmentation is cluster analysis. A practical example of a cluster analysis for the Ironman South African participants follows. The analysis starts off with Ironman South African participants to indicate the significance of 29 motives to take part in the event (for example to escape, to compete against others or because it is an international event). Then the participants are combined into clusters based on their ratings of each one of the 29 possible motives to participate in this specific sport event. The algorithm used for determining cluster membership was based on nearest in which the distance between the case and the centre of the cluster is the smallest. The cluster analysis revealed that Ironman South Africa participants can be segmented into three groups, each motivated to participate in the event for different reasons. An illustration of this follows:

- Segment 1: The escape segment, thus they participate to escape from their daily routine and to spend time with friends and family.
- Segment 2: The fitness junkies, thus participating in the event in order to improve their self-esteem as well as their health and fitness.
- Segment 3: The competition oriented participant, taking part in the event to improve on previous races or to win the race.

Step 5: Managerial assessment of the usefulness of the market segments

After sport event marketers have identified a segment, it does not necessarily mean that it will be a useful one. Therefore a viable segment should satisfy the following requirements (Slabbert, 2006:107; Moss, 2009:222; Cant, 2010:104):

- Members of the segment must be similar to each other in their product/service needs and wants, but also be different from tourists in other segments.
- The market must be measured according to the purchasing power and size of the potential segment.
- The segment must be large enough in order to be profitable in the present and in the future.
- Marketing communications must be able to reach the segment. Thus, the specific media chosen must efficiently reach and fit the target segment.
- Marketers must be able to adequately serve the needs of the segment with the current expertise and resources available to the organisation.

After sport event marketers have identified the specific segments to target, it is necessary to evaluate each segment to ensure that it is identifiable (who exactly are the participant in each

segment), accessible (segments must be able to be reached by the events marketing efforts), substantial (it must be cost-effective to target the selected segment) and generalisation (the segment must be unique from other market segments, fit with the events objectives and resources and must be stable to enable future targeting).

Step 6: Selecting the target market

When segmentation of the market is complete, the next step is to analyse the different segments and identify which group or groups are the most attractive and may be the most profitable considering marketing efforts (Cant *et al.*, 2009:129; Walker & Walker, 2011:82). Tourism entities must firstly assess the attractiveness of each of the segments in terms of size and value (Walker & Walker, 2011:82). The review of the different segments is extremely dependent on the type of product or service that is marketed (Walker & Walker, 2011:82). Therefore target markets are selected on the basis of sales (participation) forecasts and reflect a market's anticipated response to marketing efforts (Slabbert, 2006:107; McDaniel *et al.*, 2008:225; McDaniel *et al.*, 2013:286).

Continuing with the example of Ironman South Africa participants, marketers can now decide to select segment 2 (fitness junkies) as a target market as, for example, a large number of participants fall into this segment, they have a high average spending, they are loyal to the event and easy to reach through magazine advertisements.

Step 7: Designing an appropriate marketing strategy

After the market has been divided into meaningful segments, marketers should decide on a target marketing strategy. The following questions are relevant: should the organisation target one overall market, one or several market segments or target consumers individually? (Moss, 2009:225). In this step of the market segmentation process marketers should determine which strategy will be the most appropriate for reaching the selected market segments (Moss, 2009:225). The first option that arises is to develop one marketing strategy that appeals to the market as a whole. This is known as the *undifferentiated targeting strategy* (Simpson, 2005:245; Moss, 2009:256; Reid & Bojanic, 2009:153; McDaniel *et al.*, 2013:288). This strategy is appropriate when all members in a market have the same homogenous demand for a product or service. Figure 3.3 depicts this strategy, namely developing one marketing mix for the entire market (McDaniel *et al.*, 2008:226). When heterogeneous demands exist, marketers should adapt their marketing strategy to include multiple market segments. This is done through a *concentrated strategy* (Simpson, 2005:245; Moss, 2009:256; Reid & Bojanic, 2009:153; McDaniel *et al.*, 2013:289). A concentrated marketing strategy, as seen in Figure 3.3, is when an organisation develops one marketing mix to focus on a few or one profitable market

segments (Simpson, 2005:245; Moss, 2009:256). Figure 3.3 portrays the second option in strategies, namely a differentiated strategy to develop different marketing mix plans, specifically created for each of two or more market segments (Simpson, 2005:245; Peter & Donnelly Jr, 2008:75; Moss, 2009:256; McDaniel *et al.*, 2013:288). Organisations should first consider their available resources and marketing costs before a strategy is chosen (Simpson, 2005:245).

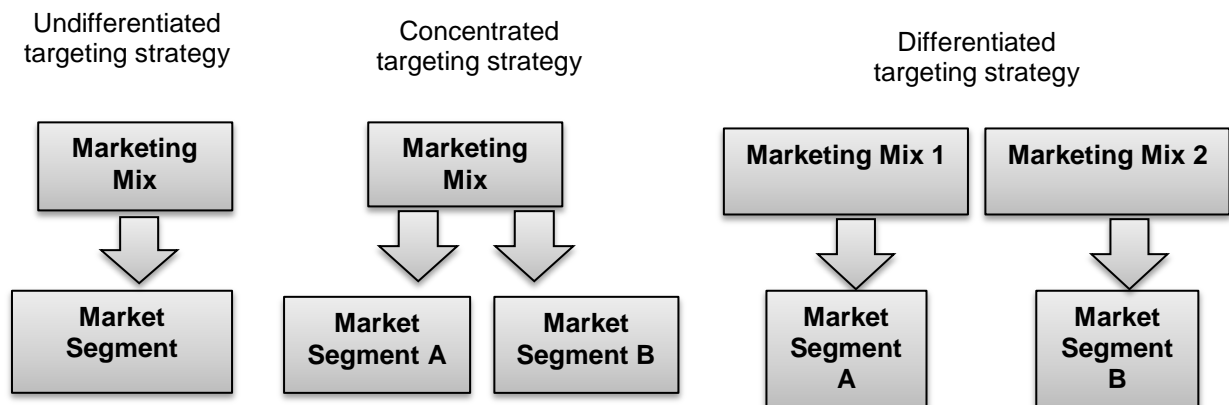


Figure 3.3: Marketing strategies for market segmentation

(Source: Adapted from Simpson, 2005:245; Cant *et al.*, 2009:135; Cant, 2010:107).

The next step is for sport event marketers to decide on the most appropriate segmentation strategy. Seeing that the market is diverse a concentrated targeting strategy or a differentiated targeting strategy will be more useful. Also, the sport participant market is not homogenous thus marketers can, for example, apply a differentiated targeting strategy. This implies that different marketing mixes are developed for different market segments. Sport event marketers should also analyse if the market segmentation of participants will fulfil the characteristics of successful segmentation. If the market complies with the characteristics, the next step is to eliminate the markets that will not be able to be reached with the available resources (for example targeting professional triathletes, Ironman South Africa may not have enough money for the marketing cost involved, furthermore this group may also be more difficult to reach seeing that professional triathletes come from different countries).

Step 8: Positioning process

Once the target market is established and a marketing strategy is chosen the last step entails market positioning (Moss, 2009:227; Walker & Walker, 2011:81). Positioning refers to developing a market strategy that is aimed to influence the target market in having a good perception of the product, service or event in comparison to the competition (Peter & Donnelly Jr, 2008:73; McDaniel *et al.*, 2008:231; Cant *et al.*, 2009:104; Cooper, 2012:306). It is

imperative that marketers understand their tourism product or event in order to have a lead position in the mind of the tourists. This is normally based on one or two key attributes that differentiate the tourism product or event from competitors (Walker & Walker, 2011:83; Cooper, 2012:306). Positioning also determines and influences tourists' perceptions of the specific product or service that are marketed (Cant *et al.*, 2009:136; Cant, 2010:108; McDaniel *et al.*, 2013:295). Marketers must establish a marketing mix (price, place, promotion and product) that will effectively target the segment members through the positioning of their product in such a way that it appeals to that specific segment (Reid & Bojanic, 2009:153). According to Moss (2009:227), a positioning strategy constitutes four steps, namely: An analysis of the competitor's positions (understanding the current market through knowledge of the competitors in the market and the way the target market perceives them). Provide a product or service that has a competitive advantage (provide consumers with a reason for the product or service being better than that of the competition). Thirdly match elements of the marketing mix to the selected segment (this means that the goods and services must deliver the benefit consumers are seeking. The price of the offering must match what the segment is willing to pay. The offering must be available at the places where consumers are likely to go). Lastly, evaluate the target market's response to the strategy and be flexible to adjust strategies if needed. Peter and Donnelly Jr (2008:73) as well as Walker and Walker (2011:83) list the following positioning strategies as the most important ways to apply to sport events:

- Better than the competition: This is an approach used when the event is very similar to the competitors' sport events, for example "Ironman South Africa is better than three endurance sports combined" (the *better* can refer to a greater challenge or that the event is well-organised).
- Different from the competition: The different from the competition approach is when a sport event markets itself as different from the current event offerings. For example "The Only Ironman event in Africa". This shows that the event is different as there is no other similar event.
- Opposite of the competition: A very appealing approach is to position the event opposite to the competition, meaning marketing the offering as being unlike competing in other sport events, for example Ironman "Like nothing you've ever experienced".

Consequently market positioning for Ironman South Africa must involve creating an image of the event that will make participants have a desire to take part in it. Market positioning must also be linked with marketing management (marketing mix), where the pricing strategies, event, communication channels and promotional activities are coordinated in order to ensure that the

best image results in return-participation and attraction of new participants. The next section will review different segmentation variables applied alone and in combination with each other in different South African endurance sport studies.

3.6 Previous segmenting research done in sport events

Previous studies reveal important information on the choice of segmentation variable(s). It is imperative to take these findings into account and to analyse the success of the application of variable(s) to segment a market in this specific study. The section will specifically focus on South African endurance sport events and the outcomes of using specific segmentation variables to divide a certain market into the best market segment for sport event marketing.

3.6.1 Segmenting using frequency of participation

Frequency of participation falls under behavioural segmentation and normally gives a marketer information regarding how many times an athlete has participated in a sport, how much money he/she has spent on the event and whether the participants form part of a sport team or club (Shilbury *et al.*, 2009:16). Lau and Mckercher (2004:279) investigated different sport segmentation variables and indicated that it is preferred to compare first time participants and repeat participants. Dick and Basu (1994:99), Oppermann (2000:78), Tang and Turco (2001:34) as well as Li, Cheng, Kim and Petrick (2008:289) agree by stating that repeat participants are a sign of satisfied (loyal) participation, while first time participants show that the event shows growth. Thus research on first and repeat participants will ultimately reveal which market is the most sustainable. Consequently it is important to note that according to Kruger, Saayman and Ellis (2010:83) as well as Kruger, Botha and Saayman (2012:119) the analysis of first and repeat participants can differ from one event to another and also be influenced by the length of the event, the type of sport and the destination of the event.

The first study used frequency of participation to compare first and repeat marathon runners. This was then linked with other variables in order to identify the main differences between these two segments.

3.6.1.1 Sustaining events: An analysis of first time versus repeat visitors at the Old Mutual Two Oceans Marathon

The main findings of Saayman and Kruger (2013:8) are discussed below:

- Six distinct motives were identified to participate in the Two Oceans marathon namely: *Intrinsic achievement, Family togetherness, Escape and relaxation, Socialisation and affiliation, Event novelty* and *Competitiveness*. These motives contradicted motives for

cyclists and open water swimmers (Streicher & Saayman, 2010:129; Kruger, Saayman & Ellis, 2010:71).

- Consequently it was found that apart from *Intrinsic achievement* the motives to participate were different for different events.
- The main statistical significant demographic differences were found between first and repeat participants and included that first-timers are younger than repeat participants, and first-timers spend more money when compared with repeaters. There also behavioural differences, including the fact that first-timers had a longer length of stay in Cape Town and travelled longer distances when compared with repeaters. Word-of-mouth and websites were the main sources of information for first time participants, while repeaters obtained their information from television, magazines and running clubs. Results also showed that the level of participation tend to differ between first-timers and repeat participants as more repeaters participated in the Ultra Marathon compared to first timers who mostly competed in the Half Marathon. Concerning tourist attractions, it is interesting that repeaters will visit more attractions in the area when compared to first-timers.
- These findings have an array of implications for the event, firstly marketers should follow a three-pronged marketing approach that meet the needs of both first-time and repeat participants and clubs.
- The first-timer segment is an important segment to target as it is constituted of young athletes that spend the most money and stayed the longest at the event destination. Thus these participants need to be retained taking into account their potential to contribute to a significant economic impact. The repeat participants are also a viable market because of their loyalty and the fact that they compete in the longer distance event and will visits tourist attractions in the event area. The last marketing strategy should aim to convert first-timers into repeat participants. This can be done through different promotional invitations such as a personified invitation or a loyalty number for each year the participant has completed the race.
- Marketing campaigns should be based on the six motives found in the study as well as activities hosted by different clubs to sustain repeaters and to grow the number of club participation.

It is clear from the abovementioned results, based on marathon runners at the Two Oceans marathon (Saayman & Kruger, 2013:9), that the application of the frequency of participation as a segmentation approach has resulted in statistical significant differences between first and

repeat participants based on the variables socio-demographic, behaviour and motives to participate. A complete profile of both first-timers and repeat marathon runners could also be compiled. Based on the results, it was recommended that, to attract both the first time and repeat participant market segments, that a diversified marketing strategy should be applied based on the unique characteristics of first-timers and repeat participants at the race.

A study by Kruger, Botha *et al.* (2012:118) used the variables frequency of visits paralleled with spending behaviour in order to identify if spending has an influence on repeat visits. Although this study focused on spectators and not participants, it still provides a great insight into how segmentation variables can be combined in order to identify target markets.

3.6.1.2 The relationship between visitor spending and repeat visits: an analysis of spectators at the Old Mutual Two Oceans marathon

The key findings and recommendations of Kruger, Botha *et al.* (2012:118) are:

- Four distinct motives were identified to visit the event, which included *Event attractiveness*, *Support and socialisation* as well as *Escape and relaxation*. *Support and socialisation* was indicated as the most important motive to attend the Two Oceans marathon.
- The study's findings contradict the notion that socio-demographic, behavioural and motivational factors influence travel behaviour. Results in this study showed that it is predominantly socio-demographic variables that influence travel behaviour. This finding supports previous findings that demographic variables mostly contribute to spectators' spending.
- The significant socio-demographic determinants that influenced spending per group were gender, language, province of origin, while the only behavioural determinant was group size. The finding supported the notion that tourists travelling from richer provinces are more likely to spend more money during the event than those travelling from poorer vicinities. Regarding gender of respondents it was found that male visitors spend more money than female visitors. Findings on the size of the travelling group, corresponded with previous research that the larger the travelling group, the lesser the spending per person.
- When reviewing the significant variables that influenced repeat attendance or the intention to re-visit the event, the following travel motives played an influential role: The combination *Event attractiveness*, and *Support and socialisation as well as combined variables Event attractiveness* and *Frequency of event previously visited*. It was also

found that there was no significant relationship between a spectator's spending and intention to re-visit. However spectators that had attended the race more frequently, showed a greater intention to visit the event again in the future.

- The study had the following implications for the event, firstly spectators should be seen just as important for sporting events as participants. Seeing that the number of times spectators attend the race also increases their intention to re-visit the event, marketers should definitely take note of spectators as a target market as it could lead to an increase in visitor numbers, which in turn will lead to higher visitor spending. Hence two different marketing strategies must be developed for spectators and participants. Marketers should focus on *Event attractiveness* as the intention to re-visit is strongly dependent on this motive. Therefore spectators must know that the event is well-organised and one of international calibre. More promotions prior to the event should be used to influence spectators, including spectator competitions and spectator fan clubs. Lastly marketers should research both spectators and participants to ensure sustainable strategic marketing plans.

From the results it is clear that spectator spending does not influence repeat visitation. This study however made a significant contribution because of its focused on spectators at a sport event rather than on participants. The subsequent section focuses on spending variables that were applied in two studies. The first study focuses only on participants, followed by a study that highlighted spending determinants for both spectators and participants.

3.6.2 Segmentation in accordance with spending variables

Laesser and Crouch (2006:397) suggested that segmenting based on spending will lead to an increased effectiveness and efficiency of marketing programmes as well as its resources. This could be done through addressing the following objectives: Firstly to target the right group of people and secondly to meet the target groups' relevant needs. Tourist spending (participant spending) is also an imperative variable for an event since it also directly determines the tourism (events) profitability (Frechtling, 2006:1). Event marketers and organisers must realise the significance of determining the highest spenders at an event. They should also recognise the key attributes that contribute to this high spending (Kasternholz, 2005:557). After the determinants for high visitor spending have been established it could result in policy development. Policy development will then strengthen spending and also lead to a maximum economic benefit through the event (Gokovali, Bahar & Kozak, 2007:737). According to Kruger (2009:16) an event can effectively apply the determinants of spending when performing market

segmentation and thus focusing the marketing efforts on the visitors (participants) that has the highest spending at the event (Kruger, 2009:16).

3.6.2.1 The determinants of spending of participants during the Cape Argus Cycle tour

The main findings of this study (Streicher, 2009:25), which used spending as segmentation variable, were:

- Socio-demographic elements mostly had an influence on the spending of participants. Firstly, the province of residence was a determinant of spending that corresponded with previous research by stating that “visitors” from richer provinces will have a higher spending during the event. Marital status was also seen as a determinant of spending, while language, gender and level of education were not found significant to spending. When looking at the behaviour of participants, the group size was not a determinant of spending, while length of stay and the type of accommodation had an influence on higher spending.

The results of the study revealed that cyclist had four main determinants of participants' spending including marital status, province of residence, number of nights and type of accommodation in Cape Town for the event. The study showed that when applying spending as the segmentation variable, it reveals a large number of participants from different provinces. The research also contributed to market segmentation literature seeing that most sport tourism studies have focused on spectators rather than the participants. The study also highlighted that different sport participants at different events will have different spending patterns. Thus, this type of market segmentation could be essential for all sport events. Segmenting with spending as variable can also lead to a greater economic impact for the city of Cape Town as marketers have identified the high spending segments and can attract these participants for future events.

3.6.2.2 Determinants of visitor spending: an evaluation of participants and spectators at the Two Oceans Marathon

This study used spending as segmentation variable in order to compare the determinants of spending between spectators and participants at the Two Oceans marathon (Kruger *et al.*, 2012:1221-1223). The main findings include:

- The results from the study confirmed the notion that a variety of socio-demographic and behavioural determinants have an influence on visitor spending. However not all the

factors were found with both spectators and participants. Therefore organisers cannot approach participants and spectators in a similar way with the hope that it will increase their visitor spending.

The behavioural determinant, more than the socio-demographic, had an effect on spending regarding participants and spectators. The following socio-demographic variables were found as significant determinants of spending: participants with higher education tend to spend more money at the event, while spectators with a higher income demonstrated higher spending while visiting the event. Previous studies Streicher and Saayman (2009) as well as Saayman and Saayman (2012) contradicted that province of residence as a determinant of spending, did not have an influence on higher spending. With regards to behavioural determinants, the research corresponded with previous studies Streicher and Saayman (2009) also Saayman and Saayman (2012) by finding that length of stay was a determinant of participants' spending. As to frequency of participation it was found that participants that took part in more marathons per year tend to spend more at the event. Both spectators and participants that did not make use of paid accommodation, spend less money at the marathon.

- The abovementioned determinants of spending should be incorporated in the marketing strategy and campaign of the Two Oceans Marathon. Both spectator and participant markets can be seen as viable markets to pursue, seeing that both can make a significant economic contribution. Marketers should also develop special packages that involve different tourism entities, i.e. accommodation (seeing that visitors who overnight in paid accommodation tend to spend more during the event). Marketers should also consider introducing discounts so more visitors go to see attractions and restaurants in the area. Travel motives such as *Socialisation and camaraderie* must be visible in the marketing campaigns, targeted to both participants and spectators. Participants' intrinsic values such as a sense of achievement, should be highlighted in marketing messages, while messages for spectators should focus on how the event is one of the biggest attractions Cape Town has to offer. Lastly, marketers should influence runners to participate in more such events as it also has an influence on higher spending and targets participants in higher income occupations such as medical professions.

The results of this study reveal that it is vital to understand the determinants of spending for both spectators and participants as it can make a significant contribution to the local economy. The last section focuses on studies that used the variable, motives to participate, to segment the market.

3.6.3 Segmentation based on motives to participate

Lee (2000:169) as well as Kim, Borges and Chon (2006:957) state that the analysis of travel motives for event attendees is a vital marketing tool or variable for market segmentation that leads to effective promotion. The notion that participants are not homogenous when it comes to motivation to participate is something that event organisers must consider as this is a notable way in segmenting potential markets (Formica & Murrmann, 1998:204; Hinch & Higham, 2004:50; Weed & Bull, 2004:47). Consequently, understanding the motives of participants is critical as it will help in developing strategies that will match the sport event offering with the motives to participate (Gill & Williams, 2008:83).

3.6.3.1 A motivation based typology of open water

Kruger *et al.* (2011:71-77) conducted a study that focused on motives as a segmentation variable in order to segment swimmers competing in the Midmar Mile. The main findings and implications include:

- Three motives to participate in the event were identified, namely: *Socialisation and escape*, *Fun and entertainment* and also *Intrinsic achievement*. In accordance with these motives a cluster analysis was used to segment participants in three distinct clusters, labelled as: *Devotees*, *Aficionados* and *Recreationalists*. *Intrinsic achievement* was found as the most important motive to participate for all three clusters. The segments also revealed that they participate with the need for social interactions and escape. However *fun and entertainment* was seen as a less important motive to participate for all three clusters.
- These findings have certain marketing implications for the event. Firstly it was found that the travel motives and clusters were unique to the study. Thus, those factors that attract participants to one event may not be the same for the markets of another sport event. The first two clusters, *Devotees* and *Aficionados* were identified as viable markets seeing that these two segments project long-term financial and sustainable prospects. The *Devotees* was found to be the more loyal participants, while the *Aficionados* significantly spend more money, travelled in larger groups, travelled further and stayed more nights in the event destination. The *Recreationists* was not seen as an attractive segment because most of these participants are local and have a small economic impact.

- Marketers must follow a two-pronged approach to attract the *Devotees* and *Aficionados* in order to ensure a greater economic impact for the region. A strategy can also be developed for the *Recreationists* seeing that this is the local market, and it will be cheaper to attract the members of this segment. Both marketing campaigns must combine intrinsic goals with socialisation and escape.
- Repeat participation is also vital for the growth of the event and therefore current loyal participants must be retained. This can be done through loyalty clubs that lead to certain benefits for loyal participants.
- It was also found that while participating in the event, participants visited tourist attractions in the area. Thus, information regarding the different tourist attractions should be marketed more extensively prior to, and during the event.

In this study segmentation based on participants' motives to participate in the event led to the identification of unique swimmer motives and helped determine distinct groups/segments of participants at this event. Therefore a clear profile of swimmers of this event was developed. The results suggested ways for marketers to use the motives and profile to develop an effective marketing strategy for each of the identified segments. The results further emphasised that other sport events should consider motivation as a variable for segmentation, especially if the event is used to extend the tourism season or to generate new influx of money.

3.6.3.2 Travel motives of participants in the Cape Argus Pick and Pay Cycle Tour

The following study used motivation as a way to segment marathon runners. The key findings and implications are discussed below (Streicher & Saayman, 2010:129):

- The study revealed five motives for cyclists to participate, *Socialisation*, *Event attractiveness*, *Personal motivation*, *Escape and relaxation* and *Event attributes*. From these results and the literature review it is found that different factors and events lead to different motives to participate. It was found that cyclists were mostly motivated by *event attractiveness*, *personal motivation* and *escape and relaxation*. *Event attractiveness* was the main reason for participation. This shows that the event itself is a major draw card as it gives cyclists the opportunity to enjoy cycling.
- These travel motives have certain implications for the event such as the fact that the event must be marketed as an attraction on its own. However, intrinsic goals of participants should also be considered in the marketing campaign of the sport event.

Marketers should realise that these participants travel in large groups and therefore, if targeted correctly, can result in more visitors to Cape Town.

3.6.3.3 Who are the comrades of the Comrades Marathon?

The study by Kruger and Saayman (2013b:87-89) used motivation as segmentation variable in order to segment marathon runners participating in the Comrades Marathon. The main findings and implications are:

- The study found that ultra-marathon runners were mostly motivated by four factors, including: *Intrinsic achievement*, *Exploration and competitiveness*, *Family togetherness and escape* as well as *Socialisation* and *Commitment*. These motives were used in a cluster analysis which revealed two distinct clusters labelled, *Recreational runners* and *Serious runners*. These clusters were mostly motivated by the *Intrinsic achievement* while *Commitment* was found for the first time in endurance sport literature. The study also revealed a unique combination of motives, thus the finding shows that motives and therefore clusters of participants, differ from one event to another, which means that what attracts participants to one event may not necessarily work for another event.
- The two clusters also differed in terms of socio-demographic variables and shared similar characteristics with the swimmer clusters (Devotees, Aficionados and Recreationalists) found by Kruger *et al.* (2011:71).
- The *Recreational runners* is a viable market to target as these runners form the biggest cluster in terms of numbers and spend the most money per person. Thus this cluster can have a positive economic impact on the region. The segment, *Serious runners*, is also a viable market as these participants visit more tourist attractions in the area and can therefore also be valuable to the tourism industry. These two segments must be targeted following a two-pronged approach and *Recreational runners* be targeted by means of magazines, while *Serious runners* must be targeted through their specific clubs. Both marketing campaigns should include the motives of *Intrinsic achievement* as well as emphasise the fact that the event leads to escape and socialisation.
- It was also found that events like the comrades marathon leads to the extension effect where participants will participate in different marathons across the country in order to qualify for a specific event. Therefore events like Ironman South Africa should also be marketed during other similar events to attract more serious runners.

From this study it was clear that marathon runners are not a homogenous segment. In fact this study showed not only that motives for participating in ultra-marathons differ from those participating in other types of marathons, but also that the combination of motives differed.

3.7 Synthesis from previous segmentation studies in an endurance sport context

From the aforementioned studies it is clear that sport event participants cannot be regarded as homogenous and that the type of event and sport significantly influence the type of participants. A combination of segmentation variables should be used to take the unique nature of the sport and its participants into consideration. When examining previous studies and the utilisation of different segmentation variables, the following lessons are learned:

- First and repeat participants can form two distinct segments that display demographic, behavioural and motivational differences. Each segment is viable seeing that first-timers can have a greater economic impact, while repeat participants are loyal and ambassadors to the sport. A separate marketing strategy can also be developed in order to convert first time participants to repeat participants.
- Frequency of participation as a variable can be combined with other variables especially to determine the factors causing participants to return to the event. It is important to note that not all variables can influence participants to repeat their participation.
- Spectators and participants can form two separate segments as both of these groups are vital for the growth and profitability of the event.
- Spending can be used as a segmentation variable and especially in combination with demographic characteristics.
- Marketing messages and campaigns should incorporate the different variables in order to reach the right market, appeal to the market and then attract the selected market.
- Variables also direct event organisers to the expectations participants have towards the event experience. This can be done for example through the introduction of a loyalty programme that creates packages in collaboration with other tourism entities in order to improve the overall organisation and attractiveness of the event.
- The segment variable, motives to participate, is useful to divide a market into distinct clusters, where each of the clusters can be profiled when other variables are applied.
- The variable, motivation to participate, is different from one event to another. This means that the factors that attract participants to one event may not necessarily be the same for another event. Thus making motives a viable segmentation variable.

- Different variables need to be applied to different events as well as different endurance sports. Therefore the variables selected should correspond to the objectives of a specific event. For example, if the goal is to identify and attract higher spenders at the particular event, segmentation based on spending will be the most useful and appropriate variable.

With the aforementioned lessons in mind, applying market segmentation can have numerous benefits for sport events in particular, as discussed in the next section.

3.8 Advantages of market segmentation for sport events

Although there are general benefits of market segmentation as mentioned in section 3.2, the specific benefits that market segmentation offer to an endurance sport event are summarised below:

- The sport event will have a competitive advantage as it specifically focus on a particular segment (for example international triathlon participants). Therefore it is important that segmentation group the participants in the most managerial way possible (Dolnicar, 2008:130). This will help detect emerging sport trends, potential problems and other marketing opportunities more easily since the sport event focuses on a smaller homogenous participant market (Slabbert, 2006:85).
- The sport event can focus on improving the event experience in a specific way rather than trying to provide everything to all participants at a higher cost (for example a sport event can focus on attracting the high spending segment which will lead to a larger economic impact, making the event more attractive to sponsors) (Dolnicar, 2008:130; Cant, 2010:91).
- Marketing efforts are focused on developing the most suitable marketing messages for the selected target markets as well as to use the appropriate communication channel to reach each segment that leads to the more effective use of resources (Dolnicar, 2008:130; Cant *et al.*, 2009:106; Cant, 2010:91).
- Evaluating the sport event's position and how the event is perceived by participants and potential participants will be made easier through market segmentation (Slabbert, 2006:85).
- A long-term relationship can be established with a specific participant group with the implication that a satisfied participant (when all expectations have been met) will most likely return or become a loyal participant. Furthermore, this participant will also share positive word-of-mouth recommendations about the sport event to other like-minded friends (Slabbert, 2006:85; Dolnicar, 2008:130).
- Recognising differences in the market is key to successful marketing and leads to closer matching the potential and actual sport participants' needs with the events offering. In a

segmented market, the marketing strategist can fully appreciate the different needs and respond accordingly (Simpson, 2005:240; Slabbert, 2006: 84; Cant *et al.*, 2009:106; McDonald & Dunbar, 2010:40).

- Market segmentation can lead to niche marketing where the sport event meets the needs of the specific market (Ironman events). In turn, this can lead to market domination but this is less likely to happen in the total market set-up (all endurance sport events) (Slabbert, 2006:84; McDonald & Dunbar, 2010:41).
- Segmentation will also help the event to position itself as a specialist in the chosen segments, seeing that their needs are understood and met which will give the event an advantage over the competing events (Dolnicar, 2008:2; McDonald & Dunbar, 2010:41).
- When a sport event organiser and marketer understand their market it allows them to develop a specific marketing mix that is tailored according to the markets' wants and needs. This includes effective and cost-efficient promotional tactics and campaigns (Simpson, 2005:240; Slabbert, 2006:85).
- The potential demand for a specific event can more easily be determined if an event organiser or marketer identifies its target market (Simpson, 2005:240).
- Recognising your target audience will help in identifying the competition in the market and give a sport event the opportunity to develop a responsive and competitive strategy (Simpson, 2005:240).
- Segmentation will help increase the sport events' resources in the market through focusing on the greater competitive advantages that offer the highest return on investment (Slabbert, 2006:84; McDonald & Dunbar, 2010:41).
- Segmentation can lead to a competitive advantage when it provides the market with a unique offering that differs from the event competitors in the market (McDonald & Dunbar, 2010:41).
- Applying a customised marketing mix that focus on the specific market, is more likely to result in sales effectiveness and cost efficiencies (Simpson, 2005:240; Slabbert, 2006:85).
- Defining and analysing a target market will allow an organisation to position and tail its products or services to the needs and specific preferences of the market (Simpson, 2005:240).
- Defining a participant target market will help in identifying opportunities that have not been recognised previously (Simpson, 2005:240; Cant *et al.*, 2009:106; Cant, 2010:91).

Considering the abovementioned benefits associated with market segmentation, it turns out to be more essential to identify the needs, motives and expectations of potential sport participants. If the right segment is targeted the participants will take part in or return to the event which consecutively will lead to growth and sustainability of the event. This has additional benefits for the development of infrastructure and the desirable image of the event destination, the development of sport facilities and the implementation of sport programmes that attract youth and therefore lead to the growth of endurance sport in South Africa.

According to Dibb and Simkin (2001:610) the different benefits of market segmentation are well documented. However, tourism entities, destinations and events struggle to implement market segmentation (Cant *et al.*, 2009:107). As a result the segmentation process and the variables that is chosen need to be evaluated and correctly implemented (Dibb & Simkin, 2001:610). The more detailed the knowledge regarding these participants, the more suitable sport marketers can customise the marketing effort. When the offering achieves the expectations of the target market it will lead to greater satisfaction and long-term loyal participants (Getz, 1997:272; Burke & Resnick, 2000:39; Ali-Knight, Drummond, McMahon Beattie, Robertson & Yeoman, 2004:136; Kastenholz, 2005:556). For this reason, and taking into account the unique nature of triathlons, market segmentation is a vital process since little research is currently available on triathletes and how to segment and target them.

3.9 Conclusion

The goal of this chapter was to analyse market segmentation and how it can be applied in a endurance sport context. This was done through obtaining knowledge of and insight into its origin of segmentation and, how it is applied in marketing and in an endurance sport context. The market segmentation process was reviewed by considering the specific variables needed to segment a market to enable the verification of the best suited variable for triathlons. This chapter showed that market segmentation forms the foundation for marketing as it is necessary to divide a market into smaller groups in order to more effectively reach and to be relevant to these groups. Market segmentation is also widely used in the tourism industry since tourists are different, travel for different reasons and seek different experiences. Sport events is a growing industry within the tourism industry that especially has a need for market segmentation as each sport event is unique and attracts a specific type of participant. The market segmentation process consist of eight distinct steps that sport event marketers should implement in order to find a target market and position itself according to the needs of its target market. Determining the variables for segmentation is an important part of the process as there are a large number of variables available to segment a market. The effort lies however in selecting the right variable

or combination of variables since every sport event is diverse. Thus different variables must be applied in order to find the best suitable variable for the sport events' participants.

Sport managers can benefit from market segmentation by using it actively as a method to analyse the structure of the market (Dolnicar, 2008:146). This will lead to valuable insight into the market, but more importantly identify specific sections of the market (Dolnicar, 2008:146). It is however important to note that often, multiple segmentation variables and strategies are used because it enables the sport marketer to develop different marketing efforts. Researchers agree that although there are many recommended segmentation bases that are viable, there is no single ideal segmentation base or variable that fits with every situation and be the most effective segmentation variable (Jang, Morrison & O'Leary, 2002:367; Morrison, 2002:178). A sport event organiser must therefore attempt different segmentation variables, in combination or alone, trusting that the segmentation technique leads to segments that are profitable for the sport event (Kruger, 2010:116).

Following in the next two chapters, two segmentation variables (motives to participate and frequency of participation) will be applied to segment triathletes that participate in Ironman South Africa.



CHAPTER 4:

A MOTIVATION-BASED TYPOLOGY OF TRIATHLETES PARTICIPATING IN IRONMAN SOUTH AFRICA

Ironman: “a temporary world within the ordinary world” -Huizinga-

ABSTRACT

Ironman South Africa is one of the world's most gruelling one-day endurance events that require athletes to complete a 3.8km sea swim, followed by a 180km cycle and finishing with a 42.2km run. All of these items should be completed in less than 17 hours. Ironman South Africa is the only Ironman event on the African continent and takes place every April in Nelson Mandela Bay (Eastern Cape Province) with nearly 2 000 athletes participating. Although triathlons such as Ironman are popular events and draw large numbers of participants, there is still little research about the participants themselves, how to attract different market segments of participants and to retain these participants. With this in mind, reasons for visiting or participation prove to be an excellent method of segmentation and hence the purpose of this research is to use reasons for participation (motivation) to identify different market segments of triathletes participating in Ironman South Africa. To achieve this aim, a survey was conducted during the registration of the event from 11 to 13 April 2013 and a total of 425 questionnaires were administered. A factor analysis was performed to identify the main motives for participants to compete in the race where after a cluster analysis based on the identified motives was performed to reveal different segments of triathletes. A factor analysis found that triathletes were motivated by seven motivational factors including: *Challenge*, *Inner vie*, *Health and fitness*, *Intrinsic achievement and control*, *Event novelty*, *Group affiliation and socialisation* and lastly, *Respect and risk*. These findings support the notion that endurance sport participants' motives are influenced by the type of sport and event. Based on these motives three distinct clusters of triathlon participants were identified: *Devotees*, *Enthusiasts* and *Aspirationalists*. Although these participants have different motives there are only significant differences in age and not in other socio-demographic characteristics. This was the first time that triathletes were analysed and segmented in a South African endurance sport context. This research therefore narrowed the gap in current research related to triathlons and triathletes in the country, which is currently non-

existent. It also shows distinct segments of different athletes which can aid organisers and destinations to create products and services that complement the participants' motives. This can ultimately lead to a more competitive and sustainable event.

Key words: *Triathlons, market segmentation, factor analysis, clustering, motivation, Ironman, South Africa*

4.1 Introduction

The popularity of triathlons makes them one of the fastest growing sports in the world (Love, 2009:1). According to Wicker, Hallmann, Prinz and Weimer (2012:2) triathlons are the ultimate endurance sport as they include the three disciplines of swimming, cycling and running. Triathlons also have the added challenge of relying on weather conditions, geographical setting and the design of the route (Pan, 2012:5). A triathlon is an endurance sport where triathletes expose themselves to a great deal of physical and psychological stress that comes with hours of continuous activity (Atkinson, 2008:165). These athletes need to consistently train to improve their fitness in all three endurance disciplines and their participation also consumes significant personal resources and time (Atkinson, 2008:166; Lamont & Kennelly, 2011:85). An Ironman triathlon is the longest form of triathlon and is a three-discipline event that consists of a 3.8 km swim, a 180 km cycle followed by a 42.2 km marathon run that triathletes need to complete in less than 17 hours (Grand'Maison, 2004:87). Annually, a large number of triathletes compete in 28 Ironman Triathlon races (World Triathlon Corporation accredited) throughout the world to qualify for the Ironman world championship held in Kona, Hawaii (Ironman, 2013:1). Ironman South Africa is the only Ironman triathlon on the African continent and is held each year in Nelson Mandela Bay, Port Elizabeth where it attracts approximately 2 000 triathletes and thousands of spectators (Ironman South Africa, 2013:1). The problem is that there is limited number of studies that specifically examine the profile and motives of these triathletes (Bell & Howe, 1988:67; Croft, Gray & Duncan, 2007:1). Ryan and Deci (2007:1) explain that "sport and exercise epitomise motives, people being moved to act" because these activities require effort, energy, focus and, mostly a great deal of discipline.

Consequently, the motives of a triathlete becomes an important social and psychological component especially when considering the social, economic, physical and psychological costs that differentiate this endurance event from others (Ogles & Masters, 2003:70). Croft *et al.* (2007:1) explain that triathletes have to make many sacrifices such as the social cost of scheduling work, family and other social agendas to accommodate training and participation (Croft *et al.*, 2007:1). Another cost that triathletes deal with is the economic expenditure on equipment (including running shoes, triathlon specific attire, swimming gear, wetsuits, road or

triathlon bikes and several supplementary accessories) needed to compete in a triathlon (Lovett, 2011:4). They also spend money on training, clubs, entry fees and travelling expenses and especially on nutrition-related products (Tribe Group, 2009:23; Lovett, 2011:4). Finally, the physical and psychological impact of a triathlon can be significant when one reflects on the heightened probability of suffering an injury with the consequent medical bills, pain, rehabilitation and time off from work (Ogles & Masters, 2003:71). Psychologically, triathletes also need to deal with lack of sleep, vast energy expenditures, altered eating habits and uncertain race outcomes, all having a mental and emotional impact (Ogles & Masters, 2003:71). Collectively, these findings show that because of the nature of a triathlon, triathletes are committed to the sport and will thus adapt their lifestyle (Tribe Group, 2009:13). Triathletes do, in fact, exhibit “tribal” traits such as fierce loyalty, dedication, enthusiasm and desire to participate (Grand’Maison, 2004:87; Tribe Group, 2009:10). Hosch (1994:30) concurs that these individuals have certain motives to train for and compete in a triathlon despite the claims that it is “not a safe” activity which pushes the mind and body to dangerous extremes. These traits show that there must be a “driving force” (motive) triggering the triathletes’ commitment. Thus an understanding of the mindset of triathletes turn out to be vital (Rohm, Milne & McDonald, 2006:30; Hawkins, Motherbaugh & Best, 2007:131;Tribe Group, 2009:10; Lovett, 2011:6).

Hawkins *et al.* (2007:130) emphasise that the multifaceted mindset of triathlon participants leads to a need for closer examination of triathlete motives as it is significant to better understand triathlon participants as a customer market segment. The goal of this exploratory research is to segment triathletes competing in Ironman South Africa based on their motives for participation to identify and profile different markets/segments for the race. There is a number of justifications for studying the motives of triathlon participants which include developing and increasing adherence to training programmes, promoting similar events and increasing physical activity in general (Ogles & Masters, 2003:69; LaChausse, 2006:305; Markland & Ingledew, 2007:25; Brown, O’Connor & Barkatsas, 2009:212). Better understanding of participants’ motives will also lead to more effective marketing communications. This in turn will enhance the event experience and contribute to a better knowledge of the grounds on which participants base their decisions (Kastenholz, 2005:556; Casper & Stellino, 2008:95). This chapter continues with the following structure: firstly literature on the subject is assessed followed by a brief description of the research method and then the results of the study are discussed. Then findings and implications of the study follows and lastly recommendations and conclusions are presented.

4.2 Literature review

According to Ogles and Masters (2003:69), the reasons for people participating in endurance sport events such as triathlons are still not inherently obvious. The demand for triathlons has grown in recent years and therefore it is important for managers and marketers of a triathlon event to gain knowledge regarding their participants (Wicker *et al.*, 2012:1; Wicker, Prinz & Weimer, 2013:2). In agreement, Arnott (2008:15) states that it becomes necessary that event managers understand who their potential participants may be and who their current triathlon participants are, especially since these participants are diverse and are all motivated differently. Previous research done by Kruger and Saayman (2013:71) confirms that motives for participating in sport events differ according to the event (i.e. swimming, cycling or running). Therefore marketers and triathlon organisers need to realise that not all participants are the same in terms of their profiles and motives for competing in these events. Participants' motives to compete in an ultra-endurance event such as Ironman South Africa will thus most likely differ from the motives of those participants who compete in other types of endurance events or less strenuous sport events (Kruger & Saayman, 2013:71). Although research has shown that there are similar factors motivating participants to continue to participate, one must understand that motivation to compete in a sport is different for each individual and thus all triathlon participants cannot be seen as a homogenous group (Weiss & Weiss, 2006:309; Hawkins, Motherbaugh & Best, 2007:131).

Iso-Ahola (1982:230) defines a motive as “an internal factor that arouses, directs and integrates a person's behaviour”. A motive, according to Hawkins *et al.* (2007:130), is the unobserved inner force that stimulates, compels and directs a certain behaviour response. Hudson (1999:7) states that the concept of needs is central to most theories of motivation. Park, Reisinger and Kang (2008:180) affirm that a person's desire to meet specific needs triggers a decision to engage in certain tourism behaviour that will satisfy that desire. Regarding sport, there is a set of motivational factors established in anticipation of the fulfilment of the desired needs (Cassidy & Pegg, 2008:2). A distinction commonly made in sport is between intrinsic and extrinsic motives (Kruger & Saayman, 2013:3). Intrinsic motives refers to when satisfaction acts as the pure driving force underlying motives, for example when a task is complete for fun, for the feeling of competence, achievement or self-determination (Ryan & Deci, 2007:18). Extrinsic motives explain behaviour where external awards or contingencies are present for example tangible benefits like trophies or social rewards like prestige (Vallerand & Losier, 1999:143; Deci & Ryan, 2000:230). These theories laid the foundation for other advanced motivation theories, particularly the self-determination theory (Deci & Ryan, 1985:131). The self-determination theory suggests that people are pushed to achieve goals through intrinsic and extrinsic pressure and that self-determined (i.e. intrinsically motivated) behaviours will generally lead to more

positive experiences (Vallerand & Losier, 1999:143). Mohammad and Som (2010:41) note that it is critical for every sport event to determine participants' motives (intrinsic and extrinsic), as it is the starting-point of marketing. Therefore knowing how an individual makes a decision to participate in a triathlon is crucial to sport marketers who want to draw up participant-orientated marketing plans (Arnott, 2008:3; Smith, 2010:21; Lovett, 2011:7).

Only when triathlon organisers appreciate the needs and motives of the triathlon participant can they determine a sustainable competitive advantage and improve their marketing communication. Thus further participation or attracting newcomers to the event will be encouraged (Arnott, 2008:4; Setina & Pisot, 2009:12). Crompton and McKay (1997:430) add that more effective communication will enhance the event experience and help identify the key components on which participants base their decisions. Knowing how participants form their decisions will enable event organisers and marketers to present an event that leads to a positive experience amongst participants that will encourage them to continue their partaking as committed athletes, involved in the event (Casper & Stellino, 2008:94). Research on the motives of participants will not only benefit the event, but help participants adapt their training programmes, promote other triathlon events and increase physical activity by inspiring the general public, especially the youth (Ogles & Masters, 2003:69; Filo, Funk & Hornby, 2009:22). This type of study can also be beneficial for the shareholders that operate within the triathlon industry (Tribe Group, 2009:5) as it helps to better understand the triathlete as a customer. Therefore, when event organisers focus their attention on the triathletes' needs, they will be able to increase the demand for their triathlon products/services (Hawkins *et al.*, 2007:140). In addition, companies that manufacture triathlete equipment can increase their efficiency by incorporating the motives of participants into their advertising and promotional activities (Lovett, 2011:9). Streicher and Saayman (2010:122) remark that research done in endurance sport such as Ironman South Africa will also help South African event organisers to:

- secure more participants in the event;
- increase media coverage;
- boost the number of spectators attending the event or viewing it via print and electronic media;
- gain more corporate sponsorships;
- ensure government support;
- create more jobs for private vendors at the event; and
- encourage an active lifestyle.

Currently, sport research consists of a few studies that examined triathletes from the perspective of determining the motivators to compete (Case & Branch, 2001:118-127; Grand'Maison, 2004:86-94; Tribe Group, 2009; Smith, 2010:1-77; Lovett, 2011:1-114; Lamont & Kennelly, 2012:236-255; Wicker *et al.*, 2012:1-24). The results of these studies are displayed in Table 4.1.

Table 4.1: Motives for participating in triathlons

AUTHOR(S)	STUDY	MOTIVES IDENTIFIED
Case and Branch (2001)	Event marketing: an examination of selected demographic and psychographic data of participants competing in the world's foremost off-road triathlon event	<ul style="list-style-type: none"> • Test one's skills against nature, others and oneself
Grand'Maison (2004)	What mental skills Ironman triathletes need and want?	<ul style="list-style-type: none"> • Push limits • Improve physical fitness • Mental conditions • Challenge • Goals and improvement • Sense of accomplishment
Tribe Group (2009)	The mind of the triathlete: market research report	<ul style="list-style-type: none"> • Personal challenge • A way to get or stay in shape • Improve on previous results • Inspired by others
Smith (2010)	A qualitative analysis of motivation of elite female triathletes	<ul style="list-style-type: none"> • Challenges • Love of the sport • Togetherness
Lovett (2011)	An examination of the motives to participate in sprint distance triathlon	<ul style="list-style-type: none"> • Affiliation • Life meaning • Personal goals • Achievement • Competition • Self-esteem
Lamont and Kennelly (2012)	A qualitative exploration of participants' motives among committed amateur triathletes	<ul style="list-style-type: none"> • Competence • Enjoyment • Wellbeing • Ego Involvement • External awards • Sociability • Self-transformation • Enduring commitment and consolidation
Wicker <i>et al.</i> (2012)	Who takes part in a triathlon? An application of lifestyle segmentation to triathlon participants	<ul style="list-style-type: none"> • Socialisation • Competition • Wellbeing • Love of the sport

It is clear from Table 4.1 that each triathlon participant is motivated by different reasons and although there are corresponding motives within the sport, each event has a unique blend of participants. Table 4.1 also shows that there are variations of motives within the different distances of triathlons (sprint, Olympic, half-ironman and ironman). Also, distinctions can be made between genders and level of competition (amateur vs. professional). Collectively, the results (Grand'Maison, 2004:87; Smith, 2010:21; Lovett, 2011:8; Lamont & Kennelly, 2012:236; Wicker *et al.*, 2012:3) show that: (1) there are differences between male and female triathlete's motives for participation, (2) there are also distinctions in different age categories and (3) differences in level of experience; (4) motives for participation have a tendency to alter the longer an athlete participates (Smith, 2010:52) and (5) triathlon participants' socio-demographic variables could be considered as the foundation to segment participant's motives (Wicker *et al.*, 2012:5).

Participant segmentation has also been researched in triathlons in a few previous studies. In a market research study conducted in the United States of America, triathletes were segmented based on their attitudes towards triathlons. This resulted in seven clusters namely *Enthusiastics* (triathletes who enjoy everything about a triathlon and who get personal benefit from participating more than any other segment), *Dedicated triathletes* (they garner immense value for their participation and see it as the core to their lifestyle. They compete as that is what they do), *Aspirational*s (they are focused on their own races and personal performance and improving from past performances. Their focus is mostly on accomplishment to finish a triathlon), *Competitives* (these triathletes are concerned with their rankings in the race and they want to finish ahead of others), *Power Trainers* (they are not focused on their past history, are inspired by others and see training as just as important as racing), *Emotionals* (they appreciate being part of the triathlon community and value the social aspects of participating in a triathlon, but triathlons are not the central part of their lives) and *Dabblers* (are committed to the personal challenge of triathlons and their ability to get and/or keep them into shape. These participants' engagement in the sport is not all encompassing). Each of these clusters has specific characteristics and motives for participating in a triathlon (Tribe Group, 2009:14-16). Triathletes therefore seem more or less homogeneous according to their demographics. However they are not a monolithic group as their motives to participate (as seen from the seven clusters) are broad and vary from each other. In Japan triathlon participants were clustered based on their motives (intrinsic motivations: understanding and growth, accomplishment, stimulation and experience, victory) and extrinsic motives (exogenous control and assimilation, tourism and aesthetics) to participate (Harada, Onishi, Koijima & Ishiii, 2010:2). The four clusters included the *Maniacal triathletes*, *Triathletes with hidden potential*, *Experienced triathletes* and lastly

Triathletes with unclear motivation. In a study done in Australia, Chang and Johnson (1995:25) moved away from using motives to segment triathletes and segmented triathlon association members based on financial aspects and specifics of the membership. The researchers identified four segments including the *Mainstream members*, *Frequent racers*, *True believers* and *Value seekers*. The unique finding in this study was the fact that the *Value seekers* were seen as the most price sensitive segment. Wicker *et al.* (2012:1) conducted a study based on lifestyle segmentation to segment 786 triathletes in Germany. They were labelled *Serious pursuiter*s, *Sport lovers* and *Socialisers* depending on interests and activities they form incorporate into their leisure time. The results revealed significant differences between these clusters in terms of age, gender, years of participation, time of practice as well as expenditure. These different clusters show that triathletes can form different market segments based on different variables. Therefore triathletes cannot be seen as a homogenous market.

To date, no research has focused on identifying the profile and motives of triathletes competing in a South African triathlon event. Previous research in the country has mainly focused on other types of endurance events including cycling events, marathons and swimming events. Kruger, Saayman and Ellis (2011:59) identified the following motives for swimmers participating in the Midmar Mile: socialisation and escape, fun and entertainment as well as intrinsic achievement. Streicher and Saayman (2010:121) lead a study on cyclists competing in The Cape Argus and the following motives were found: socialisation, event attractiveness, personal motivation, escape and relaxation as well as event attributes. In a study done by Kruger and Saayman (2013:71) on the Comrades Marathon, results show that runners were motivated by: intrinsic achievement, exploration and competitiveness, family togetherness and escape and lastly socialisation and commitment. Based on these motives, the following observations can be made from previous research in endurance sport events specifically in a South African context: (1) Sport participants travel to destinations to compete in different sport events for different reasons. (2) The reasons for participation are mostly influenced by the type of event, distance, level of fitness required, duration and terrain of the event area (Kruger & Saayman, 2013:72). (3) Sport participants are not a homogenous group when one takes into account their profiles and motives to participate. These findings are also supported by the following researchers Streicher & Saayman, 2010:121-131; Kruger, Saayman & Ellis, 2011:59-79; Saayman & Saayman, 2011:124-138; Kruger, Botha & Saayman, 2012:108-122. Previous research done in endurance sport states (4) that motivation can vary between different genders (Masters, Ogles & Jolton, 1993:38; King & Burke, 2000:1; Kolt, Driver & Giles, 2004:88), (5) different levels of participation (Ogles & Masters, 2003:70) and (6) the type of sport (Croft *et al.*, 2007:1; Ogles & Masters, 2003:71). This study will therefore add to the body of existing literature on the

endurance athlete's sport motivation, specifically that of South African triathletes that have not previously been researched.

4.3 Method of research

This was a quantitative research study where a structured questionnaire was used to collect the data. The following section describes the questionnaire, sampling method and survey as well as the statistical analysis that was applied.

4.3.1 The questionnaire

The questionnaire was based on the studies in Table 4.1 and especially on the works of Streicher and Saayman (2010), Kruger *et al.* (2011), Lamont and Kennelly (2012), Lovett (2011), McCarville (2007), Smith (2010) and Wicker *et al.* (2012). The questionnaire was divided into two sections. Section A captured demographic details (gender, home language, age, gross annual income, home province, country of origin, level of education, marital status, mode of transport) and spending behaviour (number of people in travelling group, number of participants/spectators paid for and expenditure). Section B captured motivational factors, measuring 24 items on a five-point Likert scale, where 1 = not at all important; 2 = slightly important; 3 = important; 4 = very important; 5 = extremely important. Section B also captured information specific to participants' behaviour during and before the event (entry details, previous participation in Ironman South Africa or internationally, number of sport events per year, primary category, age exposed to the sport, person whom exposed the athlete to the sport, other sporting events previously competed in, upcoming sport events in 2013, initiator of participation and sources of information about the event).

4.3.2 Sampling method and survey

According to Krejcie and Morgan (1970:608) the following calculation can be made to find the appropriate sample size:

$$(s = X^2 * N * P * (1 - P) / d^2 * (N - 1) + X^2 * P * (1 - P))$$

s = required sample size.

X² = the table value of chi-square for 1 degree of freedom at the desired confidence level (3.841).

N = the population size.

P = the population proportion (assumed to be .50 since this would provide the maximum sample size).

d = the degree of accuracy expressed as a proportion (.05).

The population size (N) is approximately 1 744 triathletes when considering 2012 participation records (Ironman South Africa, 2013:1). If this number of triathletes is used to calculate the sample size, the appropriate sample size is calculated at 313 respondents. However, taking into account the importance of accuracy and completeness, the sample size was increased to 450 questionnaires. A destination-based survey was undertaken where questionnaires were handed out on-site at the Boardwalk Convention Centre and Spa during the registration period (11 to 13 April 2013). Seven fieldworkers were instructed on how to approach participants and on the aim of the study and questionnaire. The fieldworkers were grouped in pairs and each group had to work a two-hour shift each of the three days. During this period, they had to hand out as many questionnaires as possible. The fieldworkers were instructed to approach different types of participants including different genders, age categories and nationalities to ensure a representative sample. Participants were approached after they had completed their registration and informed about the purpose of the research to ensure that they participated willingly and responded honestly. A total of 450 questionnaires were distributed over a period of two days. A total of 425 completed questionnaires were included in the study which encompasses more than the required number of questionnaires as suggested by Krejcie and Morgan (1970:608).

4.3.3 Statistical analysis

The data was captured using Microsoft Excel and analysed using SPSS (SPSS Inc, 2013:1). The analysis was done in four different stages: a factor analysis, a cluster analysis, an analysis of the significant differences and effect sizes between motivational clusters of participants at Ironman South Africa.

First, a principal axis factor analysis, using an Oblimin rotation with Kaiser normalisation, was performed on the 24 motivation items to explain the variance-covariance structure of a set of variables through a few linear combinations of these variables. The Kaiser-Meyer-Olkin measure of sampling adequacy was used to determine whether the covariance matrix was suitable for factor analysis. Kaiser's criteria for the extraction of all factors with eigenvalues larger than unity were used because they were considered to explain a significant amount of variation in the data. All items with a factor loading greater than 0.3 were considered as contributing to a factor and all items with loadings less than 0.3 as not correlating significantly with this factor (Steyn, 2000:2). Any item that cross-loaded on two factors with factor loadings both greater than 0.3, was categorised in the factor where interpretability was best. A reliability coefficient (Cronbach's alpha) was computed for each factor to estimate its internal consistency. All factors with a reliability coefficient above 0.6 were considered as acceptable in this study.

The average inter-item correlations were also computed as another measure of reliability – these, according to Clark and Watson (1995:309), should lie between 0.15 and 0.55.

Second, a cluster analysis, using Ward's method with Euclidean distances, was performed on the scores of the motives for participating in Ironman South Africa. A cluster analysis is a multivariate interdependence technique with the primary objective to classify objects into relatively homogeneous groups based on the set of variables considered. This is mostly an exploratory technique (Hair, Bush & Ortinau, 2000:594). Hierarchical clustering makes no assumptions concerning the number of groups or group structure. Instead, the members are grouped together based on their natural similarity (Johnson & Wichern, 2007:671-673). This research did not take an *a priori* view of which data points should fall into which segment. Rather, a hierarchical cluster analysis was applied to explore the natural structure of the data by means of Ward's method with Euclidean distances.

Third, Anovas, two-way frequency tables, and chi-square tests were used to investigate any significant differences between the participant clusters. The study applied demographic variables (gender, home language, country of origin, age and province of origin) and behavioural variables (length of stay, transport, times participated, expenditure, other events participating in, initiator of participations, and the time participants were first exposed to triathlons) to examine whether there were statistically significant differences between the groups.

Lastly, effect sizes were utilised to further identify any significant differences between the clusters. The purpose of effect size is to establish whether any differences exist between clusters, in this case in which combination of clusters the averages of the socio-demographic and behavioural variables had the smallest or largest effect. Cohen (1988:25) as well as Ellis and Steyn (2003:52) offer the following guidelines for the interpretation of the effect sizes: small effect: $d = 0.2$, medium effect: $d = 0.5$ and large effect: $d = 0.8$. The results of the statistical analyses are discussed in the next section.

4.4 Results

This section discusses the results of the factor analysis (motives to compete), results of the cluster analysis, the ANOVAs and effect sizes.

4.4.1 Factor analysis

The pattern matrix of the principal axis factor analyses using an Oblimin rotation with Kaiser normalisation identified seven factors (motives) for participation (see Table 4.2). These factors

accounted for respectively 67% of the total variance. All the factors had high reliability coefficients, ranging from 0.68 (the lowest) to 0.89 (the highest) while the average inter-item correlation coefficients with values between 0.35 and 0.80 also implied internal consistency for all factors. Moreover, all items loaded on a factor with a loading greater than 0.3 and the relatively high factor loadings indicated a reasonably high correlation between the factors and their component items. The Kaiser-Meyer-Olkin measures of sampling adequacy of 0.87 also indicated that patterns of correlation were relatively compact and yield distinct and reliable factors (Field, 2005:640). Bartlett's test of sphericity also reached statistical significance ($p < 0.001$) supporting the factorability of the correlation matrix (Pallant, 2007:197).

Table 4.2: Factor analysis results of motives for participating in Ironman South Africa

MOTIVATIONAL FACTORS AND ITEMS	FACTOR LOADING	MEAN VALUE	RELIABILITY COEFFICIENT	AVERAGE INTER-ITEM CORRELATION
Factor 1: Event novelty		3.57	0.75	0.38
I do it annually	0.60			
It is an international event	0.56			
Because the event is well organised	0.53			
Ironman tests my level of fitness and endurance	0.37			
For the adventure of it	0.32			
Factor 2: Respect and Risk		2.71	0.75	0.43
To earn respect from peers	0.61			
Because of the risk involved	0.62			
To make friends and family proud of me	0.54			
To escape	0.42			
Factor 3: Inner vie (compete, contend)		3.80	0.71	0.39
To push myself	0.75			
To improve my time and speed	0.62			
To compete with myself	0.54			
To compete with others	0.42			
Factor 4: Intrinsic achievement and control		3.63	0.76	0.52
To feel proud of myself and have a sense of achievement	0.65			

To improve my self-esteem	0.60			
To mentally control my body	0.54			
Factor 5: Group affiliation and socialisation		3.02	0.84	0.72
To share group identity with other triathletes	0.80			
To socialise with others	0.76			
Factor 6: Health and fitness		3.77	0.89	0.80
To improve my health	0.87			
To improve my level of fitness	0.84			
Factor 7: Challenge		4.10	0.68	0.35
Competing in Ironman is a personal challenge	0.63			
To test my skills against nature, others and myself	0.50			
It is a major challenge	0.46			
Because it is stimulating and exciting	0.32			

Factor scores were calculated as the average of all items contributing to a specific factor in order to interpret them on the original five-point Likert scale of measurement. As Table 4.2 shows, the following motives for Ironman participants were identified: *event novelty* (Factor 1), *Respect and risk* (Factor 2), *Inner vie* (Factor 3), *Intrinsic achievement and control* (Factor 4), *Group affiliation and socialisation* (Factor 5) *Health and fitness* (Factor 6) as well as *Challenge* (Factor 7). *Challenge* obtained the highest mean value (4.10) and is seen as the most important motive for participating in the triathlon with a reliability coefficient of 0.68 and an average inter-item correlation of 0.35. *Inner Vie* had the second highest mean value (3.80), followed by *health and fitness* (3.77), *intrinsic achievement and control* (3.63) *event novelty* (3.57) and *group affiliation and socialisation* (3.02). *Respect and risk* had the lowest mean value (2.71) and is rated as the least important motive for participating in Ironman South Africa.

4.4.2 Results of the cluster analysis

An exploratory cluster analysis based on all cases in the data was performed on the motivational factors. A hierarchical cluster analysis, using Ward's method of Euclidean distances, was used to determine the clusters' structures on the basis of the motivation factors. A three-cluster solution was selected as the most discriminatory (Figure 4.1). The results of the multivariate analyses were used to identify the three clusters and to discover whether significant differences existed between them ($p < 0.05$).

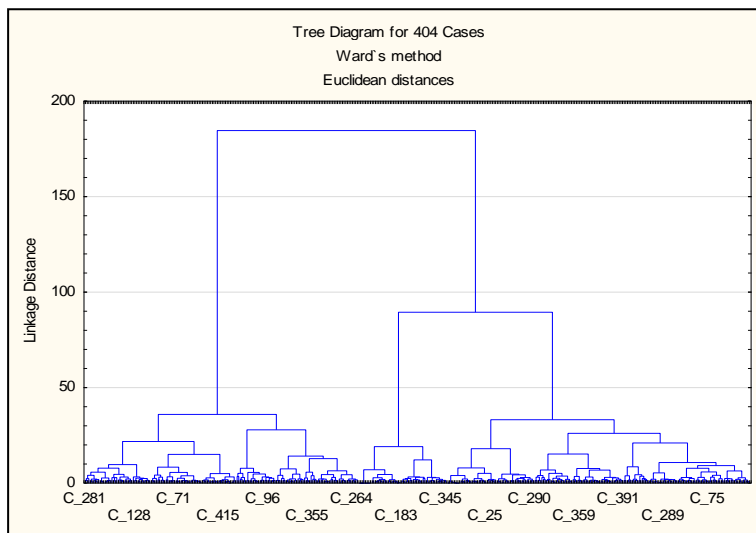


Figure 4.1: Three cluster solution: Ward's method with squared Euclidean distance measures

4.4.3 Identification of segmented clusters

As shown in Table 4.3, ANOVAs indicate that all seven motivational factors contributed to differentiating the three motivational clusters ($p < 0.05$). Corresponding with the results of the factor analysis, *Challenge* was regarded as the most important motive to participate in Ironman South Africa for all three clusters.

Table 4.3: ANOVA and Tukey's Post Hoc Multiple Comparison results for motivational factors in three clusters of Ironman South Africa participants

MOTIVES TO COMPETE	DEVOTEES (N=155)	ENTHUSIASTS (N=54)	ASPIRATIONALS (N=195)	F-RATIO	SIG. LEVEL
<i>Event novelty</i>	3.89 ^a	4.64 ^b	2.99 ^c	158.049	<0.05
<i>Respect and risk</i>	2.84 ^a	4.26 ^b	2.18 ^c	175.177	<0.05
<i>Inner vie</i>	4.00 ^a	4.58 ^b	3.42 ^c	75.571	<0.05
<i>Intrinsic achievement and control</i>	4.00 ^a	4.79 ^b	2.98 ^c	197.943	<0.05
<i>Group affiliation and socialisation</i>	3.19 ^a	4.24 ^b	2.54 ^c	74.607	<0.05
<i>Health and fitness</i>	4.14 ^a	4.66 ^b	3.23 ^c	97.584	<0.05
<i>Challenge</i>	4.25 ^a	4.83 ^b	3.76 ^c	81.101	<0.05

* Statistically significant difference: $p \leq 0.05$

^a Group differs significantly from type (in row) where ^b and ^c are indicated.

Cluster 1 included the second largest number of respondents (N=155) as well as the second largest mean values across all seven motivational factors. This cluster rated the following motives as important: *Intrinsic achievement and control* as well as *Health and fitness*. These

triathletes thus participate mostly for personal benefit. When looking at their socio-demographic characteristics (Table 4.4) it is clear that they enjoy every part of an Ironman triathlon as these triathletes spend the most money on the sport and participate in the most Ironman South Africa and international Ironman competitions. These characteristics show that this cluster is devoted to the Ironman event and therefore was labelled the *Devotees*.

Cluster 2 covered the smallest number of respondents (N=54) and had the highest mean values across all seven motivational factors. This cluster regards *Challenge, Intrinsic achievement and control, Health and fitness* and also *Event novelty* as the most important motives according to Table 4.3. This confirms that these triathletes are motivated by an array of motives seeing that they have the need to improve themselves to become better triathletes. Their demographic characteristics also correspond with their motives when considering the fact that they are the youngest, were exposed to triathlons at a younger age and compete in the most individual endurance sport events including swimming, running and cycling to improve their triathlon skills across all three sport disciplines (Table 4.4). Therefore this cluster was labelled the *Enthusiasts*.

Cluster 3 contained the largest sample of respondents (N=195) and had the lowest mean scores across the seven motivation factors. The cluster saw *Inner vie* and *Health and fitness* as the most important motives for participation (Table 4.3). These triathletes participate to feel a sense of personal accomplishment, to be part of the Ironman event and just to say: "I have finished another Ironman event". Their demographic characteristics according to Table 4.4 show that they are the oldest participants, spend more nights in the event destination, have the highest total spending and compete in the least number of Ironman events. This cluster compete with themselves and care about their personal performance, consequently they were categorised the *Aspirationalists*.

4.4.4 Results from the ANOVAs, Tukey's multiple comparisons and effect sizes

As Table 4.4 shows, there were significant differences between the three clusters of Ironman participants based on age ($p = 0.009$). The *Aspirationalists* are the oldest (40.45 years) whereas the *Enthusiasts* are the youngest of the three clusters (36.96 years). When looking at the effect sizes, there were only small differences between the clusters based on *age, number of participants paid for, average spending* and *age first exposed to triathlons*. The *Aspirationalists* paid for the fewest number of participants (average 1.16 people), while the *Enthusiasts* paid for the most participants (average of 1.35 people). When looking at average spending the *Aspirationalists* had the highest average total spending (an average of R23 004); however all three clusters had a high average spending during the event: *Devotees* had an average of R22 463 and the *Enthusiasts* an average of R18 000. The *Enthusiasts* were exposed to

triathlons at a younger age (an average of 28.16 years) and therefore has started their triathlon career earlier and have participated in more triathlon events compared to the other two clusters. Although there are no statistical differences based on other characteristics it is important to note that, according to Table 4.4, the *Enthusiasts* participate in more triathlon events (on average 6.22 events), cycling events (on average 3.81 events), running events (on average 6.69 events) and swimming events (on average 1.56) per year, than the other two clusters. When considering the group size, it is clear that *Devotees* travel in larger groups (an average of 2.89 people), they also pay for more spectators (on average 1.70 people) during the event. On average all three clusters stay at least 5 nights in the event area, although the *Aspirationalists* stayed the longest in the event area (an average of 5.52 nights). The *Devotees* had the highest average spending for participants (R19 595 per person) and spectators (R17 315 per person), while *Enthusiasts* spent the least money paying for spectators and participants. When observing the frequency of participation both in South Africa and internationally, it is clear that *Devotees* have participated in the most Ironman South Africa triathlons (an average of 2.06) the most international Ironman races (an average of 1.49) and have finished the most Ironman South Africa triathlons (an average of 1.86).

Table 4.4: ANOVA results: Differences between motivational clusters

CHARACTERISTICS	ENTHUSIASTS (N=155)	DEVOTEES (N=54)	ASPIRATIONALS (N=195)	F- RATIO	SIG. LEVEL	EFFECT SIZES**		
						Cluster 1 and 2	Cluster 1 and 3	Cluster 2 and 3
Age	38.25 ^a	36.96 ^a	40.45 ^b	4.716	0.009*	0.15	0.25**	0.39**
Group size	2.98	2.89	2.52	2.028	0.133	0.04	0.19	0.15
Number of people paid for (participants)	1.31	1.35	1.16	1.779	0.170	0.04	0.15	0.23**
Number of people paid for (spectators)	1.70	1.63	1.52	0.427	0.653	0.05	0.12	0.07
Nights in area	4.85	5.30	5.52	2.973	0.095	0.17	0.24	0.08
Total spending	R22463.23	R18600.19	R23004.40	0.184	0.832	0.15	0.01	0.07
Spending per person (paid for participants) ^o	R19595.69	R13266.04	R18450.07	1.456	0.234	0.25**	0.05	0.22**
Spending per person (paid for spectators)	R17315.57	R12951.55	R14591.29	0.674	0.511	0.17	0.11	0.10
Times participated	2.06	1.93	1.75	0.716	0.490	0.06	0.13	0.08
Times finished	1.86	1.65	1.48	1.036	0.356	0.10	0.17	0.08
Times Internationally finished	1.49	1.24	1.36	0.741	0.478	0.08	0.11	0.17
Triathlon events per year	4.43	6.22	4.72	0.936	0.393	0.13	0.05	0.11
Cycling events per year	3.68	3.81	2.95	1.228	0.294	0.02	0.14	0.22
Running events per year	6.04	6.69	5.74	0.253	0.777	0.10	0.04	0.12
Swimming events per year	1.16	1.56	0.99	1.644	0.195	0.19	0.09	0.26
Age first exposed to triathlons	30.68	28.16	31.29	2.149	0.118	0.26**	0.06	0.33**

^oExpenditure per person, calculated by adding together the respondents' spending on the various components and dividing the total by the number of people for whom respondents (participants and spectators) said they were financially responsible.

* Statistically significant difference: $p \leq 0.05$

^a Group differs significantly from type (in row) where ^b is indicated.

Effect sizes: small effect: ** $d=0.2$, (b) medium effect: *** $d=0.5$ and (c) large effect: **** $d=0.8$.

4.5 Findings and Implications

The section below discusses four distinct findings made in the study, followed by implications of the results.

Firstly, it is imperative to note that although previous studies show similar motives, the combination and importance of each motive found in this study is unique and differs from other literature. The results from this study show that participants in Ironman South Africa were motivated by seven motives: *Challenge*, *Inner vie*, *Health and fitness*, *Intrinsic achievement and control*, *Event novelty*, *Group affiliation and socialisation* as well as *Respect and risk*. *Challenge* and *Inner vie* are the most important motives for competing in the event. When these findings are compared with previous research, parallels, especially in terms of *Challenge*, are found with studies done by Grand'Maison (2004); Tribe Group (2009) and Smith (2010). In the same way, the motive *Intrinsic achievement and control* correspond with the findings of Grand'Maison (2004) and Lovett's (2011). Only Smith (2010) found *Respect and risk* as motives to participate in a triathlon. *Socialisation* was found by Lamont and Kennelly (2012) as well as Wicker *et al.* (2012). However, the combination of *Group affiliation and socialisation* was not found in any previous study. *Inner vie* was found in almost all of the previous studies including Case and Branch (2001), Grand'Maison (2004), Tribe Group (2009), Lovett (2011) as well as Lamont and Kennelly (2012). These motives confirm the notion that triathlon participants are not motivated by one single motive, but rather a combination of different motives (Grand'Maison, 2004:87; Shilbury, Westerbeek, Quick & Funk, 2009:67; Lovett, 2011:11).

Secondly, *health and fitness* as a motive is not only unique to this study but it is also the first time *health and fitness* as a motive was found in endurance sport literature (Streicher & Saayman, 2010; Kruger *et al.*, 2011; Kruger & Saayman, 2013). Previous research (Grand'Maison, 2004; Lamont & Kennelly, 2012; Wicker *et al.*, 2012) only focused on one or the other. *Event novelty* (extrinsic motive) was also found for the first time as a unique motive for participation in a triathlon. These findings support the notion that the type of sport and event influence the motives of endurance sport athletes to participate (Kruger & Saayman, 2013).

Thirdly, the study found that *Challenge* was the main motive for participation in Ironman South Africa and, as a result, Ironman triathletes are motivated more by intrinsic motives than extrinsic motives. This corresponds with research done by Ryan and Deci (2007:17) who observed a general trend that endurance sport participants are more intrinsically motivated than extrinsically motivated. This shows that the driving force behind most triathletes' participation is the

challenge against oneself, others, and nature, and thus triathletes feel the urge to push their bodies and minds to extremes. This finding is also consistent with the self-determination theory which suggests that people are pushed to achieve goals through intrinsic pressures which leads to more positive experiences (Vallerand & Lossier, 1999:142). Hosch (1994:12), Ogles and Masters (2003:23) and Tribe Group (2009:14) further support this finding and state that triathletes are a unique kind of participant as they get a personal satisfaction when they challenge themselves both physically and mentally and will adapt their lifestyle in order to be a triathlete.

Fourthly, the Ironman South Africa market was divided into three different distinct segments using a cluster analysis based on the identified motives: *Devotees*, *Enthusiastics* and *Aspirationalists*. Confirming the results of the factor analysis all three clusters regarded *Challenge* and *Inner vie* as the most important motives to participate in the event. Most differences can be found at a behavioural level rather than socio-demographics. There are clear parallels with the research done by the Tribe Group (2009) and Harada *et al.* (2010:2). Not only does each of the segments share similar characteristics, but also the motives to compete in a triathlon are similar. It was however difficult to compare clusters with previous studies done by Chang and Johnson (1995) and Wicker *et al.* (2012:1) as these studies used financial variables and lifestyle variables to segment the triathletes. Each cluster has specific motives that thrust them to participate in a triathlon or return to participate in an Ironman event. The analysis of competitors' ages makes it clear that these competitors are much older than one would find in the individual sports e.g. swimming, running and cycling (Streicher & Saayman, 2010:121-131; Kruger, Saayman & Ellis, 2011:59-79; Saayman & Saayman, 2011:124-138; Kruger *et al.*, 2012:108-122; Kruger & Saayman, 2013:71-92). This is an important finding since it implies that a swimmer, cyclist or runner could easily extend their competitive age, if they want to do so, by competing in the Ironman competition.

Based on these findings, this research has the following **marketing implications**: (1) It is crucial that marketers target each of the three clusters separately as each cluster is a viable and sustainable market. However, this can only be done by focusing on each market's specific needs and motives. (2) The *Devotees* are loyal to the Ironman event and have participated in the most Ironman South Africa and International races. Consequently, marketers must emphasise how unique the Ironman competition is and that only a small number of people can testify to have finished the competition. Marketers and event managers can also assist the *Devotees* by putting together loyalty programmes where these participants get discount and special prices when they compete in a certain number of Ironman races. Organisers can also consider introducing special numbers or colours for participants to wear that distinguish them

from the others in the field. Marketing messages need to be forwarded to other Ironman events as well as manufactures, retail shops and nutrition stores seeing that these triathletes spend the most money on equipment and other triathlon necessities. (3) Implications for the *Enthusiasts* segment include developing strategies in targeting these participants as they are the up-coming triathletes and can be developed into *Devotees* if their needs are met correctly. Marketers must develop messages that highlight the different benefits of participating in an Ironman event, not only the intrinsic benefits but also the extrinsic benefits, for example highlighting the fact that the event is well organised and that it is one of the Ironman events that can help them qualify for the Ironman world championships. These marketing messages must mostly be distributed at other endurance sport events that can help these athletes train for the Ironman event. (4) Marketers must also reach the *Aspirationalists*, seeing that the majority of triathletes that participated in Ironman South Africa fell in this cluster. This can be done by making it worthwhile to return annually through changing and improving the event each year. Marketing messages should highlight the fact that age cannot keep a true triathlete down and that the personal accomplishment will justify their participation. These messages can be distributed at clubs and gymnasiums. (5) Knowing that triathletes seek a *Challenge*, marketers must adapt their marketing messages by notifying potential participants that Ironman South Africa is the ultimate endurance event on the African continent. The event will challenge them physically and mentally and, at the end of the event, participants will feel that they have overcome a major challenge and experience a sense of self-worth and personal gratification. Marketers must also highlight that Ironman is the toughest, longest and one of the biggest personal challenges a person can face. Further market messages can emphasise that the event has an added benefit of improving one's self-esteem as well as health and fitness. These marketing messages can be communicated at other endurance events especially swimming, running and cycling events, but also other Ironman triathlons around the world. Marketers can also market Ironman at other triathlon events including half-Ironman, sprint distance and Olympic distance triathlon events. These marketing efforts will attract all three clusters as well as new participants to the event. (6) Since competing in a triathlon is expensive, travel packages that include accommodation, transport and catering could be considered to help make these events more affordable for the general public, thus giving more people the chance to participate. (7) Results show that early exposure to triathlons plays a major role in participants' motives to compete and overall sport behaviour (*Enthusiastics*). Participation in sport should be encouraged from a young age to grow love for sport and triathlons. IronKids (an Ironman event especially for children) should be promoted more extensively at schools around the country.

4.6 Conclusion

This research determined the motives of triathletes participating in Ironman South Africa (the ultimate endurance sport on the African continent) and clustered the participants according to these motives. This type of research was conducted for the first time at a triathlete event in South Africa and the profile and motives of these participants have been identified. These motives are unique to this study in comparison with previous research and were used to make certain recommendations to event organisers. With these results, gaps in the existing literature have been filled, since this research contributes to the literature not only of sport events but also of triathlete participants in South Africa. The study corroborates the argument that motives for participating differ according to the sporting event. It also supports the view that marketers and sports event organisers must understand that participants have different motives and so should not be regarded as a homogeneous group. In fact, this study shows not only that motives for participating in triathlons differ from those for participating in other types of endurance events, but also that the combination of motives differs. The study also highlighted the fact that the participants are much older than individual sporting events, for example swimming, cycling or running. This type of research is valuable to sports event organisers, as it assists in making informed and cost-effective marketing and product development decisions. It is thus recommended that similar research – comparing participants' motives and whether they are primarily intrinsic, extrinsic or a combination – be undertaken for other endurance events as well as other South African sporting events. Looking particularly at the economic value of this event, it is important that research continues at Ironman South Africa and other similar events so as to sustain these types of endurance events.



CHAPTER 5:

FIRST TIME VERSUS REPEAT TRIATHLON PARTICIPANTS AT IRONMAN SOUTH AFRICA

Ironman: “The pain is temporary, the memories will last the rest of your life” –*John Collins*–

ABSTRACT

Triathlon organisers and marketers must attempt to achieve a balance between first-time and repeat participants, but should be aware of the attributes that differentiate these participants. The purpose of this research is to segment participants of the Ironman South Africa event based on the frequency of participation and to distinguish between first-time participants and repeat participants via an empirical analysis. Self-administered questionnaires were distributed during Ironman South Africa at the Boardwalk Convention Centre and Spa during the registration period (11 to 13 April 2013). An availability or convenience sample was used to conduct the destination-based survey. Fieldworkers collected a total of 425 questionnaires and the analyses comprised two different stages: a factor analysis, and an analysis of differences based on the number of years participants at Ironman South Africa have previously participated in the event. The results showed significant differences between first-time and repeat triathletes competing in Ironman South Africa based on their demographic profile, behaviour and motives to participate. The key contributions of this research were: Firstly, segmentation based on frequency of participation was found to be a useful segmentation tool. Secondly, the results revealed unique attributes that have not been found in previous research. Thirdly, four distinct clusters namely, the *Bronze*, *Silver*, *Gold* and *Platinum segments* were identified. Fourthly, loyalty programs and cards was successfully applied for the first time as a retention tool for endurance sport participants. Fifthly, this study also challenged existing sport theory, Lastly, the research contributes to existing sport literature, seeing that this is the first research to the authors' knowledge done in South Africa regarding triathlons and understanding the unique characteristics of triathletes. These contributions emphasise that understanding endurance sport participants, in this case triathletes, will help expand the sport in South Africa and contribute to making South Africa a premier endurance sport destination.

Key words: *market segmentation, first-time triathletes, repeat triathletes, Ironman South Africa*

5.1 Introduction

First time and repeat sport participants can form two different market segments for sport and destination marketers (Kaplanidou & Gibson, 2012:477). Um, Chon and Ro (2006:1142) define first time visitors (in this instance sport participants) as the “new” market and represents participants that compete in a sport event for the first time. Therefore, repeat visitors are seen as the established consumer base that had already taken part in a specific sport event (Kerstetter & Cho, 2004:962; Um *et al.*, 2006:1142). According to Saayman and Kruger (2013:1) sport event organisers should attempt to achieve a balance between first time and repeat participants, but should be aware of the attributes that differentiate these participants. Marketers should firstly attract new participants through superior value to participants. Secondly, they need to continue the existing participant base by keeping them content with all aspects of the event in an efficient and effective manner (Harrison-Hill & Chalip, 2006:303). Hence, marketers should follow a two-pronged market segmentation approach, where both groups of participants are considered to ensure the sustainability of the sport event (Kruger, Saayman & Ellis, 2010:97). If sport managers and marketers focus only on one group it could lead to a misinterpretation of the market and head to ineffective allocation of resources such as human capital, income and sponsorships (Jang & Feng, 2007:582). But, if sport managers and marketers understand both markets it will assist them with better direction and knowledge to adapt to a changing marketplace for sport events (Li, Cheng, Kim & Petrick, 2008:279; Chiang, Wang & Chen, 2010:757). According to Harrison-Hill and Chalip (2006:313), understanding the consumer (in this case participants), their needs, wants and the benefits they are continuously seeking from the product or service, (the participating in a sport event) will be the only way to adapt to the changing sport market. Despite calls for research, limited studies had been done on how first time participants differ from repeat participants at sport events (for example Filo, Funk & O'Brien, 2008:502; Wood, Snelgrove & Danylchuk, 2010:40). Correia, Oliveria and Butler (2008:185) also emphasise that research is needed for sport event organisers to distinguish between marketing strategies for first time participants and repeat participants respectively.

Although a great deal of thought has been given to sport events in general, there is still a lack of research focusing on multi-discipline sport events comprising a variety of elements like the triathlon (Arnott, 2008:4). Triathlons are typically prearranged in one of three formats namely sprint, Olympic and ultra-distance. Ironman is currently the most popular type of ultra-distance triathlon in the United States (Frimmel, 2012:6). An Ironman triathlon is regarded as the world's most challenging multi-sport endurance event (Infront Sports & Media, 2013:1). Ironman is also seen as the number one user based sport brand and the most recognised triathlon and endurance series worldwide (Infront Sports & Media, 2013:1). In fact, according to Frimmel (2012:7) about 17% of all triathletes (approximately 23000 individuals) participate in Ironman

races. According to USA Triathlon regulations, an Ironman triathlon must consist of a 3.8 kilometre swim, a 180 kilometre cycle and a 42.2 kilometre run. The race can take up to an average of eight to 17 hours to finish (USA Triathlon, 2010:1). It is apparent that Ironman triathletes need to be in top physical condition. However, the differentiating factor remains the mental preparation these athletes undergo (Frimmel, 2012:6). Triathletes are some of the fittest and most committed athletes, dedicating a vast amount of time to training and health conscious lifestyles (Lovett, 2011:3). These endurance athletes must also alter their schedules for work, family and other social agendas in order to be prepared for a triathlon (Croft, Gray & Duncan, 2007:2). Race performance in a triathlon is also largely self-determined and relatively independent of the performance level of one's opponent (as for tennis) or one's team (as for football). This give triathletes greater control over their performance and allow their personality to have a greater effect on their performance (Stoeber, Uphill & Hotham, 2009:216).

The aforementioned emphasise the importance of defining first time and repeat triathletes as well as to distinguish them from other athletes on their unique mind-set to successfully undergo and complete extensive training and lifestyle changes. With all this in mind, the aim of this research is to segment participants of the Spec-savers Ironman South Africa (the only Ironman triathlon event on the African continent) (hereafter referred to as Ironman South Africa). The segmentation is based on the frequency of participation to distinguish between first time and repeat participants. The research that was done will be presented in the sequence of firstly to discussing the relevant literature, then to explain the research method and lastly to discuss the results. The article closes with the discussion of the findings and consequences of the study and then offers conclusions and recommendations.

5.2 Literature review

Literature confirmed that the typical average triathlete prove to be a well-educated, affluent male in his mid-thirties (Case & Branch, 2001:120; Chang & Johnson 1995:25; Clingman & Hilliard, 1987:123; Tribe Group, 2009:9; Devine, Bolan & Devine, 2010:62; Martin & Pancoska, 2010:32). Furthermore, the average number of years that athletes participate in triathlons is confirmed as 7.4 years (Case & Branch, 2001:120). When considering the average age of triathlon participants (namely 39 years), it is evident that athletes that compete in other endurance races are younger. Thus, a triathlon presents mature adults with the potential for longer-term participation (Tribe Group, 2009:20; Lovett, 2011:18). Then it is also important to take note of other studies observations that endurance sport participants like triathletes, vary in their behaviour and motives to participate according to their age, the level of competition and their previous experience (Ogles, Masters & Richardson, 1995:235; Ogles & Masters, 2000:73; 2003:71; Lachausse, 2006:316). At present, triathletes are presented as a homogenous

demographic group. This suggests potential for the extension into other demographics (Tribe Group, 2009:14). This can be achieved through concentrated marketing efforts and market segmentation to attract both first time and repeat triathlon participants (Tribe Group, 2009:4).

According to Wedel and Kamakura (2000:83), Dolnicar (2002:3) and Liu, Kiang and Brusco (2012:10293) market segmentation can be defined as “the process of defining and sub dividing a large homogenous market into clearly identifiable segments having similar needs, wants or demand characteristics. Its objective is to design a marketing mix that precisely matches the expectations of customers in the targeted segment”. Getz (1997:261) adds that there are different variables against which a market can be segmented including demographical, geographical, psychographic, socio-economic and behavioural features. Likewise, athletes’ status as first time or repeat participants can be considered as a market segmentation variable for sport participant studies (Formica & Uysal, 1995:175; Lau & McKercher, 2004:283). Saayman and Kruger (2013:1) take it further to show the benefits of using frequency of participation as a market segmentation variable. The other benefits include firstly that it is clear for repeat participants to be content with a sport event and form the backbone of the event (Getz, 1998:13; Li *et al.*, 2008:288; Bouchet, Bodet, Bernache-Assolland & Kada, 2010:2). A second benefit is the cost-effectiveness of attracting an established market (Oppermann, 2000:78). Thirdly it is evident that repeat participants demonstrate loyalty towards the event they have participated in and will become ambassadors for the event if they are treated appropriately (Tang & Turco, 2001:35; Caneen, 2004:270). Lastly, repeat participants can also help promote the event through word-of-mouth recommendations (Dick & Basu, 1994:100; Schoemaker & Lewis, 1999:346).

Petrack (2004:463) argues that event organisers should not assume that repeat participants represent the desired market. First time participants are also a viable market. Firstly, they lead to event development. They also have a role in predicting the success of a campaign's marketing effort. Secondly, studying first time participants will bring about an understanding of their consumer behaviour, which can lead to increased market share that ensure a sustainable and profitable event (Gursoy & McCleary, 2004:367; Seabra, Abrantes & Lages, 2007:1541; Anderson & Mittal, 2000:108; Lovett, 2011:8). Finally, event organisers and marketers should be familiar with the profile of first time participants as they can become committed participants. Subsequently, the committed participants could establish an increase in expenditure that will result in a greater economic impact of the event (Kuenzel & Yassim, 2007:43). Analysing first time participants will also help give insight in the motives that encourage participants to take part in a new event, in this matter the triathlon (Lovett, 2011:9). Tribe Group (2009:12) reveals

that the volume of new triathletes suggests that the sport's appeal is expanding and becoming attractive to a larger proportion of athletes.

First time and repeat participants are thus significant segments to be investigated in more detail. Table 5.1 highlights the differences between first and repeat athletes at various sport events including triathlons.

Table 5.1: Differences between first time and repeat sport participants

VARIABLES	MAIN FINDINGS	AUTHOR(S)
DEMOGRAPHIC VARIABLES		
Age	Triathlon performance will weaken with age. However, experience form an important variable with regards to performance in sports and especially in vital events.	Villaroel, Mora and González-Parra (2011:364)
	First time triathlon athletes start their participation at an older age.	Tribe Group (2009:34)
	In terms of the socio-demographic differences, first timers are younger compared to repeaters.	Gitelson and Crompton (1984:200), Lau and McKercher (2004:280) and Li <i>et al.</i> (2008:279)
Gender	Male first-time triathletes outnumber female triathletes, were with repeat triathletes the margin is higher of males outnumbering the females.	Tribe Group (2009:20)
Level of income	The average household income for both first time and repeat triathletes is higher than the national average income.	Tribe Group (2009:21)
	Repeat triathlon participants have higher household income in comparison with first time participants.	Tribe Group (2009:21)
	The main factor determining the participation for both first time and repeat triathletes in an event is its proximity to athletes' hometown.	Tribe Group (2009:6)
BEHAVIOURAL VARIABLES		
Expenditure	Repeat triathlon participants whom are loyal to the event are more likely to maintain and grow their spending for and on the event.	Tribe Group (2009:11)
	Repeat participants will remain receptive to essential products, but will take longer to purchase them.	Tribe Group (2009:11)
	First time participants tend to spend more money for and on the event compared to repeaters.	Saayman and Kruger (2013:7)
Activities sought and behaviour	Repeat athletes visit more attractions in the event area.	Saayman and Kruger (2013:8)
	Both first time and repeat triathletes also show serious participation in other sports, especially outdoor sports.	Tribe Group (2009:38)
Perceived risk	Based on previous performance, repeat athletes are more selective regarding the event route/track as it allows them to measure their level of fitness at that point in time. This assists them in selecting the events to participate in or not.	Arnott (2008:10)
	Repeat participants have more concerns about safety than first time participants.	Tribe Group (2009:56)
Information sources	Websites and word of mouth are main information sources. Repeaters heard about the race through the television, magazines and run clubs.	Saayman and Kruger (2013:8)

	Both first time and repeat triathletes have high level of interest in magazines related to triathlons and sports in general.	Tribe Group (2009:38)
	Repeat participants tend to more frequently access and browse triathlon-related websites.	Tribe Group (2009:38)
Intention to revisit and satisfaction	First time athletes indicated uncertainty towards returning to the same event again.	Saayman and Kruger (2013:8)
	Overall satisfaction of the event was significantly related to participation history	Taylor and Shanka (2008:954)
	Repeat participants had higher mean scores than first time participants for their intention to attend similar events in the next year.	Kaplanidou and Gibson (2012:480)
Level of experience	The previous experience of repeat participants as well as their knowledge of what to expect prove to be their sources of confidence and mental preparedness.	Frimmel (2012:6)
	Adult swimming athletes were significantly affected by their past experience at swimming events and the number of swim competitions they participate in a year.	Hastings, Kurth, Schloder and Cyr (1995:102); Hritz and Ramos (2008:300)
	Repeat participants take part in the most challenging triathlon events, thus as their experience grow, their desire to participate progressively more.	Tribe Group (2009:4)
Other	Repeat participants are more likely to use a coach regularly.	Tribe Group (2009:23)
	Repeat triathletes are in better shape (concerning weight) than first time participants.	Tribe Group (2009:22)
MOTIVES TO PARTICIPATE		
Travel motives	Having fun, being physically fit, making friends and seeking achievement are important motives for participation in swimming events, but they change over time or are dependent on age, gender, ability and skill level.	Kruger, Saayman and Ellis (2011)
	Intrinsic achievement and escape and relaxation were the most important motives to participate for both first time and repeat marathon runners.	Saayman and Kruger (2013:8)
	First time charity sport participants were motivated by achievement, while repeat participants were motivated by involvement, status and socialisation.	Taylor and Shanka (2008:954)
	First time triathletes had lower weight concern scores than triathletes which had completed one to five sprint triathlons.	Lovett (2011:74)
	Older runners had greater weight concerns and general health orientation motives than their younger counterparts.	Ogles and Masters (2000:75)
	Triathletes participating in their first triathlon had lower competition scores than those triathletes who had competed in more than six sprint triathlons.	Lovett (2011:74)

It is clear from Table 5.1 that significant differences exist between the first time and repeat participants as two separate market segments. Sport event organisers and marketers must therefore develop different programmes to focus specifically on the two market segments. It is evident that each sport event is unique as well as the type of participants it attracts. Hence, one cannot assume that these two sport participant segments are homogenous in terms of their profiles, motives, preferences and behaviour (Kruger, Saayman & Hermann, 2012:6). This emphasises the importance of understanding the profiles, needs, behaviour and preferences of first time and repeat participants especially at a multi-disciplinary event such as Ironman South Africa. Currently, only one previous study focused on the differences between first time and repeat marathon runners in South Africa done by Saayman and Kruger (2013:1-16).

The benefits of such research for event marketers and organisers that operate within the triathlon industry (Tribe Group, 2009:9) include:

- Better understanding of triathletes in the sport market (Lovett, 2011:26);
- When triathletes' (first time and repeat) needs are met, triathlon event organisers and marketers are able to create an increase in the demand for their product or services (the event itself) leading to an increased market share (Hawkins, Mothersbaugh & Best, 2007:120);
- Incorporating the research's findings into Ironman South Africa's advertising and promotional activities can increase efficiency (Lovett, 2011:10); create more specific market segments (Lovett, 2011:10; Saayman & Kruger, 2013:1); contribute to an overall increase in participation in triathlon events through effective marketing messages (Lovett, 2011:10) and lastly help create specific marketing programmes that meet specific sport event market needs (Vogt, Stewart & Fesenmaier, 1998:11; Wang, 2004:101; Regan; Carlso & Rosenberger, 2009:6);
- The appropriate management and marketing of both first time and repeat participants (as a combined market) would ultimately contribute to greater sustainability of the Ironman South Africa event (Gill & Williams, 2008:28; Kruger, Botha & Saayman, 2012:108);
- Doherty and Murray (2007:49) add that attracting both first time and repeat participants will help the event gain sponsorship which is vital for sport organisations, due to the cut of public funding. The Independent Evaluation group (IEG) highlights the importance of sponsorships in its statement that more than two-thirds of sponsorships worldwide be

directed to sport (sited in Doherty & Murray, 2008:49), but due to increased competition in sport sponsorships, corporate sponsorship turn out to be more occasional (Taylor & Shanka, 2008:947).

With the aforementioned benefits in mind and due to the lack of research in South Africa regarding first time and repeat athletes, the study will contribute to sport literature in South Africa and especially to triathlon literature.

5.3 Method of research

A quantitative approach was applied to collect data through the distribution and collection of a structured questionnaire. The method that was used will be discussed in the following order, the presentation of the focus of the study followed by an explanation of the questionnaire design, the survey manner and the sampling method. The section will close with the statistical analysis.

5.3.1 Focus of the study

The Spec-savers Ironman South Africa triathlon is Africa's premier ultimate one-day endurance race event. This is a multi-discipline event integrating a 3.8km swim, followed by a 180km cycle and lastly a 42.2km run (Ironman South Africa, 2013:1). Ironman South Africa attracts approximately 2000 triathletes from 50 nationalities to Nelson Mandela Bay, Port Elizabeth each year (Ironman South Africa, 2013:1). The 2013 Ironman triathlon, which was the 9th Ironman event in South Africa, attracted nearly 50 professional competing athletes and 426 registered international participating athletes (Ironman South Africa, 2013:1).

5.3.2 The questionnaire design

The questionnaire design that was applied to survey the participants at Ironman South Africa 2013 was adapted from the work of Streicher and Saayman (2010), Kruger *et al.* (2011), Lamont and Kennelly (2012), Lovett (2011), McCarville (2007), Smith (2010) and Wicker, Hallmann, Prinz and Weimar (2012) for the purpose of the specific event and research objectives. The questionnaire was divided into two sections. Section A captured demographic details (gender, home language, age, gross annual income, home province, country of origin, level of education, marital status, mode of transport) and spending behaviour (number of people in travelling group, number of participants/spectators paid for and expenditure). Section B depicted motivational factors, measuring 24 items on a five point Likert scale where 1 = not at all important; 2 = slightly important; 3 = important; 4 = very important; 5 = extremely important. Section B also gathered information specific to participants' behaviour during and before the event (entry details, previous participation in Ironman South Africa or internationally, number of sport events participated in annually, primary category, age when first exposed to the event,

person whom exposed you to the sport, other sporting events previously competed in, upcoming sport events to be participated in 2013, initiator of participation, and information sources used to be updated and notified on the event).

5.3.3 Survey

Self-administered questionnaires were distributed at the Boardwalk Convention Centre and Spa throughout the registration period (11 to 13 April 2013). A destination based survey was implemented. Seven field workers were trained to ensure that they understood the aim of the study as well as the questionnaire content and design. The field workers were grouped in pairs and each group had to work a two-hour shift each of the three days. They had to hand out as many questionnaires as possible. The field workers approached participants after they have registered for the event to brief them on the purpose of the survey. This was done to ensure that the registered event participants contribute willingly to the survey. The field workers had to approach participants from different genders, ages and nationalities to ensure a representative sample.

5.3.4 Sampling method

The availability or convenience sample was applied and a total of 450 questionnaires were distributed over a period of three days. The 2012 participation statistics were used to determine the estimated population size (N). Approximately 1 744 triathletes participated in the 2012 Ironman South Africa event (Ironman South Africa, 2013:1). Applying Krejcie and Morgan's (1970:608) sample size formula a total of 313 respondents needed to be sampled from a population of 1 744 triathletes. This is also necessary to obtain valid and credible results. To address concerns of inaccurate and half completed questionnaires, the sample size was enlarged to 450 questionnaires. Field workers had gathered a total of 425 fully completed questionnaires which represents more than the aimed sample of 313.

5.3.5 Statistical analysis

Microsoft Excel was used for data capturing while SPSS (SPSS Inc, 2013) was utilised to analyse the data. The analysis comprised two different stages, namely a factor analysis and the analysis of differences based on the number of years athletes have participated in Ironman South Africa.

First, a principal axis factor analysis, using an Oblimin rotation with Kaiser normalisation was performed on the 24 motivation items to explain the variance-covariance structure of a set of variables through a few linear combinations of these variables. The Kaiser-Meyer-Olkin measure of sampling adequacy was used to determine whether the covariance matrix was

suitable for factor analysis. Kaiser's criteria for the extraction of all factors with eigen values larger than unity were used because they were considered to explain a significant amount of variation in the data. All items with a factor loading greater than 0.3 were considered as contributing to a factor, and all items with loadings less than 0.3 as not correlating significantly with this factor (Steyn, 2000:2). Any item that cross-loaded on two factors with both loadings greater than 0.3, was categorised relating to the factor with best interpretation. A reliability coefficient (Cronbach's alpha) was computed for each factor to estimate its internal consistency. All factors with a reliability coefficient above 0.6 were considered as acceptable. The average inter-item correlations were also computed as another measure of reliability, these according to Clark and Watson (1995:309) should lie between 0.15 and 0.55.

Secondly, participants were analysed based on the number of years they have participated in Ironman South Africa. Two-way frequency tables and Chi-square tests as well as ANOVAs and Tukey's multiple comparisons were employed to investigate any significant differences between first-time and repeat participants. The study applied demographic and behavioural variables as well as motivational factors to examine whether statistically significant differences existed among the different groups. Effect sizes were used to further identify any significant differences between the participant groups. The purpose of effect size was to establish whether any differences existed between first time and repeat participants. Furthermore, it determined in which combination the averages of the socio-demographic and behavioural variables had the smallest or largest effect. Cohen (1988:25) as well as Ellis and Steyn (2003:52) offer the following guidelines for the interpretation of the effect sizes namely small effect: $d = 0.2$, medium effect: $d = 0.5$ and large effect: $d = 0.8$. In the next section follows a discussion of the statistical analysis.

5.4 Results

The results and statistical analysis will be discussed in two sections. Firstly, the results of the factor analysis (motives to participate) will be discussed, followed by the results of the ANOVA's and cross tabulations with Chi-square tests.

5.4.1 Factor analysis

The pattern matrix of the principal axis factor analysis using an Oblimin rotation with Kaiser Normalization identified seven factors (motives) for participation (c.f. 4.4). These factors accounted for 67% of the total variance. All the factors had high reliability coefficients, ranging from 0.68 (the lowest) to 0.89 (the highest). The average inter-item correlation coefficients with values between 0.35 and 0.80 also implied internal consistency for all factors. Moreover, all items loaded on a factor with a loading greater than 0.3. The relatively high factor loadings

indicated a reasonably high correlation between the factors and their component items. The Kaiser-Meyer-Olkin measures of sampling adequacy of 0.87 also indicated that patterns of correlation were relatively compact and yield distinct and reliable factors (Field, 2005:640). Bartlett's test of sphericity also reached statistical significance ($p < 0.001$) supporting the factorability of the correlation matrix (Pallant, 2007:197).

The motives to participate in Ironman South Africa were identified as **Challenge** with the highest mean value (4.10) (competing is a personal challenge; to test my skills against nature, others and myself; it is a major challenge; because it is stimulating and exciting). The second highest score was for **Inner vie** (3.80) (to push myself; to improve my time and speed; to compete with myself or with others). **Health and fitness** (3.77) ranked three out of seven motives (to improve my health; to improve my fitness) followed by **Intrinsic achievement and control** (3.63) (to feel proud of myself and have a sense of achievement, to improve my self-esteem, to mentally control my body). **Event novelty** scored 3.57 (I do it annually, it is an international event, because the event is well organised, Ironman tests my level of fitness and endurance; for the adventure of it) followed by **Group affiliation and socialisation** with a mean score of 3.02 (to share group identity with other triathletes; to socialise with others). The lowest mean value was for **Respect and risk** (2.71) (to earn respect from peers, because of the risk involved, to make friends and family proud of me, to escape).

5.4.2 First time versus repeat participants at the Ironman South Africa

As is evident from the literature review, one can divide participants at a sport event into different segments based on different variables. Loyalty programmes are widely used in the tourism and hospitality industry as well as airlines and car hire agencies to help them to learn specific details about their target market's buying patterns and behaviour (Gillies, Kitimura & Yokota-Landou, 2005:3). The frequent flyer programme is a good example of an incentive programme operated by an airline to reward customers for their sustained loyalty and convince them to become lifetime customers (Canster, 2013:1). Airlines use different colour cards (bronze, silver, gold and platinum) to indicate distinct benefits for the different card holders (Canstar, 2013:1). The cards also have a hierarchy where customers can receive a different colour card if they are more involved (fly more), thus the higher level of loyalty card the more benefits will be presented to the card holder (Canstar, 2013:1). This strategy can also be applied to the sport market, specifically for the Ironman South Africa event. In this study, four segments were identified based on the number of times athletes have previously participated in the Ironman South Africa event. Then, applying the frequent flyer concept, the four participant segments were divided in different loyalty segments. Firstly the *Bronze segment* (see Table 5.2 below) represents first time triathletes that have not participated in any Ironman South Africa event before. This group

consisted out of the second highest number of participants (107 triathletes). The second segment is the *Silver Segment* made up of 28% of all triathletes. These triathletes prove to return to the event and have participated in one Ironman South Africa event previously. The third group is the *Gold segment*, which were represented by triathletes that have previously participated in two or three Ironman South Africa events. Most of the triathletes that participated in the 2013 Ironman South Africa were in this segment (120 triathletes, 35%). The fourth segment is the *Platinum segment* and triathletes in this group have previously participated in at least four or more Ironman South Africa events. This segment represented the lowest number of triathletes (N=59).

Table 5.2: Participant segments at Ironman South Africa based on frequency of participation

NUMBER OF TIMES PARTICIPATED	COUNT	PERCENT
0 (Bronze segment)	107	31%
Once before (Silver segment)	95	28%
2-3 times (Gold segment)	120	35%
4+ (Platinum segment)	59	17%

5.4.3 Results of ANOVA and Tukey's post hoc multiple comparisons

ANOVAs were applied to determine the differences between first time and repeat participants at the 2013 Ironman South Africa and were based on socio-demographic and behavioural characteristics as well as motivational factors. As shown in Table 5.3, there are statistically significant differences between the four segments based on age ($p<0.000$), nights spent at destination ($p< 0.035$), times participated in Ironman South Africa ($p<0.000$), times finished Ironman South Africa ($p<0.000$) and *Event novelty* ($p< 0.000$) as motives to participate in the event.

Table 5.3: Results of ANOVA and Tukey's post hoc multiple comparisons for participant characteristics between first timers and repeaters

	CLUSTER 1	CLUSTER 2	CLUSTER 3	CLUSTER 4			EFFECT SIZES**					
Characteristics	Bronze segment (n=107)	Silver segment (n=95)	Gold segment (n=120)	Platinum segment (n=49)	F- ratio	Sig. level	Cluster 1 and 2	Cluster 1 and 3	Cluster 1 and 4	Cluster 2 and 3	Cluster 2 and 4	Cluster 3 and 4
Age	36.91 ^a	38.91 ^a	40.37 ^b	44.43	9.540	0.000*	0.21**	0.39**	0.89****	0.15	0.57***	0.46**
Group size	2.55	2.69	2.76	3.09	0.831	0.478	0.07	0.09	0.24**	0.03	0.17	0.14
Number of people paid for (participants)	1.17	1.16	1.23	1.41	1.378	0.249	0.01	0.08	0.24**	0.10	0.24**	0.17
Nights in area	5.35 ^a	5.69 ^a	4.43 ^b	5.25 ^a	2.896	0.035*	0.10	0.33**	0.04	0.39**	0.13	0.30**
Total spending	R31325.28	R17797.47	R20409.52	R17526.27	1.590	0.192	0.16	0.13	0.16	0.12	0.01	0.13
Spending per person (paid for participants) °	R22620.80	R16814.86	R16414.23	R15375.74	1.745	0.158	0.17	0.18	0.21**	0.02	0.08	0.07
Times participated	0.00 ^a	1.00 ^b	2.36 ^c	5.93 ^d	0.716	0.000*	-	4.89****	2.98****	2.82****	2.48****	1.79****
Times finished	0.00 ^a	0.60 ^b	1.85 ^c	5.39 ^d	471.062	0.000*	1.17****	2.24****	3.05****	1.54****	2.72****	2.01****
Times Internationally finished	1.33	2.40	1.14	1.49	0.741	0.234	0.21**	0.06	0.05	0.24**	0.18	0.11
Triathlon events per year	4.06	5.50	5.43	3.71	1.185	0.316	0.17	0.13	0.11	0.01	0.21**	0.16
Cycling events per year	3.07	3.44	3.87	3.25	0.416	0.742	0.06	0.18	0.05	0.07	0.03	0.14

Running events per year	5.46	6.15	7.44	5.94	0.892	0.446	0.09	0.22**	0.06	0.14	0.03	0.17
Swimming events per year	0.93	1.13	1.05	1.29	0.551	0.648	0.10	0.07	0.21**	0.04	0.08	0.14
Age first exposed to triathlons	29.85	30.39	31.25	33.41	1.838	0.140	0.05	0.14	0.35**	0.09	0.29**	0.21**
Motives												
Event novelty	3.27 ^a	3.58 ^b	3.70 ^b	3.99 ^{bc}	9.966	0.000*	0.33**	0.53***	0.87****	0.13	0.44**	0.35**
Respect and risk	2.69	2.76	2.61	2.77	0.397	0.755	0.07	0.07	0.08	0.14	0.01	0.16
Inner Vie	3.71	3.81	3.81	3.93	0.974	0.405	0.13	0.13	0.25**	0.00	0.13	0.13
Intrinsic achievement and control	3.60	3.62	3.65	3.75	0.327	0.806	0.02	0.05	0.15	0.03	0.14	0.11
Group affiliation and socialisation	2.89	3.02	3.07	3.08	0.581	0.628	0.12	0.16	0.17	0.05	0.06	0.00
Health and fitness	3.59	3.80	3.88	3.91	2.022	0.111	0.22**	0.29**	0.32**	0.08	0.11	0.03
Challenge	4.11	4.16	4.10	4.13	0.163	0.922	0.07	0.02	0.03	0.10	0.05	0.04

^oExpenditure per person, calculated through the sum of the respondents' spending on the various components and dividing the total by the number of people for whom respondents (participants and spectators) indicated they were financially responsible.

* Statistically significant difference: $p \leq 0.05$

^a Group differs significantly from type (in row) where ^b is indicated.

Effect sizes: small effect: ** $d=0.2$, (b) medium effect: *** $d=0.5$ and (c) large effect: **** $d=0.8$

The next section contains the discussion of all the differences that were identified:

- **Age:** Considering age, there were significant differences between all four of the frequency segments. The *Bronze segment* differed statistically from the *Silver*, *Gold* and *Platinum segment*. To the same extent the *Silver segment* differed from the *Platinum segment*, but not from the *Gold segment*. There were also significant differences between triathletes from the *Gold segment* and *Platinum segment* according to age. *Bronze* Ironman triathletes were the youngest with an average age of 36.91 years, while the *Platinum segment* represented the oldest athletes with an average age of 44.43 years, much older than the *Bronze segment* participants. The *Silver* and *Gold* segments had similar ages namely 38.91 and 40.37 years respectively.
- **Group size:** There were no statistical significant differences between the different triathlete groups based on group size, although effect sizes showed a small difference in group size of *Bronze segment* participants when compared to *Platinum segment* participants. It is evident from the results that *Platinum segment* triathletes travelled with more people (an average of 3.09) than *Bronze segment* participants (an average of 2.55 people).
- **Number of people paid for (participants):** There were no statistical differences in the number of people paid for in the different triathlete segments. However effect sizes showed that there were small differences between the *Bronze segment* and *Silver segment* that paid for an average of 1.17 and 1.16 participants respectively compared to the *Platinum segment* that paid for an average of 1.41 participants.
- **Length of stay:** Results proved that statistical significant differences existed between the different triathlete segments. According to the effect sizes, there were small differences between the *Gold*, *Bronze* and *Silver segment* participants. Small differences were evident between triathletes from the *Silver* and the *Platinum segment*. With regards to participants visiting the Port Elizabeth area, the *Silver segment* triathletes stayed most nights (5.69 nights), followed by the *Bronze segment* triathletes (5.53 nights), while the *Gold segment* stayed for the shortest period of time with an average of 4.43 nights.
- **Expenditure in total:** Although no significant differences were evident, the different triathlete groups exceeded the average expenditure as it ranged from R31 325 (*Bronze segment*) to R17 526 (*Platinum segment*). It is thus clear that the *Bronze segment* had spent the largest amount of money during the Ironman South Africa event in 2013, followed by the *Gold*, *Silver* and then lastly the *Platinum segment*.

- **Expenditure per person:** No statistical differences were found for expenditure per person, although effect sizes confirmed a small difference between the *bronze* and the *platinum segment*. The average spending per participant proved to be very high. Results confirmed that the *Bronze segment* participants showed the highest spending average (R22620.80), followed by the *Silver segment* (R16814.86) and then the *Gold segment* (R16414.23). The *Platinum segment* triathletes showed the lowest average on expenditure per person (R15375.74).
- **Previous times participated in Ironman South Africa:** Insignificant differences ($p=0.000$) were found in the number of times participants took part in Ironman South Africa. Effect sizes proved noteworthy differences between all four of the participant groups. On average the *Platinum segment* participants had previously competed in an average of 5.93 races, followed by the *Gold segment* triathletes with an average of 2.36 former events. The *Silver segment participants* had competed in only one preceding race while the *Bronze segment* participants had not yet participated in a race before, thus 2013 Ironman was their first Ironman event.
- **Ironman South Africa, previous times finished:** Both statistical ($p=0.000$) and effect sizes confirmed significant differences between the various triathlete groups for the number of times participants finished an Ironman South Africa race. The *Platinum segment* triathletes had finished the most races with an average of 5.39 times and differed radically from all three the other groups. The *Gold segment* finished on average 1.85 races followed by the *Silver segment* that completed the race 0.60 times (the average proved less than one race, as not all triathletes from the *Silver segment* could finish their first Ironman South African race). The 2013 event was the first Ironman South Africa triathlon for the *Bronze segment*.
- **Ironman International previous times finished:** There were no significant statistical differences for the number of times triathletes had finished International Ironman triathlons. However, effect sizes showed small differences between the *Bronze* (1.33 times) and *Silver segments* (2.40 times). The *Silver segment* triathletes finished the most international Ironman events, more than the *Gold* (1.14 times) and the *Platinum segment* triathletes (1.49 times).
- **Number of triathlon events per year:** The four triathlete groups participated on average in at least three triathlon events. The *Silver segment* participated in the most triathlon events (an average of 5.50) per year, followed by the *Gold segment* (on average 5.43), the *Bronze segment* (4.06) and then the *Platinum segment* with the least triathlon event participation during 2013.

- **Number of cycling events per year:** There were no significant differences between the triathlete groups, although on average the triathletes participated in three cycling events throughout the year. The *Gold segment* participated in the most cycling events with an average of 3.87 races.
- **Number of running events per year:** All four triathlete groups showed to have participated mostly in running events compared to the other two disciplines a triathlon includes. On average the triathletes competed in at least five running events per year. In addition, effect sizes confirmed a small difference between the *Bronze segment* and *Gold segment*. Moreover, the *Bronze segment* also competed in cycling events (average 5.46) and the *Gold segment* participated in roughly two more running events (7.44).
- **Number of swimming events per year:** No triathlete group participated in many swimming galas through the year (on average one gala per year). There were also no significant statistical differences, but effect sizes reported a small difference between the *Bronze* and the *Platinum segment*. The *Bronze segment* had an average partaking in at least 0.93 galas while the maximum participation was from the *Platinum segment* (1.29 swimming galas per year).
- **Motives to participate:** Only one motive proved statistical significant differences between the participant groups namely *Event novelty*. The *Bronze segment* differed significantly from the *Silver*, *Gold* and *Platinum segments*, while the *Platinum segment* also differed from the *Silver* and *Gold segments*. Event novelty was a very important motive for the *Platinum segment* triathletes (3.99) and less important for triathletes from the *Bronze segment* (3.27). The other six motives showed no statistically significant differences between the four participant groups. However, based on effect sizes, small differences were found with *Inner Vie* where *Platinum segment* triathletes regarded it as a more important motive (3.93) compared to triathletes from the *Bronze segment* (3.71). *Health and fitness* also illustrated minor effect size differences. The *Bronze segment* differed from the other triathlete segments and viewed *Health and fitness* (3.59) as a less important motive for partaking in Ironman South Africa. Investigation of the mean values and the results obtained from the factor analysis proved that all four segments considered *Challenge* as the most important motive to participate in Ironman South Africa. Triathletes from the *Bronze segment* indicated *Inner Vie* and *Intrinsic achievement and control* as the most important motives to participate in Ironman South Africa, while the *Silver*, *Gold* and *Platinum segments* considered *Inner Vie* and *Health and Fitness* to be more important motives for participation in the event.

5.4.4 Cross tabulations and Chi-square test results

According to Table 5.4, there were statistically significant differences between *Bronze*, *Silver*, *Gold* and *Platinum segments* at Ironman South Africa 2013 based on home language ($p=0.031$), province ($p=0.001$), marital status ($p=0.037$), primarily being a runner ($p=0.006$), other tourist attractions visited ($p=0.000$), the web as an information source ($p=0.012$) and club ($p=0.037$). These differences are discussed below.

- **Gender:** In all four triathlete groups the male participants were more than the female participants, especially in the *Platinum segment* (Male=92%; Female=8%)
- **Home language:** All four participant groups were mostly English speaking, although a large percentage of the *Bronze* (18%) and *Silver segments* (18%) spoke foreign languages. Most triathletes from the *Platinum segment* (36%) spoke Afrikaans.
- **Province of origin:** The majority of the *Bronze segment* triathletes (37%) originated from overseas, while the *Silver* (42%) and *Gold segments* (39%) came from the Gauteng province. Most triathletes from the *Platinum segment* originated from the Western Cape (31%) and Gauteng (35%). In all four the triathlete groups there were substantial percentages of overseas participants. However, a variety of participants derived from across the country to participate in Ironman South Africa 2013.
- **Marital status:** Most triathletes from all the groups were married, while it is evident that the *Bronze segment* (26%) and the *Silver segment* (21%) showed a notable percentage of single triathletes. The *Platinum segment* had the most divorced triathletes (9%).
- **Level of education:** All four groups showed a high level of education and were mostly in professional occupations or held a diploma, degree or post-graduate qualification. All respondents had a matric certificate.
- **Primary discipline:** All four participant groups indicated that they were not primarily swim athletes, although the triathletes from the *Bronze segment* indicated that they were uncertain which discipline represented their best performance activity. The *Silver* and *Gold* groups indicated that they were mostly cyclists (58% and 49% respectively) and runners (54% and 57% respectively). More than half of the triathletes in the *Platinum segment* (58%) confirmed that their vast experience in triathlons prepared them to be first and foremost runners.
- **Age categories participated in:** The age categories mostly represented in the *Bronze segment* were 30 to 34 years, 35-39 years and 40-44 years. (26%=30-34; 15%=35-39 and 19%=40-44). Triathletes in the *Silver segment* mostly entered for the

age groups 30 to 49 years. (20%=30-34; 18%=35-39; 14%=40-44 and 13%=45-49), while most of the triathletes in the *Gold segment* entered for the age groups 25 to 44 years (11%=25-29; 12%=30-34; 21%=35-39 and 18%=40-44). The triathletes from the *Platinum segment* represented most of the age groups (14%=30-34; 12%=35-39; 20%=40-44; 22%=45-49; 7%=50-54 and 7%=55-59). The most professional triathletes were part of the *Bronze* and *Silver segments* (2% and 3% respectively).

- **Other tourist attractions visited:** It is evident that the *Bronze* and *Silver segments* were more likely to visit tourist attractions (50% and 40% respectively). This corresponded with the fact that a great proportion of athletes from the two groups visited from overseas. On the other hand, the *Gold* and *Platinum segments* were nationals and thus less likely to visit tourist attractions.
- **Information sources:** The majority of triathletes from all four participant groups heard about Ironman South Africa through word-of-mouth recommendations. Significantly more *Bronze* and *Silver segment* participants heard about the event using websites (29% and 26% respectively) and information gained from affiliated triathlon clubs (12% and 9% respectively). Magazines and television proved to be more popular information sources for triathletes from all four segments, while radio and email were not important information sources for these groups.

Table 5.4 Chi-square test results of visitor characteristics between first time and repeat participants

CHARACTERISTICS	FREQUENCY OF PARTICIPATION				CHI SQUARE VALUE	DF	SIG. LEVEL	PHI-VALUE
	0: Bronze segment	1 :Silver segment	2: Gold segment	3: Platinum segment				
Gender					6.020	3	0.111	0.132
Male	78%	78%	77%	92%				
Female	22%	22%	23%	8%				
Home language					13.901	6	0.031*	0.201
Afrikaans	27%	25%	27%	36%				
English	55%	57%	63%	65%				
Other (foreign)	18%	18%	11%	0%				
Province					54.193	27	0.001*	0.403
Eastern Cape	13%	15%	14%	10%				
Gauteng	33%	42%	39%	35%				
Kwazulu-Natal	3%	5%	4%	5%				
Free State	2%	1%	0%	5%				
Western Cape	10%	5%	13%	31%				
Mpumalanga	0%	1%	4%	0%				
Northern Cape	0%	1%	0%	0%				
North West	2%	1%	1%	0%				
Limpopo	0%	0%	3%	3%				
Outside RSA borders	37%	27%	22%	10%				
Marital status					26.105	15	0.037*	0.275
Married	51%	64%	49%	66%				
Not married	26%	21%	23%	17%				
In a relationship	15%	6%	15%	3%				
Divorced	8%	6%	6%	9%				
Widow/er	0%	1%	0%	2%				
Living together	0%	1%	7%	3%				

Level of education					7.697	12	0.808	0.150
No school	-	-	-	-				
Matric	11%	5%	13%	14%				
Diploma/degree	37%	41%	36%	29%				
Post-graduate	20%	26%	24%	24%				
Professional	31%	27%	27%	32%				
Other	9%	1%	0%	2%				
Primarily a:								
Swimmer	Yes=24%;No= 76%	Yes=21%;No= 79%	Yes=14%;No= 86%	Yes=20%;No= 80%	2.836	3	0.418	0.91
Cyclist	Yes=44%;No= 56%	Yes= 58% ;No=42%	Yes= 49% ;No=51%	Yes=37%;No= 63%	2.686	3	0.443	0.88
Runner	Yes=36%;No= 64%	Yes= 54% ;No=46%	Yes= 57% ;No=43%	Yes= 58% ;No=42%	12.283	3	0.006*	0.189
Age Category(ies) participated in					47.334	36	0.098	0.371
Did not indicate	15%	16%	11%	14%				
18-24	2%	3%	1%	0%				
25-29	8%	6%	11%	0%				
30-34	26%	20%	12%	14%				
35-39	15%	18%	21%	12%				
40-44	19%	14%	18%	20%				
45-49	6%	13%	6%	22%				
50-54	4%	3%	4%	7%				
55-59	3%	3%	3%	7%				
60-64	0%	0%	0%	3%				
65-69	0%	1%	0%	0%				
70-74	0%	0%	0%	2%				
PRO	2%	3%	1%	0%				
Other tourist attractions visited?					20.395	3	0.000*	0.252
Yes	50%	40%	26%	18%				
No	50%	60%	74%	82%				

Information sources								
Television	Yes=16%;No=84%	Yes=15%;No=85%	Yes=22%;No=78%	Yes=14%;No=86%	2.284	3	0.516	0.085
Radio	Yes=6%;No= 94%	Yes=5%;No= 95%	Yes=1%;No= 99%	Yes=0%;No=100%	5.454	3	0.141	0.129
Website	Yes= 29% ;No=71%	Yes= 26% ;No=74%	Yes=14%;No=85%	Yes=10%;No=90%	10.997	3	0.012*	0.183
E-mail	Yes=7%;No=93%	Yes=2%;No=98%	Yes=5%;No=95%	Yes=1%;No=99%	3.396	3	0.334	0.101
Magazines	Yes=17%;No=83%	Yes=14%;No=86%	Yes=17%;No=83%	Yes=21%;No=79%	1.207	3	0.751	0.060
Word-of-mouth	Yes= 51% ;No=49%	Yes= 41% ;No=59%	Yes= 48% ;No=52%	Yes= 57% ;No=43%	3.647	3	0.302	0.105
Club	Yes= 12% ;No=88%	Yes= 9% ;No=91%	Yes=5%;No=95%	Yes=0%;No=100%	8.487	3	0.037*	0.160

* indicates significance at the 5% level

Phi-value: **small effect = 0.1; ***medium effect=0.3 and ****large effect=0.5

5.5 Findings and Implications

The research presented clear and significant differences between first time and repeat triathletes competing in the Ironman South Africa event when considering their demographic profile, their behaviour and motives to participate. This supports the notion by Saayman and Kruger (2013) that sport participants cannot be regarded as a homogenous target group. Furthermore, the results confirmed that most differences were based on triathletes' different behavioural patterns.

The research also included results that are not available in current sport literature, namely that according to *group size*, it is evident that repeat participants travel in larger groups than first time participants. The rationale could possibly be that repeat participants are mostly locals and familiar with attractions. This could also be the basis for repeat participants showing lower *expenditure* compared to first time participants being mostly foreigners (Saayman & Kruger, 2013). However, this study proved that repeat participants do not visit *tourist attraction* in the event area which contradicts the findings of Saayman and Kruger (2013). An interesting result was that first time participants were *exposed* to triathlons at an earlier age (average age of 28.95 years) which contradicts the results of Tribe Group (2009) who found that triathletes started their participation in triathlons at an older age. Results also showed that first time participants used websites, word-of-mouth recommendations and club affiliation as *information sources*, while repeat participants relied on word-of-mouth recommendations, magazines and television advertisements. These findings are consistent with Tribe Group (2009) as well as Saayman and Kruger (2013) although the influence of club affiliation as a marketing medium was not previously surveyed in sport participant research. The high reliance on word-of-mouth recommendations can be associated with the club affiliation of the participants. Consequently, triathletes that form part of a club inform and encourage each other to participate in triathlons. *Event novelty* was identified as a unique motive in this research. In addition, results confirmed that first time participants were mostly motivated by *Challenge*, *Inner vie* and *Intrinsic achievement and control*, whereas repeat participants viewed *Event novelty*, *Challenge*, *Inner vie* and *Health and fitness* as the most important motives to participate in Ironman South Africa (Ogles & Masters, 2003; Lovett; 2011; Saayman & Kruger, 2013). In terms of socio-demographic variables, two aspects showed significant differences namely *age* and *gender*. First time participants were younger (30-34 years) compared to repeat participants (45-49 years) which corresponds with results of Gitelson and Crompton (1984), Lau and McKercher (2004) and Li *et al.* (2008). Both groups were mostly made up by male participants although there were less female repeat participants than first time female participants. This is consistent

with the findings of Case and Branch (2001); Chang and Johnson (1995); Clingman and Hilliard (1987); Tribe Group (2009); Devine *et al.* (2010) and Martin and Pancoska (2010).

Another important finding was the identification of four distinct segments namely *Bronze* (participants had not yet participated in any Ironman South Africa event), *Silver* (participants returned to the event, had participated once before), *Gold* (participants had taken part in two to three Ironman South Africa events) and *Platinum* (athletes took part in at least four events before). The identification of such segments had not been done through previous studies. It is important that event organisers realise that both first time and repeat triathletes are viable markets and should be targeted through marketing, though in different ways (Harisson-Hill and Chalip, 2006:303, Saayman and Kruger, 2013:1; Kruger *et al.* 2010:83). Marketers should consider loyalty programmes where each triathlete is classified in a group according to his/her past participation experience. For example, first time participants receive a bronze card that gives them certain benefits and distinguish them from other triathletes. Thus, the more an athlete participates in triathlon events, the quicker he/she can advance to another level (colour) presenting them with more benefits. For the purpose of the implications, the first two segments (*Bronze* and *Silver*) were combined as they share similar characteristics and form the first time participant category. The *Gold* and *Platinum segments* were combined to form the repeat participant category. Based on the results and findings, event organisers should follow a three-fold marketing strategy, with the first two strategies based on the event itself (that is attracting both first time and repeat participants). A third marketing strategy should aim to increase participation in triathlons in South Africa and expand the sport in general.

The first marketing strategy should be created for the *Bronze segment* as well as the *Silver* segment. The marketing message should focus on participants' motives to participate, but especially on *Challenge, Intrinsic achievement and control* and *Inner vie*. These triathletes have just started participating in Ironman South Africa, thus it is important for them to experience a sense of achievement, push themselves to further achievement, improve their self-esteem and challenge their body and mind. These marketing messages should firstly be distributed at International Ironman events, but also to international triathlons to attract more athletes. As this segment had the highest spending, but travelled in smaller groups, they must be encouraged to increase their expenditure and travel in larger groups. The Ironman Expo is an ideal event to increase expenditure as it exposes first time triathletes (who are not yet professional triathletes) to the top of the range triathlon equipment and products. Therefore, more marketing emphasis should be placed on the expo and the variety of products on offer. Tourism organisations in the area could also collaborate with sport event organisers to create packages that allow the

triathletes to visit main attractions in the area as most of the participants are international guests and could lead to a longer stay and greater spending in South Africa.

The second marketing strategy should be created for the *Gold* and *Platinum* segments. These are the loyal participants at Ironman South Africa and therefore need to be influenced to return to the event each year. For these participants *Event novelty* is a very important motive to participate, thus the event itself is an important attraction. These participants take part in Ironman South Africa each year and therefore the way in which it is organised has an important effect on the athletes' decision making process. Thus, the event must improve and offer something unique each year. Ironman South Africa's marketing messages must highlight the uniqueness of the event. This could include the international nature of the event, the scenic surroundings, that the premier endurance factor will make the continuous participation a challenging and rewarding experience. Seeing that experience influences the type of event and number of events these triathletes choose to participate in, marketing messages should be distributed at other sporting events. Triathletes should be informed that experience and age can contribute to better performance and drive. The repeat triathletes travel in larger groups, but spend less money during the event, thus marketers should develop packages that involve the whole group (spouse, children and friends) as it will increase expenditure and influence participants to return to the event each year. Marketing messages should be channelled to other provinces in South Africa to expand participation from all the provinces.

The third marketing strategy should focus on expanding the Ironman brand in South Africa. There are only a limited number of triathlons hosted in the country. The main goal of sport organisers should be to make triathlons accessible to all people of South Africa irrespective of ability, gender, race or geographic location. Furthermore, it should be marketed as a recreation and professional performance event. The message to convey should be that completing an Ironman event is to complete an ultimate endurance challenge. Marketing should be channelled to all the provinces, at sport clubs, schools and even at sport manufacturers. It is furthermore important that marketing messages should emphasise the benefits of entering from a young age, enabling the participant to be part of this event for many years. Marketing messages should be drafted to engage athletes from all ages. Furthermore, South Africa has the ideal climate, terrain and infrastructure to present a world class destination for endurance sport and the Ironman brand could therefore be extended to other coastal cities. This could increase the number of Ironman and half-Ironman events in South Africa each year. Non-coastal triathlons such as 5150 Bela-Bela triathlon, North West triathlon championships and Ekurhuleni 5051 African Championships should also be marketed as the ideal preparation for the Ironman event. Ironman South Africa should also collaborate with other cycling, running and swimming events

in order to motivate participants in those events that it provide excellent preparation that will lead to a peak performance during the Ironman event.

Finally, the results of this survey contradicts Frimmel's theory (2012) that past experience influences a participant's knowledge of an event and therefore better prepare the participant for the next event. This research also opposes the theories of Tribe Group (2009) and Villaroel *et al.*, (2011) where they conclude that a participant with more experience in a sport event will show an increased desire to continue participation in the future. Results showed that first time participants did not take part as much in the individual discipline events (swimming, running and cycling) that comprise a triathlon. First time participants seemed to be in the peak of their triathlon experience, thus they focus less on participating in individual endurance sports, but rather on a large number of triathlon events to advance as a triathlete. First time triathletes see all three disciplines as important and do not prefer one discipline over another. These triathletes are in peak physical condition and do not participate just to finish, but rather to improve their event time. This is also evident in the number of professionals that is in the *Bronze* and *Silver* segments. Repeat triathletes on the other hand are more likely to come from South Africa and as the numbers of national triathlon events are limited, they participate more in other individual endurance events like cycling. Repeat triathletes, due to their past experience, know in which discipline they perform best namely running, cycling or swimming. Thus, triathlon participants, due to the extreme physical and mental preparation to participate, peak in the beginning of their career at a younger age. This is due to the fact that although experience has an influence, first time participants still have to adapt their lifestyle, training and mental preparation to be able to participate in an Ironman event. The uniqueness of triathletes is also evident in their motives to participate, which includes *challenge* and *health and fitness*. These motives were not apparent in endurance sport literature, which emphasises that further research is needed on Ironman South Africa and such types of endurance sport events to understand the unique mind-set of these sport participants.

5.6 Conclusion

This research aimed to segment participants and spectators at the only Ironman triathlon event on the African continent, namely Spec-savers Ironman South Africa. The research was based on the frequency of participation to distinguish between the profile of first time and repeat participants. This research made key contributions namely that segmentation based on frequency of participation is a useful tool to categorise participants in a meaningful manner, as endurance athletes cannot be regarded as a homogenous target group. Secondly, the results revealed unique attributes that have not been found in previous studies, especially when focusing on the motives and behavioural patterns of participants. In the third place, four distinct

clusters namely *Bronze*, *Silver*, *Gold* and *Platinum segments* were identified. Each of these clusters demonstrated different characteristics and therefore a three-fold marketing strategy was designed (combining the first two segments for the first strategy, the last two segments for the second strategy and all the segments to form a strategy to increase triathlon participation in general). Fourthly, loyalty programmes and cards were successfully introduced as a marketing tool. This loyalty programme should be used as a retention tool for first time endurance sport participants. Furthermore, the study challenged existing sport theories in its finding that although experience has an influence on different aspects of participation it has a lesser influence on triathletes because they need to be in peak physical and mental condition to compete in an Ironman event. This emphasises the unique nature of the triathlete. Lastly, the research contributes to existing sport literature, as it is the first research done in South Africa on triathlons to understand the unique characteristics of triathletes. The research also contributes to endurance sport literature in general as there is a lack of research in this field. These contributions emphasise that understanding endurance sport participants will help to spread out the sport in South Africa and contribute to make South Africa a premier endurance sport destination. It is therefore recommended that future research should investigate the career ladder of professional triathletes, the difference in gender preferences and how the uniqueness of triathletes differs from other endurance sport participants.



CHAPTER 6:

CONCLUSIONS AND RECOMMENDATIONS

"You don't play triathlon. You play soccer; it's fun. You play baseball. Triathlon is work that can leave you crumpled in a heap, puking by the roadside. It's the physical brutality of climbing Mount Everest without the great view from the top of the world. What kind of person keeps coming back for more of that? – Chris McCormack, two-time IRONMAN World Champion.

6.1 Introduction

The aim of this study was to segment triathletes participating in Ironman South Africa. To achieve this goal, the objectives summarised below, were set in Chapter 1 and achieved in their respective chapters.

The first objective was to give a comprehensive overview of triathlons and triathletes. This objective was then divided into two sub objectives. Sub objective 1.1 was to review the unique nature and background of triathlons by focusing on Ironman triathlons, especially Ironman South Africa. This was achieved in Chapter 2 of the study. The research clearly indicated that a triathlon is a distinctive endurance sport with specific characteristics that attract a certain type of athlete. Triathlons have also become very popular around the world making Ironman South Africa a distinct challenge, seeing that it is the only Ironman event held on the African continent.

Sub objective 1.2 was to examine triathletes in terms of their profile, behaviour, motives and unique nature as well as to compare these endurance athletes with other endurance athletes. This sub objective was also achieved in Chapter 2. Sport theories relevant to participation in endurance sports such as triathlons were examined. The literature analysis confirmed that individual triathletes differ from one another as well as from other endurance athletes in terms of demographics, behaviour and motives to participate.

The second objective was to conduct an extensive analysis of market segmentation and the way in which it is applied in an endurance sport context. This goal was achieved in Chapter 3 and the literature analysis clearly indicated a variety of variables that can be considered for segmentation in an endurance sport context. Each of these variables have specific

implications for an event, some of which is more useful than others. The effectiveness of a variable is dependent on the purpose and context of the segmentation. Consequently a sport event marketer should attempt different segmentation variables, in combination or alone, to determine the segmentation technique that leads to segments that are profitable for that specific sport event.

The third objective was to segment participants at the Ironman South Africa event based on their motives to participate. This goal was achieved in Chapter 4 (Article 1). The empirical analysis clearly indicated that there are seven motives that inspire triathletes to participate in triathlons. These motives are similar to previous studies, although the combination and importance of each motive was different and unique to this study. These unique motives assisted to segment the Ironman South Africa participants into three distinct clusters, each a viable market to target for future events.

The fourth objective was to segment participants of the Ironman South Africa event based on the frequency of participation and to distinguish between first time and repeat participants. This objective was achieved in Chapter 5 (Article 2). The empirical analysis revealed that there are significant differences between first time and repeat triathletes that compete in Ironman South Africa. These differences, based on triathletes' demographic profile, behaviour and motives to participate, has led to four distinct segments. These segments, together with expanding triathlons in South Africa, resulted in three marketing strategies each aimed to reach a certain market.

The fifth and final objective was to draw conclusions and make recommendations concerning the variables/approaches applied in this study to design the optimum segmentation approach for triathletes in South Africa. This chapter concludes the findings of the research and applies the research results from Chapters 4 and 5 to design the criteria for effective market segmentation in a triathlon context. It also presents recommendations for future triathlon events and further research.

6.2 Conclusions

Next follows the conclusions regarding the literature review and the surveys, as reported in Chapters 2, 3, 4 and 5.

6.2.1 Conclusions concerning the literature review

The next section summarises the main conclusions made in the foregoing chapters. Each part relevant to a certain topic is divided in two different sections.

Triathlons

- Triathlons are endurance multi-sport events that comprise of swimming, cycling and running (c.f. 2.1).
- The sport began at the San Diego Track Club in 1974 and roots back to Mission Bay, Southern California. A group of friends began to train in a group. Amongst them were runners, swimmers and cyclists and soon their training turned into informal races (c.f. 2.1).
- The demand to host triathlon events has risen considerably over the last five years. This popularity is apparent in the increased club membership, triathlon events that are being sold out at a very fast pace and the increased number of full-year triathlon licenses being sold in especially countries such as Germany, New Zealand, The United States, Australia and Japan. The increased media attention that triathlons receive, especially on television and in triathlon magazines, also indicate a steady growth in popularity of this sport (c.f. 2.1).
- Due to the rapid progression of triathlons throughout the world, triathlons have received increased attention in academic literature, although most of the studies focus on performance, physiology and medical aspects of triathlons (c.f. 2.1).
- It is clear that the triathlon market is very competitive and in order for this sport to continue its expansion, more research is required that recognises and meets the unique needs of the triathlon participant (c.f. 2.1).

The unique nature of triathlons

- A triathlon is a lifestyle sport as training is necessary in order to improve fitness and skill in the three different disciplines of swimming, cycling and running. Therefore ongoing participation in triathlon events will consume significant personal resources. Thus, a triathlon can have a dominant influence on how a triathlete and his family live their lives (c.f. 2.10).
- Triathletes can start at any age; it requires no sporting background and gives individuals with different abilities the opportunity to participate with other triathletes on the same race course. Triathlons help athletes overcome fears and give an individual the chance to take a risk, control their mental and physical actions and take credit of completing a triathlon (c.f. 2.2).

- There is a variety of aspects that contribute to the exclusivity of triathlons that include (c.f. 2.2):
 - The range of formats allows progression in the sport, an athlete can therefore move freely and easily from other sport disciplines;
 - There are different durations of triathlons (short to long distances);
 - Differences regarding course difficulty (different terrains and weather conditions);
 - The completion of a triathlon leads to an element of prestige; and
 - Although there are a limited number of triathlon events, the already established triathlons take place in a variety of event destinations around the world. This requires that triathletes have to travel between different events in order to compete regularly.
- Depending on the distance of the event, triathlons can range from one to 17 hours to complete. Currently, a triathlon race is standardised as a sequence that begins with swimming, followed by cycling and finishes with running (c.f. 2.3).
- There are different distances for triathlons including sprint, Olympic, long/half Ironman 70.3, Ironman and Ultra-Ironman. More recently off-road triathlons (the addition of mountain biking) has also been introduced (c.f. 2.3).

Ironman triathlons

- The Ironman distance (3.8km swim, 180km cycle and 42.2km run) is the most popular long distance triathlon. Since the event began, participation has increased and today thousands of triathletes compete in about 28 Ironman races all over the world (c.f. 2.3).
- Ironman South Africa is the only full-distance triathlon held on the African continent. The event takes place each April in Nelson Mandela Bay, Port Elizabeth where 50 nations are represented by approximately 1800 triathletes who compete in the race (c.f. 2.4).
- It is clear that triathlons are a unique endurance sport, which is growing in popularity. Therefore an event organiser such as the Ironman South Africa's organiser, should obtain knowledge regarding the participants' needs and decision-making processes to ensure a sustainable and competitive event (c.f. 2.5).

Triathlon participants' demographic profile, behaviour and motives to participate

- When analysing previous literature, the demographic profile of a typical triathlete comprise well-educated males in their late thirties to early forties that originate from countries around the world, thus they will travel long distances in order to compete. These athletes have a high average household income that leads to very high spending on triathlons and triathlon related products. Most triathletes are married with children or in a committed relationship. These athletes travel in groups of three people and will stay an average of seven nights at the event destination (c.f. 2.6).
- Although the demographic profile gives an idea of the characteristics of a triathlete, it is also important to consider the behaviour of these participants. Previous studies show that triathletes have high average years of previous participation, follows a strict training programme which involves long hours of training during the week and also a specific diet. Triathletes do not often exercise with a coach, but rather form part of a triathlon club. Besides participating in triathlons, triathletes spend their leisure time with friends and family or participate in other sports, especially marathon running. Most triathletes read magazines to acquire information regarding triathlons and normally select an event according to the proximity of this event to the triathletes' hometown (c.f. 2.6).
- Apart from triathletes' demographic profile and behaviour it also is important to review the factors that motivate these triathletes to participate in events. Previous literature indicates that triathletes participate mostly for the challenge of the event as well as to improve their self-esteem by getting into shape and living a healthy lifestyle (c.f. 2.6).
- Previous literature also confirms that triathletes' profile, behaviour and motives are applied to divide them into different segments with unique characteristics (c.f. 2.10).

Comparison between triathletes and other endurance athletes

- When comparing triathletes to swimmers, cyclists and marathon runners (competing in South African events) the following key differences were found: triathletes are on average older, travel longer distances (more international participants) and have a much higher spending when compared with other endurance athletes. When considering their motives to compete, triathletes were less motivated by *Socialisation and escape* or *Relaxation*, while corresponding motives were *Personal motivation* and *Intrinsic achievement. Challenge*, which is one of the most important motives for triathletes, was not found in any other endurance literature (c.f. 2.7).

- The characteristics of marathon participants show the most similarity with those of triathletes when compared with swimmers and cyclists (c.f. 2.7).
- Interestingly, the comparison of triathletes' characteristics to other endurance sport athletes that do not participate in either one of the three triathlon individual disciplines reveals that mountain bikers share more similarities with triathletes in comparison with the swimmers, cyclists and runners (c.f. 2.8).

Unique characteristics of triathletes

- Subsequently, knowing how triathletes differ from other endurance athletes is just the beginning of understanding the uniqueness of these athletes. Other characteristics include (c.f. 2.10):
 - Training and competing in a triathlon leads to a “compromised social life” due to the great deal of personal commitment;
 - Consistent training in order to improve skill and fitness as well as competing in an event consume significant personal resources;
 - Being a triathlete also involves substantial amounts of physical and psychological stress over several hours of continuous activity;
 - Triathletes are devoted to the sport which is evident in their high spending behaviour despite the economic climate;
 - The more triathletes participate in triathlon events (i.e. repeating their participation each year), the more their participation and desire to participate in the most challenging triathlon events increase. Thus, participants remain engaged in the sport over a long period of time;
 - Triathlons are popular under “mature adults” as evident in the high average age of triathletes; and
 - Triathletes can be identified by three key characteristics: confidence, dedication and vigour.
- Only a few sport theories support and describe these unique triathlete features, namely serious leisure theory, event travel career theory, self-determination theory and the flow theory (c.f. 2.11).

The need for market segmentation in triathlons

- Looking at the unique nature of triathlons and the participants it attracts, it becomes important to apply market segmentation as it allows marketers to target the right group of participants, thus attracting more triathletes to the sport as well as retaining the current participants (c.f. 3.1).

- Acknowledging that every sport participant is diverse and that the sport tourism industry cannot cater for each individual sport participant separately, forms the foundation for market segmentation (c.f. 3.1).

Market segmentation and the benefits associated with it

- Market segmentation can be defined as: “the process of splitting customers (participants) in a market into different groups or segments, within which customers (participants) share a similar level of interest in the same, or comparable, set of needs satisfied by a distinct marketing proposition” (c.f. 3.2).
- When an organisation or event applies market segmentation to their market, it can lead to the following general benefits (c.f. 3.2):
 - Clear definition of the consumer (participant);
 - Better understanding of the market and factors that motivate the individuals within market;
 - The ability to respond to the market’s changing needs;
 - The identification of niche markets;
 - Assessing and monitoring the position(s) of competitor(s);
 - Increasing cost effectiveness of marketing;
 - The identification of innovative marketing ideas;
 - Developing a sustainable product, that meets consumers’ needs; and
 - Positioning the product according to the identified needs.
- These benefits highlight that market segmentation is at the heart of marketing and that individuals in a market are not homogenous, therefore no single marketing offering will satisfy all individuals that participate in a sport event (c.f. 3.2).
- Seeing that sport participants are so complex and participate for different reasons, it becomes essential to research sport participant market segments in an attempt to understand these segments and improve the participants’ event experience. A positive experience will induce participants to become loyal to the event through maintaining their level of involvement (c.f. 3.3).

The market segmentation process

- It is vital to analyse the market segmentation process and its application to sport events (c.f. 3.3).
- Previous literature has led to the development of the market segmentation process which exists of eight steps, namely (c.f. 3.4):
 - Step 1: Identify the total market.

- Step 2: Determine the need for segmentation.
- Step 3: Determine/apply variables for segmentation.
- Step 4: Profile each selected segment.
- Step 5: Managerial assessment of the usefulness of the market segments.
- Step 6: Select the target market.
- Step 7: Designing an appropriate marketing strategy.
- Step 8: Positioning process.
- Segmentation variables need to perform to critical functions in the market segmentation process: firstly the variables must be used to divide the market in different groups and secondly the variables help to describe and profile the segments (c.f. 3.4).

Segmentation variables used in previous studies and the current study

- Although segmentation studies have been based on an array of consumer characteristics such as personality characteristics, spending, seasonality and motives to participate, both tourism and marketing literature distinguish four groups that include geographic, demographic, psychographic and behavioural variables (c.f. 3.4).
- Previous sport studies done in South Africa used frequency of participation, motives to participate and spending determinants in combination with demographic, geographic and behavioural characteristics to segment sport participants (c.f. 3.6).
- The first variable used in this study was motives to participate by clustering participants according to their different motives to participate in Ironman South Africa. Previous literature showed that triathlon participants are diverse and thus different factors motivated them. This is an important segmentation variable as it gives insight into the mind-set of the participants as well as an understanding of participants' decision-making process which can lead to participant-orientated marketing plans (c.f. 4.1).
- The second variable that was applied includes frequency of participation to compare first versus repeat triathletes. Participants were divided according to their previous year of participation in Ironman South Africa. Thereafter different analyses were completed in order to identify the differences between these two groups. This is an important variable to apply as first time and repeat sport participants can form two different market segments. Sport event organisers should not only achieve a balance between first time and repeat participants, but should also be aware of the attributes that differentiate the participants (c.f. 5.1).

- The two different segmentation variables applied in this study is significant, because event organisers realise that market segmentation could lead to an array of benefits for their sport event, which include (c.f.3.7):
 - The sport event can gain a competitive advantage, because the event is focusing on smaller homogenous participant markets;
 - The sport event can focus on improving the event experience, rather than wasting money on providing everything to all participants at a higher cost;
 - Marketing is focused on providing the most suitable marketing messages, through the appropriate communication channels to reach the targeted markets, leading to effective use of resources;
 - Market segmentation will help an event identify its position and demand as perceived by current and potential participants;
 - A long-term relationship can be formed with a specific participant group;
 - Recognising differences in the market will lead to closer matching the potential and actual sport participant's needs with the events offering;
 - Market segmentation can lead to niche marketing where the sport event meets the needs to a specific niche market for example Ironman events;
 - An event can position itself as a specialist in the chosen segments, giving the event an advantage over competing events;
 - Understanding the market will result in the development of a marketing mix that is tailored according to the market's expectations;
 - Recognising your target market will help identify competing events in the market and give a sport event the opportunity to develop a responsive competitive strategy;
 - Segmentation leads to using resources to advance competitive advantage and offer the highest return on investment; and
 - Defining a participant target market will help in identifying opportunities that have not previously been recognised.
- The different benefits of market segmentation are well documented, but tourism entities, destinations and (sport) events struggle to implement market segmentation.
- Therefore the segmentation process and the variables chosen need to be evaluated and implemented correctly (c.f. 3.7).

6.2.2 Conclusions from the surveys

The next section applies the market segmentation process, as discussed in Chapter 3, to the Ironman South Africa event.

Step 1: Identify the total market

The first step was to identify and define the total market, including potential participants to participate in future events. The current information regarding the existing Ironman South Africa market and what is known about the participants were determined. To know the total market, the market size of Ironman South Africa (how many triathletes participate each year and if the event is expanding), the participants (the most important part of the process, identifying what is currently known about the existing participants) as well as other segments (identified if there are any existing segments which the event specifically targets) need to be identified. There is a variety of ways in which this information can be obtained including registration details (mostly demographic information such as the participant's age, gender, and the current year of participation, nationality and other Ironman events they participate in). Other ways to gather information are analysing the members of triathlon clubs, considering triathlon magazine subscription details and other triathlon event registration details. The internet is also an information source that could present information on triathletes from bloggers, triathlon training and lifestyle sites as well as the events on Ironman South Africa's website. These sources gave an impression of potential participants and provided information that verified if an athlete has previously taken part in Ironman South Africa. These information sources also assisted in identifying new trends and gaining data on triathletes' expectation from an event. However, limited information was available on who the participants are (only certain demographic information available) and no information on why the participants participate in the Ironman event. There was also no information available that could differentiate Ironman South Africa participants from other endurance participants. Therefore it is clear that there inadequate details on triathletes are available specifically regarding the current Ironman South Africa market, because it is viewed as an uniform or homogenous group (as no differences were identified or market segments formed). Consequently market segmentation is a vital part of marketing and therefore of Ironman South Africa marketers are advised to implement it for successful and sustainable marketing efforts.

Step 2: Determine the need for segmentation

It is clear from Step 1 that segmentation for Ironman South Africa is necessary as event organisers currently lack information regarding the participants and their needs. Therefore

Ironman South Africa organisers and marketers should measure segmentation against the following criteria:

Heterogeneous: As seen in previous endurance sport literature it is clear that sport participants are not homogenous and that participants differ from event to event, different lengths and forms of a sport, according to the level of experience and with regards to gender. Market segmentation is vital for triathlons as according to the author's knowledge, no previous studies were done on triathletes in South Africa. Therefore it was essential to identify if there were any differences between triathletes in general.

Measurable: Research was done regarding the different preferences triathletes have for the event and the sport. This was measured in the form of a destination-based survey.

Substantial: When reflecting on Chapters 2, it is clear that Ironman South Africa participants have a high average spending as well as a large number of international participants. It is clear that there is a demand for this event. Thus, to focus on attracting new participants, retaining loyal participants, attracting high spending participants and persuading triathletes to travel in larger groups will ensure the expansion and sustainability of the event.

Actionable: Ironman South Africa organisers should apply the outcomes and recommendations of this research to decide on the amount they are willing to spend on marketing efforts and on improving the event according to participants' demands. Then, marketers should be able to develop a marketing mix that reaches the market in the most appropriate way within the determined budget. An example is to create a cost-effective website for international participants who want to participate in Ironman South Africa. The website should provide a step by step guide on entering, registering and competing in the event. The guide can, for example, include the registration process, accommodation available, flight bookings and specials on destination attractions that can be visited).

Accessible: Ironman South Africa should apply recommendations made in this study to ensure that the marketing messages reach the right target markets. Ironman South Africa should choose the appropriate communication channels such as magazines and television to reach the market. Triathlon clubs should also be targeted as a marketing base as this could lead to more positive word-of-mouth referrals to the event. Then, marketing messages should appeal to the selected market be based on participants' motives to take part in the event.

Step 3: Determine/apply variables for segmentation

In the literature review, various methods or approaches of market segmentation were discussed. The two variables/bases used in this study to segment the triathletes that competed in Ironman South Africa are critically evaluated in the next section. The advantages and disadvantages of each approach are outlined to determine the effectiveness and viability of each approach. The two segmentation variables for this study were motives to participate and frequency of participation as discussed in Chapters 4 and 5 respectively.

a) Segmenting triathletes that participated in Ironman South Africa based on motives to participate (c.f. 4.4)

Participant's main motivations to compete in Ironman South Africa were determined with a factor analysis that was discussed in Article 1. Thereafter a cluster analysis was performed to segment triathletes based on their motives to participate. Seven motivational factors emerged from the results, namely *Event novelty*, *Respect and risk*, *Inner vie*, *Intrinsic achievement and control*, *Group Affiliation and socialisation*, *Health and fitness* as well as *Challenge*. These seven factors led to the clustering of three distinct segments that is the *Devotees*, *Enthusiasts* and *Aspirationalists*.

Advantages:

- Market segmentation that makes use of motives to participate as a variable led to three distinct triathlete clusters each having distinct motives to participate as well as significant differences between the clusters. Cost-effective marketing messages could be complimented by the motives and aimed at each cluster accordingly.
- The specific characteristics of each cluster and the unique motives and combination of motives specific to the event are different from other events. Participants' high spending and number of nights in the event destination also show that each of the three clusters are a viable market to target.

Disadvantages:

- The socio-demographic profile did not reveal significant differences except for *age*. Therefore the demographic profile of each cluster is similar. Thus, results did not reveal significant differences in relation to participant's lifestyle and behaviour.
- Triathlon participants were not motivated by one single motive, but rather a combination of different motives. This can cause marketing messages to be cluttered and confusing.

b) Distinguishing between first and repeat participants at Ironman South Africa (c.f. 4.4)

In Article 2, frequency of participation was applied as a variable for segmentation with significant differences between first time and repeat participants. These participants were then divided into four segments based on their previous participation in Ironman South Africa. The four segments were identified at Ironman based on the number of times they have previously participated in the event. Then the frequent flyer concept was utilised and the four participant segments were divided in different loyalty segments. Firstly the *Bronze segment* represents the first time triathletes that have not previously participated in any Ironman South Africa events. The second segment is the *Silver Segment* that represents triathletes that are returning to the event and have previously participated in only one Ironman South Africa event. The third group is the *Gold segment*, which are triathletes that have previously participated in two or three events. The last segment is called the *Platinum segment*. Triathletes in this group have previously participated in at least four or more Ironman South Africa events. ANOVAs revealed statistical significant differences between these segments based on *age, nights spent at the event destination, number of times participated in Ironman South Africa, number of times Ironman South Africa was finished and event novelty* as motive to participate in the race. Chi Square tests also identified statistically significant differences between *Bronze, Silver, Gold and Platinum segments* at Ironman South Africa according to *home language, province of residence, marital status, primarily being a runner, other tourist attractions visited, information sources websites and clubs*. Three marketing strategies were developed. Firstly for the *Bronze* and *Silver segments* (these two segments shared similar characteristics), secondly for the *Gold* and *Platinum segments* which also shared corresponding characteristics. Lastly, a marketing strategy was developed to expand triathlons in South Africa.

Advantages:

- Four distinct segments were identified and this was the first time that triathlete segments based on their frequency of participation were identified in triathlon literature. Three distinct marketing strategies were developed aimed to attract newcomers, retain repeaters and expanding the sport in South Africa.
- Segmenting with frequency of participation highlights the importance of both first time as well as repeat participants, seeing that Ironman South Africa cannot just focus on one of the two groups as this could lead to misinterpretation of the market and result in the ineffective allocation of resources.

- Two distinct marketing strategies (combining the first two segments for the first marketing strategy and combining the last two segments for the second marketing strategy) were formed based on the results found in the study (c.f. 5.4). Each marketing strategy is straightforward and assists Ironman South Africa organisers in attracting and reaching the two different market segments.
- Frequency of participation as a segmentation variable gives researchers the opportunity to experiment with different statistical methods, which can identify more distinct differences between participants.
- Clear statistical significant differences between first time and repeat participants existed between all four segments based on behavioural, socio-demographic and motivational factors resulting in a well-defined profile of each segment.
- Frequency of participation market segmentation leads to a complete profile of each of the segments which include:
 - Informing Ironman South Africa's marketers on the profile of the participants (who) in each segment (demographic);
 - Confirming the reasons that motivate these participants to take part in the event (motives) and also gives an indication of what marketing message should be created and conveyed to each segment;
 - What these triathletes do, while at the event destination (behaviour);
 - How to reach each segment (communication channels were identified);
 - Where the individuals in each segment mostly originate from (geographic location); and
 - The economic spending of these segments (socio-economic information).
- The comparison of first and repeat participants assisted in identifying the national and international markets which can also form two different segments.
- The study challenged existing sport theories as it found that experience has to a lesser degree an influence on triathletes although it has an effect on different aspects of participation. The reason for the lesser influence of experience is that triathletes need to be in peak physical and mental shape to be able to compete in an Ironman event. Therefore the results obtained from this segmentation variable made a substantial contribution to endurance sport literature.

Disadvantages:

- Academic authors and sport event organisers/marketers have to choose a method to divide participants according to frequency of participation. Thus, the number of segments to target as well as the criteria for dividing the market into these segments,

need to be determined. The challenge sport event organisers face is to ensure that each segment is representative in sample size and that participants are evenly spread between the different segments.

- In the case of this study the many differences that exist between the participants have led to the option to form several segments that might not be suited for the budget and resources of the event.

Step 4: Profile each selected segment

A cluster analysis was performed in Article 1 (Chapter 4), while in Article 2 participants were divided according to the number of years previously participated in Ironman South Africa. In both articles different segments were formed and then profiled according to their socio-demographic, behaviour and motives to participate which pointed to unique characteristics of each segment.

In Article 1 (c.f. 4.4 and 4.5) three clusters were formed based on their motives to participate. Three clusters were identified *The Devotees*, *Enthusiasts* and *Aspirationalists*. The complete profile was discussed in Chapter 4. A short review of each segment follows in the next section:

- *The Devotees* were mostly motivated by *Intrinsic achievement* and *Control* as well as *Health and fitness*. *Devotees* have spent the most money and participate in the most Ironman South Africa and international Ironman events.
- *The Enthusiasts* had the highest mean values across all seven motivational factors, thus they are inspired to participate by an array of motives. They were the youngest, were exposed to triathlons at a younger age and participated in the most other endurance sport events.
- *The Aspirationalists* were mostly motivated by *Inner vie* and *Health and fitness*, thus they feel a sense of personal accomplishment to be part of the Ironman event. They were the oldest participants, had spent more nights in the event destination and competed in the least number of Ironman events.

In Article 2 (c.f. 5.4 and 5.5), four segments were identified according to their previous years of participation. These segments were then labelled according to a loyalty card programme used in other tourism industries. The four segments were the *Bronze*, *Silver*, *Gold* and *Platinum segments*. A complete profile of each of these segments was discussed in Chapter 5.

A brief overview of the findings are:

- *The Bronze segment* represented the youngest participants, had the smallest group size, had the highest spending on the sport and was exposed at an earlier age to triathlons. Triathletes in this segment were mostly motivated by *Challenge* and *Inner vie*, a high percentage of this participants came from overseas and visited tourist attractions at the event destination. They made use of word-of-mouth, triathlon clubs and television to stay informed on the event.
- *Silver segment* participants represented the second youngest participants, travelled in small groups, had spent the most nights at the event destination and were exposed to triathlons at the second youngest age. These participants had viewed *Challenge*, *Inner vie* and *Health and fitness* as the most important motives to participate. A large percentage of these participants came from Gauteng and foreign countries. Most participants in this segment had visited (and will in future visit) tourist attractions in the area. These participants made use of television, word-of-mouth recommendations and triathlon clubs to stay informed on triathlons.
- *Gold segment* participants were the second oldest participants, had spent the least nights at the event destination, had high spending and were exposed to triathlons at an older age. These participants viewed *Challenge* and *Health and fitness* as the most important motives to participate. Most of these participants came from Gauteng, had not visited (and will not in future visit) tourist attractions in the event area and had made use of television and word-of-mouth recommendations to be kept informed on different events.
- *Platinum segment* participants represented the oldest participants. These participants had travelled in the largest groups, but had the lowest spending behaviour. They were exposed to triathlons at an older age and viewed *Event novelty* and *Challenge* as the most important motives to participate. In this segment, most participants were locals from Gauteng and the Western Cape and expressed themselves primarily as runners. This segment had the least number of females and participants had not visited (and will not in future visit) tourist attractions in the area.

Step 5: Managerial assessment of the usefulness of the market segments

In this step Ironman South Africa must measure the usefulness of each segment and need to determine if these segments are worthwhile to target.

Based on the findings made in Article 1, it is crucial that marketers target each of the three clusters separately as each cluster is a viable and sustainable market on its own. However this can only be done by focusing on each of the clusters' specific motives and needs.

- *The Devotees* were loyal to the Ironman South Africa event, seeing that they had participated in the most previous Ironman events. These participants can be ambassadors for the event and should therefore be retained through a loyalty programme.
- *The Enthusiasts* were the up-coming triathletes and event organisers and marketers must persuade these participants to become *Devotees*. This can be done by highlighting the intrinsic as well as extrinsic benefits of participating in Ironman South Africa.
- Marketers must also reach the *Aspirationalists* seeing that most of the triathletes participating in Ironman South Africa fell into this segment. These participants must be motivated to return to the event annually by improving the event experience each year.

When reviewing Article 2 Ironman South Africa should combine the first two segments (*Bronze and Silver*) as they shared similar characteristics and form the first time participant category. The *Gold and Platinum segments* should also be combined to form the repeat participant's category. Based on the results in Chapter 5, event organisers should develop a marketing strategy for the first time and repeat categories:

- First time participants: These participants are vital to target as they have the highest spending behaviour, are mostly international participants and will visit tourist attractions at the event destination. Thus they can spend more money at the Ironman expo and stay longer in South Africa to view attractions which will generate more money for the tourism industry.
- Repeat participants: These are the loyal participants of Ironman South Africa and therefore need to be targeted to ensure they return each year. The event itself is an important factor on which participants base their decision. Hence, improving the sport event's organisation and experience will help retain these participants. These participants can also be encouraged to spend more money during the event through the availability of tourist packages that involve the whole group (family and friends).

Step 6: Select a target market

In this step, organisers of Ironman South Africa should decide which of the selected markets they want to target through marketing and through improved organisation of the event. Seeing that each of the segments is viable and important to reach the decision must be based on the objective the event has for future events. Ironman South Africa organisers should also review their budget and available resources. If possible, each of the segments must be targeted as each one is unique and plays a vital role in the expansion and sustainability of the event.

Step 7: Designing an appropriate marketing strategy

As the Ironman South Africa participant market is heterogeneous, a *concentrated targeting strategy* or a *differentiated targeting strategy* should be implemented. The design of the marketing strategy is discussed in the section: Recommendations for future Ironman South Africa (c.f. 6.4)

Step 8: Positioning Process

The section: Recommendation for future Ironman South Africa event section (c.f. 6.4) will also discuss the specific marketing mix that Ironman South Africa needs to adopt in order to attract potential participants and retain existing participants.

6.3. Recommendations with regards to the survey

The next section presents recommendations firstly, with regards to future surveys and how Ironman South Africa can improve the registration process. Secondly recommendations are made for the improvement of the questionnaire for future research and lastly recommendations are made for future market segmentation of triathletes.

6.3.1 Recommendations for future surveys at the registration process

- The destination-based survey that was used to hand out questionnaires to Ironman participants during registration was successful as the sample size was reached. The process of dividing field workers into pairs that had to work two hour shifts each, was also effective as the registration area was small and too many fieldworkers would have caused frustration for the participants as it would have crowded the available space. The only problem experienced was that it was difficult to identify who was participating in the Ironman main event, seeing that three registration processes (Ironman South Africa, Corporate Ironman and IronLady) were taking place at the same time.

- To help make registration easier Ironman South Africa may introduce a Biometric Registration System that allows triathletes to pre-register and at the venue only need to scan their fingerprints and sign a digital waiver. This is a system that can be incorporated by other endurance events as all the participants' details are recorded into a database and can be used at other similar events. The organisers must however ensure that participants are aware of the new system and that it is tested beforehand (perhaps through a pilot group).
- Recommendations for future surveys include that the survey should still be destination-based rather than online to ensure that the sample size is met and that participants who are participating in that year's event take part in the survey. Event organisers should have clear signage of where the different registrations take place. The registration areas could also be split into zones that are further spread from one another in order to eliminate confusion with regards to the area where participants need to register. It is important to inform participants beforehand on the subject of the survey that is going to take place so that they are aware and willing to cooperate. Event organisers should also provide tables and chairs where participants can complete the survey after being registered. Fieldworkers should wear similar t-shirts or badges for easy identification when participants need to return the completed questionnaire. It will also confirm that the fieldworkers are affiliated with the event.
- Field workers as well as participants must be informed on the importance of the motives to participate section in the questionnaire and be advised to complete it accurately and precisely. If not it can lead to deceptive and unusable data.

6.3.2 Recommendations with regards to the questionnaire

- It is essential that the questionnaire is developed in collaboration with event organisers as they provide valuable information regarding the event and the participants.
- The questionnaire used to survey participants was successful in the fact that it delivered statistical significant differences. The questionnaire however can be improved by the findings made in this study. The questionnaire should have distinct sections that measure demographic, behavioural, motivation and lifestyle aspects of participants to reveal where the main difference between triathletes exist. A pilot study is recommended where the survey is distributed to a variety of triathletes so they can give input with regards to appropriate questions and questions that could be added. It can also be considered to do a preliminary qualitative study (through focus

groups) with a few triathletes in order to get their input on the questionnaire and how it can be improved.

- The frequency of participation question in the questionnaire could be misleading for some participants. Therefore it becomes vital that the question be structured that all participants understand the question in the same way and that it does not lead to inconsistent data. The question can for example be asked according to categories since this will simplify the statistical analysis or the question can be asked: Have you previously participated in Ironman South Africa, indicate Yes or No. If the participants indicate yes, they should fill in the number of previous times they have participated in the race.
- The section on the motives to participate should be formulated with care. The questionnaire is based on previous triathlon literature, but seeing that participants take part in different events for different reasons, certain motivational factors could not be applicable to the event. It is important that the motivational questions asked are relevant to the unique nature of triathletes. Thus it can include questions such as: participating in a triathlon is part of my lifestyle, I participate in Ironman South Africa to improve my mental fitness/state or I participate in triathlons to extend my competitive age. Most of the relevant motivational factors that influence participant's choice to take part in the event should be mentioned in the questionnaire. It will help to compare motives identified in this study with motives in other studies.

6.3.3 Recommendations with regard to market segmentation of triathletes

When considering the results from Article 1 and 2 it is clear that both market segmentation variables delivered promising results and distinct clusters. However segmentation done according to frequency of participation led to more significant differences and two distinct clusters were formed. The first time as well as repeat segments had a distinct profile, motives to participate, unique behavioural patterns, different geographic locations and also specific communication channels. The information that was gathered makes it easier for marketers to reach the different segments in a cost-effective manner. A two-pronged marketing strategy and campaign can be launched that is distinctive from each other and targets either the first timers or repeaters. Both these two segments are vital to attract participants as an event not only needs newcomers, but also has to retain the repeaters. The results also revealed ways in which present marketing efforts to these participants as well as to improve the organisation of the event to satisfy the participants' expectation of the event. Thus all the information that was collected through the questionnaire was useful. The motives to participate should be added to the questionnaire as it gives valuable information

regarding the grounds on which participants base their decisions and is a more useful variable to apply in combination with demographic, geographic and behavioural variables.

6.4 Recommendations for future Ironman South Africa events

- It is essential that the organisers of Ironman South Africa realise that market segmentation is vital for their event because, if participants are not targeted correctly and if their needs are not met, the event will not expand, be sustainable in the future and also not attract enough sponsorships that is needed for financial support. Market segmentation is also significant as it can give Ironman South Africa a competitive advantage over other competing endurance sport events in the country.
- Ironman South Africa should incorporate the recommendations made in Article 1 (c.f. 4.5) and Article 2 (c.f. 5.5) into their marketing plans as well as improve the event according to the recommendations made.
- Ironman South Africa must expand marketing efforts by focusing on each specific segment, expanding marketing span by promoting triathlons at other endurance sporting events and international Ironman competitions. International marketing should emphasise that Ironman South Africa is renowned for fast times, friendly local people and that the spectator support makes it one of the most sought after international Ironman destinations.

Additional recommendations with regard to Article 1

- Identifying the motives to participate, assisted the marketer(s) of Ironman South Africa in determining if participants are intrinsically or extrinsically motivated. Seeing that Ironman South Africa participants are more intrinsically motivated, marketing messages can be created and conveyed that focus on internal achievement and the way in which the event enhance self-esteem. Thus the focus of marketing will be on the internal awards of the event to participants. Knowing on which intrinsic motives participants base their decisions, can lead to a better event experience and more loyal participants.
- Companies and manufactures that sponsor and work with Ironman South Africa can incorporate the motives of participants in their advertising and promotional activities. For example launching an ultimate challenge triathlon brand in stores countrywide that is described as clothes and accessories worthy of an Ironman.
- It was found that motives tend to alter the longer an athlete participates in an event. This type of market segmentation assists marketers to adapt their marketing efforts

according to these to participants' changing motives and also to identify new trends and demands in the participant market.

- The identified clusters in Article 1 can be compared with other endurance sport clusters in order to identify similarities and differences between triathletes and other athletes.
- *Health and fitness* was identified as an important motive for triathletes to participate, but have not been apparent in other endurance sport literature. This indicates a niche area that enables marketers of Ironman South Africa to introduce marketing campaigns that differ from other sport event campaigns. *Event novelty* was also identified as an important motive to participate, which has not been evident in other triathlon literature yet. Therefore event organisers and marketers must realise that the event itself is also seen as an attraction. Consequently if event organisers continue with a well organised event and introduce improvements to the event that will enhance the participants' experience each year will ultimately lead to the retaining of participants.
- A unique finding of this study was that the age of triathlon participants are older than the average endurance athletes. This can be used to motivate other endurance athletes to extend their competitive age through participation in triathlons.

Additional recommendations for the event with regard to Article 2

- It becomes more important to target repeat Ironman South Africa participants as these participants form the backbone of the event. It is also financially more viable to attract the existing market. Existing participants can then be encouraged to become ambassadors for the event.
- Ironman South Africa should however also attract first time participants as it will help to identify if the sport appeal is expanding and if the marketing campaign is successful. More first time participants can also lead to an increased market share and first time participants can be prompted to become repeaters which will lead to a greater economic impact for the event.
- Loyalty programmes such as the frequent flyer program proposed in this study can be introduced into sport events. Event organisers can use this programme to encourage participants to each year return to the event because of the added benefits for loyal participants, i.e. to be distinguished from other triathletes. A loyalty programme is vital for Ironman South Africa as it will inspire participants to each year return to the event. As Ironman South Africa will celebrate its 10th anniversary in 2014, it provides an ideal offset for a loyalty programme. This could firstly be done

through offering triathletes that have participated in the event throughout the ten years, to enter and participate for free in the 2014 race. Further sponsorships should be acquired for triathlon attire to distinguish the 10 year participants from the other participants. This will also give the loyal participants the credit they deserve.

- The segmentation according to previous participation not only influences marketing, but also shows the organisers that improving and expanding the expo before the event can lead to higher spending behaviour amongst the triathletes. Organisers can also combine other tourism industries with the sport event like the attractions in the event area by developing packages that involve the whole travelling group. This will also result in a greater economic impact.
- Club affiliation is an important finding as it can help marketers target individuals at different triathlon clubs. *Event novelty* is an important motive for repeat participants. It confirms the necessity for Ironman South Africa organisers to improve the event each year in order to motivate the repeat participants to return to the event on an annual bases.

6.5 Recommendations for expanding triathlons as a sport in South Africa

Recommendations to expand Ironman South Africa as well as other triathlons events held in the country were made in Article 2 (c.f. 5.5). Additional recommendations include:

- Triathlon events, such as Ironman South Africa, should promote a healthy lifestyle by encouraging the participation of sport and especially triathlons at sport clubs, gymnasiums, schools and universities;
- Ironman South Africa and other triathlon events must expand the media coverage of the events. This can be done by focusing on greater media channels (SuperSport) and other channels (magazines and radio) in order to inform more people that Ironman is the ultimate challenge a triathlete can face. Organisers must also ensure that live events are broadcasted by South African sport channels which will expand the popularity of triathlons across the country.
- Organisers can also cooperate with equipment manufactures by creating an Ironman South Africa brand where the products are specifically designed for triathlon events and is identifiable by the Ironman logo.
- Ironman events in South Africa should be expanded to at least three events during the year. This will help spread triathlons geographically and also seasonally. Different cities can bid to host the Ironman event. A new destination will draw participants that

want to experience something new and also make international participants aware of the scenic and ideal environments South Africa has for endurance sports.

- Ironman South Africa and similar triathlon events should incorporate more social media in their marketing campaigns. This is possible through the sharing of inspirational stories by triathletes on Facebook, presenting daily tips and news bulletins about the event on Twitter, sharing highlights on YouTube and encouraging participants to write blogs, share training tips and encourage friends and family to take part or support the event. Social media can also be used prior to the event by encouraging participants to share their lifestyle routines before the race (for example their eat plan, their training duration and their relaxation activities). Social media as well as Ironman triathlon websites can also be used for participants to write about their experience during the race.
- Triathlon event such as Ironman South Africa must highlight the economic benefit of these types of events in order to attract more sponsorship to the event. Organisers must make sponsors aware to the fact that Ironman South Africa is regarded as an international triathlon event, that it attracts large numbers of international and professional athletes and that the event can have a positive connotation to the sponsors brand as Ironman is a tale of human endurance and fighting spirit. Sport celebrities can be influenced to compete in the ultimate challenge as it will attract more media coverage for sponsors.
- In order to expand the number of participants that take part in triathlon events each year, organisers must restructure the race course. For example Ironman South Africa can change the course according to a number of international Ironman races. The changes will enhance safety and ensure a fair race, and add to the challenge of facing a new race course which could be a reason for participants' decision to participate in the event.
- It is important that Ironman South Africa highlights that triathlons are not only a sport for males but also for females who can become a repeat participant that return to the event each year. Ironman South Africa and other triathlon events can highlight different woman that were prominent in the sport and has pursued it well into their mature adult lives. Extra focus can be placed on females by advising them in how to train and mentally prepare for the race. This can be done by the formation of an IronWomen and IronLady clubs where females that participate in the sport can encourage and help each other to take part in many future events.
- In order to further expand triathlons in South Africa it is important that the youth of South Africa is exposed to triathlons at an early age. Therefore Ironman South Africa

can cooperate with the National Federation for Triathlons and other multi-sports in South Africa to ensure that there are equal opportunities for all races, genders and cultures to participate in the event.

- Triathlons can also be expanded to non-coastal cities by gaining government funding for the building of sport facilities to host triathlons.
- Ironman South Africa must emphasise that triathlons are not necessarily for top-fit athletes competing in the long-distance race, but that there is also other variations of the event including IronKids and Corporate Ironman (shorter distance triathlon events). These events encourage children as well as people of all ages to be active and take part in a fun event. This concept must be incorporated at other triathlon and endurance events as it will attract more people to the sport.
- Triathlon clubs and coaches should be incorporated into gymnasiums across South Africa, giving gym members the chance to join a triathlon club with a coach who could advise with training and lifestyle adaption.

6.6 Recommendations for future research

- Due to limited research regarding triathletes in South Africa and the unique nature of the sport and its participants, future research should be applied. Future research can firstly expand on current research by experimenting with other variables such as lifestyle segmentation and segmentation based on spending. This type of research is vital as it can help a sport organiser choose the most appropriate way to segment their participants.
- Research should also focus on segmenting participants according to different age groups, seeing that age was a significant factor in both segmentation variables used in this study. As results revealed that triathletes are older than the average sport participant, it could further be examined by researching the “Career Ladder” of a triathlete.
- Research should also focus on female participants and how they differ from male participants as well as their needs and motives that inspire and drive their participation. This is important for the event as only a small percentage of females currently participate in Ironman South Africa. Research can also be done at the IronLady event in order to identify the reasons for females to rather participate in this shorter distance event. As only a few females participate in Ironman South Africa, a qualitative study could be done focusing on these females to get their input on how to attract more females to the sport.

- Future research must investigate the level of experience of a participant and how it influences the motives to participate. This can be done by comparing professional and non-professional triathletes to recognise if there are significant differences between these two groups as triathlons acquire both types of participants to participate on the same play field.
- Future research can also compare different triathletes that compete in different triathlon distances (sprint, Olympic and half Ironman) in order to identify if triathletes participating in shorter distance triathlons share the same unique characteristics as Ironman triathletes. This type of research can take place at events such as Ironman 70.3 in East London, 5150 Bela Bela triathlon or the Sasol Cross Triathlon.
- Studies should also incorporate the mental factor (mental toughness) associated with triathlons and how it influences participants' choice to take part in the event. Further research could also investigate and compare this mental fitness to other endurance athletes. This research could follow a qualitative approach to determine triathletes' exercise plan to mentally prepare for the event as well as its influences on their decision to participate in the event. The afore-mentioned research can also be combined with the lifestyle component (which is apparent in triathlon literature) by measuring the extent to which participation in triathlons form part of triathletes' lifestyle.
- The same questionnaires must be used at different multi-sport endurance events across South Africa and then each participant market that was identified could be compared with one another. This is to clearly identify aspects that differentiate one endurance multi-sport participants from another. For example comparing Ironman South Africa triathletes with participants whom participate in the SA Xti-Series (1.5km swim, 27km Mountain biking and a 12km trial run).
- Future research can combine different fields of study including social sciences, human nutrition and physical therapy. This research will support current Ironman participants as experts could advice on how triathletes can physically and mentally prepare for a triathlon. Using the research nutritionist can help develop eating plans and diets that will ensure that triathletes are healthy and fit to participate. Health experts and physical therapists can make use of this type of study to advice triathletes on how to participate without pushing your body too far. These types of studies can be incorporated into a subscriber newsletter or magazine especially for South African triathletes.

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Appendix A: Questionnaire

SPEC-SAVERS IRONMAN SOUTH AFRICA PARTICIPANT SURVEY 2013

SECTION A

1. Gender

M	1
F	2

2. Which year were you born?

3. Home language?

Afrikaans	1
English	2
Other (Specify)	3

4. What is your annual gross income?

< R20 000	1
R20 001 - R140 000	2
R140 001 - R221 000	3
R221 001 - R305 000	4
R305 001 - R431 000	5
R431 001 - R552 000	6
R552 001 >	7

5. How many people are travelling in your group (including yourself)?

Number

6. How many people are you paying for at during Ironman SA (including yourself)?

Number of participants:

Number of spectators:

7. If not a local resident of Port Elizabeth, how many nights do you stay over in the area (excluding race days)?

Number

8. Province of origin?

Eastern Cape	1
Gauteng	2
KwaZulu Natal	3
Free State	4
Western Cape	5
Mpumalanga	6
Northern Cape	7
North West	8
Limpopo	9
Outside RSA borders	10

9. Country of residence (if outside RSA borders)

10. Where applicable, please estimate how much you spend on the following items during Ironman South Africa.

Entry fee	R
Accommodation	R
Transport	R
Gear/equipment	R
Meals	R
Medicine	R
Souvenirs	R
Other (Specify)	R
a.	R
b.	R
c.	R
d.	R

11. Highest level of education?

No school	1
Matric	2
Diploma, degree	3
Post-graduate	4
Professional	5
Other, specify	6

12. Marital status?

Married	1
Not married (single)	2
In a relationship	3
Divorced	4
Widow/er	5
Living together	6

13. Mode of transport?

Own car	1
Rental car	2
Bus	3
Train	4
Airplane	5
Other, specify	6

SECTION B: ENTRY DETAILS AND MOTIVES TO PARTICIPATE

14. Rate on the scale of importance why you participate in Ironman South Africa.

	5. Extremely important				
	4. Very important				
	3. Important				
	2. Slightly important				
	1. Not at all important				
1. Competing in Ironman South Africa is a personal challenge	1	2	3	4	5
2. To test my skills against nature, others and myself	1	2	3	4	5
3. To improve my health	1	2	3	4	5
4. To improve my level of fitness	1	2	3	4	5
5. To socialise with other triathletes	1	2	3	4	5
6. To share a group identity with other triathletes	1	2	3	4	5
7. To earn respect from peers	1	2	3	4	5
8. To make my family and friends proud of me	1	2	3	4	5
9. To compete with others	1	2	3	4	5
10. To compete with myself	1	2	3	4	5
11. To improve my time and speed	1	2	3	4	5
12. To push myself	1	2	3	4	5
13. To improve my self-esteem	1	2	3	4	5
14. To feel proud of myself and to feel a sense of achievement	1	2	3	4	5
15. To feel mentally in control of my body	1	2	3	4	5
16. To escape	1	2	3	4	5
17. Because it is stimulating and exciting	1	2	3	4	5
18. Because of the risk involved	1	2	3	4	5
19. For the adventure of it	1	2	3	4	5
20. It is a major challenge	1	2	3	4	5
21. Because the event is well-organised	1	2	3	4	5
22. I do it annually	1	2	3	4	5
23. Ironman South Africa tests my level of fitness and endurance	1	2	3	4	5
24. It is an international event	1	2	3	4	5

15. Please indicate your entry details (for example Pro or age category 18-24):

16a. Including 2013, how many times have you:

previously participated in Ironman SA?	
previously finished Ironman SA?	
previously participated in Ironman internationally?	

16b. In how many of the following sport events do you participate in per year?

Triathlons	
Cycling events	
Running events	
Swimming events	
Other type of events, please specify	

17a. Are you primarily:

A cyclist	1
A runner	2
A swimmer	3

18a. At what age were you first exposed to triathlons?

18b. Who exposed you to triathlons?

19. Which sport events did you participate in before starting to compete in triathlons?

20. What other sporting events are you competing in during 2013?

21a. Did you or are you planning to visit any tourist attractions while you are in the area?

Yes	1
No	2

21b. If yes in 21a, please specify which tourist attractions you have visited or are planning to visit?

22. Who initiated your participation?

Self	Yes	No
Spouse	Yes	No
Media	Yes	No
Friends	Yes	No
Children	Yes	No
Family	Yes	No
Club	Yes	No
Organisation	Yes	No
Other, specify	Yes	No

23. How did you hear about Ironman SA?

Television	1	Club	7
Radio	2	Facebook	8
Website	3	Twitter	9
Email	4	Internet blogs	10
Magazines	5	Other (Specify):	11
Word-of-mouth	6		

24. Any recommendations or suggestions?

Thank you and good luck!!