

# **A critical evaluation of market segmentation at national arts festivals in South Africa**

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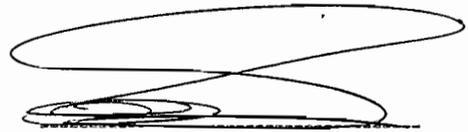
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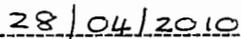
I, Martinette Kruger, identity number 8511110089081 and student number 13018493, hereby declare that this research submitted to the North West University, for the PhD study: ***A critical evaluation of market segmentation at national arts festivals in South Africa***, is my own independent work; and complies 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 (or partial fulfilment) of the requirements for the attainment of any qualification.



MARTINETTE KRUGER



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Since I was a little girl, I dreamed of completing my PhD before I was 25 years old. Never would I have imagined that I would actually achieve this dream sooner than I had initially anticipated. As a result, nothing can compare to the feeling of pride, elation and amazement I feel with the completion of this research. This study is the result of my love and passion for the field of tourism and especially for arts festivals. I am thankful to my Heavenly Father for giving me the strength and perseverance to complete this study, for blessing me with the gift of knowledge and for showing me that dreams can come true. This would also not have been possible if it was not for several individuals whose advice and continual encouragement were invaluable to the success of this study:

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I dedicate this study to all those who, even in adversity, have the strength and courage to pursue their dreams. If you believe it, you can do it!

# ABSTRACT

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## A CRITICAL EVALUATION OF MARKET SEGMENTATION AT NATIONAL ARTS FESTIVALS IN SOUTH AFRICA

The Klein Karoo National Arts Festival (KKNK) and the Aardklop National Arts Festival (Aardklop) are two of the largest and most popular arts festivals in South Africa. From a sustainability point of view, the primary aim of these festivals is to increase show ticket sales. However, show ticket sales have declined in recent years which, if this trend continues, will result in the discontinuation of these festivals. Market segmentation can assist the festivals' marketers/organisers to address this problem by identifying markets that buy show tickets, thereby supporting the festivals' shows/productions. With the latter in mind, the main purpose of this study was to critically evaluate different segmentation variables and approaches available to segment visitors who buy show tickets.

Market segmentation is the process of dividing the festival market into smaller, more clearly defined groups that share similar needs, wants and characteristics. The more detailed the knowledge of the needs and motives of potential visitors, the closer the festivals can get to a customised festival programme creating greater satisfaction, long-term relationships, repeat visits and an increase in tickets supporting the shows/productions. Various variables/bases are used to segment a market to understand visitors' needs, motives and expectations. These variables/bases of segmentation include demographics, expenditure, psychographics, decision behaviour, geographic, product specific, interests, travel motivations and communication channels. These variables give a complete visitors profile and are used to identify and compare different segments.

Although these variables have been recommended as viable segmentation bases, there seems to be no single ideal base or variable that is the most effective segmentation criterion, since each variable serves a specific purpose. Therefore, the most appropriate variable or variables can only be selected if the objectives of the segmentation strategy are clearly defined. With the aim of the festivals in mind, it is therefore imperative to evaluate these segmentation variables and approaches critically to determine the most suitable variables to segment the festival market. To achieve the latter as well as the goal of this study, the study is divided into five articles. Research for all the articles was undertaken at the festivals and data obtained from 2008 were used for Aardklop, while data gathered in 2009 were used for the KKNK. Questionnaires were interview-administered and distributed randomly during the course of the

festivals. In total, 495 questionnaires were completed in the visitor survey for Aardklop and 555 questionnaires for the KKNK.

The variables travel motives, expenditure, visitor behaviour in terms of genre attendance and frequency of visitation were applied separately as well as in combination to address the goal of this study. Along with these variables, combination of statistical analysis or approaches including factor analysis, cluster analysis, regression analysis, ANOVA, as well as independent t-tests were applied to segment the festivals' markets. The best results were obtained when the variables and statistical analyses were used in combination rather than alone and provided valuable insights into the profile of the festivals' visitors. The contribution of this research therefore lies in the following:

- Visitors at two similar Afrikaans festivals were, for the first time, analysed and compared using various methods of segmentation.
- The methods used to segment the visitors were applied for the first time not only in this study, but also in the South African festival context. The following methods were applied for the first time in this study and can therefore be seen as a benchmark in South African festival research: Travel motives as a method of market segmentation; Distinguishing between genre attendees and non-genre attendees; Frequency of visitation and Segmenting and clustering festival visitors based on the genres attended.
- The methods used in this study therefore add value to the tourism and festival industry and contribute to the body of knowledge about South African arts festival visitors and especially about the optimum approach to segment the festival market.
- A combination of variables should be used to comprehensively segment the festival market with the aim of increasing show ticket sales.
- In addition, from a methodology point of view, this study has contributed to the following: Questionnaire design and development, selection of the sampling frame and size, as well as the type of statistical analysis used (separately and in combination). This study therefore greatly assists not only festival marketers/organisers but also future researchers.

The information obtained from this study can be applied to comprehensively segment and profile the festival market and customise the festival programme based on visitors needs. This should lead to an increase in ticket sales, a greater economic impact and, ultimately, to the continuous sustainability of arts festivals in South Africa.

**Key words:** *Klein Karoo National Arts Festival, Aardklop National Arts Festival, Segmentation variables/bases, Marketing; Spending analysis*

# OPSOMMING

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## 'N KRITIESE EVALUERING VAN MARKSEGMENTERING BY NASIONALE KUNSTEFEESTE IN SUID-AFRIKA

Die Klein Karoo Nasionale Kunstefees (KKNK) en die Aardklop Nasionale Kunstefees (Aardklop) is twee van die grootste en mees populêre kunstefees in Suid-Afrika. Vanuit 'n volhoubaarheidsperspektief, is die primêre doel van hierdie feeste om kaartjieverkope te verbeter. Die kaartjieverkope van vertonings het egter in die afgelope paar jaar afgeneem, en indien hierdie tendens voortgaan, sal hierdie feeste gestaak word. Marksegmentering kan die feeste se bemarkers/organiseerders help om hierdie probleem aan te spreek deur markte wat kaartjies koop te identifiseer, en sodoende sal die feeste se vertonings/produksies ondersteun word. Ten opsigte van die laasgenoemde is die hoofdoel van hierdie studie om die verskillende segmenteringsveranderlikes en benaderings beskikbaar om besoekers wat kaartjies koop te segmenteer, krities te evalueer.

Marksegmentering is die proses waarmee die feesmark in kleiner, meer duidelik-gedefinieerde groepe wat dieselfde behoeftes, ontberinge en eienskappe het, verdeel word. Hoe meer gedetailleerd die kennis van die motiewe van potensiële besoekers, hoe nader kan die feeste daaraan kom om 'n pasgemaakte feesprogram te skep wat meer bevrediging, langtermyn verhoudings, herhalende besoeke en 'n styging in kaartjieverkope, wat die vertonings/produksies sal ondersteun, te weeg sal bring. Verskeie veranderlikes/basisse word gebruik om 'n mark te segmenteer om sodoende besoekers se behoeftes, motiewe en verwagtinge te verstaan. Hierdie veranderlikes/basisse van segmentering sluit demografiese inligting, besteding, psigografiese inligting, besluitsgedrag, geografiese, produk-spesifieke, belange, reismotiverings en kommunikasiekanale in. Hierdie veranderlikes verskaf 'n volledige besoekersprofiel en word gebruik om verskillende segmente te identifiseer en te vergelyk.

Alhoewel hierdie veranderlikes al aanbeveel is as lewensvatbare segmenteringsbasisse, wil dit blyk of daar geen enkele ideale basis of veranderlike is wat die mees effektiewe segmenteringskriterium is nie, aangesien elke veranderlike 'n spesifieke doel het. Dus kan die mees toepaslike veranderlike of veranderlikes slegs gekies word indien die doelwitte van die segmenteringstrategie duidelik gedefinieer is. Met die feeste ingedagte, is dit dus van uiterste belang om hierdie segmenteringsveranderlikes en -benaderings krities te evalueer om die mees gepaste veranderlikes om die feesmark te segmenteer, te bepaal. Om die laasgenoemde te bewerkstellig sowel as die doel van die studie, is die studie in vyf artikels verdeel. Navorsing vir

al die artikels is gedoen by die feeste en die data verkry in 2008 is gebruik vir Aardklop, terwyl data van 2009 gebruik is ten opsigte van KKNK. Vraelyste is toegedien op die onderhoudsmetode en is lukraak deur die loop van die feeste versprei. 'n Totaal van 495 vraelyste is voltooi gedurende Aardklop se besoekersopname, en 555 vraelyste is verkry tydens die KKNK se besoekersopname.

Die veranderlikes reismotiewe, besteding, besoekersgedrag in terme van genre-bywoning en frekwensie van besoeke is apart toegepas sowel as in kombinasie om sodoende die doelstelling van hierdie studie aan te spreek. Tesame met hierdie veranderlikes, is 'n kombinasie van statistiese analyses of benaderings wat faktor-analise, bondel-analise, regressie-analise, ANOVA, sowel as onafhanklike *t*-toetse toegepas om die feeste se markte te segmenteer. Die beste resultate is verkry toe die veranderlikes en statistiese analyses in kombinasie eerder as afsonderlik gebruik is en daar is waardevolle insig verkry ten opsigte van die profiel van feesgangers. Die bydra van hierdie navorsing lê dus in die volgende:

- Besoekers aan twee soortgelyke Afrikaanse feeste is, vir die eerste maal, geanaliseer en vergelyk deur die gebruik van verskeie segmenteringsmetodes.
- Die metodes wat gebruik is om die besoekers te segmenteer, is vir die eerste maal, nie net in hierdie studie nie, maar in Suid-Afrikaanse feeste-konteks gebruik. Die volgende metodes is vir die eerste maal in hierdie studie toegepas en kan dus gesien word as 'n maatstaf van Suid-Afrikaanse feeste-navorsing: Reismotiewe as 'n metode van marksegmentering; Onderskeiding tussen genre-bywoners en nie-genre-bywoners; Frekwensie van besoeke en Segmentering en bondelling (clustering) van feesgangers gebaseer op die genres bygewoon.
- Die metodes wat in hierdie studie gebruik is voeg dus waarde toe tot die toerisme- en feesindustrie en dra by tot die kennisbasis ten opsigte van Suid-Afrikaanse kunstefeesbesoekers en veral oor die optimale benadering tot die segmentering van die feesmark.
- 'n Kombinasie van veranderlikes moet gebruik word om die feesmark komprehensief te segmenteer met die doel om kaartjieverkope te verhoog.
- Verder, vanuit 'n metodologiese oogpunt, het hierdie studie tot die volgende bygedra: Vraelysontwerp en -ontwikkeling, seleksie van die proefsteekraamwerk en -grootte, sowel as die tipe statistiese analyses wat gebruik is (apart en gekombineerd). Hierdie studie verleen dus nie slegs hulp aan feesbemarkers en -organiseerders nie, maar ook aan toekomstige navorsers.

Die inligting verkry uit hierdie studie kan toegepas word om die feesmark komprehensief te segmenteer en te profileer, en om die feesprogram pas te maak gebaseer op besoekers se

behoefte. Dit sal lei tot 'n verhoging in kaartjieverkope, 'n groter ekonomiese impak en, uiteindelik, die deurlopende volhoubaarheid van kunstefeeste in Suid-Afrika.

***Sleutelwoorde:***  *Klein Karoo Nasionale Kunstefeeste, Aardklop Nasionale Kunstefeeste, Segmenteringsveranderlikes/-basiswa, Bemaking, Spanderingsanalise*

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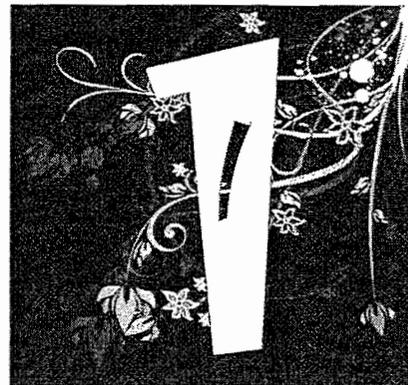
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# CHAPTER 1:

## INTRODUCTION, PROBLEM STATEMENT, OBJECTIVES AND METHOD OF RESEARCH



*"All our dreams can come true, if we have the courage to pursue them."*

*~Walt Disney*

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### 1.1 INTRODUCTION

Among the fastest growing segments of tourism in the world are festivals and events (Goeldner, Ritchie & McIntosh, 2000:234; Jackson & O'Sullivan, 2002:326; Lee, Lee & Wicks, 2004:61). Today, events are seen as a sector with considerable economic and job creation benefits (Getz, 1997:5). Since these events vary in size and impact, terms such as special events, mega-events, hallmark events and major events are used to describe and categorise them. Categorisation according to type and sector, such as public, cultural, sporting, tourism and corporate events is also used. Furthermore, according to Jackson and O'Sullivan (2002:326) one of the fastest growing segments in events tourism is arts festivals.

An arts festival can be defined as a community-themed event or celebration designed to showcase different art forms and activities – along with the related tourism and hospitality experiences – for external communities (Kruger & Petzer, 2008:113). According to Getz (1999), festivals are of short duration and have an extraordinary impact on the host area in terms of visitor volumes, visitor expenditures and publicity that may lead to increased awareness and a more positive image for the city or region. Added to this, researchers agree that several positive outcomes accrue from festivals. These include: building community cohesion and identity (Derrett, 2003:50; Molloy, 2002); strengthening relationships between visitors and the host community (Backman, Backman, Uysal & Mohr, 1995); reducing seasonality and spreading demand into new areas (Nicholson & Pearce, 2000:237); contributing to sustainable development (Backman *et al.* 1995; Quinn, 2006:288); preserving sensitive natural or social and cultural environments (Kim, Uysal & Chen, 2002:128) and generating income, supporting existing businesses and encouraging new businesses resulting in positive economic impacts on

the local economy (Daniels, 2004; Moscardo, 2007:23; Morgan, 2007:113; Jago, Chalip, Brown, Mules & Ali, 2003:4; Morgan, Pritchard & Pride, 2002).

Based on the benefits described above, it is understandable that more destinations are offering or hosting different forms of festivals and events. The contribution of events to tourism lies in the fact that events serve as attractions and offer entertainment. Many countries such as Australia, Switzerland, England and Canada base much of their destination marketing effort on festivals and events (Saayman, 2004:211). This is also the case in South Africa, where events, and especially arts festivals, are an important part of the tourism industry. Over the past few years the country has experienced a significant increase in the number and size of arts festivals (Tassiopoulos, 2005:4). Festivals such as the Klein Karoo National Arts Festival, Aardklop National Arts Festival, Innibos Arts Festival, Volksblad Arts Festival, Oppikoppi Music Festival, Grahamstown National Arts Festival, Cape Town International Jazz Festival, Cultivaria and the Wacky Wine Festival, serve as examples. However, with more than 300 festivals held in the country, the escalating introduction of new festivals and events to the festival calendar leads to an overabundance in the festival market and increased competition, which has a direct impact on the sustainability of arts festivals in South Africa (Van Zyl & Strydom, 2007:121).

The purpose of this proposal is to discuss the research process to be followed in this study. This will be realised by analysing the problem statement, which will be followed by the goals and objectives of the study, the research methodology, definitions of key concepts and, lastly, the chapter classification.

## **1.2 PROBLEM STATEMENT**

Two of the most popular and successful arts festivals in South Africa are the Klein Karoo National Arts Festival (hereafter referred to as the KKNK) and the Aardklop National Arts Festival (hereafter referred to as Aardklop). Both these festivals aim to promote the arts in Afrikaans (Hauptfleisch, 2001:173), as well as to give their respective host communities (Oudtshoorn and Potchefstroom) a financial injection by using the festivals as mass tourist attractions (Kitshoff, 2004:237). Similarities exist between these two festivals based on their nature, festival programmes and festival visitors. As a result, these festivals are continually competing with one another for artists, sponsors and, most importantly, for festival visitors.

The mutual aim of these two festivals is to attract the maximum number of visitors and the associated expenditure (Strydom, Saayman & Saayman, 2006:63). However, increasing visitor numbers does not mean a successful festival or event and can, in itself, be problematic. Not all visitors visit a festival for artistic fulfilment and there are thousands of visitors who go to the

festivals for the socialisation and not for the arts (Prentice & Anderson, 2003:9). These visitors may attend the occasional festival show/production but, for the rest, they prefer the stalls, restaurants, wine-tasting booths and pubs (Cruywagen, 2002:190; Hauptfleisch, 2001:175; Kitshoff, 2003:11).

With the latter in mind, Le Grange (2003:66) indicated that festival marketers/organisers must decide whether they want to cater for the tastes of the festival visitors who are there for the socialisation, or whether they want to cater for the tastes of the art lovers or festival junkies. From a sustainable point of view, it is better to have 10 visitors spending R100 each on festival shows/productions as opposed to 100 visitors spending R10 each on buying souvenirs at the stalls. According to Saayman and Saayman (2005a:582; 2006:219), to sustain the nature of the festival, it is important to identify and determine the types of visitors who attend ticketed shows/productions and to understand and expand on this market as well as to attract them.

The reason for this is that ticket sales are a festival's main source of income and are therefore used as an indicator of visitor interest in the festival and how successfully the programme addresses and fulfils visitors' needs. Since a festival's life cycle is linked to visitor interest, ticket sales also reveal whether the festival programme/product must be modified or changed, because this is determined by changes in visitor interest (Saayman, 2006:114). The latter is best reflected by a festival's product life cycle. As shown in Figure 1.1, both the KKNK and Aardklop have been going through successive stages of growth in their product life cycles since their beginnings in 1994 and 1998 respectively. However, even though a large number of visitors attend the festivals each year, ticket sales for the KKNK's shows/productions have shown an alarming decline, especially since 2005 (Saayman, Saayman, Slabbert & Viviers, 2007:10), while ticket sales for Aardklop have declined in 2008. Even though ticket sales for the KKNK increased in 2009, this is insufficient evidence to conclude that the festival is re-entering a growth phase.

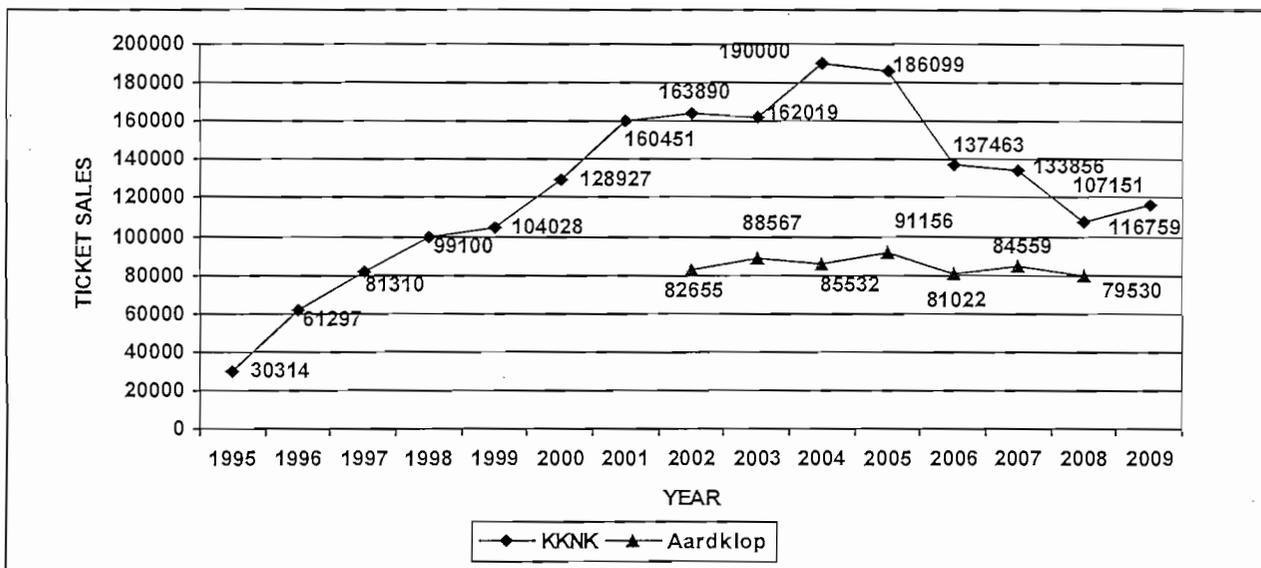


Figure 1.1: The KKNK's and Aardklop's product lifecycles measured in ticket sales

Source: Saayman, Saayman, Van Heerden, Van Zyl & Horn, 2002:25; Saayman & Saayman, 2005b:44, 2006:35; Kruger, Saayman & Saayman, 2008:26; Slabbert, Kruger, Viviers, Saayman & Saayman, 2009:25

Ticket sales have a serious impact on the future profitability and sustainability of these festivals. It is necessary either to modify the festivals' programmes/products or to identify the reasons for the current target market's lack of interest in buying tickets for the festivals' shows/productions. The latter should, however, be informed decisions based on research. The festivals can then determine whether new markets need to be approached. Frisby and Getz (1989:7) and Mehmetoglu and Ellingsen (2005:119) noted that it is crucial for all tourism products, including events/festivals, to adapt their programmes/products to respond to changes in demand. With market research, and more specifically with market segmentation, these changes can be determined and this will assist festival marketers and organisers to provide relevant festival programmes.

Market segmentation is widely considered to be at the very heart of marketing (Morgan & Pritchard, 2001:153). McIntosh and Goeldner (1990:407); Lawton (2001:114); Andrews and Currim (2003:177) as well as Kyle, Kerstetter and Guadagnolo (2002:5) defined market segmentation as the process of dividing the present and potential market into homogeneous groups based on meaningful characteristics. Promotion, product, and pricing efforts can then be concentrated on serving the most prominent portions of the market – the target markets. Mahoney (1983:5) supports this idea by defining it as the process of (a) grouping existing and potential visitors with similar preferences into groups called market segments, (b) selecting the

most promising segments as target markets, and (c) designing marketing mixes that satisfy the special needs, desires and behaviours of the target markets.

Market segmentation recognises that visitors differ in their tastes, needs, lifestyles and motivations, and maximises market demand by directing marketing efforts at what are regarded as economically significant groups of visitors. The technique is an analytical process, which puts visitors first, helps maximise resources and emphasises festival strengths over competitors. This offers a route to more effective and better aimed marketing programmes, fewer direct confrontations with competitors and more satisfied visitors (Dibb & Simkin, 1996:1). Segmentation can also answer questions about the size of potential markets, spending patterns, price sensitivity, loyalty, response to changes in the marketing mix, and the potential effectiveness of promotions (Getz, 1997:260). Market segmentation can therefore be used to determine the existing festival markets' needs and whether the current festival programmes are satisfying these needs. If not, product modifications can be made based on the wants, needs and preferences of the target market.

Added to this many research studies have indicated the benefits derived from market segmentation, especially with regards to arts festivals. These include: clear definition of the visitor (Andereck & Caldwell, 1994:40; Arrimond & Elfessi, 2001:391), better understanding of the market based on motivation (Getz, 1993:949; Van der Wagen, 2005:80), ability to respond to markets' changing needs (Ferrell, Hartline & Lucas, 2002:74; Frisby & Getz, 1989:7), identification of niche markets (Getz, 1997:260; Keller & Kotler, 2006:242,246), increasing the cost effectiveness of marketing (Moutinho & Witt, 1994:305), innovative ideas (Van der Wagen, 2005:80), understanding and assessing the competition (Burke & Resnick, 2000:39; Dibb & Simkin, 2001:610) and the development of a sustainable product and better positioning of the product (Bennett & Strydom, 2001:64; Lee, Lee & Wicks, 2004:1; Mayfield & Crompton, 1995:14).

With these benefits in mind, it is imperative to identify the needs, motives and expectations of potential festival visitors through the process of market segmentation. The more detailed the knowledge of each festival visitor, the closer the festival marketers can get to a customised offering. This will be achieved by offering the target markets what they want, thus creating greater satisfaction and long-term visitor relationships (Ali-Knight, Drummond, McMahon-Beattie, Robertson & Yeoman, 2004:136; Burke & Resnick, 2000:39; Getz, 1997:272; Kastenholz, 2005:556).

According to Slabbert (2002:40), various statistical methods are used to do comprehensive market segmentation to understand these needs, motives, and expectations. These include cluster analysis, correspondence analysis, regression analysis, Automatic Interaction (AID) analysis, latent class analysis; judgment based segmentation, factor and component analysis as well as expenditure. Within tourism research, many variables have been used in conjunction with these methods to determine and profile visitor segments, and the possible number of variables is unlimited (Dodd & Bigotte, 1997:47). These segmentation variables include the following: demographics (Hudson, 2000; Lee & Lee, 2000; Muller & Cleaver, 2000; Kim, Cheng & O'Leary, 2007; Spencer & Holecek, 2007; Tassiopoulos & Hadam, 2008; Tkaczynski, Rundle-Thiele & Beaumont, 2009; Xia, Evans, Spilsbury, Ciesielski, Arrowsmith & Wright, 2009), expenditure (Mok & Iverson, 2000; Koc & Altinay, 2007; Jang & Ham, 2009), psychographics (Ekinci & Chen, 2002; Kim, Crompton, Botha & Kim, 2000; May, Bastian, Taylor & Whipple, 2001; McCleary & Choi, 1999; Yannopoulos & Rotenberg, 1999; Chandler & Costello, 2002; Plog, 2001; Funk & Bruun, 2007; Galloway, Mitchell, Getz, Crouch & Ong, 2008), decision behavioural (Chen & Gursoy, 2000; Mok & Iverson, 2000; Cole & Illum, 2009), geographic (Dolnicar, Grabler & Mazanec, 1999; Lee & Lee, 2009), activity-specific (Choi, Tsang, Wai & Tsang, 1999; Koo, Tao & Yeung, 1999; Nicholson & Pearce, 2000; Füller & Matzler, 2008), product-specific (Chen, 2000; Shoemaker, 2000), lifestyle (Vyncke, 2002; Lee & Sparks, 2007), interests (Olsen, Warde & Martens, 2000), travel motivations (McKercher, 2002; McKercher & du Cros, 2003; Ryan & Huyton, 2000; Kerstetter, Hou & Lin, 2004; Yuan, Cai, Morrison & Linton, 2005; Frochot, 2005; Kim, Borges & Chon, 2006) and communication channels (Dey & Sarma, 2009).

Among these variables, the most prominent approaches in festival/event tourism are primarily tied to five major segmentation bases as described by Kotler (1991) and Nyaupane, White and Budruk (2006:84). These are: demographic (age, gender, language, occupation, lifecycle, family size and nationality), geographic (country, state, city/town and region or origin), socio-economic (profession, education and income), psychographic (personality, lifestyle, activities, attitudes, interest, opinions and motivations), and behavioural (user status and usage rate) variables. Based on the latter, Getz (1997:260) has identified segmentation variables especially for events like arts festivals. Figure 1.2 depicts the variables grouped according to the main segmentation questions: From where will they come? Who exactly are they? What do they want? Under what conditions will they attend the event or festival? How can they be reached? And how often will they visit?

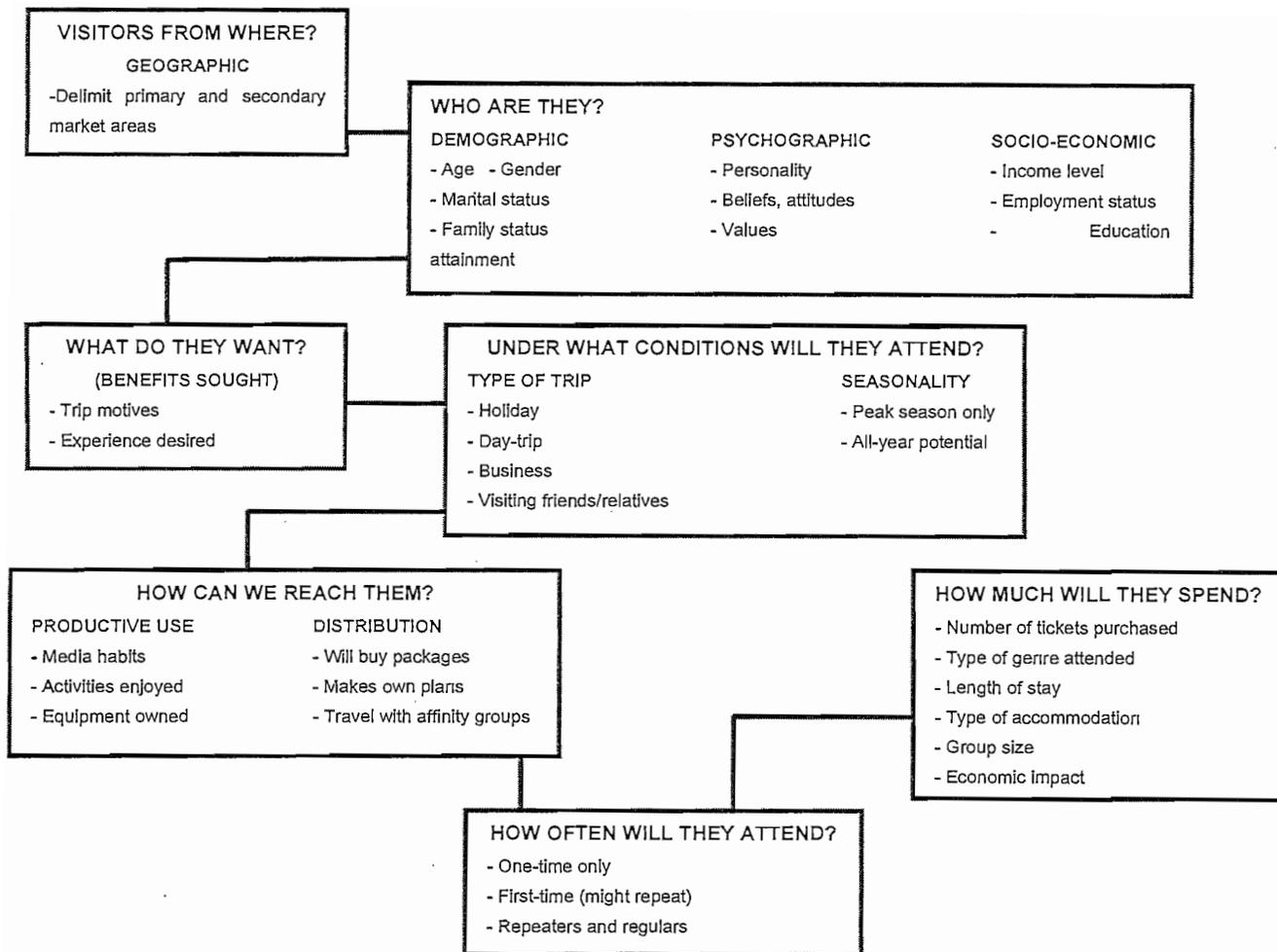


Figure 1.2: Segmentation variables/bases for events

Source: Adapted from Getz, 1997:261

However, although these variables have been recommended as viable segmentation bases, researchers seem to agree that there is no single ideal segmentation base or variable that fits every situation and is the most effective segmentation criterion (Jang, Morrison & O’Leary, 2002:367; Morrison, 2002:178). Bowen, Kotler and Makens (1996:246) agree, and add that there is no single way to segment a market. A (festival) marketer therefore has to try different segmentation variables, alone and in combination, hoping to find the best way to view the market structure. For this reason, the variables/bases, as outlined in Figure 1.2, need to be critically evaluated.

Frochot and Morrison (2000:22), Andrews and Currim (2003:190) as well as Xia *et al.* (2009:2) warn that each market segmentation technique serves a specific purpose and it is only if the objectives of a segmentation strategy are clearly defined that the most appropriate variable or variables to segment can be selected. With the latter and the afore-mentioned problem in mind, in the South African festival context, the primary aim of arts festivals such as the KKNK and

Aardklop should be to increase tickets sales by attracting visitors who support the genres (shows/productions) at the festivals. This be the main criteria used to evaluate the variables/bases applied in this study. Increased ticket sales will not only allow arts festivals to stay true to their main aim (i.e. preserving and enhancing the Afrikaans language and culture) but will ultimately have a positive impact on the future sustainability and economic impact of arts festivals in the country. Therefore the research question that this thesis will attempt to address is: which market segmentation approach is the most viable in addressing the issues raised above?

### **1.3 GOAL AND OBJECTIVES OF THE STUDY**

#### **1.3.1 Goal**

To critically evaluate different market segmentation approaches for visitors to national arts festivals in South Africa.

#### **1.3.2 Objectives**

The achievement of the goal relies on the following objectives:

##### **Objective 1**

To segment visitors to Aardklop based on their travel motives.

##### **Objective 2**

To identify the socio-demographic and behavioural determinants of visitor spending at Aardklop.

##### **Objective 3**

To distinguish between genre supporters and non-genre supporters at Aardklop.

##### **Objective 4**

To segment visitors to the KKNK based on the frequency of visitation to distinguish between first-time and repeat festival attendees.

##### **Objective 5**

To cluster visitors to the KKNK and Aardklop based on the genres supported.

##### **Objective 6**

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

## **1.4 METHOD OF RESEARCH**

This is a quantitative study, collecting primary data on the topic from existing sources and using a self-administered questionnaire to collect problem-specific data (primary data).

### **1.4.1 Literature Study**

A literature study was based on specific keywords: *tourism, event tourism, art festival, market segmentation, determinants, expenditure, economic impact, target market, travel motives, first-time visitors, repeat visitors, sustainability, ANOVA, factor analysis, cluster analysis, t-tests and regression analysis*. The theoretical framework of market segmentation was investigated. This was done by means of analyses of journal articles, theses, dissertations, newspaper articles, books and other tourism-related literature as well as sources on the KKNK, Aardklop, market segmentation and tourism. Information searches were conducted mainly through library catalogues and indexes, as well as the Internet. Scientific databases such as Google Scholar, ScienceDirect and Ebscohost played a vital role in searching for the most recent, relevant publications and information. Through these sources, a complete analysis of market segmentation was done by looking at the importance and benefits of market segmentation as well as the various methods/approaches of conducting comprehensive segmentation. Since an intensive literature study as well as an empirical survey (that was facilitated using questionnaires) were used, this study incorporates both primary and secondary sources.

### **1.4.2 Empirical Study (Survey)**

The following section highlights the methods chosen to conduct the empirical analysis.

#### **1.4.2.1 Research design and method of collecting data**

According to Slabbert (2004:63), the advantages of a quantitative approach include:

- It is suitable for collecting demographic information, for example gender, age and income.
- It is inexpensive to conduct.
- It is relatively easy to tabulate and analyse the data using statistical programmes.

In this approach, the researcher is interested in the meaning of the participants' experiences concerning the festival. The research will therefore be causal in nature. This study will attempt to determine the socio-demographic information, travel motives, frequency of visitation and behaviour at the festivals to critically evaluate the variables/bases used to profile visitors to the KKNK and Aardklop.

For the purpose of this study, data from the survey done in 2008 will be used for Aardklop, while the 2009 survey will be used for the KKNK. The reason being that the questionnaire used in these surveys contained a section on travel motives which was previously not included in the questionnaires. Both these surveys were conducted at the respective festivals by the Institute for Tourism and Leisure Studies at the North-West University, Potchefstroom Campus. As shown in Table 1.1, a total of 495 questionnaires were completed for Aardklop and a total of 555 questionnaires were completed for the KKNK. A structured questionnaire served as the instrument for collecting the data at the respective festivals. The data was used to compile graphs and tables to establish a profile of the festival visitors.

*Table 1.1: Questionnaires completed during Aardklop and the KKNK*

<b>Festival</b>	<b>Date</b>	<b>Number of visitor questionnaires</b>
Aardklop	30 September – 3 October 2008	495 questionnaires
KKNK	6 – 11 April 2009	555 questionnaires

*Source: Kruger, Saayman & Saayman, 2008:2; Slabbert, Kruger, Saayman, Saayman & Viviers, 2009:5*

#### **1.4.2.2 Selection of the sampling frame**

Cooper and Emory (1995:207), state that using an availability sampling method with a population (N) of 100 000, the recommended sample size (S) is 384. However, these authors also indicated that, as a rule of thumb, the law of diminishing returns will apply when the sample size is greater than 300. In 2008, a total of 55 518 visitors attended Aardklop (Kruger, Saayman & Saayman, 2008:27) and a total of 44 934 visitors attended the KKNK in 2009 (Slabbert, Kruger, Viviers, Saayman & Saayman, 2009:38). A sample size of 400 was therefore anticipated for both festivals. However, since visitor spending is used in Chapter 3, only questionnaires with complete spending information can be included in the analysis. To take this into account, the sample sizes for both festivals were increased to 450. The sample size was increased to 500 for the KKNK to take into account the importance of complete spending information. The number of questionnaires for both Aardklop and the KKNK thus encompasses more than the required number of questionnaires according to the formula given by Cooper and Emory (1995:207).

#### **1.4.2.3 Sampling method**

The surveys followed a non-probability sampling method. A convenience or availability sample was used to conduct the surveys during the duration of the festivals. The surveys consisted of a self-administered questionnaire. A destination-based survey was undertaken, where questionnaires were handed out on site during the events. The survey took place at several locations throughout the cities of Oudtshoorn and Potchefstroom to limit bias toward certain

visitors. However, they were generally conducted in the show areas/venues, in the closed streets where the festival visitors gather between shows and on the main festival grounds. Adult visitors were randomly selected as they entered or departed from these areas and when they were sitting down and relaxing at the various venues. The field workers were trained to ensure that they understood the aim of the study as well as the questionnaire. Respondents were further briefed about the purpose of the research beforehand to ensure that they participated willingly and responded openly and honestly. The questionnaires were progressively handed out towards the end of the festivals as this gave a more accurate account of visitor spending.

#### **1.4.2.4.1 Development of the questionnaire**

The Institute for Tourism and Leisure Studies at the North-West University, Potchefstroom Campus developed both questionnaires in collaboration with the festivals' organisers. Questions were used to measure the independent variables and demographic information. The questionnaire used to survey visitors to Aardklop in 2008 (see Appendix 1A) and the KKNK (see Appendix 1B) in 2009 measured the following:

- Demographic details (gender, home language, age, occupation, home province and preferred accommodation) as well as spending behaviour (number of persons paid for, length of stay and expenditure of visitors on different spending components). The spending questions were detailed by spending category, including accommodation, shows, food and beverages, shopping, recreation and transport.
- Information with regard to the festival (type of shows at the festival, the number of tickets bought, other festivals attended, and the number of years attended). Similar to the spending questions, the type of shows (genres) at the festival were also categorised and included: Drama, Dance theatre, Word art and poetry, Children's theatre, Theatre discussions, Music theatre and cabaret, Classical music, Choir and ensemble, Rock, Visual arts and Exhibitions and comedy. Due to the festival programme, Jazz was also included in the KKNK questionnaire.
- Visitors' specific motivations for attending the festivals as well as the preferred type of accommodation and media. The section on travel motivations was based on the work of Crompton (1979) and Crompton and McKay (1997) and was adapted for each festival.

Pilot studies were not necessary because the questionnaires had been successfully used in surveys carried out previously at Aardklop and the KKNK, and changes have been continually made to improve them.

#### **1.4.2.5 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., 2007) was used to process the information. SPSS is a world leader in e-Intelligence software and services, enabling its visitors to turn raw data into usable knowledge. The data analysis involved initial data analysis (descriptive statistics) and focused on the demographic profile of the visitors to Aardklop and the KKNK. Using SPSS, a factor analysis, cluster analysis, regression analysis and *t*-test analysis were carried out. A factor analysis was performed to determine the leading motives for attending each festival and a cluster analysis was used to identify segments of visitors based on travel motives. A cluster analysis was also employed to cluster visitors at the festivals based on the different genres attended to effectively identify the genre supporters. A regression analysis was used to identify the determinants of spending by visitors to Aardklop and an independent *t*-test was used to determine the differences between genre supporters and non-supporters at Aardklop. ANOVAs were used to investigate any significant differences between the first-time and repeat visitors at the KKNK as well as between the different segments/groups identified by the aforementioned analyses. A brief description of each analysis to be used is given in the next section.

#### **a. Regression Analysis**

According to Gujarati (2006:133), regression analysis is concerned with the study of the relationship between one variable called the dependant variable and one or more other independent variables. For the purpose of this study, the model will be a linear regression of total spending on a number of quantitative and qualitative determinants of spending (Tustin, Ligthelm, Martins & Van Wyk, 2005).

#### **b. ANOVA Analysis (Analysis of Variance)**

An ANOVA, sometimes called an *F*-test, is closely related to the *t*-test. The major difference is that, where the *t*-test assesses the difference between the means of two groups, an ANOVA assesses the difference between the means of two or more groups. The purpose of analysis of variance (ANOVA) is to test whether there is a statistically significant difference in the population means of more than two groups (Eiselen, Uys & Potgieter, 2005:119). ANOVA analysis was carried out to determine differences between groups/segments on the variables predictive of group membership.

#### **c. Cluster Analysis**

A cluster analysis is defined as a multivariate interdependence technique, whose primary objective is to classify objects into relatively homogeneous groups based on the set of variables considered (Hair, Bush & Ortinau, 2000:594). A cluster analysis was used in this study to cluster visitors to Aardklop based on their travel motives as well as to cluster visitors to both the KKNK and Aardklop based on the genres attended.

#### **d. Factor Analysis**

A factor analysis is a multivariate technique for identifying whether the correlations between a set of observed variables stem from their relationship to one or more latent variables in the data (Field, 2005:731; Pallant, 2007:179). A factor analysis was performed on both the motivation factors and evaluation items of each festival.

#### **e. Independent *t*-test Analysis**

An independent-sample *t*-test is used to compare the mean scores on some continuous variable between two different groups (e.g. male and female) (Einspruch, 2005:67; Pallant, 2007:103;232). In this study, an independent *t*-test was done to determine the differences between genre attendees and non-attendees at Aardklop.

### **1.5 DEFINITIONS OF KEY CONCEPTS**

The following concepts will be used regularly throughout the thesis:

#### **1.5.1 Arts festivals**

According to Kruger and Petzer (2008:113), an arts festival can be defined as a community-themed event or celebration designed to showcase different art forms and activities – along with the related tourism and hospitality experiences – for external communities. Jackson and O'Sullivan (2002:327) agree and define an arts festival as a community celebration that serves as a public demonstration of 'what the community is all about'. Added to this, McIntosh and Goeldner (1990:158) indicate that art festivals often include various types of fine arts together with other cultural expressions to make them more broadly appealing.

#### **1.5.2 Market segmentation**

McIntosh and Goeldner (1990:407) define market segmentation as the process of dividing the present and potential market based on meaningful characteristics and concentrating promotion, product, and pricing efforts on serving the most prominent portions of the market – the target markets. According to Dibb and Simkin (2004:58), it is an effective way of subdividing a larger market. McDonald and Dunbar (1995:10) support these views and, according to them, market segmentation is the process of splitting visitors (tourists) into different groups, or segments, within which visitors with similar characteristics have similar needs. By doing this, each one can be targeted and reached with a distinct marketing mix.

#### **1.5.3 Segmentation variables/bases**

Segmentation variables or bases are the dimensions or characteristics of individuals (festival visitors), groups or businesses that are used for dividing a total market into segments (Dibb *et*

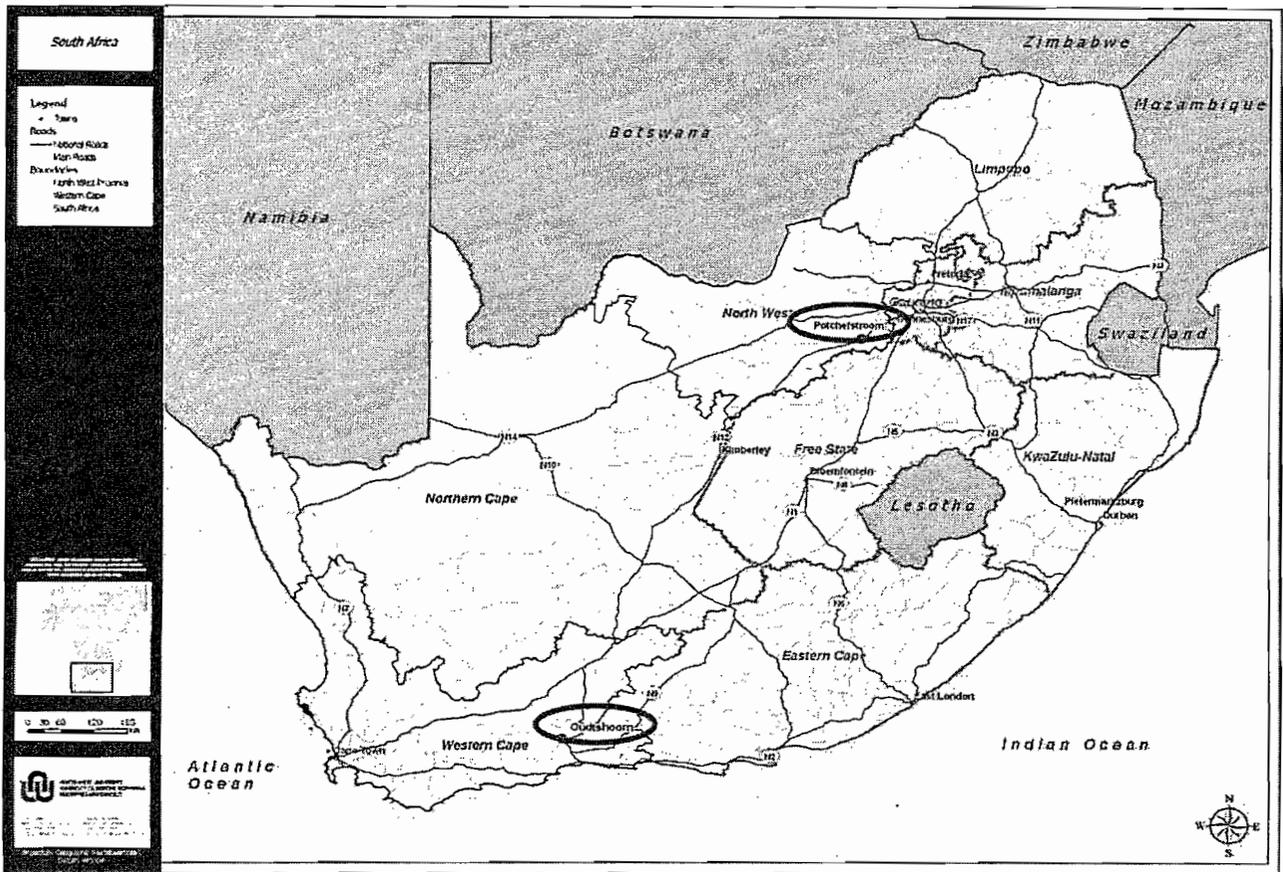
*al.*, 2001:210; George, 2001:112; Getz, 1997:260; Keller & Kotler, 2006:261). Cravens (1997:127) agrees, and adds that segmentation variables perform two important functions: the variable(s) is/are used to divide a market into segments and the second function is to describe or create a profile of the segments. In the literature and also in practice, a distinction is often made between four groups of variables, geographic, socio-demographic, psychographic, and buyer behaviour (Armstrong & Kotler, 2005:54; Bothma & Burgess, 2007:37; Burke & Resnick, 2000:41; Cooper & Wahab, 2001:89; Fill, 2007:329; Horner & Swarbrooke, 2001:159; Moutinho & Witt, 1994:306; Youell, 1996:138). There is, however, no single way to segment a market. A (festival) marketer has to try different segmentation variables, alone and in combination, hoping to find the best way to view the market structure (Bowen *et al.*, 1996:246).

#### **1.5.4 KKNK**

The Klein Karoo National Arts Festival (KKNK) is an annual arts festival hosted in Oudtshoorn (see Map 1.1) during the March/April school holidays. The main aim of the KKNK is to promote the arts in Afrikaans, as well as to give the host community of Oudtshoorn a financial injection by using the festival as a mass tourism attraction. Oudtshoorn attracts about 1000 artistes in about 200 productions and exhibitions yearly over eight days. The festival accommodates both visual and performing arts; drama, cabaret, musical theatre, classical music, jazz and light music. Open-air concerts have become a unique characteristic of the KKNK (ANON, 2001:2; ANON, 2007:1; Kitshoff, 2004:237).

#### **1.5.5 Aardklop**

The Aardklop National Arts Festival is held annually in the town of Potchefstroom situated in the North West Province (see Map 1.1). The festival started in 1998 with the aim of preserving and enhancing the Afrikaans language and culture as well as to meet the need for an arts festival in the northern part of the country. The festival programme includes classical music, theatre, children's and street theatre, dance, cabaret, rock, jazz, literature and the visual arts (Van Zyl, 2002; Van Heerden, 2003:11-12; Van Zyl & Strydom, 2007:127).



Map 1.1: Map of Potchefstroom (Aardklop) and Oudtshoorn (the KKNK)

## 1.6 CHAPTER CLASSIFICATION

This thesis will consist of seven chapters. The following section includes a brief outline of what can be expected from each of the chapters.

Chapter 1 includes the introduction, problem statement, aims and objectives, method of research and definition of key concepts. The aim of this chapter is to give an overview of the festivals' backgrounds and the problems faced by the festival marketers and organisers. It also aims to emphasise the importance of determining the optimum market segmentation approach especially for arts festivals.

Chapter 2 contains Article 1, which segments visitors to Aardklop based on their main motives for attending the festival. Visitors were clustered based on the motives identified, and this article attempt to show the viability of segmenting festival visitors based on travel motives and ways that this method can be utilised to increase ticket sales.

Chapter 3 contains Article 2. In this article, the socio-demographic and behavioural determinants of spending by visitors to Aardklop were established. The benefits and impacts of

these determinants, especially concerning market segmentation, are outlined as well as ways that they can be applied to increase visitor spending, improve the festival programme and, particularly, to increase ticket sales.

Chapter 4 contains Article 3. This article determined the differences between genre attendees and non-attendees to Aardklop based on socio-demographic and behavioural characteristics. With this method, a comprehensive profile of the genre attendees is drawn to successfully increase ticket sales.

Chapter 5 consists of Article 4, which segmented visitors to the KKNK based on the number of times the festival has been visited to distinguish between first-time and repeat visitors. This chapter shows the importance of both first-time and repeat visitor markets and how the festival programme and marketing strategies can be adapted to attract more visitors – especially potential and current genre supporters.

Chapter 6 contains Article 5. This article clustered visitors to Aardklop and the KKNK based on the genres attended. This method of market segmentation contributes to the sustainability of festivals, since marketing strategies can be effectively aimed at genre supporters.

The final chapter consists of conclusions drawn from the discussion in the foregoing chapters. Recommendations are made to aid festival organisers and marketers in the effective planning and marketing of the festivals. In this chapter, a summary is given of the importance of market segmentation, especially by festival management, as well as a summary of the main issues that need to be considered when doing so. Each segmentation approach, as applied in each article, is critically evaluated to determine the most effective market segmentation approach for national arts festivals in South Africa.

# CHAPTER 2:

## TRAVEL MOTIVES AS A METHOD FOR MARKET SEGMENTATION OF VISITORS TO THE AARDKLOP NATIONAL ARTS FESTIVAL



*“So many of our dreams at first seem impossible, then they seem improbable, and then, when we summon the will, they soon become inevitable.”*

*~Christopher Reeve*

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### ABSTRACT

The purpose of this study is to apply market segmentation to visitors to the Aardklop National Arts Festival based on their travel motives. The reason being that previous research indicated that the future of festivals is dependent on the number of show tickets sold. To achieve the goal, a questionnaire survey ( $N=495$ ) was conducted whereafter a factor analysis was performed to determine the leading motives for attending the festival. Cluster analysis was then employed to identify segments of visitors based on travel motives. Five distinct clusters were identified, *Families, Novelists, Culture seekers, Escapists* and *Festival junkies*. *Festival junkies* was identified as the most important market for the festival. The results of the study showed statistically significant differences between the five clusters in terms of age, the number of people paid for and the number of days spent at the festival. Marketing and management implications for effectively targeting *Festival junkies* and *Culture seekers* are also discussed.

*Key words: Aardklop National Arts Festival; market segmentation; travel motives, cluster analysis, factor analysis*

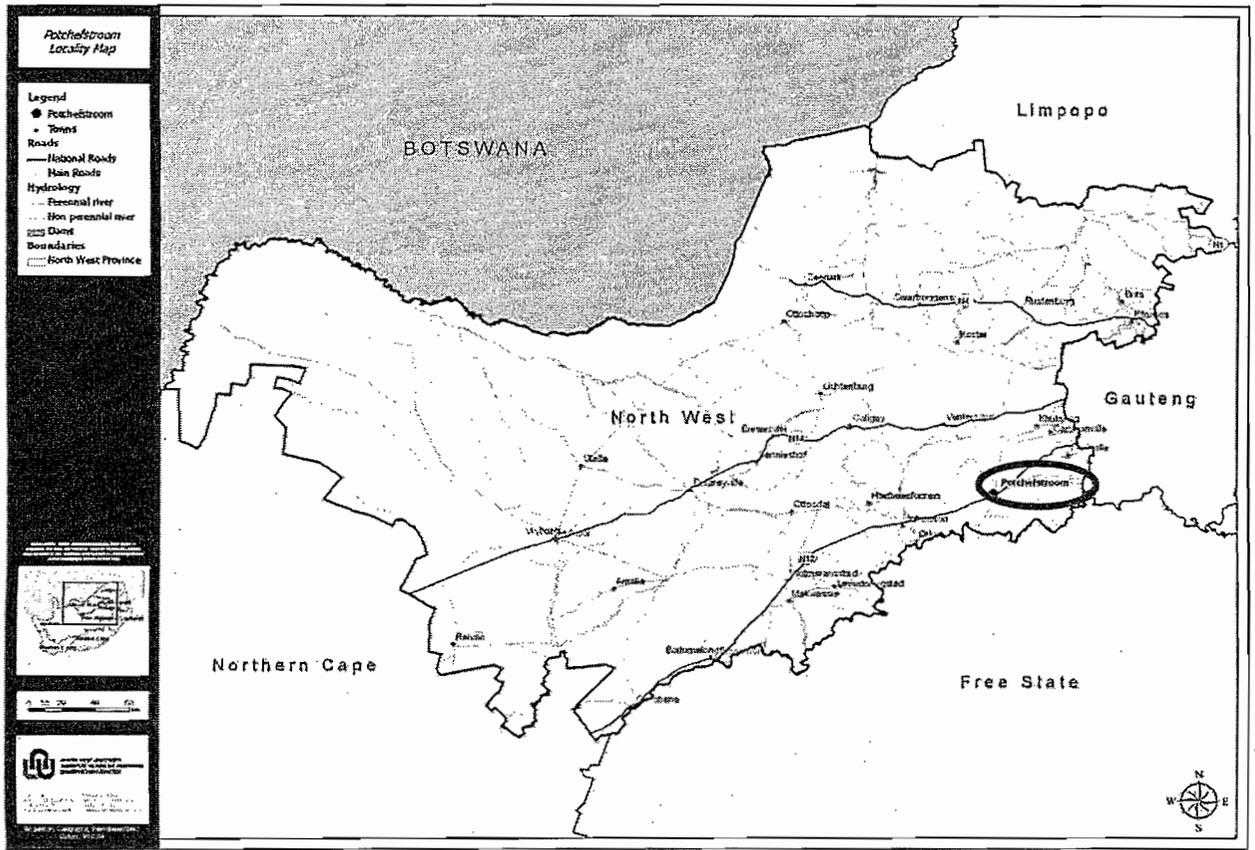
# TRAVEL MOTIVES AS A METHOD FOR MARKET SEGMENTATION OF VISITORS TO THE AARDKLOP NATIONAL ARTS FESTIVAL

## 2.1 INTRODUCTION

Festivals are an important part of the tourism industry and, in the case of South Africa, there has been an estimated annual growth rate in visitor numbers of between 10% and 15% (Tassiopoulos, 2000; 2005:4). The contribution of events to tourism lies in the fact that events serve as attractions and offer entertainment. South Africa, like many other countries such as Australia and Switzerland, base much of their destination marketing efforts on festivals/events (Saayman, 2004:211). This has proved to be very successful, and the country has experienced a significant increase in the number and size of festivals and events over the past few years (Saayman & Saayman, 2004:629; Tassiopoulos, 2005:4).

According to Saayman and Saayman (2004:629), one of the great advantages of hosting arts festivals, or events in general, is that they can create a demand in a time that might be regarded as off-season. Kim, Uysal and Chen (2002:128) state that arts festivals are organised to create a positive image of a destination and to bring money into the local economy. In addition, arts festivals can minimise negative impacts, increase destination competitiveness, contribute to sustainable development, foster better host-guest relationships, and help preserve the sensitive natural or social and cultural environments (Long & Perdue, 1990; Walo, Bull & Breen, 1996; Kim, Uysal & Chen, 2002:128; McKercher, Mei & Tse, 2006:55; Quinn, 2006:288; Getz, 2008:403,405).

The Aardklop National Arts Festival (hereafter referred to as Aardklop) is one of the three largest South African arts festivals. Aardklop is held annually in the town of Potchefstroom situated in the North West Province (see Map 2.1). The festival started in 1998 with the aim of preserving and enhancing the Afrikaans language and culture as well as to meet the need for an arts festival in the northern part of the country. An estimated 55 518 people visited this festival annually over five days in September 2008. The festival programme includes classical music, theatre, children's and street theatre, dance, cabaret, rock, jazz, literature and the visual arts (Van Zyl, 2002; Van Heerden, 2003:11-12; Van Zyl & Strydom, 2007:127).



Map 2.1: Map of Potchefstroom

One of the problems facing festival and events organisers in South Africa is the growth in the number of festivals/events. Currently, there are over 300 festivals/events of various kinds held throughout the year, and new ones keep being added to the calendar (Van Zyl & Strydom, 2007:121). This leads to an overabundance in the festival market which has a direct impact on the sustainability of a festival such as Aardklop. Van Zyl (2006:150) warns that the latter can ultimately lead to a situation of 'festival fatigue', in which it becomes financially impossible for visitors to choose among the profusion of festivals. This is not the only problem facing festivals. Economic difficulties are also putting strain on visitors' disposable income and the changing characteristics of visitors – that is changing the composition of the family unit, the ageing of the population, the rise in the ethnic population and the change in its composition – add to the problem (Kara & Kaynak, 1997:874). These challenges require event organisers and marketers to re-evaluate and modify their festival strategy to ensure sustainability (Mykletun, Crofts & Mykletun, 2001:493).

According to Getz (1993), Kara and Kaynak (1997:873) and Crompton and McKay (1997:426), the starting point of any marketing strategy is to understand the reasons that visitors attend an event or festival (travel motives). Therefore, the purpose of this article is to segment visitors to

Aardklop by means of travel motives. To achieve this, the article is organised in the following manner: the introduction will be followed by a review of the related literature, followed by an explanation of the method of research and a discussion of the results and their implications whereafter the conclusions will be presented.

## 2.2 LITERATURE REVIEW

Prentice and Anderson (2003:9) warn that not everyone at a destination during a festival can be assumed to be a festival goer, and they caution about making the assumption that all festival visitors are motivated to visit the destination to participate in the festival. Research by Scott (1996) and Rachael and Douglas (2001) have shown that travel motives differ from festival to festival or attraction to attraction. Therefore, segmenting markets based on their motivations can be seen as a prerequisite to an effective marketing strategy to optimise the use of marketing and promotional resources (Crompton & McKay, 1997:426; Juwaheer, 2006:4; Boo & Jones, 2009:66). From a festival organisers' perspective, the most desirable visitors to attract are those who stay longer, travel for the purpose of attending the festival, and who are likely to spend money supporting the festival shows/productions. For this reason, it has become critical to select, attract and retain the most viable target market(s) through the process of market segmentation (Mykletun *et al.*, 2001:494; Koc & Altinay, 2007:228).

Researchers have experimented with a wide range of market segmentation applications in an effort to define their target markets (Hsu & Crofts, 2006:280). The most popular variables for visitor segmentation include the geographic, socio-demographic, psychographic (which includes travel motivation), behavioural characteristics and/or visitor expenditure (Dibb & Simkin, 1996:14; Kara & Kaynak, 1997:873; Hanlan, Fuller & Wilde, 2006:17). Lee (2000:169), Kim, as well as Borges and Chon (2006:957) state that an analysis of travel motives for festival attendance is an important marketing tool or variable for market segmentation and effective promotion. Backman, Backman, Uysal and Sunshine (1995), Kara and Kaynak (1997:873) and Formica and Murrmann (1998:204) support this notion and conclude that festival visitors are not homogeneous when it comes to motivations and that festival organisers should consider motivations in segmenting potential markets.

Recent studies show that the analysis of travel motives to visit festivals helps event managers to better position their work (Scott, 1996); plan and market festival programmes effectively (Kim *et al.*, 2002:129); predict visitors' future travel patterns (Cha, McCleary & Uysal, 1995:33; Jang & Wu, 2006:314); identify markets in which visitor motivation and festival features and resources match (Bansal & Eiselt, 2004:388); monitor satisfaction and understand visitors'

decision processes (Crompton & McKay, 1997:426); respond to the changing needs and trends of the market (Ferrell, Hartline & Lucas, 2002:74); identify strengths and opportunities with a view to ensuring tourists' satisfaction (Lee & Lee, 2001); initiate improvements for increased visitor numbers and/or revenues such as a tailor-made festival programme designed to meet the needs of the visitors (Baker & Crompton, 2000; Crompton & McKay, 1997:426) and strengthen management and product development (Gnoth, 1997:283; Raybould, 1998:238).

These factors have become increasingly important as the growing number and diversity of festivals and events has led to heightened competition. Crompton and McKay (1997:426) and Van Zyl (2005:73) state that the enhancement and maintenance of visitors' central motivations should be the primary goal of festival managers, since identifying and prioritising motives is a key ingredient in understanding visitors' decision processes. Visitors may have several different needs, which they desire to satisfy through a festival visit. Different visitors may engage in the same festival element and derive different benefits from the experience. Measuring the main desires that visitors are seeking to satisfy at the festival, and which motivational factors lead to the preference of the particular festival, can give a more detailed profile of the visitors and enable marketers/organisers to better address their needs with a tailor-made and cost-effective marketing programme (Crompton & McKay, 1997:426; Raybould, 1998:238; Gitelson & Kerstetter, 2000:179).

Motivational factors or motives for attending arts festivals are well documented in tourism literature. They include socialisation, family togetherness, novelty, escape and excitement as the most common motives for travelling to festivals (see Van Zyl, 2006:151; Uysal, Gahan & Martin, 1993; Mohr, Backman, Gahan & Backman, 1993; Formica & Uysal, 1996; Formica & Uysal, 1998; Kruger & Saayman, 2008; Cha *et al.*, 1995:35-37; Uysal, Gahan & Martin, 1993; Backman *et al.*, 1995; Scott, 1996; Schneider & Backman, 1996:143; Crompton & McKay, 1997; Lee, 2000; Nicholson & Pearce, 2001; Formica & Murrmann, 1998; Kim *et al.*, 2006; Park, Reisinger & Kang, 2009). These motives have furthermore been used to segment festival markets using a cluster analysis (see Table 2.1). Formica and Uysal (1996) compared festival motivations of residents and non-residents attending the Umbria Jazz festival in Italy. Twenty-three motivational items were factor analysed to five dimensions of motivation: *excitement and thrills*, *socialisation*, *entertainment*, *event novelty* and *family togetherness*. Statistically significant differences were found between the Umbria region and out-of-the region visitors with respect to two of the five motivational factors. Results revealed that residents tended to be more motivated by *socialisation* while non-residents appeared to be more driven by *entertainment*.

Formica and Uysal (1998:19-21) explored festival motivations for attending the Spolento Festival Italy. This time, six factor groups emerged from the factor analysis:

*socialisation/entertainment, event attraction/excitement, group togetherness, cultural/historical, family togetherness and site novelty*. Significant differences existed between *moderates* and *enthusiasts* with respect to age, income and marital status. *Enthusiasts* were characterised by greater age, higher income and marriage, while *moderates* were younger, single and earned a lower income. Faulkner, Fredline, Larson and Tomljenovic (1999:164-169) explored visitors' motivations to attend Sweden's Storsjöyran music festival. Twenty-five motivational items were selected and factor analysis delineated seven dimensions of motivation: *local/cultural identity, excitement/novelty seeking, party, local attractions, socialisation, known group socialisation and ancillary activities*. Significant differences were found between *local repeaters, young party set and local families* in terms of demographic characteristics, travel and festival attendance arrangements and satisfaction levels.

Five motivational categories emerged from 34 motivational items, in Lee and Lee's (2001:813-814) study of visitor motivation to the World Culture Expo in Kyongju, South Korea. These were: *culture, novelty and stimulation, family togetherness, boredom alleviation and socialisation*. Significant differences were furthermore found between three clusters, *culture and variety seekers, escape-oriented seekers and least cultural-oriented seekers* in terms of type of person accompanied, information sources, visit type, income level and amount of expenditures. Lee, Lee and Wicks (2004:66) also studied the festival motivations to the 2000 Kyongju World Cultural Expo in South Korea. In their study, six motivational categories emerged: *cultural exploration, family togetherness, novelty, escape, event attractions and socialisation*. A cluster analysis identified four clustered segments for the six motivation factors namely *culture and variety seekers, multi-purpose seekers, escape seekers and event seekers*. The multi-purpose seekers were found to be the most important segment.

In their study of visitors to the Fairfax! Music festival in Virginia, USA, Bowen and Daniels (2005:159-161) identified three motivation factors namely *discovery, music and enjoyment*. Based on their patterns of motivations, four groupings of visitors were revealed by the cluster analysis: *just being social, enrichment over music, the music matters and love it all*. These groups differed based on race, gender, marital status, and household income. Chang (2006:1229) segmented visitors to the Rukai Tribal area, an aboriginal festival in Taiwan based on five motivational factors (*equilibrium recovery, festival participation and learning, novelty seeking, socialisation and cultural exploration*) into three clusters: *aboriginal cultural learners, change routine life travellers and active cultural explorers*. It was further revealed that *cultural exploration* were the most important factor attracting visitors to the festival. In a more recent study, Park *et al.* (2009:170-177), explored festival motivations for attending the South Beach Wine and Food Festival in Miami, Florida. Forty-four motivation items were factor analysed. The

seven factors that motivated first-time visitors to the festival were the *desire to taste new wine and food, enjoy the event, enhance social status, escape from routine life, meet new people, spend time with family* and *get to know the celebrity chefs and experts*.

Based on the above-mentioned, it is clear that many studies have used travel motives to segment a festival/event market. However, based on the literature review (as summarised in Table 2.1), segmenting festival visitors based on their motives has, to date, never been applied to South African arts festivals. By understanding what drives and motivates participation, Aardklop's marketers and organisers can gain better insight into a strategy to maintain attendees and draw new ones to the festival.

**Table 2.1: Analysis of research on market segmentation based on festival motives**

Researcher/s	Study	Travel motives	Identified market segments/clusters	Segment characteristics
Formica & Uysal (1996)	A market segmentation of festival visitors: Umbria Jazz Festival in Italy	<ul style="list-style-type: none"> <li>▪ Excitement/thrills</li> <li>▪ Socialisation</li> <li>▪ Event novelty</li> <li>▪ Family togetherness</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: Moderates</li> <li>▪ Cluster 2: Enthusiasts</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: Interested in culture experiences, interacting with other visitors and excitement</li> <li>▪ Cluster 2: interested in the festival but to a lesser extent and are not interested in interacting with other visitors and avoid festival crowds</li> </ul>
Formica & Uysal (1998:19-21)	Market segmentation of an international cultural-historic event – Spoleto Festival in Italy	<ul style="list-style-type: none"> <li>▪ Socialisation &amp; entertainment</li> <li>▪ Event attraction and excitement</li> <li>▪ Group togetherness</li> <li>▪ Cultural/historical</li> <li>▪ Family togetherness</li> <li>▪ Site novelty</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: Moderates</li> <li>▪ Cluster 2: Enthusiasts</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: Interested in culture experiences, interacting with other visitors and excitement</li> <li>▪ Cluster 2: interested in the festival but to a lesser extent and are not interested in interacting with other visitors and avoid festival crowds</li> </ul>
Formica & Murrmann (1998:201-205)	The effects of group membership and motivation on attendance: Spoleto Festival in Italy	<ul style="list-style-type: none"> <li>▪ Socialisation and entertainment</li> <li>▪ Event attraction and excitement</li> <li>▪ Group togetherness</li> <li>▪ Cultural/historical attraction</li> <li>▪ Family togetherness</li> <li>▪ Site novelty</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: Families</li> <li>▪ Cluster 2: Friends and Groups</li> <li>▪ Cluster 3: Couples</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: Had the highest mean scores on 'family togetherness'</li> <li>▪ Cluster 2: Had the highest mean scores on 'Group togetherness' and 'Socialisation and Entertainment'</li> <li>▪ Cluster 3: Had a higher rating on 'Event attraction and excitement' and 'Cultural/Historical attraction'</li> </ul>
Lee & Lee (2001:813-814)	World Culture Expo Segments (Kyongju, South Korea)	<ul style="list-style-type: none"> <li>▪ Culture</li> <li>▪ Novelty and stimulation</li> <li>▪ Family togetherness</li> <li>▪ Boredom alleviation</li> <li>▪ Socialisation</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: The Culture and Variety seekers</li> <li>▪ Cluster 2: The Escape-orientated seekers</li> <li>▪ Cluster 3: The Least Cultural-orientated seekers</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: had the highest mean scores on 'culture', 'novelty and stimulation' and 'family togetherness'</li> <li>▪ Cluster 2: had the second highest mean score on 'culture' and the highest mean score on 'boredom alleviation'</li> <li>▪ Cluster 3: had the lowest mean score on 'culture', 'novelty stimulation' and 'boredom alleviation'</li> </ul>
Lee, Lee & Wicks (2004:66)	Segmentation of festival motivation by nationality and satisfaction (The 2000 Kyongju World Cultural Expo, South Korea)	<ul style="list-style-type: none"> <li>▪ Cultural exploration</li> <li>▪ Family togetherness</li> <li>▪ Novelty</li> <li>▪ Escape (recover equilibrium)</li> <li>▪ Event attractions</li> <li>▪ Socialisation</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: Culture and Families</li> <li>▪ Cluster 2: Multi-purpose seekers</li> <li>▪ Cluster 3: Escape seekers</li> <li>▪ Cluster 4: Event seekers</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: had the highest mean score on 'family togetherness' and 'cultural exploration'</li> <li>▪ Cluster 2: had the highest means scores across all factors except 'family togetherness'</li> <li>▪ Cluster 3: had the second highest mean scores on 'escape' and 'novelty'</li> <li>▪ Cluster 4: had the second highest mean scores on 'event' and 'socialisation'.</li> </ul>
De Guzman, Leones, Tapia, Wong & de Castro (2006:864-865)	Segmenting visitor motivation to WOW (Wealth of Wonders) Philippines	<ul style="list-style-type: none"> <li>▪ Culture exploration</li> <li>▪ Event attraction</li> <li>▪ Socialisation</li> <li>▪ Family togetherness</li> <li>▪ Novelty</li> <li>▪ Escape</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: Binding tourists</li> <li>▪ Cluster 2: Bonding tourists</li> <li>▪ Cluster 3: Blazing tourists</li> <li>▪ Cluster 4: Bracing tourists</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: participate in cultural activities for socialisation</li> <li>▪ Cluster 2: look for festivals with a high degree of originality, strangeness, unfamiliarity and uniqueness</li> <li>▪ Cluster 3: Look for socialisation</li> <li>▪ Cluster 4: are motivated by activities that relax and provide escapism from daily routine</li> </ul>
Chang (2006:1229)	Segmenting visitors to aboriginal cultural festivals: An example in the Rukai Tribal area, Taiwan	<ul style="list-style-type: none"> <li>▪ Equilibrium recovery</li> <li>▪ Festival participation and learning</li> <li>▪ Novelty seeking</li> <li>▪ Socialisation</li> <li>▪ Cultural exploration</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: Aboriginal cultural learners</li> <li>▪ Cluster 2: Change routine life travellers</li> <li>▪ Cluster 3: Active culture explorers</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cluster 1: Enjoy new things, younger single tourists (students),</li> <li>▪ Cluster 2: Value festival participation and social interaction, well-educated single, young tourists</li> <li>▪ Cluster 3: interested in novelty seeking and new cultural experiences</li> </ul>

## **2.3. METHOD OF RESEARCH**

For the purpose of this article, the data obtained in 2008 will be used, since this was the first time that travel motivations were included in the questionnaire. The method of research used will be discussed under the following headings: (i) the questionnaire and (ii) statistical analysis.

### **2.3.1 The Questionnaire**

The questionnaire used to survey visitors to Aardklop in 2008 consisted of four sections. Section A captured demographic details (gender, home language, age, occupation, home province, home town and preferred accommodation) as well as spending behaviour (number of persons paid for, length of stay and expenditure) while sections B, C and D focused on the motivational factors and the visitors' preference for visiting the festival. The section on travel motivations was based on the work of Crompton (1979) and Crompton and McKay (1997) and was adapted for Aardklop. Nineteen items were measured in the motivation section on a five-point Likert scale and respondents were asked to indicate how important they considered each item on the scale (1 = not at all important; 2 = less important; 3 = important; 4 = very important and 5 = extremely important). For the purposes of this article, the information obtained from sections A, B and C was predominantly used. A destination-based survey was undertaken, where questionnaires were handed out on-site during the events. The surveys took place at several locations throughout the city of Potchefstroom to limit bias toward certain visitors. However, they were generally conducted in the concert areas/venues, in the closed streets where the festival visitors gathered between shows and on the main festival grounds. Adult visitors were randomly selected as they entered or departed from these areas and when they were sitting down and relaxing at the various venues. The field workers were trained to ensure that they understood the aim of the study as well as the questionnaire. Respondents were further briefed about the purpose of the research beforehand to ensure that they participated willingly and responded openly and honestly. In total, 495 questionnaires were completed over a period of five days (30 September – 3 October 2008). According to Cooper and Emory (1995:207) for any population of 100 000 (N) the recommended sample size (S) is 384. Since a total of 55 518 visitor groups attended Aardklop in 2008 (Kruger *et al.*, 2008:27), the number of completed questionnaires is greater than the required number of questionnaires. Microsoft® Excel® was used for data capturing and basic data analysis.

### **2.3.2 Statistical analysis**

SPSS (SPSS Inc., 2007) was used for the analysis of data and, in this study, it comprised of four stages. Firstly, a general profile of visitors to Aardklop was compiled. Secondly, a principal component factor analysis, using a Oblimin rotation with Kaiser Normalisation was performed on 19 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 also used to determine whether the covariance matrix is suitable for factor analysis. Kaiser's criteria, for the extraction of all factors with eigenvalues larger than one, were used because they were considered to explain a significant amount of variation in the data. In addition, all items with a factor loading above 0.3 were considered as contributing to a factor, whereas all items with factor loadings lower than 0.3 were considered as not correlating significantly with this factor (Steyn, 2000). In addition, any item that cross-loaded on two factors with factor loadings 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 the internal consistency of each factor. All factors with a reliability coefficient above of 0.6 were considered as acceptable in this study. The average inter-item correlations were also computed as another measure of reliability. According to Clark and Watson (1995), the average inter-item correlation should lie between 0.15 and 0.55.

Thirdly, a cluster analysis, using Ward's method with Euclidean distances, was performed on the motivational factor scores. A cluster analysis is defined as a multivariate interdependence technique whose primary objective is to classify objects into relatively homogeneous groups based on the set of variables considered (Hair, Bush & Ortinau, 2000:594) and is mostly an exploratory technique. Lastly, multivariate statistics were used to examine any statistically significant differences between these motivational clusters. Two-way frequency tables and Chi-square tests were employed to profile the clusters demographically, while ANOVA's with Tukey's multiple comparisons were employed to investigate any significant differences between clusters concerning factor scores. The study employed demographic variables (gender, home language, age, occupation and province of origin) as well as behavioural variables (length of stay, preferred type of shows/productions, expenditure, other festivals attended and repeat visitation) to examine whether statistically significant differences existed among different groups.

## **2.4. RESULTS**

The results will be discussed in four sections. Firstly, an overview of the profile of visitors to the Aardklop will be presented. Secondly, the results of the factor analysis (travel motives) will be discussed, followed by the results of the cluster analysis and, lastly, the profiles of the clusters will be presented.

### 2.4.1 Visitor profile to Aardklop National Arts Festival

Based on the results captured and displayed in Table 2.2, more of the visitors are female; they are predominantly Afrikaans-speaking, on the average 41 years old and originate mainly from Gauteng and North West provinces. A large proportion of visitors are in a professional occupation and financially responsible for an average of two persons during their visit. They stay an average of three days and three nights in Potchefstroom. Visitors are loyal to the Festival and have visited Aardklop an average of four times.

Table 2.2: Aardklop visitor profile 2008

Category	Profile of visitors
Gender	Male 42%; Female 58%
Home language	Afrikaans (94%)
Age	Average age: 41.56 years
Province of residence	Gauteng (43%) and North West (32%) Provinces
Occupation	Professional (31%)
Number of days	Average of 3.10 days in Potchefstroom
Number of nights	Average of 3.25 nights in Potchefstroom
Number of people paid for	Average of 2.31 persons
Number of visits to festival	Average of 4.26 times

### 2.4.2 Results from the factor analysis

The pattern matrix of the principal component factor analysis using a Oblimin rotation with the Kaiser Normalisation identified five factors that were labelled according to similar characteristics (Table 2.3). The five factors accounted for 58.9% of the total variance. All factors had relatively high reliability coefficients ranging from 0.61 (the lowest) to 0.80 (the highest). The average inter-item correlation coefficients with values between 0.29 and 0.57 also imply internal consistency for all factors. Moreover, all items loaded on a factor with loading greater than 0.3. As mentioned earlier, any items that cross-loaded on two factors with factor loadings greater than 0.3 were categorised in the factor where interpretability was best. In this case, the item 'To explore the environment', cross-loaded on Factor 2 and Factor 3. It was decided that the interpretability of this item was best in Factor 3. The same applies to the item 'Aardklop is different to other festivals', which cross-loaded on Factor 1 and Factor 3. Relatively high factor loadings indicate a reasonably high correlation between the delineated factors and their individual items. The Kaiser-Meyer-Olkin measure of sampling adequacy of 0.85 also indicated that patterns of correlation are relatively compact and should yield distinct and reliable factors (Field, 2005:640).

Table 2.3: Factor analysis results of Aardklop visitors' motivations

Motivation factors and items	Factor loading	Mean value	Reliability coefficient	Average inter-item correlation
<b>Factor 1: Festival productions/shows</b>		3.59	0.80	0.57
Quality productions	.919			
Variety of productions	.913			
Ticket prices are reasonable	.592			
<b>Factor 2: Family togetherness</b>		2.62	0.64	0.37
To the benefit of my children	.756			
To buy arts	.685			
To spend time with family	.661			
<b>Factor 3: Exploration</b>		2.67	0.61	0.34
To explore the environment	.366			
To meet new people	.722			
Aardklop is different to other festivals	.445			
<b>Factor 4: Escape</b>		3.77	0.72	0.41
To relax	.812			
To get away from my routine	.748			
To spend time with friends	.560			
Sociable festival	.468			
<b>Factor 5: Festival attractiveness</b>		3.46	0.71	0.29
To support the food stalls	.831			
To support the stalls	.806			
To see well-known performers	.465			
It is primarily an Afrikaans festival	.441			
It is an annual commitment	.428			
It is the closest festival for me	.312			
<b>Total variance explained</b>	58.9%			

Factor scores were calculated as the average of all items contributing to a specific factor so that it can be interpreted on the original 5-point Likert scale of measurement. As shown in Table 2.3, the following motivations were identified:

● **Factor 1: *Festival productions/shows***

*Festival productions/shows* (Factor 1) had the second highest mean value of 3.59, a reliability coefficient of 0.80 and an average inter-item correlation of 0.57. This factor included sub-categories such as *Quality productions*, *Variety of productions* and *Ticket prices are reasonable*.

● **Factor 2: *Family togetherness***

*Family togetherness* (Factor 2) received the lowest mean value (2.62) and the reliability coefficient was 0.64 and the average inter-item correlation was 0.37. Factor 2 includes *To the benefit of my children*, *To buy arts* and *To spend time with family*. This motive has also been studied by Formica and Uysal (1996; 1998), Formica and Murrmann (1998), Lee and Lee (2001), Lee *et al.* (2004) and De Guzman *et al.* (2006).

● **Factor 3: *Exploration***

This motive consists of three aspects, namely *To explore the environment*, *To meet new people* and *Aardklop is different to other festivals*. The mean value was 2.67, the reliability coefficient was 0.61 and the average inter-item correlation was 0.34.

● **Factor 4: *Escape***

*Escape* (Factor 4) was the most important motivation for visitors to attend Aardklop and had the highest mean value (3.77). The reliability coefficient was 0.72 and the average inter-item correlation was 0.41. This factor included aspects such as *To relax*, *To get away from my routine*, *To spend time with friends* and *Sociable festival*. *Escape* has also been identified as important in research by Lee *et al.* (2004:66) and De Guzman *et al.* (2006:864-865). In fact, most research on travel motives seems to report escape as an important travel motive (see Uysal *et al.* (1994); Beh & Bruyere (2007); and Saayman & Saayman (2008)).

● **Factor 5: *Festival attractiveness***

*Festival attractiveness* consisted of *To support the food stalls*, *To support the stalls*, *To see well-known performers*, *It is primarily an Afrikaans festival*, *It is an annual commitment* and *It is the closest festival for me*. This factor had a mean value of 3.46, a reliability coefficient of 0.71 and an average inter-item correlation of 0.29.

*Festival productions/shows*, *Exploration* and *Festival attractiveness* can be regarded as distinctive motives for travelling to an arts festival such as Aardklop, since the grouping of items differs significantly compared to previous research. It also shows that the compilation of the questionnaire and items included reveal diverse and unique motives.

### 2.4.3 Results from the cluster analysis

To enhance the understanding of the factor structure, an exploratory cluster analysis based on all cases in the data set was performed on the motivation factors. A hierarchical cluster analysis, using Ward's method and Euclidean distances, was used to determine the clusters' structures based on the motivation factors. A three- and five-cluster solution was examined, and the five cluster solution was selected as the most easily discriminatory (Figure 2.1). The results of multivariate statistics were used to identify the five clusters and to indicate that significant differences existed between them ( $p < 0.05$ ).

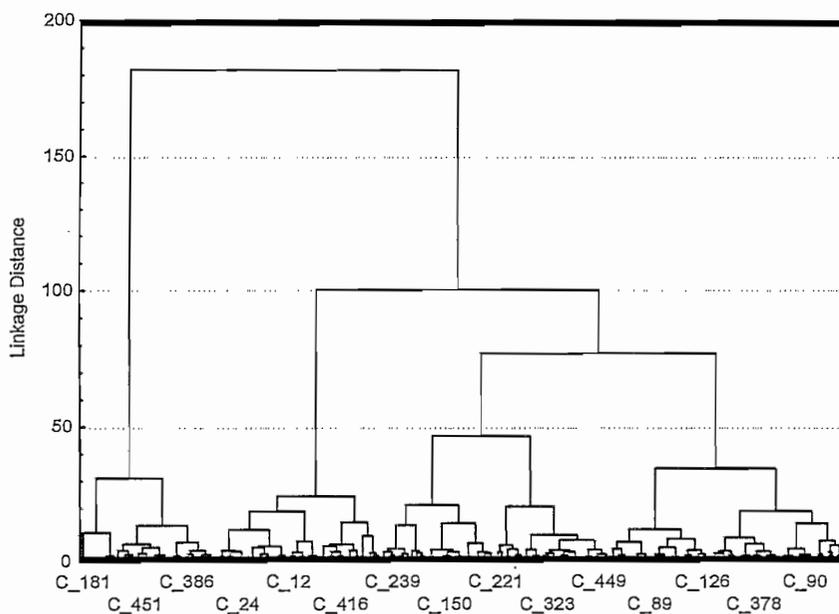


Figure 2.1: Five cluster solution: Ward's method with Squared Euclidean distance measures

### 2.4.4 Identification of segmented clusters

A MANOVA on the five factors indicate statistical significant differences (Wilk's Lambda =  $p$ ,  $p < 0.001$ ). ANOVAs indicated that all five factors contributed to differentiating between the five motivational clusters ( $p < 0.05$ ). In addition, Tukey's post hoc multiple comparisons were employed to explore these differences between clusters with regard to each factor. Table 2.4 indicates differences in means between the five clusters and reveals the importance of each of the factors for festival travel for the members of each cluster.

Table 2.4: ANOVA and Tukey's post hoc multiple comparison results for motivational factors in five clusters of Aardklop visitors

Motivational factors	Cluster 1 <i>Families</i> (N = 93)	Cluster 2 <i>Novelists</i> (N = 81)	Cluster 3 <i>Culture seekers</i> (N = 127)	Cluster 4 <i>Escapists</i> (N = 76)	Cluster 5 <i>Festival junkies</i> (N = 82)	F-ratio	Sig. level
Festival productions/ shows	3.62 <sup>a</sup>	2.59 <sup>b</sup>	4.10 <sup>c</sup>	2.82 <sup>b</sup>	4.45 <sup>d</sup>	107.728	<0.0001
Family togetherness	3.55 <sup>a</sup>	1.78 <sup>b</sup>	2.01 <sup>bc</sup>	1.72 <sup>b</sup>	4.03 <sup>d</sup>	216.311	<0.0001
Exploration	2.57 <sup>a</sup>	1.63 <sup>b</sup>	2.39 <sup>a</sup>	2.82 <sup>a</sup>	3.97 <sup>d</sup>	110.821	<0.0001
Escape	3.83 <sup>a</sup>	2.71 <sup>b</sup>	3.73 <sup>a</sup>	4.06 <sup>ac</sup>	4.51 <sup>d</sup>	79.433	<0.0001
Festival attractiveness	3.56 <sup>a</sup>	2.59 <sup>b</sup>	3.52 <sup>a</sup>	3.06 <sup>c</sup>	4.34 <sup>d</sup>	71.841	<0.0001

Note: Respondents were asked to indicate how important they considered each item on the scale (1 = not at all important; 2 = less important; 3 = important; 4 = very important and 5 = extremely important). Tukey's multiple comparisons indicate that statistically significant differences exist among the clusters with different superscripts. For example, in terms of Festival shows and productions, differences were found between Cluster 1 (with superscript a) and all the other clusters. No difference was found between Cluster 4(b) and Cluster 2 (b), but with superscript b, they differ significantly from Cluster 1 (a), Cluster 3 (c) and Cluster 5 (d), while Cluster 3 (c) and Cluster 5 (d) differ significantly from all other clusters.

Cluster 1 contained 93 respondents and had the highest mean value on *Family togetherness* (3.55) of all clusters except for Cluster 5, which seemed to measure high on all factors, and therefore this cluster was labelled *Families*. Cluster 2 contained 81 respondents and had relatively lower mean scores than all other clusters on all factors. In this cluster *Escape* (2.71), *Festival productions/shows* (2.59) and *Festival attractiveness* (2.59) were the most important factors and they were therefore labelled the *Novelists*. Cluster 3 contained 127 respondents, representing the largest sample of the respondents. This cluster was found to have the second highest mean value on *Festival productions/shows* (4.10) among all clusters and was named the *Culture seekers*. This is the only cluster where *Festival productions/shows* is more important than *Escape*. Lee and Lee (2001:813-814) and Lee *et al.* (2004:66) also identified a similar cluster in their respective research. Cluster 4 contained 76 respondents and, within this cluster, *Escape* (4.06) had a significantly larger mean than all other factors. Thus, this cluster was labelled the *Escapists*. Cluster 5 contained 82 respondents and was labelled the *Festival junkies*. This cluster had the highest mean scores for all the factors among the five cluster groups.

When compared to previous research, with the exception of Cluster 3 (*Culture seekers*), none of the other clusters was identified in other studies indicated in the literature review. Although the clusters have similar characteristics, none of the previous studies labelled clusters the same. The findings further indicate that, in general, the *Escape* factor had the highest mean scores within each cluster, supporting the finding that escape was an important motive for visitors to attend Aardklop. Table 2.4 also indicates that all five clusters placed higher importance on the *Festival productions/shows* and *Festival attractiveness* than on the *Exploration* and *Family*

*togetherness*. The cluster analysis identified the most significant market segments to be the *Culture seekers* (Cluster 3) and the *Festival junkies* (Cluster 5). The *Culture seekers* are characterised by having high mean scores on the attributes pertaining to the festival itself and the productions. They are also the cluster that represents the largest sample of respondents. The *Festival junkies* are characterised by having the highest mean scores across the five motivation factors appearing to be very enthusiastic. Aardklop's marketers/organisers should therefore place high priorities to marketing efforts in attracting these markets.

ANOVAs were also used to determine the differences in other characteristics of visitors. The results of this analysis revealed that age, the number of people paid for and the number of days spent in Potchefstroom differ significantly between the clusters (Table 2.5). The *Families* (Cluster 1), *Culture seekers* (Cluster 3) and the *Festival junkies* (Cluster 5) are on average in their mid-forties, while the *Novelists* (Cluster 2) are slightly younger – in their late thirties. The *Escapists* (Cluster 4) are the youngest visitors with an average age of 30 years. The *Families* and *Festival junkies* are financially responsible for more people (an average of three persons) during their stay at the festival compared to the *Novelists*, *Culture seekers* and *Escapists*, who are respectively responsible for an average of two persons. With regard to the length of stay, the *Escapists* spend the most days (an average of four days) at the festival, while the *Families*, *Novelists*, *Culture seekers* and *Festival junkies* respectively stay three days. There was no significant difference between the clusters based on the number of people in the travel party, the number of nights spent in Potchefstroom, visitor expenditure, the number of years attended and the number of tickets bought. Even though there are no statistically significant differences between the clusters based on expenditure, Table 2.5 shows that the *Culture seekers* spend more compared to the other clusters and the *Families* and *Novelists* spend the least at the festival.

Table 2.5: Results of ANOVA and Tukey's post hoc multiple comparisons for visitor characteristics of clusters

Characteristics	Cluster 1 <i>Families</i> (N = 93)	Cluster 2 <i>Novelists</i> (N = 81)	Cluster 3 <i>Culture seekers</i> (N = 127)	Cluster 4 <i>Escapists</i> (N = 76)	Cluster 5 <i>Festival junkies</i> (N = 82)	F-ratio	Sig. level
Age	44 <sup>a</sup>	39 <sup>a</sup>	44 <sup>a</sup>	30 <sup>b</sup>	44 <sup>a</sup>	13.936	9.963
Number of people in travel party	4	3	4	3	4	1.174	0.322
Number of people paid for	3 <sup>a</sup>	2 <sup>b</sup>	2 <sup>b</sup>	2 <sup>b</sup>	3 <sup>ab</sup>	10.047	8.624
Length of stay Days	3 <sup>a</sup>	3 <sup>b</sup>	3 <sup>b</sup>	4 <sup>b</sup>	3	6.395	0.000*

Nights	3	3	3	4	3	1.253	0.288
Expenditure per person <sup>o</sup>	R1059.72	R1169.51	R1517.63	R1252.94	R1265.80	1.684	0.153
Number of tickets bought	7	7	7	4	7	2.415	0.049
Years attended	4	4	5	4	5	1.442	0.219

<sup>o</sup>Expenditure per person, which was calculated by adding the spending of the respondent on the various components asked, and subtracting transport cost to the festival from the number obtained, since the inclusion of transport cost would automatically cause a bias for visitors further away from Potchefstroom

\* Statistically significant difference:  $p \leq 0.05$

<sup>a</sup> Group differs significantly from type (in row) where <sup>b</sup> is indicated

<sup>c</sup> Group differs significantly from type (in row) where <sup>d</sup> is indicated

Two-way frequency tables were constructed to provide a complete demographic profile for each of the five clusters. Chi-square tests were used to determine whether significant demographic differences existed between the five clusters. Only small to medium practical significant differences were found based on other demographic characteristics and Appendix 2A provides a summary of the profile of the five clusters based on various demographic and behavioural variables. Statistically significant differences were found for occupation, indicating that more visitors from high income groups were *Families* or *Novelists*, while those in the low-income group were mostly *Escapists*. Also most of the drama attendees were *Culture seekers*, with *Escapists* being the lowest proportion of attendees. Word-art and poetry, musical theatre and cabaret as well as classical music attendees were also *Culture seekers*, while children's theatre was mostly attended by *Families* and *Festival junkies*. *Escapists*, on the other hand, preferred the rock shows, which could be ascribed to their younger age. Furthermore, visitors to Innibos Arts Festival seem to be *Escapists* and *Festival junkies*.

Based on the results from the cluster analysis, the *Culture seekers* (Cluster 3) and the *Festival junkies* (Cluster 5) were identified as the Festival's most important market segments. These clusters indicate that mainly female visitors in their early forties with a high-income occupation had completed the questionnaires. They travel in groups of four persons and are therefore more likely to travel with children. These visitors originate from Gauteng and the North West Province and enjoy mostly dramas, dance theatre, music theatre and cabaret, as well as comedy shows and productions. They are furthermore the highest spending clusters (R1217.63 and R1265.80, respectively) at the festival, buying an average of seven tickets and staying an average of three days. These visitors are loyal and travel for the purpose of attending the festival. This profile does not differ significantly from the general profile of the visitors as depicted in Table 2.2.

## 2.5. DISCUSSION AND IMPLICATIONS

The overall findings of this study reveal that the main motivation for attending Aardklop is *Escape*, as this motive had the highest mean score in four of the five clusters. This result is

consistent with the research conducted by Lee *et al.* (2004) and De Guzman *et al.* (2006) as well as many other studies conducted in this field of tourism and event research. However, 'Family togetherness' as a motive was not considered as the most important motive for visitors to attend Aardklop. This result therefore contradicts research conducted by Uysal *et al.* (1993), Backman *et al.* (1995) and Mohr *et al.* (1993). From the factor analysis, it is clear that besides escape, the festival's attributes and what it has to offer are among the main reasons for attending Aardklop. Results show that visitors are loyal and most return regularly, which is proof that the festival has developed into a sustainable attraction. Results also confirmed that motivational variables are effective in explaining and segmenting visitors to this festival, as indicated by Lee *et al.* (2004) and Chang (2006).

Results from this study support the notion of Crompton and McKay (1997) and Lee (2000) that some core dimensions of motivation appear to be similar in different festival research, while the order and the components of motivational factors vary according to the type of festival. In addition, the results revealed that Aardklop's visitors are not homogeneous as was reported in other similar research studies (*see* Cha *et al.* (1995:38); Chang (2006:1231); Formica and Murmann (1998:204)), which implies the necessity of applying market segmentation. Consequently, a differentiated marketing strategy should be pursued by the festival's management to reach the most viable target markets such as *Culture seekers*, *Festival junkies* and *Escapists*, with the most appropriate promotional devices. *Culture seekers* and *Festival junkies* seem to be the festival's most important markets, since these target markets support the festival's shows and productions, stay longer and are also the highest spenders at the festival (Table 2.5). According to Saayman and Saayman (2006:219), sustainability of arts festivals is best achieved by focusing a festival's marketing efforts on high spenders and visitors who attend ticketed shows. It is therefore important to sustain the nature of the festival by attracting *Culture seekers* and *Festival junkies* who purchase more show tickets. An alternative market to consider is *Escapists*, since they are younger visitors who are interested in socialisation at the festival, but who are also motivated by the festival's shows and productions. Since this target market is younger, this market could develop into future *Culture seekers* and *Festival junkies* and therefore prove to be viable for the future sustainability of the festival. The latter is also important since Walker, Scott-Melnyk and Sherwood (2002:24) revealed that people who are exposed to the arts at an early age tend to support arts and cultural activities more frequently.

Research in the field of market segmentation has contributed to more innovative ways of doing segmentation, and segmentation by means of travel motives is one such method. From this study, the following findings can be reported: Firstly, travel motives can be applied as a method for comprehensive market segmentation. The advantages of this method of segmentation

include a detailed visitor profile, a customised festival programme, identification of high spenders and a better allocation of resources. Secondly, as mentioned earlier, visitors to the festival are not homogeneous and confirm the notion that different festivals feed different motives of visitors and that not all visitors have the same degree of commitment or interest in experiencing the festival. Therefore, the festival's organisers should use resources more effectively and efficiently once the right target market is identified. Hence, these findings suggest some important implications for the organisers/marketers of Aardklop as indicated below.

Firstly, marketing efforts should be focused on Gauteng and the North West Province since the majority of Aardklop's visitors, including *Culture seekers*, *Festival junkies* and high spenders originate from these provinces. Secondly, *Culture seekers* and *Festival junkies* should be encouraged to purchase more tickets at the festival. Aardklop's organisers/marketers should therefore emphasise the festival's high quality and affordable shows/productions with well-known South African artists and performers in their promotional material. The significantly higher ratings in the drama, dance theatre, music theatre and cabaret and, especially, the comedy shows/productions suggest that target promotions should emphasise these types of shows/productions at the festival. The festival organisers could also consider adapting the festival programme to allow more of these types of shows/productions to be showcased. Secondly, *Culture seekers* and *Festival junkies* should be persuaded to stay longer at the festival, and this can be achieved by offering more packages that include the type of shows/productions they are interested in. Group discounts as well as discounts for ticket prices could also entice visitors to stay longer. Thirdly, since *Culture seekers* and *Festival junkies* are also likely to travel with children, packages that include children's theatre could also be considered. As mentioned earlier, attracting young visitors and exposing them to the arts are vital for sustaining Aardklop. Fourthly, based on the motivations of *Culture seekers* and *Festival junkies*, Aardklop's sociable and relaxing nature should also be an integral part of the festival experience and should be promoted to highlight the uniqueness of the event to this cluster. The blend of culture and experience will thus contribute most to creating an exclusive atmosphere to attract and retain this target market. Lastly, the results confirm a strong brand loyalty as well as the fact that the event has become a major tourist attraction in the region.

## **2.6. CONCLUSION**

The purpose of this study was to segment visitors to the Aardklop National Arts Festival by means of travel motives. The results of this study revealed that Aardklop visitors have diversified interests and place different emphases on specific motivations. The findings of this study suggest that when profiling visitors and planning festivals or events, motivation analysis is

an important tool for identifying the different needs of different markets to promote the festival/event. The contribution of this article lies, firstly, in confirming that travel motives are a useful way of applying market segmentation, since this leads to a greater understanding of the reasons that visitors attend Aardklop, as well as the different market segments at this particular festival. Secondly, this research has contributed greatly to the literature base of travel motivation as well as market segmentation. Lastly, it was the first time that this method of segmentation has been applied to South African national arts festivals.

Based on the results of this research, it is recommended that similar studies are applied to other arts festivals in South Africa, and the results compared to determine how the unique motives for each festival influence visitors. In addition, the genres of arts festivals should also be investigated as a method for market segmentation, since the results revealed that the festival's productions/shows and attributes are important motives for visitors to attend. In addition, it would be innovative to combine the relationship between travel motives and the different genres at the festival to determine the markets at the festival.

Appendix 2A: Visitor characteristics of clusters

Characteristics	Cluster 1 Families (n = 93)	Cluster 2 Novelists (n = 81)	Cluster 3 Culture seekers (n = 127)	Cluster 4 Escapists (n = 76)	Cluster 5 Festival junkies (n = 82)	Chi-square value	df	Significance level	Phi- value
Gender						7.465	4	0.113	0.128
Male	40%	41%	43%	57%	37%				
Female	60%	59%	57%	43%	63%				
Language						4.728	8	0.786	0.102
Afrikaans	95%	90%	96%	93%	95%				
English	4%	6%	3%	5%	4%				
Other	1%	4%	1%	3%	1%				
Occupation						24.957	8	0.002	0.234
High-income occupation (Professional, Management, Self-employed)	49%	52%	40%	36%	38%				
Medium-income occupation (Technical, Sales, Farmer, Mining, Administrative, Civil service, Education)	29%	19%	24%	11%	28%				
Low-income occupation (Housewife, Pensioner, Student, Unemployed)	22%	29%	36%	53%	34%				
Province						36.918	36	0.426	0.285
North West	35%	30%	33%	26%	31%				
Gauteng	47%	43%	44%	46%	45%				
Eastern Cape	1%	1%	1%	0%	1%				
Free State	12%	11%	5%	8%	9%				
Western Cape	1%	4%	4%	7%	4%				
Mpumalanga	0%	4%	5%	1%	3%				
Northern Cape	1%	3%	1%	3%	1%				
KwaZulu-Natal	2%	0%	2%	0%	2%				
Limpopo	1%	5%	6%	5%	5%				
Outside RSA	0%	0%	0%	4%	1%				
Type of shows/productions									
Drama	Yes=41%;No=59%	Yes=41%;No=59%	Yes=58%;No=42%	Yes=20%;No=80%	Yes=48%;No=57%	29.815	4	0.000*	0.255
Dance theatre	Yes=7%;No=93%	Yes=12%;No=88%	Yes=9%;No=91%	Yes=5%;No=95%	Yes=23%;No=77%	17.231	4	0.002*	0.194
Word art & poetry	Yes=3%;No=97%	Yes=7%;No=93%	Yes=13%;No=87%	Yes=3%;No=97%	Yes=7%;No=2%	11.331	4	0.023*	0.157
Children's theatre	Yes=11%;No=89%	Yes=4%;No=96%	Yes=2%;No=98%	Yes=5%;No=95%	Yes=10%;No=90%	9.431	4	0.051*	0.143
Theatre discussions	Yes=4%;No=96%	Yes=5%;No=95%	Yes=9%;No=91%	Yes=5%;No=95%	Yes=12%;No=93%	5.692	4	0.223	0.111
Musical theatre & cabaret	Yes=43%;No=57%	Yes=35%;No=65%	Yes=50%;No=50%	Yes=25%;No=75%	Yes=37%;No=63%	13.729	4	0.008*	0.173
Classical music	Yes=9%;No=91%	Yes=10%;No=90%	Yes=21%;No=79%	Yes=4%;No=96%	Yes=16%;No=84%	16.194	4	0.003*	0.188
Choir & ensemble	Yes=8%;No=92%	Yes=7%;No=93%	Yes=10%;No=90%	Yes=3%;No=97%	Yes=7%;No=3%	4.007	4	0.405	0.094
Rock	Yes=9%;No=91%	Yes=15%;No=85%	Yes=21%;No=79%	Yes=34%;No=66%	Yes=21%;No=79%	18.893	4	0.001*	0.203
Visual arts & exhibitions	Yes=7%;No=93%	Yes=10%;No=90%	Yes=14%;No=86%	Yes=11%;No=89%	Yes=11%;No=89%	3.433	4	0.488	0.086
Comedy	Yes=47%;No=53%	Yes=46%;No=54%	Yes=55%;No=45%	Yes=36%;No=64%	Yes=52%;No=48%	8.150	4	0.086	0.133
Festival as main reason for visiting Potchefstroom						13.482	8	0.096	0.173
Yes									
No	77%	68%	76%	59%	74%				
Local resident	12%	19%	11%	27%	18%				
	11%	14%	13%	14%	7%				
Other festivals attended									
Klein Karoo National Arts Festival	Yes=26%;No=74%	Yes=24%;No=76%	Yes=27%;No=73%	Yes=26%;No=74%	Yes=33%;No=67%	2.065	4	0.724	0.067
Grahamstown National Arts Festival	Yes=2%;No=98%	Yes=4%;No=96%	Yes=4%;No=96%	Yes=7%;No=93%	Yes=6%;No=94%	2.720	4	0.606	0.077
Volksblad Arts Festival	Yes=4%;No=96%	Yes=5%;No=95%	Yes=6%;No=94%	Yes=4%;No=96%	Yes=7%;No=93%	1.169	4	0.883	0.050
Innibos Arts Festival	Yes=14%;No=86%	Yes=10%;No=90%	Yes=9%;No=91%	Yes=24%;No=76%	Yes=20%;No=80%	11.818	4	0.019*	0.160

\* Statistically significant difference:  $p \leq 0.0$

# CHAPTER 3:

## DETERMINANTS OF VISITOR EXPENDITURE AT THE AARDKLOP NATIONAL ARTS FESTIVAL



*"The poor man is not he who is without a cent, but he who is without a dream".*

*~Harry Kemp*

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### ABSTRACT

The Aardklop National Arts Festival is one of the most popular arts festivals in South Africa and, given the economic value of the festival, an understanding of expenditure patterns and the determinants influencing spending behaviour is vital to the festival marketers/organisers - especially from a sustainability point of view. Therefore the aim of this article is to investigate the socio-demographic and behavioural determinants that influence visitor expenditure at Aardklop, based on visitor surveys conducted at the festival in 2008. Regression analysis was applied to establish the most significant determinants and results indicate that higher income, occupation, age, people paid for, tickets purchased, and attendance of other festivals are significant determinants influencing the amount of money spent by visitors at the festival. These findings will not only generate strategic insights on marketing for the festival, but knowledge of these determinants can also lead to a greater economic impact, as well as a competitive advantage.

**Key words:** *Aardklop Arts Festival, Determinants of spending, Marketing*

# DETERMINANTS OF VISITOR EXPENDITURE AT THE AARDKLOP NATIONAL ARTS FESTIVAL

## 3.1 INTRODUCTION

The Aardklop National Arts Festival (hereafter referred to as Aardklop) is one of the three largest South African arts festivals. It is held annually in the town of Potchefstroom situated in the North West Province. The festival started in 1998 with the aim of preserving and enhancing the Afrikaans language and culture as well as to meet the need for an arts festival in the northern part of the country. An estimated 55 518 people visited this festival over five days in September 2008 (Kruger, Saayman & Saayman, 2008:27). The festival programme includes classical music, theatre, children's and street theatre, dance, cabaret, rock, jazz, literature and the visual arts (Van Zyl, 2002; Van Heerden, 2003:11-12; Van Zyl & Strydom, 2007:127).

Festivals like Aardklop are increasingly being used as instruments for promoting tourism and boosting the regional economy (Felsenstein & Fleischer, 2003:285; Tassiopoulos, 2000; 2005:4). The advantages of festivals as a tourism promotion tool are that (1) festivals increase the demand for local tourism (Chacko & Schaffer, 1993:475; Nicholson & Pearce, 2000:237); (2) successful festivals can help recreate the image of a destination (Hall, 1992); (3) festivals contribute towards the exposure of a location/region trying to get on the tourism map and (4) the strategic placement of a festival in the local tourism calendar can help to extend the tourism season (Getz, 1997; Saayman & Saayman, 2004:629). In addition to this, Quinn (2006:288) argues that festivals can provide an effective vehicle for sustainable tourism. This is especially important in a country such as South Africa, where the growth and diversity in festivals creates high levels of competition (Nicholson & Pearce, 2000).

According to Kruger (2009:3), in order to sustain the nature of the festival it is important to identify and attract the visitors who attend ticketed shows/productions. The reason being that research done by Thrane (2002:281); Saayman and Saayman (2006:220); Kruger, Saayman and Saayman (2009a) and Kruger, Saayman and Ellis (2009b), indicated that visitors attending festival shows/productions stay longer and spend more than those not interested and, as a consequence of this, their overall personal expenditure during the festival is greater. This, in turn, results in greater economic impact of the festival (Gokovali, Bahar & Kozak, 2007:737; Kastenholz, 2005:556).

Since the total economic impact of a festival is a function of both the direct and indirect expenditures made by visitors (Lee, Lee, Lee & Babin, 2008:56), it is important to understand

visitor spending behaviour at a festival and the underlying determinants affecting such behaviour (Mok & Iverson, 2000:300). Kruger *et al.* (2009a,b) also revealed that ticket sales and the types of shows/productions attended can be used as an indicator of visitor interest in a festival and how successfully the programme addresses and fulfils visitors' needs. Therefore this article will identify the socio-demographic and behavioural determinants that are predictors of visitor expenditure at Aardklop. To achieve this, the article is structured in the following manner: a literature review is followed by a description of the survey and a discussion of the results and, finally, the implications and the conclusions.

### 3.2 LITERATURE REVIEW

According to Craggs and Schofield (2009), a wide range of socio-demographic and behavioural determinants influence visitor expenditure and the latter can be used to identify the important determinants affecting visitor spending. Previous research on individual visitor expenditure levels has been studied as being dependent on socio-demographics (Kastenholz, 2005:557) and has been shown to be positively associated with higher household income (Fish & Waggle, 1996:70; Cannon & Ford, 2002:264; Crouch, 1994:12; Legohérel, 1998:22; Mak, Moncur & Yonamine, 1977:6; Mehmetoglu, 2007:213; Taylor, Fletcher & Clabaug, 1993:33; Thrane, 2002:281; Kruger, 2009:31).

Cannon and Ford (2002:263) demonstrated that spending patterns were also related to visitors' place of residence (expenditure levels increasing for visitors from out-of-state). Saayman and Saayman (2008), Saayman, Krugell and Van der Merwe (2007:18); Slabbert, Saayman and Saayman (2008:11) and Kruger (2009:28), also found that province of origin (location) plays an important role in the spending of visitors at arts festivals and national parks in South Africa. Results indicated that visitors originating from richer provinces, especially Gauteng and the Western Cape tend to spend more. Research done by Lee (2001:663); Long and Perdue (1990:12) and Saayman *et al.* (2007:185) has further shown that the distance travelled to visit tourist attractions affects expenditures positively. While Saayman *et al.* (2007:190) found that the effect of marital status on expenditure is inconclusive; Mak *et al.* (1977:6) demonstrated that married visitors stay fewer days and spend significantly less per person per day than non-marrieds. Gokovali *et al.* (2007:743) along with Mak *et al.* (1977:6) found that visitors with a higher education level do not stay significantly longer, and spend less per day on average than less educated visitors. Cannon and Ford (2002:263), Cai, Hong and Morrison (1995:36) and Saayman and Saayman (2006:217) indicated that the inclusion of children in the travel party results in decreased spending per day, while Lee (2001:663) found that the presence of children had no significant effect on expenditure.

The role of age was not conclusive in research done by Cai *et al.* (1995:36) and Lee (2001:663) though, with some studies (for example Mak *et al.* (1977:6), Perez and Sampol (2000), Saayman and Saayman (2006:217), Kastenholz (2005:563) and Thrane (2002:284)) a positive correlation between older age and total expenditure levels was revealed while others revealed the inverse relationship (for example Mudambi and Baum (1997), Mehmetoglu (2007:213) and Pouta, Neuvonen and Siövanen (2006:131)). Thrane (2002:284) found that male visitors spent more than females, while Craggs and Schofield (2009) and Letho, Cai, O'Leary and Haun (2004:293) concluded that female visitors tend to spend more. This was based on their respective studies of visitor spending at the Salford Quays (UK) and Taiwanese tourist shopping preferences and expenditures. The influence of other socio-demographic determinants such as language and race/ethnicity have also, to varying extents, been used in the tourism literature but a positive correlation with visitor spending is not clear (Cannon & Ford, 2002:263; Crouch, 1994:12; Dimara & Skuras, 2001:690; Lee, 2001:659; Letho *et al.*, 2004:320; Perez & Sampol, 2000:625).

Travel purpose also has significant impacts, with business travellers exhibiting the highest spending patterns and the most expensive travel style (Mok & Iverson, 2000:302; Letho *et al.*, 2004:320). Specific leisure travel motives (nature, culture, sun and beach tourism, to name but a few) or benefits sought have rarely been studied in this context and, generally, no relevant impact on expenditure levels has been found (see Downward and Lumsdon's 2003 study on day visitors' spending patterns in a British rural area). Consistent with most research on travel motives (see Uysal, McDonald and Martin(1994); Beh and Bruyere (2007); Saayman and Saayman (2008); Lee *et al.* (2004:66); Schneider and Backman (1996) and De Guzman *et al.* (2006:864-865)), Kruger *et al.* (2009b) found that visitors at Aardklop were mainly motivated by escape. Family, social benefits (Kerstetter & Mowrer, 1998), excitement, event novelty, socialisation, family togetherness (Uysal, Gahan & Martin, 1993) and excitement (Mohr, Backman, Gahan & Backman, 1993) were also identified as major motivators for visitors to attend festivals. Scott (1996) concluded that the type of festival, rather than its background is a better indicator of success in attracting visitors. No significant influences on higher spending were found in these studies. However, in a study of tourist expenditure levels in the Portuguese Central Region, Eusebio (2005) showed that culturally interested tourists tend to spend relatively more than other tourist groups. Thrane (2002:284), Kruger (2009:28), Saayman, Van der Merwe and Pienaar (2009) and Kruger and Saayman (2009) found that visitors who mainly travel to attend an arts festival spend more money than those who attend the festival for other reasons. Kruger (2009:28) revealed that visitors who have attended other festivals are more inclined to fall into the "high-spender" category.

As far as travel context is concerned, a larger group size (Seiler, Seiler, Hsieh & Hsieh, 2002:56; Lee, 2001:663) and a longer duration of stay (see Saayman, Krugell and Van der Merwe (2007:191) and Seiler *et al.* (2002:47)) were shown to be positively correlated with overall expenditure levels. Downward and Lumsdon (2003), Cannon and Ford (2002:263), Sun and Stynes (2006:721) as well as Mehmetoglu (2007:213) showed, on the other hand, that decreasing spending per day was related to longer duration of stay while Saayman and Saayman (2008) and Saayman *et al.* (2009) found in their study of visitor spending to the Kruger National Park in South Africa that the increase in the number of people in the travel party leads to a decrease in spending per person. Limited research has been done to determine the influence of preferred accommodation on visitor spending. Results were produced from studies done by Saayman *et al.* (2007:18) who determined the influence of type of catering on visitor expenditure at the Kruger National Park. Their respective results indicated that visitors with more elaborate catering needs and who prefer a combination of self-catering and other types of catering, tend to spend more. Gyte and Phelps (1989) as well as Long and Perdue (1990:12) indicated that repeat visitors tend to spend more while Mak *et al.* (1977:7) revealed that repeat visitors stay longer than first time visitors, but do not spend significantly more or less. However, Jang, Bai, Hong and O'Leary (2004:332), Oppermann (1997:178), Alegre and Juaneda (2006:698), Petrick (2004b:463) and Pouta *et al.* (2006:132) found that first time visitors spend more than repeat visitors despite their shorter length of stay.

Based on these findings, it is clear that different socio-demographic and behavioural determinants influence visitor spending at different tourism products. These types of studies, however, have been limitedly applied to national arts festivals in South Africa. Results were produced from research done by Saayman and Saayman (2006) at selected arts festivals in the country as well as by Kruger *et al.* (2009a) and Saayman, Saayman and Slabbert (2009) in their respective studies of visitors to the Klein Karoo National Arts Festival (KKNK) and Grahamstown National Arts Festival. Results indicated that occupation, distance travelled, length of stay, the reason for attending the festival and preferred type of shows/productions were significant determinants influencing the amount of money spent by visitors at the festivals.

Mykletun, Crofts and Mykletun (2001:494) argue that not all groups of visitors at a festival are alike and it is therefore important to periodically assess which segments provide the greatest returns on investment. Laesser and Crouch (2006:397) agree, and add that a possible approach for improving returns from festival marketing expenditures lies in an appropriate (i.e. return-maximising) market segmentation strategy, targeting those groups of visitors and their needs that generate comparably high revenues. Spotts and Mahoney (1991:24) and Legohérel and Wong (2006:16) indicated that visitor expenditure is an important factor for comprehensive

tourism segmentation and can be used to determine the high spenders in addition to the determinants that positively influence higher spending. This is because travel (festival) marketers seek visitors who will spend money, and not just time, on their tourism products (in this case, festivals) (Mok & Iverson, 2000:299).

The underlying rationale of segmenting the market by means of expenditure is based on the necessity of increasing the effectiveness and efficiency of marketing programmes and their resources, both in terms of addressing (1) the right group of people and (2) their relevant needs (Laesser & Crouch, 2006:397). Tourist/visitor spending is furthermore one of the most critical variables of analysis for tourist destinations (festivals) since it directly determines the tourism (festival) sector's profitability (Frechtling, 2006:1). It is therefore important to determine which visitors spend most at a festival and which variables are most influential in determining their expenditure levels (Kastenholz, 2005:557). According to Gokovali *et al.* (2007:737), once the factors that affect visitor expenditure are determined, policy development will be possible to strengthen the spending to maximise the economic benefits of a festival. Festival organisers can thus effectively apply the determinants when doing market segmentation to focus their marketing efforts on those visitors who spend the most at the festival (Kruger, 2009:16).

Taking this into consideration, identifying the determinants that influence visitors' spending at Aardklop will prove to be extremely helpful, especially from a marketing point of view. This research will therefore greatly assist Aardklop's marketers and organisers in determining what it takes to encourage visitors to attend the ticketed shows/productions. This will also assist in the enhancement of retention and loyalty as well as the sustainable growth from profitable visitors.

### **3.3 METHOD OF RESEARCH**

The method of research used will be discussed under the following headings: (i) the questionnaire and (ii) data analysis.

#### **3.3.1 The questionnaire**

The questionnaire used to survey visitors to Aardklop in 2008 consisted of four sections. Section A captured demographic details (gender, home language, age, occupation, home province, home town and preferred accommodation) as well as spending behaviour (number of persons paid for, length of stay and expenditure of visitors on different spending components). The spending questions were detailed by spending category, and included accommodation, shows, food and beverages, shopping, recreation and transport. Section B captured all the information with regard to the festival (type of shows at the festival, the number of tickets bought, other festivals attended, and the number of years attended) while Section C focused on

the visitors' specific motivations for attending Aardklop as well as the preferred type of accommodation and media. Section D measured the respondents' evaluation of certain aspects of the festival. For the purposes of this article, the information obtained from sections A, B and C was predominantly used. In total, 495 questionnaires were completed over a period of five days (30 September – 3 October 2008) by means of availability sampling. According to Cooper and Emory (1995:207) for any population of 100 000 (N) the recommended sample size (S) is 384. Since a total of 55 518 visitors attended Aardklop in 2008 (Kruger, Saayman & Saayman, 2008:27), the number of completed questionnaires is greater than the required number of questionnaires. All questionnaires were completed at the Main Festival Grounds and various venues in Potchefstroom where fieldworkers moved around to minimise bias. Microsoft® Excel® was used for data capturing and basic data analysis.

Most questions have multiple choice responses or were answered on a 5-point Likert scale. The dependent (predicted) variable is spending per person, which was calculated by adding the spending of the respondent on the various components asked, and subtracting transport cost to the festival from the value obtained, since the inclusion of transport cost would automatically cause a bias for visitors further away from Potchefstroom. This gave total spending excluding transport, which was then divided by the number of people whom the respondent was paying for in the trip, to give spending per person. The socio-demographic and behavioural determinants used in the analysis are described in Table 3.1.

*Table 3.1: Questions used and their descriptions*

Category	Question description	Coding	Variable
Socio-demographics	Home language	Afrikaans = 1; Other = 0	LANGUAGE
	Gender	Female = 2; Male = 1	GENDER
	Age	Open question	AGE
	Occupation	High income* = 1; Other = 0	OCCUP1
	<u>Province:</u>		
	Gauteng	Yes = 1; No = 0	GAUTENG
	North West	Yes = 1; No = 0	NORTH WEST
Behavioural	Group size	Open question	GROUP
	Number of people paid for	Open question	PEOPLE PAID FOR
	Number of days	Open question	DAYS
	Number of nights	Open question	NIGHTS
	Number of visits to Aardklop	Open question	TIMES
	Attendance of other festivals over the past three years		
	Klein Karoo National Arts Festival	Attend = 1; Not attend = 0	KKNK

	(KKNK) Grahamstown Volksblad Innibos  Festival main reason for visit to Oudtshoorn	Attend = 1; Not attend = 0 Attend = 1; Not attend = 0 Attend = 1; Not attend = 0  Yes = 1; No = 0	GRAHAMSTOWN VOLKSBLAD INNIBOS  REASON
Type of shows/ productions attended	Drama Dance theatre Word art & poetry Children's theatre Theatre discussions Music theatre and cabaret Classical music Choir and Ensemble Rock Visual arts and exhibitions Comedy	Yes = 1; No = 0 Yes = 1; No = 0	DRAMA DANCE THEATRE POETRY CHILD THEATRE DISCUSSIONS MUSIC THEATRE CLASSICAL CHOIR ROCK VISUAL ARTS COMEDY
Type of media	Television Radio Website E-mail Newsletter Magazines Newspapers Word-of-mouth	Yes = 1; No = 0 Yes = 1; No = 0	TV RADIO WEBSITE EMIAL NEWSLETTER MAGAZINES NEWSPAPERS WORD-OF-MOUTH

\*High income = Professional, Management, Self-employed; Other = Technical, Sales, Farmer, Mining, Administrative, CIVIL service, Education, Housewife, Pensioner, Student, Unemployed

The dummy variables are coded 1 and 0 according to the table above. As mentioned earlier, Section C of the questionnaire measured visitors' motives to attend Aardklop. Nineteen items were measured in the motivation section on a five-point Likert scale and respondents were asked to indicate how important they considered each item on the scale (1 = not at all important; 2 = less important; 3 = important; 4 = very important and 5 = extremely important). A factor analysis was performed on these items and the motivation factors displayed in Table 3.2 below, were extracted as indicated by Kruger *et al.* (2009). Factor scores were calculated as the average of all items contributing to a specific factor and results indicated that *Escape* was the most important motive for visitors to attend Aardklop. This is consistent with research done by Lee *et al.* (2004:66) and De Guzman (2006:864-865). This was followed by *Festival productions/shows* and *Festival attractiveness*. *Family togetherness* and *Exploration* received the lowest mean scores and were therefore not central motives to attend the festival (Kruger *et al.*, 2009). These factor scores were included in the further analysis.

Table 3.2: Motivational factors and their descriptions

Category	Question description	Coding	Variable
Travel motives	<b>Factor 1: Festival productions / shows</b>	5-point Likert Scale	PRODUCTIONS
	Quality productions		
	Variety of productions		
	Ticket prices are reasonable		
	<b>Factor 2: Family togetherness</b>	5-point Likert Scale	FAMILY
	To the benefit of my children		
	To buy arts		
	To spend time with family		
	<b>Factor 3: Exploration</b>	5-point Likert Scale	EXPLORATION
	To explore the environment		
	To meet new people		
	Aardklop is different to other festivals		
	<b>Factor 4: Escape</b>	5-point Likert Scale	ESCAPE
	To relax		
	To get away from my routine		
	To spend time with friends		
	Sociable festival		
<b>Factor 5: Festival attractiveness</b>	5-point Likert Scale	FESTIVAL	
To support the food stalls			
To support the stalls			
To see well-known performers			
It is primarily an Afrikaans festival			
It is an annual commitment			
It is the closest festival for me			

### 3.3.2 Statistical analysis

Analysis of data followed two stages. Firstly, a general profile of visitors to Aardklop was compiled using SPSS. Secondly, a regression analysis was performed to identify the determinants of visitor spending at the festival. Although the survey alone will provide some insight into the characteristics of visitor spending at Aardklop, such analysis does not describe the relative strength or the significance of the relationship between spending and its different determinants. Regression analysis has successfully been applied in many studies (c.f. Fish & Waggle, 1996:72; Jang *et al.*, 2004:334; Kastenholz, 2005:558; Qui & Zhang, 1995:44; Seiler *et al.*, 1992:52; Saayman *et al.*, 2007; Kruger *et al.*, 2008) to identify the determinants of spending.

There are a number of different types of regression analysis that can be used. In standard multiple regression, all the independent (or predictor) variables are entered into the equation simultaneously. Each independent variable is evaluated in terms of its predictive power, over and above that offered by all the other independent variables (Pallant, 2007:147). In stepwise regression the best predictors for the dependent variable are selected. In the *forward stepwise* method, an initial model was defined that contained only the constant whereafter successively the best predictor is selected (from the ones available for inclusion) until no predictor significantly improved the ability of the model to the predict spending.

The *backward* stepwise method is the opposite of the forward method in that all predictors are included in the model and the predictors that contributed least to the dependent variable (spending) are successively removed from the model until all remaining predictors contribute significantly to the prediction of spending (Field, 2005:161).  $R^2$  gives the proportion of variance in spending that is explained by the predictors included in the model. A  $R^2$  of 0.25 or larger can be considered as practically significant (Ellis & Steyn, 2003:53). The adjusted  $R^2$  indicates how much variance in the outcome would be accounted for if the model had been derived from the population from which the sample was taken (Field, 2005:723). The adjusted  $R^2$  therefore gives an idea of how well the regression model generalises and, ideally, its value needs to be the same or very close to the value of  $R^2$  (Field, 2005:188). For the purpose of this article, forward and backward stepwise regression analyses were used and the best model was selected according to the adjusted R-squared.

The predictors included quantitative variables like age, length of stay, number of times that Aardklop has been visited, and the size of the travel party. It also included qualitative variables that indicate the presence or absence of a quality or attribute that may influence total spending at the festival. Such qualitative (or dummy) variables were constructed, as indicated in Tables 1 and 2, for the following variables: gender, language, occupation, type of media and types of shows attended. For the first time, the influence of travel motives and type of media were included in the regression analysis to determine their influence on spending per person.

### **3.4 RESULTS**

The results will be discussed in two sections. Firstly, an overview of the profile of visitors to Aardklop will be presented followed by the results of the regression analysis.

#### **3.4.1 Visitor profile to Aardklop National Arts Festival**

Based on the results captured and displayed in Table 3.3, visitors are female, predominantly Afrikaans-speaking, with an average age of approximately 41 years and originate mainly from

Gauteng and North West provinces. The largest group of visitors are in a professional occupation, on average financially responsible for two persons during their visit. They stay an average of three days and three nights in Potchefstroom. Visitors are loyal to the festival, indicating that they have visited Aardklop an average of four times.

Table 3.3: Aardklop visitor profile 2008

Category	Profile of visitors
Gender	Male 42%; Female 58%
Home language	Afrikaans (94%)
Age	Average age: 41.56 years
Province of residence	Gauteng (43%) and North West (32%) Provinces
Occupation	Professional (31%)
Number of days	Average of 3.10 days in Potchefstroom
Number of nights	Average of 3.25 nights in Potchefstroom
Number of people paid for	Average of 2.31 persons
Number of visits to festival	Average of 4.26 times

### 3.4.2 Results from the backward regression analysis

As indicated in Table 3.4, 37% ( $R^2$ ) of the variance in spending per person is explained by the predictors included in the backward regression analysis. The  $F$ -ratio is significant with  $p < 0.001$ , indicating that a significant proportion of the variance in spending is explained by included predictors (Field, 2005:154).

Table 3.4: Results from backward regression

Dependent Variable: Total spending per person						
Method: Least Squares						
Included observations: 151						
	Beta	Std. Err. of Beta	B	Std. Err. of B	t(130)	p-level
C			1065	754.85	1.41	0.1608
AGE	0.24	0.08	22	7.51	2.92	0.0041
OCCUPATION	0.17	0.08	477	233.20	2.05	0.0428
PEOPLE PAID FOR	-0.42	0.08	-460	91.27	-5.04	0.0000
NIGHTS	0.14	0.08	139	76.44	1.82	0.0705
NORTH WEST	-0.13	0.09	-470	318.97	-1.47	0.1429
GAUTENG	-0.10	0.09	-269	241.90	-1.11	0.2688
TICKETS	0.25	0.08	57	19.17	2.98	0.0035
DANCE THEATRE	-0.16	0.07	-651	294.37	-2.21	0.0288
CHILDRENS THEATRE	0.13	0.08	675	416.30	1.62	0.1074

CLASSICAL MUSIC	-0.16	0.08	-618	315.15	-1.96	0.0519
KKNK	0.23	0.07	694	219.31	3.17	0.0019
GRAHAMSTOWN	0.12	0.08	649	416.76	1.56	0.1219
VOLKSBLAD	-0.20	0.08	-1006	390.74	-2.58	0.0111
INNIBOS	-0.09	0.08	-324	275.35	-1.18	0.2412
EMAIL	-0.08	0.08	-361	353.96	-1.02	0.3094
NEWSLETTER	0.15	0.09	742	451.73	1.64	0.1027
NEWSPAPERS	-0.11	0.08	-311	213.74	-1.46	0.1481
WORDOFMOUTH	-0.10	0.08	-295	231.37	-1.27	0.2053
EXPLORATION	-0.10	0.09	-148	131.64	-1.12	0.2631
ESCAPE	0.10	0.09	169	159.25	1.06	0.2912
<b>R</b>	<b>0.61</b>			<b>F(20,130)</b>		<b>3.76</b>
<b>R<sup>2</sup></b>	<b>0.37</b>			<b>p&lt;</b>		<b>0.001</b>
<b>Adjusted R<sup>2</sup></b>	<b>0.27</b>			<b>Std. Error of estimate</b>		<b>1193.80</b>

The results indicate that age and high income occupation are the most significant socio-demographic indicators. Results also show that older visitors tend to spend more than younger visitors. Discretionary income, as expected, also positively influences spending and therefore the higher income occupation groups are inclined to spend more at the festival. Even though the majority of Aardklop's visitors originate from the North West and Gauteng provinces (see Table 3.2), the negative sign indicates that these visitors are not inclined to be high spenders at the festival. Surprisingly, length of stay (the number of nights in Potchefstroom) had a small influence on higher spending.

Number of people paid for, number of tickets bought and other festivals attended (KKNK and Volksblad) are the most significant behavioural indicators. The negative sign in the number of people paid for category indicates that the visitors who pay for fewer people tend to spend more per person. Visitors who have purchased more tickets and attend KKNK are also inclined to be higher spenders. Visitors who have furthermore indicated that they also attend Volksblad Arts Festival are not apt to fall in the higher spending category. Even though festivals such as the Innibos Arts Festival and the Grahamstown National Arts Festival had no significant influence on higher spending, visitors who attend Grahamstown are more likely to spend more compared to Innibos attendees.

With regard to the type of genres attended, the only significant show/production was Dance theatre. The negative sign of the regression coefficient, however, indicates that visitors who are interested in these types of shows are not inclined to be high spenders. Children's theatre and

Classical music showed no significant influence on higher spending. The signs of the coefficients, however, indicate that visitors who attend Children's theatre tend to spend more compared to those who attend Classical music productions/shows.

None of the media used to promote the festival were significant. When interpreting the sign of the coefficients, visitors who have heard about the festival from the newsletter are more inclined to be higher spenders compared to those who have heard about Aardklop via e-mail, newspapers, and word-of-mouth. *Exploration* and *Escape* were the only motives included by the stepwise regression, but had no considerable influence on higher spending. The sign of the coefficients indicate that visitors whose main motives were to *Escape* tend to spend more compared to visitors who are motivated by *Exploration*.

### 3.5 FINDINGS

The results of the analysis confirm research by Craggs and Schofield (2009) that a combination of socio-demographic and behavioural determinants influence visitor spending at Aardklop. The significant behavioural determinants include number of people paid for, number of tickets bought and other festivals attended. The socio-demographic determinants that influence spending per person were age and high income occupation. Based on the results the following findings were revealed:

- Contradictory to research conducted by Saayman *et al.* (2007) and Seiler *et al.* (2002), length of stay had no significant influence on visitor spending.
- Visitors with a higher income occupation spend more at the festival. These results are consistent with research done by Fish and Waggle (1996); Kruger (2009); Saayman *et al.* (2009); Cannon and Ford (2002); Crouch (1994); Legohérel (1998); Mak *et al.* (1977); Mehmetoglu (2007); Taylor, Fletcher and Clabaugh (1993) and Thrane (2002).
- Province of origin had no influence on higher spending and this contradicts findings by Kruger (2009); Saayman *et al.* (2009); Saayman *et al.* (2007); Slabbert *et al.* (2009) and Saayman and Saayman (2008) who found significant results between province of origin (location) and spending in South Africa.
- Contradictory to research findings by Cai *et al.* (1995); Lee (2001); and Saayman *et al.* (2007), age was significant and indicated that older visitors spend more than younger visitors. This result is consistent with research done by Mak *et al.* (1977); Perez and Sampol (2000); Saayman and Saayman (2006:217); Saayman *et al.* (2009); Kastenholz (2005:563); Kruger (2009) and Thrane (2002:284).
- Visitors, who pay for fewer people during their stay, tend to spend more. This is an indication that visitors who travel in smaller groups to the festival spend more. This result is supported by research done by Saayman and Saayman (2008); Kruger (2009); Saayman *et*

*al.* (2009) and Thrane (2002) and contradicts the general perception that larger groups spend more.

- Concerning attendance of other festivals, results support the research findings by Saayman and Saayman (2006) who revealed that visitors who attend KKNK spend more at Aardklop.
- It is further evident that visitors interested especially in the dance theatre shows/productions are not inclined to be high spenders at the festival. This contradicts the research by Saayman *et al.* (2009) who found that visitors who attend more dance items spend more at the Grahamstown National Arts Festival. It further contradicts the research by Kruger (2009) who found that visitors who attend drama, music theatre and cabaret productions tend to be high spenders at the Klein Karoo National Arts Festival.
- Results also revealed that visitors who purchase more tickets to attend the festival's shows/productions tend to be high spenders. This is a positive indication that visitors travel for the purpose of attending the festival to experience the culture and this is supported by Thrane (2002:284), Kruger *et al.* (2008:28), Saayman *et al.* (2009) and Kruger and Saayman (2009) who found that visitors who mainly travel to attend an arts festival spend more money than those who attend the festival for other reasons.
- The influence of travel motives and type of media on visitor spending was measured for the first time. Consistent with the research by Downward and Lumbdsdon (2003), travel motives had no significant impact on higher spending. Results indicated, however, that visitors who are motivated by *Escape* tend to spend more, which supports the finding by Kruger *et al.* (2009) that visitors at Aardklop are mainly motivated by escape. With regard to the type of media, results indicated that visitors who were made aware of the festival by means of the newsletter were not high spenders. Travel motives and type of media therefore have no significant influence on visitor spending and since this was the first time that both these variables have been included in this type analysis with regard to National Arts Festivals in South Africa, the influence of the latter cannot be compared to previous research.

### **3.6 IMPLICATIONS AND CONCLUSION**

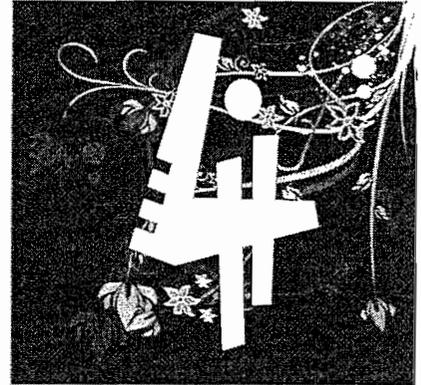
The purpose of this article was to establish the determinants of spending by visitors to Aardklop. Results indicated that older visitors, earning a higher income, paying for fewer people, and who also attend KKNK can be regarded as high spenders. Results support and contradict findings of previous research as discussed in the section above. The findings highlight the fact that determinants influencing visitor spending differ from one tourism product (festival) to another. Determinants unique to this research include the influence of visitor motives and type of media on higher spending.

Based on the results, the following implications can be identified by this research:

- Firstly, Aardklop's marketers/organisers can use the determinants identified to segment the festival's market and to profile the high spenders at the festival in order to sell more tickets and to have a greater economic impact.
- Secondly, Aardklop's marketers should use the festival's central location with respect to its main markets to its advantage in marketing material to attract more high spenders from Gauteng and the surrounding provinces. The festival should also consider special festival packages with discounts on ticket prices and accommodation to encourage visitors to spend more days at the festival.
- Thirdly, from a methodological point of view, this approach makes it possible to identify individuals who are likely to spend more based on a wide variety of variables such as age, travel motives, gender, and different genres attended to name but a few. Hence the combination of variables is endless and one is therefore not limited to only a few variables as one would find in other market segmentation approaches.
- Lastly, it is clear that those visitors who purchase tickets for the shows/productions spend more. This has a direct impact on the sustainability and future of the festival. Therefore these visitors should not only be encouraged to spend more at the festival but they should also be retained by means of quality productions and a festival programme that fulfils their needs. This requires continuous research and knowledge of the needs of this specific market. The different genres, together with the artists involved and the unique theme of the festival, should also be used in promotion and other marketing communication efforts to attract more high spenders to the festival.

# CHAPTER 4:

## SEGMENTATION BY GENRES: THE CASE OF THE AARDKLOP NATIONAL ARTS FESTIVAL



*To accomplish great things, we must not only act, but also dream; not only plan, but also believe. ~ Anatole France*

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### ABSTRACT

The purpose of this study was to distinguish between genre supporters and non-genre supporters at the Aardklop National Arts Festival. This was done to determine genre supporters' individual needs and wants so that effective marketing strategies can be developed and the festival programme designed to attract more genre supporters. Previous research indicated that the future of festivals is dependent on the number of show tickets sold and festivals therefore need to attract more genre supporters. To achieve this goal, a questionnaire survey ( $N=495$ ) was conducted, where after independent  $t$ -tests were used to determine the differences between visitors who attend the different ticketed shows/productions and those who do not. Results showed that genre attendees and non-attendees differ significantly based on socio-demographic and behaviour characteristics, which gave a comprehensive profile of the two types of visitors at the festival. This method proved to be successful especially in increasing ticket sales. Marketing and management implications for effectively targeting genre supporters were also indicated.

*Key words: Genre segmentation; t-test analysis; festivals, market profile*

# SEGMENTATION BY GENRES: THE CASE OF THE AARDKLOP NATIONAL ARTS FESTIVAL

## 4.1 INTRODUCTION

The aim of this research is to determine whether there are significant differences between visitors who attend the different types of shows/productions (genres) at the Aardklop National Arts Festival (hereafter referred to as Aardklop) and those that do not. This will be done for the following two reasons: Firstly, launched in 1998, Aardklop is one of three largest South African arts festivals. It is held annually in the town of Potchefstroom, situated in the North West Province. The aim of the festival is preserving and enhancing the Afrikaans language and culture as well as to meet the need for an arts festival in the northern part of the country (Van Heerden, 2003:11-12; Van Zyl & Strydom, 2007:127). Secondly, from an economic point of view, an estimated 100 000 people visit the festival annually over five days in September generating over R46 million in 2008 for the region (Kruger, Saayman & Saayman, 2008:29).

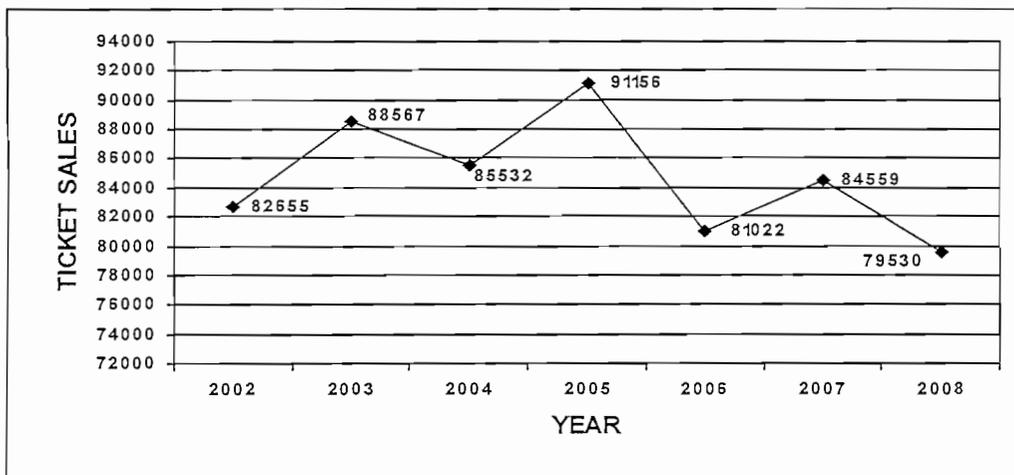


Figure 4.1: Product lifecycle measured in ticket sales

Source: Kruger, Saayman & Saayman, 2008:26

According to Quinn (2006:288), festivals such as Aardklop can provide an effective vehicle for sustainable tourism since it reduces seasonality by extending the tourist season (Nicholson & Pearce, 2000:237). The latter is especially important in a country such as South Africa, where the growth and diversity in festivals creates high levels of competition (Nicholson & Pearce, 2000). However, the ticket sales in 2008 show a slight decline (see Figure 4.1) compared to previous years indicating that Aardklop is moving into the decline phase of its product life cycle. This has a serious impact on the future profitability and sustainability of festivals in the country (Le Grange, 2003:56). Koc and Altinay (2007:228) and Uys (2003:13), stated that developing and sustaining competitive advantage in competitive tourism (festival) markets largely depends

upon understanding visitors in terms of who buys what, when, why, where and how through the process of market segmentation. According to Kruger (2009:3), to sustain the nature of the festival it is important to identify and attract the visitors who attend ticketed productions/shows since these visitors stay longer and spend more than those who do not (Thrane, 2002:281; Saayman & Saayman, 2006:220; Kruger, Saayman & Saayman, 2009). To achieve the aim of this research, the article is structured in the following manner: a literature review is followed by a description of the survey and a discussion of the results and, finally, the implications and the conclusions.

## **4.2 LITERATURE REVIEW**

Market segmentation is widely considered to be at the very heart of marketing (Morgan & Pritchard, 2001:153) and an indication that markets, and the individuals who make up such markets, are not homogenous and therefore no single market offering will satisfy all individuals (Cooper & Wahab, 2001:88; Dibb, Ferrell, Pride & Simkin, 2001:205; Fill, 2007:329). Morgan and Pritchard (2001:153) add that market segmentation maximises market demand by directing marketing efforts at what is regarded as economically significant groups of visitors. Added benefits of market segmentation include an ability to predict visitor behaviour, an improved ability to identify and exploit new market opportunities for commercial benefit, and more focused ideas for product development (Heok, Gendall & Esslemont, 1996; Jang, Morrison & O'Leary, 2004:20). Segmentation further enables marketers to avoid direct competition in an increasingly crowded marketplace, because it provides opportunities to distinguish their particular product (festival), perhaps on the basis of price, but more often through styling, promotional appeal and festival programme/packages (Morgan & Pritchard, 2001:153). The process therefore allows for easier choices about the most appropriate visitors to serve and making the best of limited resources (Dibb & Simkin, 2001:609; Hoyle, 2002:178).

According to research undertaken by Mayfield and Crompton (1995), festival organisers do not undertake thorough visitor-orientated research, believing in their own ability to know what their visitors want, or lacking in the resources to do research. Frisby and Getz (1989:7) warn that all tourism products, including events/festivals, go through successive stages of growth, and therefore their programme/product must also respond to changes in demand. It is, according to Mayfield and Crompton (1995), crucial to know and understand the underlying desires of the visitors to attend a festival or event, if the festival programme is to meet their needs and wants. With market segmentation, changes can be determined and this will assist festival marketers and organisers in selecting the right target market and providing a relevant programme (Jang *et al.*, 2004:19). The more detailed the knowledge of each visitor, the closer the festival marketers

can get to a customised offering that creates greater satisfaction and long-term visitor relationships (Ali-Knight, Drummond, McMahon-Beattie, Robertson & Yeoman, 2004:136).

According to Jang *et al.* (2004:19) one of the most common ways of identifying the right target market is to profile the segments of the total market since profiling helps by distinguishing the attitudes, behaviours, socio-demographics, travel planning patterns, and trip-related characteristics of travel market segments. Researchers have experimented with a wide range of market segmentation applications in an effort to define or profile their target markets (Hsu & Crofts, 2006:280). The most popular variables or bases for visitor segmentation include the geographic (nations, states, provinces, regions, counties, cities, or neighbourhoods), demographic (age, language, family size, family life cycle, gender, religion, race, generation and nationality), socio-economic (income, education, occupation, and social class), psychographics (psychological/personality traits, lifestyle, travel motivation or values), and behavioural characteristics (occasions, benefits, user status, usage rate, loyalty status, buyer readiness stage, attitude and visitor expenditure) (Armstrong & Kotler, 2005:54; Bothma & Burgess, 2007:37; Burke & Resnick, 2000:41; Cooper & Wahab, 2001:89; Fill, 2007:329; Horner & Swarbrooke, 2001:159; Moutinho & Witt, 1994:306; Youell, 1996:138; Dibb & Simkin, 1996:14; Kara & Kaynak, 1997:873; Hanlan, Fuller & Wilde, 2006:17).

Although these variables have been recommended as viable segmentation bases, researchers seem to agree that there is no single ideal segmentation base that fits every situation (Morrison, 2002; Jang *et al.*, 2002:367). However, authors such as Morrison *et al.* (1996), Loker and Perdue (1992) as well as Jang *et al.* (2002:367) have suggested that behaviour or benefit segmentation is one of the best segmentation variables. The rationale behind this segmentation approach is that benefits sought by visitors are the fundamental reasons for the existence of true market segments and they determine the visitor's behaviour much more accurately than do other descriptive variables such as demographic and geographic characteristics. Frochot and Morrison (2000) and Ahmed, Barber and Astous (1998) argue that benefit segmentation is most helpful in designing and modifying facilities and attractions, vacation (festival) packaging, activity (festival) programming, and service quality measurement.

One of the most important behaviours of festivalgoers is the number of tickets purchased as well as the type of shows/productions (genres) attended. The reason being that research by Kruger (2009) and Kruger, Saayman and Ellis (2009) revealed that ticket sales and the genres attended can be used as an indicator of visitor interest in a festival and how successfully the programme addresses and fulfils visitors' needs. Ticket sales are also directly linked to the product life cycle of the festival (as shown in Figure 4.1) and are furthermore the festivals'

primary source of income. Therefore it is crucial for the festival to sustain its growth in ticket sales by attracting more genre supporters since these 'festival junkies' seem to be the most viable and profitable target market (Saayman & Saayman, 2006:218-219; Kruger, 2009).

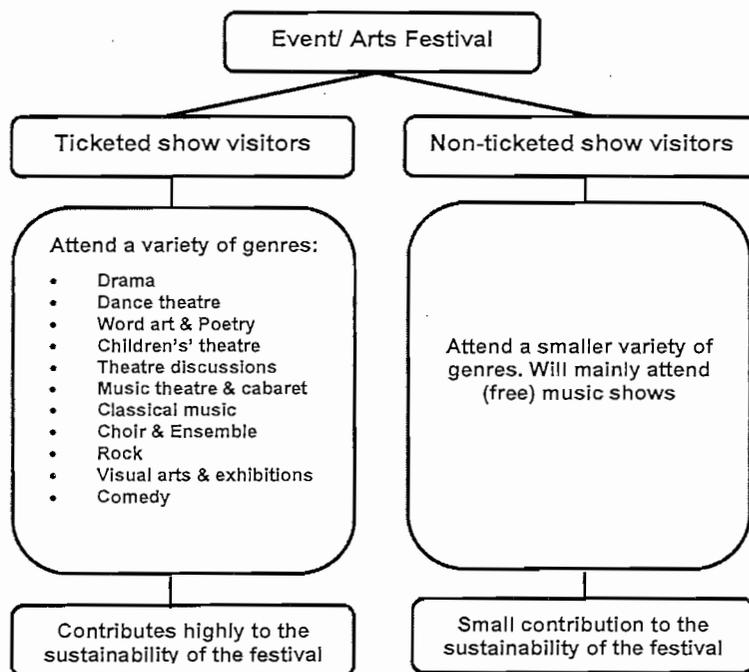


Figure 4.2: Event/Arts festival markets

Based on this, Figure 4.2 illustrates that there are two possible types of visitors attending the festival: those that buy tickets (ticket show visitors) and those that only attend free shows (non-ticket show visitors). The ticket show visitors attend a variety of shows/productions at the festival and therefore contribute greatly to the sustainability of the festival. The non-ticket show attendees, on the other hand, are limited in terms of what is free - which are mostly music shows. From a marketing point of view, it is important for the festival marketers/organisers to keep the main aim of the festival (to preserve and enhance the Afrikaans language and culture) in mind when targeting these visitors. Considering the latter as well as the importance of increasing ticket sales, this study has three research questions: (1) is there a difference between the profiles of ticketed show visitors and non-ticketed visitors; (2) what are the differences and (3) how does this impact on the festival organisers? .

### 4.3 METHOD OF RESEARCH

For the purpose of this article, the data obtained in 2008 will be used. The method of research used will be discussed under the following headings: (i) the questionnaire and (ii) data analysis.

#### 4.3.1 The questionnaire

The questionnaire used to survey visitors to Aardklop in 2008 consisted of four sections. Section A captured demographic details (gender, home language, age, occupation, home province and preferred accommodation) as well as spending behaviour (number of persons paid for, length of stay and expenditure of visitors on different spending components). The spending questions were detailed by spending category, including accommodation, shows, food and beverages, shopping, recreation and transport. Section B captured all the information with regard to the festival (type of shows at the festival, the number of tickets bought, other festivals attended, and the number of years attended) while Section C focused on the visitors specific motivations for attending Aardklop as well as the preferred type of accommodation and media. Similar to the spending questions, the type of shows (genres) at the festival were also categorised and included: Drama, Dance theatre, Word art and poetry, Children's theatre, Theatre discussions, Music theatre and cabaret, Choir and ensemble, Rock, Visual arts and exhibitions and Comedy. Section D measured the respondents' evaluation of certain aspects of the festival. For the purpose of this article, the information obtained from sections A, B and C was predominantly used. In total, 495 questionnaires were completed over a period of five days (30 September – 3 October 2008) by means of availability sampling. According to Cooper and Emory (1995:207) for any population of 100 000 (N) the recommended sample size (S) is 384. Since a total of 55 518 visitor groups attended Aardklop in 2008 (Kruger *et al.*, 2008:27), the number of completed questionnaires is greater than the required number of questionnaires. All questionnaires were completed at the Main Festival Grounds and various venues in Potchefstroom where fieldworkers moved around to minimise bias. Microsoft® Excel® was used for data capturing.

Most questions have multiple choice responses or were answered on a 5-point Likert scale. The socio-demographic and behavioural determinants used in the analysis are described in Table 4.1. Section C of the questionnaire measured visitor's motives to attend Aardklop. Nineteen items were measured in the motivation section on a 5-point Likert scale and respondents were asked to indicate how important they considered each item on the scale (1 = not at all important; 2 = less important; 3 = important; 4 = very important and 5 = extremely important). The motivation factors, as indicated by Kruger *et al.* (2009), included in the *t*-test analysis are also displayed in Table 4.1 below. Factor scores were calculated as the average of all items contributing to a specific factor, and results indicated that *Escape* was the most important motive for visitors to attend Aardklop. This was consistent with research done by Lee, Lee and Wicks (2004:66) and De Guzman (2006:864-865). This was followed by *Festival productions/shows* and *Festival attractiveness*. *Family togetherness* and *Exploration* received

the lowest mean scores and were therefore not central motives to attend the festival (Kruger *et al.*, 2009).

**Table 4.1: Questions used and their descriptions**

Category	Question description	Coding	Variable
Socio-demographics	Age	Open question	AGE
Behavioural characteristics	Group size	Open question	GROUP SIZE
	Number of people paid for	Open question	PEOPLE PAID FOR
	Number of days	Open question	DAYS
	Number of nights	Open question	NIGHTS
	Number of visits to KKNK	Open question	YEARS ATTENDED
	Number of free shows attended	Open question	FREE SHOWS
Travel motives	Factor 1: Festival productions / shows Quality productions Variety of productions Ticket prices are reasonable	5-point Likert Scale	FESTIVAL PRODUCTIONS
	Factor 2: Family togetherness To the benefit of my children To buy arts To spend time with family	5-point Likert Scale	FAMILY TOGETHERNESS
	Factor 3: Exploration To explore the environment To meet new people Aardklop is different to other festivals	5-point Likert Scale	EXPLORATION
	Factor 4: Escape To relax To get away from my routine To spend time with friends Sociable festival	5-point Likert Scale	ESCAPE
	Factor 5: Festival attractiveness To support the food stalls To support the stalls To see well-known performers It is primarily an Afrikaans festival It is an annual commitment It is the closest festival for me	5-point Likert Scale	FESTIVAL ATTRACTIVENESS

### 4.3.2 Statistical analysis

The analysis of data in this study consisted of two stages. Firstly, a general profile of visitors to Aardklop was compiled with the help of SPSS (SPSS Inc., 2007). Secondly, independent *t*-tests were used to compare the mean scores between visitors who attend ticketed productions/shows

and those who do not. Each genre was compared separately to determine whether there are statistically significant differences between show attendees and non-show attendees in terms of demographical variables (age) as well as behavioural variables (group size, number of people paid for, length of stay, number of tickets bought, free shows attended, expenditure per person<sup>1</sup>, other festivals attended, and travel motives (as indicated in Table 4.1). Cohen's *d*-values were also calculated as a measure of the effect size since this will provide an indication of the magnitude of the differences between the two groups. Guidelines for interpretation of the effect size are  $d = 0.2$  indicates a small effect,  $d = 0.5$  a medium effect and  $d = 0.8$  a large effect (Steyn, 2000).

## 4.4 RESULTS

The results will be discussed in two sections. Firstly, an overview of the profile of visitors to the Aardklop National Arts Festival will be presented. Secondly, the results of the *t*-test will be discussed separately for each genre.

### 4.4.1 Visitor profile to Aardklop National Arts Festival

Based on the results captured and displayed in Table 4.2, more visitors are female, predominantly Afrikaans-speaking, with an average age of approximately 41 years and they originate mainly from Gauteng and North West provinces. The largest group of visitors are furthermore in a professional occupation, on average financially responsible for approximately two persons during their visit and stay an average of approximately three days and three nights in Potchefstroom. Visitors purchase an average of five tickets and mostly attend comedy, drama and music theatre and cabaret productions. Visitors are loyal to the festival, indicating that they have visited Aardklop an average of four times.

*Table 4.2: Aardklop visitor profile 2008*

Category	Profile of visitors
Gender	Male 42%; Female 58%
Home language	Afrikaans (94%)
Age	Average age: 41.56 years
Province of residence	Gauteng (43%) and North West (32%) Provinces
Occupation	Professional (31%)
Number of tickets bought	Average of 5.2 tickets
Most popular shows attended	Comedy (48%); Drama (44%) and Music theatre and Cabaret (40%)
Number of days	Average of 3.10 days in Potchefstroom
Number of nights	Average of 3.25 nights in Potchefstroom
Number of people paid for	Average of 2.31 persons

Expenditure per group <sup>1</sup>	R2799.97
Number of visits to festival	Average of 4.26 times

<sup>1</sup> Expenditure per group was calculated by adding the spending of the respondent on the various components asked, and subtracting transport cost to the festival from the value obtained, since the inclusion of transport cost would automatically cause a bias for visitors further away from Potchefstroom.

#### 4.4.2 Results from the independent *t*-test

Independent *t*-tests were done for each genre to determine whether there are significant differences between the visitors who attend a specific genre against those who do not. The significant results for each genre will be discussed separately in this section.

##### 4.4.2.1 Drama

Table 4.3: *T*-test results for Drama

Variables	Attendees			Non-attendees			t-value	p
	Mean	Std.Dev.	N	Mean	Std.Dev.	N		
AGE	46.17	13.61	214	37.94	15.53	272	6.12	0.0000*
GROUP SIZE	3.79	3.40	214	3.51	2.64	273	1.06	0.2917
PEOPLE PAID FOR	2.35	1.43	211	2.28	1.67	268	0.49	0.6247
DAYS	3.30	1.43	213	2.95	1.55	275	2.57	0.0105*
NIGHTS	3.29	1.50	173	3.21	1.68	180	0.46	0.6472
TICKETS	8.05	7.11	204	4.57	3.95	171	5.71	0.0000*
FREE SHOWS	3.82	3.52	112	4.73	4.06	182	-1.95	0.0524
YEARS ATTENDED	4.63	3.00	201	3.96	2.94	252	2.38	0.0178*
FESTIVAL PRODUCTIONS	3.93	0.79	210	3.33	1.08	270	6.70	0.0000*
FAMILY TOGETHERNESS	2.65	1.17	203	2.59	1.19	265	0.57	0.5694
EXPLORATION	2.53	1.05	207	2.78	1.03	266	-2.60	0.0095*
ESCAPE	3.74	0.96	212	3.80	0.85	274	-0.75	0.4551
FESTIVAL ATTRACTIVENESS	3.46	0.90	210	3.46	0.90	274	-0.02	0.9880
SPENDING PER PERSON	1674.71	1606.90	212	944.37	1044.88	268	6.01	0.0000*

As shown in Table 4.3, there is a significant difference between drama attendees and non-drama attendees based on age, number of days spent in Potchefstroom, number of tickets bought, number of years attended, some of the travel motives and spending per person. Drama attendees are considerably older (an average of 46 years) and purchase significantly more tickets (an average of 8) compared to non-drama attendees (who are an average of 38 years old and only buy an average of 5 tickets). They furthermore stay longer at the festival (an average of 3.3 days) and spend noticeably more per person (R1674.71 compared to R944.37). It is also clear that attendees are loyal visitors and have attended the festival an average of 4.6 times. Attendees and non-attendees also differ significantly based on travel motives. Drama attendees are more motivated by the *Festival productions* and are therefore more likely to

attend productions/shows at the festival, while non-drama attendees are motivated more by *Exploration*. Drama attendees also represent the second largest group of respondents.

#### 4.4.2.2 Dance theatre

Table 4.4: T-test results for Dance theatre

Variables	Attendees			Non-attendees			t-value	p
	Mean	Std.Dev.	N	Mean	Std.Dev.	N		
AGE	39.62	15.83	55	41.81	15.19	431	-1.00	0.3159
GROUP SIZE	3.57	2.57	54	3.64	3.05	433	-0.15	0.8796
PEOPLE PAID FOR	2.15	1.28	54	2.33	1.60	425	-0.81	0.4193
DAYS	3.33	1.47	54	3.07	1.51	434	1.19	0.2327
NIGHTS	3.30	1.79	46	3.24	1.57	307	0.25	0.8023
TICKETS	7.52	7.03	52	6.30	5.96	323	1.34	0.1821
FREE SHOWS	3.93	2.32	30	4.43	4.02	264	-0.67	0.5060
YEARS ATTENDED	4.98	3.42	49	4.17	2.92	404	1.79	0.0739
FESTIVAL PRODUCTIONS	4.08	0.90	52	3.53	1.00	428	3.72	0.0002*
FAMILY TOGETHERNESS	2.88	1.29	51	2.59	1.16	417	1.66	0.0976
EXPLORATION	2.88	1.20	53	2.64	1.03	420	1.54	0.1232
ESCAPE	3.94	0.96	54	3.75	0.89	432	1.47	0.1413
FESTIVAL ATTRACTIVENESS	3.67	1.04	52	3.43	0.88	432	1.79	0.0737
SPENDING PER PERSON	1316.73	1081.03	54	1260.62	1403.68	426	0.28	0.7772

Table 4.4 indicates that Dance theatre attendees only differ significantly from non-attendees based on their travel motives. Similar to drama attendees, visitors who attend dance theatre productions/shows are more motivated by *Festival productions* at Aardklop.

#### 4.4.2.3 Word art and poetry

Table 4.5: T-test results for Word art and poetry

Variables	Attendees			Non-attendees			t-value	p
	Mean	Std.Dev.	N	Mean	Std.Dev.	N		
AGE	49.44	13.52	39	40.88	15.22	447	3.40	0.0007*
GROUP SIZE	3.92	3.44	39	3.61	2.96	448	0.63	0.5285
PEOPLE PAID FOR	2.34	1.74	38	2.31	1.56	441	0.13	0.8992
DAYS	3.31	1.26	39	3.08	1.53	449	0.89	0.3756
NIGHTS	3.44	1.39	32	3.23	1.62	321	0.70	0.4849
TICKETS	9.68	7.14	38	6.10	5.90	337	3.47	0.0006*
FRESH SHOWS	4.82	4.94	17	4.35	3.82	277	0.48	0.6290
YEARS ATTENDED	6.34	3.00	35	4.09	2.92	418	4.39	0.0000*
FESTIVAL PRODUCTIONS	4.02	0.68	38	3.56	1.02	442	2.73	0.0066*
FAMILY TOGETHERNESS	2.58	1.19	35	2.62	1.18	433	-0.19	0.8507
EXPLORATION	2.46	1.11	37	2.69	1.04	436	-1.28	0.2010
ESCAPE	3.53	1.12	38	3.79	0.88	448	-1.74	0.0823
FESTIVAL ATTRACTIVENESS	3.32	0.82	38	3.47	0.91	446	-0.97	0.3337
SPENDING PER PERSON	1729.74	1536.87	38	1227.15	1349.59	442	2.18	0.0299*

Word art and poetry attendees differ significantly from non-attendees based on age, number of tickets bought, number of years attended, some travel motives and spending per person (see Table 4.5). Attendees are in their late forties (average age 49 years) which is significantly older than non-attendees who are in their early forties. Significantly more tickets are also purchased by attendees (an average of 10 tickets) and it is therefore not surprising that these visitors are mainly motivated by *Festival productions*. Attendees spend more per person (an average of R1729.74) compared to non-attendees and have attended the festival an average of 6 times. Compared to the other genres, Word art and poetry attendees have attended the festival the longest and are therefore Aardklop's most loyal visitors.

#### 4.4.2.4 Children's theatre

Table 4.6: T-test results for Children's theatre

Variables	Attendees			Non-attendees			t-value	p
	Mean	Std.Dev.	N	Mean	Std.Dev.	N		
AGE	40.66	14.06	29	41.62	15.35	457	-0.33	0.7413
GROUP SIZE	3.65	1.25	31	3.63	3.08	456	0.02	0.9806
PEOPLE PAID FOR	3.06	1.26	31	2.26	1.58	448	2.78	0.0057
DAYS	3.37	1.35	30	3.09	1.52	458	0.99	0.3218
NIGHTS	3.21	1.27	19	3.25	1.61	334	-0.11	0.9135
TICKETS	7.19	7.85	31	6.40	5.95	344	0.69	0.4910
FRESHOWS	3.54	2.11	24	4.46	4.00	270	-1.11	0.2698
YEARS ATTENDED	4.66	3.07	29	4.23	2.98	424	0.74	0.4620
FESTIVAL PRODUCTIONS	3.87	0.73	29	3.58	1.02	451	1.52	0.1292
FAMILY TOGETHERNESS	3.43	1.13	29	2.56	1.17	439	3.86	0.0001
EXPLORATION	2.70	1.27	29	2.67	1.03	444	0.16	0.8743
ESCAPE	3.87	0.88	30	3.77	0.90	456	0.62	0.5366
FESTIVAL ATTRACTIVENESS	3.48	1.01	30	3.46	0.89	454	0.12	0.9041
SPENDING PER PERSON	1084.02	969.16	31	1279.56	1393.69	449	-0.77	0.4428

Table 4.6 shows that there is a significant difference between Children's theatre attendees and non-attendees based on the number of people paid for and travel motives. Attendees pay on average for more people during their stay (an average of three persons compared to two) since they most likely travel with children to the festival. It is therefore not surprising that these visitors are more motivated by *Family togetherness*. Children's theatre attendees also represent the smallest group of attendees.

#### 4.4.2.5 Theatre discussions

Table 4.7: T-test results for Theatre discussions

Variables	Attendees			Non-attendees			t-value	p
	Mean	Std.Dev.	N	Mean	Std.Dev.	N		
AGE	48.12	14.04	34	41.07	15.25	452	2.61	0.0093*
GROUP SIZE	3.48	2.43	33	3.64	3.04	454	-0.29	0.7700
PEOPLE PAID FOR	2.53	1.95	32	2.30	1.54	447	0.82	0.4126
DAYS	3.48	1.28	33	3.07	1.52	455	1.51	0.1311
NIGHTS	3.33	1.56	30	3.24	1.60	323	0.30	0.7634
TICKETS	7.33	6.36	33	6.38	6.10	342	0.85	0.3954
FREE SHOWS	5.86	4.50	21	4.27	3.82	273	1.82	0.0705
YEARS ATTENDED	4.55	3.02	31	4.24	2.98	422	0.56	0.5782
FESTIVAL PRODUCTIONS	3.96	1.04	34	3.56	1.00	446	2.22	0.0269*
FAMILY TOGETHERNESS	2.86	1.37	33	2.60	1.17	435	1.24	0.2141
EXPLORATION	2.87	1.17	34	2.66	1.04	439	1.13	0.2574
ESCAPE	3.81	1.11	34	3.77	0.88	452	0.24	0.8094
FESTIVAL ATTRACTIVENESS	3.53	1.04	34	3.46	0.89	450	0.45	0.6521
SPENDING PER PERSON	1543.50	1105.54	32	1247.18	1386.22	448	1.18	0.2377

Based on the results reflected in Table 4.7, Theatre discussion attendees are in their late forties (average age 48 years) which is significantly older than non-attendees (average age 41 years) and are more motivated by *Festival productions*.

#### 4.4.2.6 Music theatre and cabaret

Table 4.8: T-test results for Music theatre and cabaret

Variables	Attendees			Non-attendees			t-value	p
	Mean	Std.Dev.	N	Mean	Std.Dev.	N		
AGE	45.39	14.47	191	39.09	15.27	295	4.53	0.0000
GROUP SIZE	3.67	2.49	193	3.61	3.29	294	0.21	0.8305
PEOPLE PAID FOR	2.29	1.67	188	2.32	1.51	291	-0.21	0.8361
DAYS	3.33	1.37	192	2.95	1.57	296	2.75	0.0063
NIGHTS	3.24	1.46	156	3.26	1.70	197	-0.13	0.8992
TICKETS	7.68	6.84	185	5.29	5.08	190	3.84	0.0001
FREE SHOWS	4.62	4.59	112	4.24	3.38	182	0.81	0.4162
YEARS ATTENDED	4.56	3.12	178	4.07	2.88	275	1.73	0.0837
FESTIVAL PRODUCTIONS	3.89	0.81	193	3.39	1.07	287	5.54	0.0000
FAMILY TOGETHERNESS	2.58	1.15	183	2.64	1.20	285	-0.52	0.6060
EXPLORATION	2.57	1.06	184	2.73	1.04	289	-1.62	0.1053
ESCAPE	3.79	0.87	191	3.77	0.92	295	0.25	0.8017
FESTIVAL ATTRACTIVENESS	3.47	0.89	189	3.46	0.91	295	0.15	0.8809
SPENDING PER PERSON	1635.58	1546.66	189	1027.51	1185.22	291	4.86	0.0000

Music theatre and cabaret attendees are older (average age 45 years) than non-attendees, who are in their late thirties, and spend more days at the festival (an average of 3.3 days) (see Table

4.8). Attendees purchase more tickets for productions/shows (an average of 8) and are therefore more motivated by *Festival productions*. As a result, attendees spend significantly more per person (an average of R1635.58) than non-attendees.

#### 4.4.2.7 Classical music

Table 4.9: T-test results for Classical music

Variables	Attendees			Non-attendees			t-value	p
	Mean	Std.Dev.	N	Mean	Std.Dev.	N		
AGE	50.87	14.38	62	40.20	14.92	424	5.28	0.0000
GROUP SIZE	3.16	1.93	62	3.70	3.12	425	-1.33	0.1856
PEOPLE PAID FOR	2.35	1.31	60	2.31	1.61	419	0.20	0.8377
DAYS	3.46	1.36	61	3.05	1.52	427	1.98	0.0480
NIGHTS	3.49	1.55	51	3.21	1.60	302	1.17	0.2443
TICKETS	10.47	9.54	57	5.75	4.98	318	5.58	0.0000
FREE SHOWS	4.90	5.15	30	4.32	3.72	264	0.77	0.4406
YEARS ATTENDED	5.58	3.40	57	4.07	2.87	396	3.62	0.0003
FESTIVAL PRODUCTIONS	3.97	0.83	61	3.54	1.02	419	3.16	0.0017
FAMILY TOGETHERNESS	2.70	1.23	59	2.61	1.17	409	0.56	0.5757
EXPLORATION	2.49	1.15	60	2.70	1.03	413	-1.47	0.1435
ESCAPE	3.64	0.94	61	3.79	0.89	425	-1.22	0.2235
FESTIVAL ATTRACTIVENESS	3.52	0.88	61	3.45	0.90	423	0.55	0.5852
SPENDING PER PERSON	1860.02	1820.40	60	1182.21	1273.78	420	3.63	0.0003

As shown in Table 4.9, Classical music attendees are the oldest visitors at the festival (average age 51 years) and purchase the most tickets (average of 10). These loyal visitors have attended the festival an average of 6 times and stay longer at the festival than non-attendees who are younger, purchase significantly fewer tickets and stay fewer days. Similar to other genre supporters, Classical music attendees are also more motivated by *Festival productions* and therefore also spent significantly more per person (R1860.02) than non-attendees.

#### 4.4.2.8 Choir and ensemble

Table 4.10: T-test results for Choir and ensemble

Variables	Attendees			Non-attendees			t-value	p
	Mean	Std.Dev.	N	Mean	Std.Dev.	N		
AGE	50.22	17.61	36	40.90	14.87	449	3.57	0.0004
GROUP SIZE	2.94	1.63	35	3.68	3.08	451	-1.41	0.1601
PEOPLE PAID FOR	1.94	1.21	35	2.33	1.59	443	-1.42	0.1556
DAYS	3.69	1.18	35	3.06	1.52	452	2.39	0.0174
NIGHTS	3.42	1.32	33	3.23	1.62	319	0.66	0.5113
TICKETS	10.12	10.13	34	6.11	5.47	340	3.70	0.0002
FREE SHOWS	4.24	5.23	17	4.39	3.80	276	-0.16	0.8698
YEARS ATTENDED	5.72	3.46	32	4.15	2.92	420	2.89	0.0040
FESTIVAL PRODUCTIONS	3.96	0.85	35	3.56	1.01	444	2.25	0.0247

FAMILY TOGETHERNESS	2.67	1.26	35	2.61	1.18	432	0.29	0.7719
EXPLORATION	2.58	1.23	36	2.68	1.03	436	-0.53	0.5986
ESCAPE	3.80	0.88	36	3.77	0.90	449	0.20	0.8430
FESTIVAL ATTRACTIVENESS	3.66	0.85	36	3.44	0.90	447	1.42	0.1565
SPENDING PER PERSON	1662.61	1140.82	35	1235.49	1384.60	444	1.78	0.0761

Similar to Classical music attendees, visitors who attend Choir and ensemble productions (Table 4.10) are the oldest visitors at Aardklop (average age 50 years), purchase an average of 10 tickets, have visited the festival and average of 6 times and are more motivated by *Festival productions*. Non-attendees are also very similar to the non-classical music attendees based on their age, number of days spent at the festival, number of tickets bought, years attended and motivation (see Table 4.9).

#### 4.4.2.9 Rock

Table 4.11: T-test results for Rock

Variables	Attendees			Non-attendees			t-value	p
	Mean	Std.Dev.	N	Mean	Std.Dev.	N		
AGE	31.32	12.52	94	44.02	14.84	392	-7.67	0.0000
GROUP SIZE	3.63	2.72	91	3.63	3.06	396	-0.02	0.9829
PEOPLE PAID FOR	2.28	1.81	90	2.32	1.51	389	-0.22	0.8238
DAYS	3.59	1.29	93	2.99	1.53	395	3.52	0.0005
NIGHTS	3.48	1.45	81	3.18	1.63	272	1.49	0.1359
TICKETS	6.01	6.61	87	6.60	5.98	288	-0.79	0.4297
FREE SHOWS	5.05	3.79	58	4.22	3.90	236	1.47	0.1422
YEARS ATTENDED	4.05	2.97	83	4.31	2.99	370	-0.72	0.4737
FESTIVAL PRODUCTIONS	3.60	1.07	93	3.59	0.99	387	0.06	0.9503
FAMILY TOGETHERNESS	2.38	1.19	91	2.67	1.17	377	-2.15	0.0320
EXPLORATION	2.80	0.99	92	2.64	1.06	381	1.32	0.1872
ESCAPE	3.83	0.94	93	3.76	0.89	393	0.66	0.5127
FESTIVAL ATTRACTIVENESS	3.35	0.94	92	3.49	0.89	392	-1.36	0.1739
SPENDING PER PERSON	1303.82	1220.63	90	1258.42	1403.92	390	0.28	0.7773

As indicated in Table 4.11, Rock attendees are the youngest visitors at the festival (average age 31 years). Their younger age could be explained by the fact that these visitors are mostly students and, compared to non-attendees, these visitors stay longer at the festival (an average of 4 days) and are unsurprisingly motivated less by *Family togetherness*.

#### 4.4.2.10 Visual arts and exhibitions

Table 4.12: T-test results for Visual arts and exhibitions

Variables	Attendees			Non-attendees			t-value	p
	Mean	Std.Dev.	N	Mean	Std.Dev.	N		
AGE	42.00	15.08	50	41.51	15.30	436	0.21	0.8313
GROUP SIZE	4.06	2.73	50	3.58	3.03	437	1.06	0.2876
PEOPLE PAID FOR	2.31	1.43	49	2.31	1.59	430	-0.02	0.9815
DAYS	3.49	1.50	51	3.06	1.50	437	1.95	0.0520
NIGHTS	3.69	1.64	39	3.19	1.58	314	1.84	0.0659
TICKETS	8.10	8.12	49	6.22	5.74	326	2.01	0.0449
FREE SHOWS	5.17	4.86	30	4.29	3.76	264	1.17	0.2427
YEARS ATTENDED	5.74	3.35	46	4.09	2.90	407	3.59	0.0004
FESTIVAL PRODUCTIONS	3.69	0.93	50	3.58	1.02	430	0.72	0.4710
FAMILY TOGETHERNESS	2.67	1.03	50	2.61	1.20	418	0.33	0.7382
EXPLORATION	2.65	1.08	50	2.67	1.05	423	-0.13	0.8985
ESCAPE	3.70	1.00	51	3.78	0.89	435	-0.64	0.5220
FESTIVAL ATTRACTIVENESS	3.26	0.92	51	3.48	0.90	433	-1.69	0.0923
SPENDING PER PERSON	1559.98	1378.60	49	1233.62	1367.02	431	1.58	0.1143

Visual arts and exhibition attendees differ significantly from non-attendees based on the number of tickets bought and years attended (Table 4.12). Attendees purchase on average more tickets (8 compared to 6) and have attended Aardklop more often (an average of 6 times compared to 4 times).

#### 4.4.2.11 Comedy

Table 4.13: T-test results for Comedy

Variables	Attendees			Non-attendees			t-value	p
	Mean	Std.Dev.	N	Mean	Std.Dev.	N		
AGE	42.42	14.53	232	40.78	15.89	254	1.19	0.2362
GROUP SIZE	3.75	3.32	235	3.52	2.67	252	0.83	0.4082
PEOPLE PAID FOR	2.33	1.46	230	2.29	1.67	249	0.26	0.7958
DAYS	3.29	1.28	235	2.93	1.67	253	2.66	0.0081
NIGHTS	3.13	1.43	188	3.38	1.76	165	-1.46	0.1440
TICKETS	7.81	6.88	227	4.41	3.94	148	5.46	0.0000
FREE SHOWS	4.44	4.00	140	4.33	3.78	154	0.23	0.8181
YEARS ATTENDED	4.55	3.02	216	4.00	2.93	237	1.98	0.0478
FESTIVAL PRODUCTIONS	3.85	0.86	232	3.35	1.07	248	5.68	0.0000
FAMILY TOGETHERNESS	2.63	1.16	225	2.60	1.20	243	0.23	0.8162
EXPLORATION	2.55	1.08	227	2.78	1.00	246	-2.39	0.0175
ESCAPE	3.77	0.88	232	3.77	0.92	254	0.03	0.9780
FESTIVAL ATTRACTIVENESS	3.45	0.91	232	3.47	0.89	252	-0.19	0.8462
SPENDING PER PERSON	1577.53	1256.39	230	981.19	1410.49	250	4.87	0.0000

Based on the results depicted in Table 4.13, Comedy attendees represent the largest group of attendees, spend more days at the festival, and purchase significantly more tickets (an average of 8 compared to 4). Attendees have attended Aardklop more times and spend significantly more per person than non-attendees. As expected, attendees are motivated more by *Festival productions* while non-attendees are encouraged more by *Exploration*.

#### 4.5 FINDINGS AND IMPLICATIONS

The results from this study indicate that there are clear differences between genre attendees and non-attendees at Aardklop. These differences are mostly based on socio-demographic and behavioural characteristics which give a comprehensive profile of the two types of visitors at the festival. In general, genre attendees are older and characterised by purchasing tickets for a variety of shows/productions at the festival with drama, comedies, and music theatre and cabaret being the most popular genres. As expected, genre attendees also spend more days at the festival and, as a result, spend significantly more money during the festival. These visitors are also loyal visitors who have attended Aardklop more often and are thus mainly motivated by the *Festival productions*. It is interesting to note that Classical music, Choir and ensemble, and Word-art and poetry attendees seem to be Aardklop's most ardent genre supporters - even though these genres attract a small number of visitors. This result is surprising, since these types of genres are not main elements in the festival programme and rarely feature mainstream and contemporary artists or are included in marketing efforts. Non-genre attendees, on the other hand, are characterised by their younger age, shorter stays, fewer years attended, fewer tickets purchased and lower spending.

This information provides useful insights into the profiles of the different genre attendees at the festival. Based on this, the following important marketing implications can be identified:

Firstly, from a marketing and sustainability point of view, Aardklop's marketers and organisers should focus their marketing efforts on attracting and retaining more genre supporters since this will ensure that the festival grows in visitor numbers (especially loyal visitors) and, at the same time, gain a competitive advantage.

Secondly, Aardklop needs to increase its ticket sales and this can be achieved on two levels: (1) In accordance with the first implication, the festival must attract more genre attendees and (2) Aardklop needs to convince non-attendees to purchase tickets supporting the festival's shows/productions. Genre attendees are mainly motivated by *Festival productions* which covers the variety, quality and affordability of genres. These aspects should therefore be incorporated into marketing efforts to encourage visitors to purchase more tickets. The different genres at the

festival should furthermore be more visible in marketing efforts and award-winning, exclusive and popular productions should be the prominent features. To encourage non-attendees to purchase tickets, these aspects should be combined with the motive *Escape*, since this will promote the festival as an all-inclusive package. Since non-attendees are mainly motivated by the free shows and socialisation at the festival, Aardklop's marketers/organisers could also consider special festival packages which include discounts on food and beverage items if, for example, three or more tickets are purchased.

Thirdly, the length of stay of both the genre attendees and non-attendees needs to be increased. This can be achieved with special festival packages that include local attractions and discounts for ticket prices and accommodation. This will not only entice visitors to spend more days at the festival but also to attend more ticketed shows/productions. Lastly, genre attendees are already in their late forties and early fifties and this has serious implications for the future sustainability of the festival. Therefore, younger visitors need to be attracted to the festival and should be targeted with a customised festival programme which incorporates the different types of shows/productions together with the unique theme and vibe of the festival. Aardklop could also consider more shows/productions aimed at the youth; for example productions from different universities and schools as well as popular rock and contemporary music artists. The attendance at these shows could be linked to a competition held during the festival, where young visitors who attend these shows/productions stand a chance to win various prizes such as free tickets, free merchandise, and backstage passes to name but a few. This will encourage younger visitors to attend more shows/productions during the festival.

#### **4.6 CONCLUSION**

The purpose of this article was to determine whether there are significant differences between genre and non-genre attendees at Aardklop. This was the first time that visitors were segmented based on the type of genre attended at a national arts festival in South Africa. Results indicated that this type of segmentation can be successfully applied to arts festivals. In fact, this method is the only type of segmentation that effectively distinguishes different markets based on attendance of different genres. From the research the following advantages of this type of segmentation are as follows:

- This approach separately profiles each genre and non-genre attendee at the festival allowing festival organisers to customise the festival programme to attract more genre attendees and encourage non-attendees to support the ticketed shows/productions. For example, the results show that Classical music, Choir and ensemble, and Word art and poetry supporters purchase the most tickets at the festival and, as a result, are also the highest spenders at the festival. However, the current festival programme only offers limited productions

of these genres. As a result, only a small number of visitors support these genres. Festival organisers view these small attendance figures as a lack of interest in these genres and therefore do not include them as main features in the festival programme. Because of this, the festival loses out on potential ticket sales. Results from this study clearly show that Aardklop's festival programme should include more of these types of shows/productions, since they are supported by the high spenders and visitors who attend the festival for the arts. This will not only result in a greater economic impact of the festival but will allow Aardklop to stay true to its main aim i.e. preserving and enhancing the Afrikaans language and culture.

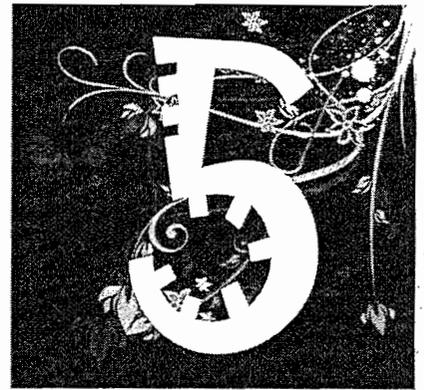
● Potential festival markets can therefore also be identified more easily and possible gaps in the festival programme can be determined as mentioned above.

The aforementioned will ultimately lead to an increase in overall ticket sales and result in a more competitive and sustainable festival. This research therefore emphasises the importance of market segmentation and especially its continuous implementation. This type of segmentation research should also be applied to other arts festivals in the country to compare results and to expand the body of knowledge. It is furthermore recommended that a cluster analysis is performed to enhance the understanding of the profile of genre attendees.

# CHAPTER 5:

DOES LOYALTY PAY?

FIRST-TIME VERSUS REPEAT  
VISITORS AT A NATIONAL  
ARTS FESTIVAL



*“We all have dreams. But in order to make dreams come into reality, it takes an awful lot of determination, dedication, self-discipline, and effort.”*

*~ Jesse Owens*

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## ABSTRACT

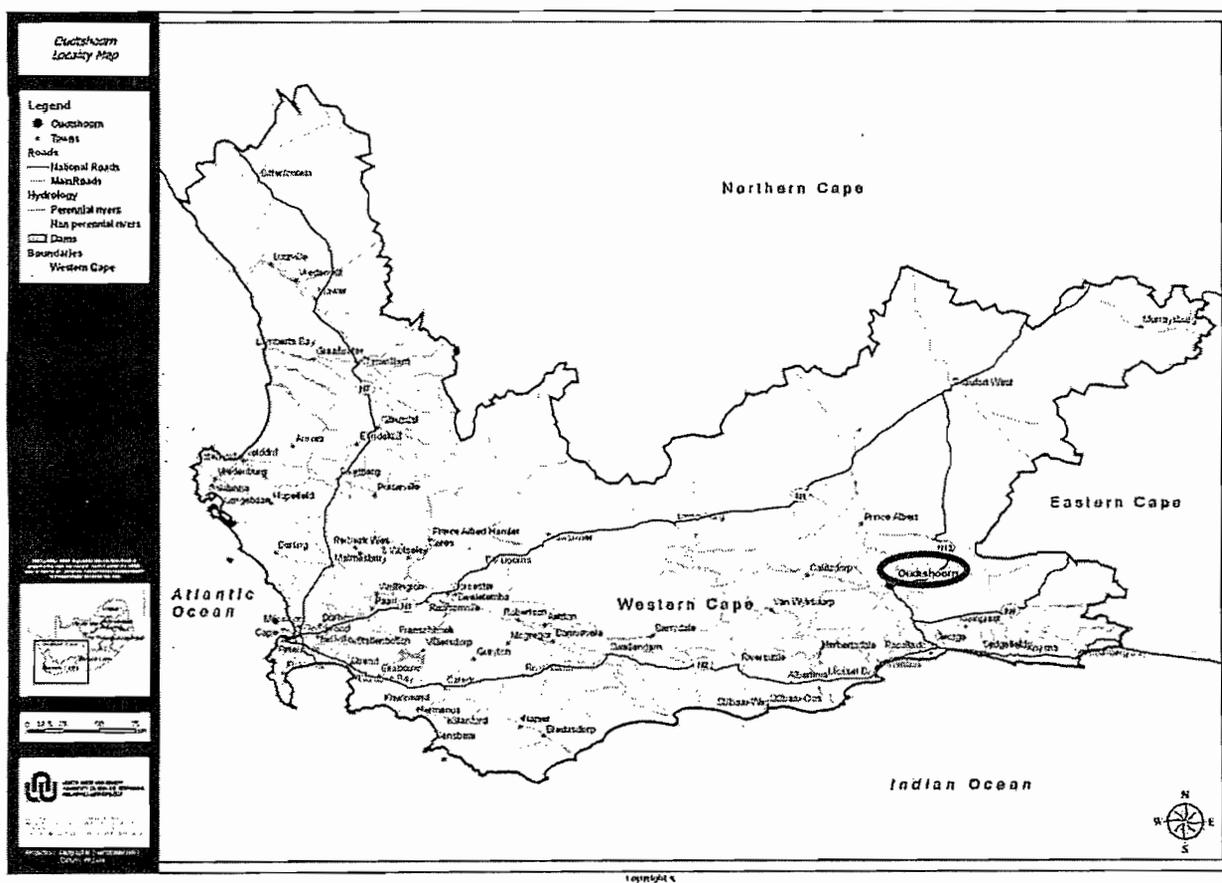
The aim of this research is to segment visitors to one of South Africa's biggest arts festivals based on the frequency of visits to distinguish between first-time and repeat festival attendees. Both first-time and repeat visitor groups play a fundamental role in the overall well-being and success of a festival and festival organisers must strive to achieve a balance between first-time and repeat visitors. Therefore, festival managers should be aware of the festival attributes that differentiate between the first-time visitor group and repeat visitors attending the festival. These differences include socio-demographics, behavioural characteristics, destination perception, perceived value and travel motivations. This article therefore offers a systematic comparison of first-time and repeat visitors to the Klein Karoo National Arts Festival based on these categories. A questionnaire survey ( $N=495$ ) was conducted at the festival and the findings indicate that there are significant differences between first-time and repeat visitors at the festival. Repeat visitors spend a significant amount of money during the festival and are mainly motivated by *Festival shows/productions*. Repeat visitors, on the other hand, are loyal visitors who stay longer and spend more money, especially on tickets supporting the festival's shows/productions. Results reveal that both first-time and repeat visitor groups are important for the long-term sustainability of the festival. This method of segmentation has also proven to be successful and, based on the latter, managerial and marketing implications are proposed for the festival organisers.

**Keywords:** *First-time visitors; Repeat visitors; Arts festival*

# DOES LOYALTY PAY? FIRST-TIME VERSUS REPEAT VISITORS AT A NATIONAL ARTS FESTIVAL

## 5.1 INTRODUCTION

Governments and businesses, as well as residents and festival organisers, perceive festivals as a financial injection to local economies (Delamere, 2001). Generating over R91.3 million in 2009, the Klein Karoo National Arts Festival (hereafter referred to as the KKNK) is the largest arts festival in South Africa in terms of economic impact (Slabbert, Kruger, Viviers, Saayman & Saayman, 2009:41). The KKNK is a celebration and enhancement of the arts through the medium of Afrikaans. Launched in 1994, the week-long festival, held annually in Oudtshoorn (located in the Western Cape, see Map 5.1) during the March/April school holidays, features a range of pop, rock, cabaret, classical music, drama and dance. The festival presents over 200 productions, working with over 750 artists in 40 different venues attracting more than 100 000 visitors each year, making it one of the biggest and most popular arts festivals in the country (Kitshoff, 2004:240; Van Zyl, 2005:9).



Map 5.1: Oudtshoorn (location of the KKNK)

However, with more than 300 festivals held annually in South Africa, festivals are competing fiercely for visitors, artists and sponsors. This has a serious impact on the future profitability and sustainability of festivals in the country (Le Grange, 2003:56). According to Uys (2003:13), a sustainable marketing strategy is needed to maintain a steady growth rate. The latter added that one of the best ways to secure long term growth is to understand each tourist (festival) market as an individual group of tourists (visitors). Shanka and Taylor (2004:134) agree, and argue that in this increasingly competitive festival and event sector there is significant interest in investigating event (festival) visitors. Hence, market segmentation is used to identify visitors, i.e. the target market, and to better understand their needs.

Oppermann (1999:51) revealed that segmenting visitors based on the number of times a destination (or in this case a festival) has been visited can provide destination (festival) marketers (and organisers) with valuable information for more cost-effective target marketing. According to McKercher and Wong, (2004:171) and Lau and McKercher (2004:279), two types of visitors visit a destination (festival); first-time visitors and repeat visitors. First-time visitors represent new visitors who are discovering (visiting) a destination (festival) (Lau & McKercher, 2004:279). Repeat visitors, on the other hand, are familiar with the destination (festival) and satisfied with the experiences offered. With this in mind, Shanka and Taylor (2004:135) add that whereas many annual festivals rely on repeat visitors, it is worthwhile determining which of the attributes significantly discriminate between first-time and repeat festival visitor groups, because these findings could be of benefit to the event (festival) management committees. The need for researching the requirements of both first-time and repeat visitors groups is furthermore significant for the short-term momentum and hence long-term sustainability for the staging of an event (festival) (Shanka & Taylor, 2004:135).

Therefore the aim of this research is to segment visitors to the KKNK based on the frequency of visits to distinguish between first-time and repeat festival attendees at the KKNK. To achieve the latter, the article is structured in the following manner: the literature review will be followed by a description of the method of research, which is followed by a discussion of the results, a discussion of the findings, implications and, finally, concluding remarks.

## **5.2 LITERATURE REVIEW**

Destination (festival) marketers are using stronger discretion in selecting promotions aimed at potential tourists (visitors) to maximise their marketing return on investment (Tang & Turco, 2001:34). According to Lau and McKercher (2004:280), repeat visitation represents an attractive, cost-effective market segment for most destinations (festivals). Oppermann (2000a:78) agrees, and highlights different reasons why repeat visitation has been regarded as

a desirable phenomenon in marketing: (1) the marketing costs needed to attract repeat visitors are lower than those required for first-timers (Tang & Turco, 2001:34); (2) repeat visitation is considered a positive indication of tourist satisfaction; (3) repeat visitors are the type of tourists most likely to revisit a destination which is linked to loyalty and economic sustainability (Dick & Basu, 1994:99; Caneen, 2004:265) and (4) they might recommend the destination to friends and relatives which results in a positive word-of-mouth effect (Oppermann, 2000a:78; Li, Cheng, Kim & Petrick, 2008:289; Shoemaker & Lewis, 1999).

Yet, according to Petrick (2004b:463), it is only an assumption that repeat visitors are the most desired visitors. Empirical evidence has yet to show that loyal (or repeat) visitors are any better than new visitors (Oppermann, 2000b). Oppermann (2000b) argues that there is a vast difference between first-time visitors and repeat visitors and that loyalty segmentation must account for these differences. Even though repeat purchase and/or visitation is often touted as something to be desired (Oppermann, 2000a:78), an undersupply of new visitors is usually an indication of a destination (festival) in decline (Oppermann, 1998:136; Lau & McKercher, 2004:279). Hence, both first-time and repeat visitor groups play a fundamental role in the overall well-being and success of a destination (festival) and it is for this reason collectively that destination managers (festival organisers) must strive to achieve a balance between first-time and repeat visitors (Oppermann, 1997).

According to Vogt, Stewart and Fesenmaier (1998:69), attracting new visitors is a major concern for destinations (festivals) that rely on tourism (visitors) as an agent for economic development and growth. Visitation levels are therefore difficult to maintain unless the destination (festival) marketing is continually reaching new visitors, making them aware of the destination (festival), and convincing them to visit. Shanka and Taylor (2004:135) add that, should an event (festival) become increasingly successful over a number of years of staging, and hence increase its profile, it may then attract a greater proportion of first-time visitors. This may, in turn, change the nature of an event (festival) in terms of programming and structure of offerings, which may then change the value of the event (festival) for the local domestic market, which was previously considered as the core of the visitor group. It is therefore worth investigating whether there are differences in what repeat visitors want, and what first-timers want from the festival (Shanka & Taylor, 2004:135).

Oppermann (1999) and Li *et al.* (2008:279) stated that it is extremely important to understand these differences since they provide destination (festival) management with more specific direction. This is because the tourism demand for repeat visitors is quite different from that for first-time visitors (Wang, 2004:115). Correia *et al.* (2008:198) add that destination (festival)

managers must distinguish marketing strategies between first and repeat visitors and also that they should pay attention to visitors' specific preferences to attract them. Jang and Feng (2007:587) warn that, if destinations (festivals) only focus on continuous repeaters, destination (festival) marketers and managers (organisers) may misunderstand the movement of their market and allocate resources inefficiently. To avoid inefficiency, destinations (festivals) should further understand their entire market structure which consists of other segments, including continuous repeaters and first-time visitors (Jang & Feng, 2007:587). An implication is that travel and destination (festival) managers (organisers) need to consider these differences and to propose different programmes for these two potentially different market segments (Vogt, Stewart & Fesenmaier, 1998:69; Wang, 2004:115). Specifically, information concerning tourists' status as first-time or repeat visitors can be useful in market segmentation (Formica & Uysal, 1998), signalling destination familiarity (Tideswell & Faulkner, 1999) and determine a destination's position in its life cycle (Oppermann, 1998:136; Priestly & Mundet, 1998).

Gitelson and Crompton (1984) pioneered the research of first-time and repeat visitors and concluded that first-time and repeat visitors had different motivations, leading to different intended activity sets. A number of researchers in the field of tourism followed, where the differences between first-time visitors and repeaters were reported. The most notable differences include socio-demographics, behaviour characteristics, destination perceptions, satisfaction and image as well as travel motivations (see Fakeye & Cromton, 1991; Lau & McKercher, 2004; McKercher & Wong, 2004; Oppermann, 1998; Petrick, 2004a,b; Shanka & Taylor, 2004; Li, Cheng, Kim & Petrick, 2008). This is discussed in the section below.

Concerning socio-demographics, significant differences were found between first-time and repeat visitors based on age, spending patterns, length of stay and nationality:

- Gitelson and Crompton (1984:199) as well as Lau and McKercher (2004:284) found that first-time visitors were more likely to be younger while repeat visitors were more likely to be older. This result was confirmed by Li *et al.* (2008:288) who found that first-time visitors tend to be younger and single. Li *et al.* (2008:288) also revealed that first-timers were most likely to be long-haul visitors who travel greater distances, while repeaters were more likely to travel to visit friends and relatives and take weekend trips. Caneen (2004:271) found that nationality, more than age and gender, significantly influenced visitors' decision to return to Hawaii. However, no significant differences were found in other studies in terms of gender, education and income (Li *et al.*, 2008:282) This supports the findings by McKercher and Wong (2004) that few demographic differences distinguish first-time and repeat visitors. First-time visitors stay for shorter periods than

repeaters (Oppermann, 1997:178; Wang, 2004:108; Lau & McKercher, 2004:284; Oppermann, 1998), while only Li *et al.* (2008:289) found the opposite.

- While it is essentially argued that repeat visitors spent more money (Oppermann, 2000a:78), the findings within the context of first-time and repeat visitation studies are not as conclusive as one might expect (Li *et al.*, 2008:281). Wang (2004:108) found that repeat visitors spend more than first-time visitors. A possible explanation for this finding is because repeat visitors perceive the overall value for money to be more satisfactory than first-time visitors (Kozak & Rimmington, 2000) and satisfaction leads to repeat action (Baker & Crompton, 2000; Kozak, 2001:784). Tang and Turco (2001:39); Oppermann (1997:178); Alegre and Juaneda (2006:686); Li *et al.* (2008:288) and Petrick (2004b:469) all found in their respective research that first-time visitors spend significantly more than repeaters. Li *et al.* (2008:288) and Petrick (2004b:469) concluded that repeat visitors are more price sensitive and more apt to search for lower prices than first-time visitors.

Fakeye and Crompton (1992:364) found that travel motives that impel first-time visitors to select a destination (festival) are likely to be different from those which induce previous visitors to return. This was also empirically verified by Gitelson and Crompton (1984) and Hughes and Morrison-Saunders (2002).

- Consistently, first-timers are more likely to be seeking variety and new cultural experiences, while returning visitors are more likely to be seeking relaxation and spending time with, or visiting, family and friends (Gitelson & Crompton, 1984; Hughes & Morrison-Saunders, 2002). Fakeye and Crompton (1992:366) further revealed that first-time visitors are likely to be more curious to see the area than repeaters whose curiosity motive has been satiated by previous visits, while socialisation is of major importance for repeaters. In addition, Alegre and Juaneda (2006:686) revealed that while first-timers are motivated by external factors (including the price of the holiday), repeaters favour factors inherent in the destination (such as the quality of the surroundings or accommodation) or are a consequence of their previous stay there (a reduction in non-monetary costs or a sense of emotional attachment).

Visitors' activities and behaviour characteristics appear to reflect these differed motivations between the two groups (relaxation and social needs for repeat visitors and novelty for first-time visitors) (Li *et al.*, 2008:280):

- Wang (2004:108) found that first-time visitors were involved in more activities, while repeat visitors were engaged in fewer tourist activities. This is supported by Fakeye and Crompton (1991), Kepmerman, Joh and Timmermans (2004:159), Lau and McKercher

(2004:284) as well as Oppermann (1997:178), who also found that first-time visitors visit more attractions within a destination area; explore a destination more widely and participate in a variety of activities, with particular interest in large icons and events. Repeat visitors, on the other hand, visited a smaller number of attractions (Wang, 2004:108), but spent their time more intensively (Oppermann, 1997:178) since they are destination-aware tourists who are aware of the range of activities available (Lau & McKercher, 2004:279). Li *et al.* (2008:280) revealed that repeat visitors tend to make more congruent plans than first-time visitors, and are less likely to change their plans because of their experiences with the destination. Wang (2004:114) found that repeat visitors are furthermore engaged in activities related to local culture and life and prefer more social activities, such as shopping, dining or visiting friends and relatives. Rosenbaum (2006:294), on the other hand, found that Japanese repeat visitors to Hawaii are more interested in engaging in personal pleasure and relaxation activities, and less intent on taking part in cultural or sightseeing tours.

The tourism literature furthermore suggests that previous destination (festival) experience (and familiarity) significantly impacts visitors decision-making processes, perceptions and image of the destination (festival), as well as their levels of satisfaction (Gursoy & McCleary, 2004; Oppermann, 1998, 2000a,b; Stewart & Vogt, 1999).

- Fakeye and Crompton (1991) and Correia, Oliveira and Butler (2008:185) found that first-time visitors have more complex and differentiated *images of destinations* than repeat visitors. This is probably because repeat visitors typically develop their images out of previous actual experiences while first time visitors establish their images of the destination through information obtained from external sources (e.g. tourism suppliers and family and friends) (Reid & Reid, 1993). First-time visitors identified natural and cultural amenities and accommodation as more important image components, whereas repeaters found some factors associated with social opportunities such as food, friendly people, bars and evening entertainments more important than other image components (Fakeye & Crompton, 1991).
- Repeat and first-time visitors were found to have different *perceptions of satisfaction* with a destination (Wang, 2004:103). Kozak and Rimmington (2000) determined that repeat visitors' perceived destination attributes were more satisfactory than those of first-time visitors. These attributes included overall value for money, standard of accommodation, feelings of safety and security, hospitality and cleanliness. Shanka and Taylor (2004:142) found in their study of visitors to the Taste of the Valley food and wine festival in Perth, that repeat visitors had more positive attitudes towards parking, and service attributes of the festival compared to first-time visitors, while Li *et al.* (2008:289)

found that repeat visitors were significantly more satisfied with attractions, accommodation, and restaurants than first-timers. However McKercher and Wong (2004) and Anwar and Sohail (2004:165), found that repeaters are less likely to be satisfied, but have a stronger intention to revisit in the future than first time visitors (Juaneda, 1996; Petrick & Backman, 2002; Sonmez & Graefe, 1998; Mohr, Backman, Gahan & Backman, 1993; Gyte & Phelps, 1989; Petrick *et al.*, 2001). However, repeaters might have a lower level of satisfaction because of higher expectations in some cases (Anwar & Sohail, 2004:167; McKercher & Wong, 2004), which means that satisfaction may not be directly correlated with revisit intention (Li *et al.*, 2008:281).

- Repeat visitors also use a wide range of *information sources* (Shanka & Taylor, 2004:142). Letho, O'Leary and Morrison (2004) reported that visitors' information search efforts do not necessarily decrease as their experiences with a specific destination increase. Oppermann (1997) adds that, contrary to the general risk reduction hypothesis, previous experience with the destination may lead to a more diversified and detailed demand for information and activities sought. However, Li *et al.* (2008:288) revealed that first-timers appear to be active travel planners who start collecting information much earlier. Their travel planning behaviour, as well as their travel consumption patterns, seem to be 'tourism/travel' oriented, meaning that most of their decision activities and money are spent on travel arrangements (i.e. travel and accommodation). They also rely more on family and friends, as well as professionals, to make their travel decisions (Li *et al.*, 2008:288). In contrast, repeaters seem to rely more on their own experiences to make travel decisions than on other information sources, and hence spend less time in planning. Many of them travel to visit friends and family or simply for a short break. Their visits are therefore more 'recreation/activity' oriented.

Based on the above-mentioned, it is clear that differences exist between first-time and repeat visitors, making it worthwhile to use this innovative method of segmentation at a national arts festival. It would also be the first time that this approach to segmentation is applied to visitors at a national arts festival in South Africa.

### **5.3 METHOD OF RESEARCH**

The method of research will be discussed under the following headings: (i) the questionnaire and (ii) statistical analysis.

#### **5.3.1 The questionnaire**

The questionnaire used to survey visitors to the KKNK in 2009 consisted of three sections. Section A captured demographic details (gender, home language, age, occupation, home

province, home town and preferred accommodation) as well as spending behaviour (number of persons paid for, length of stay and expenditure) while sections B, and C focused on the motivational factors, the visitors' preference for visiting the festival and their behaviour at the festival (number of tickets purchased, preferred type of shows/productions, attendance of the festival and media usage). The section on travel motivations was based on the work of Crompton (1979) and Crompton and McKay (1997) and was adapted for the KKNK. Twenty-one items were measured in the motivation section on a five-point Likert scale and respondents were asked to indicate how important they considered each item on the scale (1 = not at all important; 2 = less important; 3 = important; 4 = very important and 5 = extremely important). Eleven items were also evaluated on a five-point Likert scale and respondents were asked to indicate to what extent they agreed with each item (1 = totally disagree; 2 = do not agree; 3 = neutral; 4 = agree and 5 = totally agree). For the purpose of this article, the information obtained from all the sections (A, B and C) were used. In total, 555 questionnaires were completed over a period of six days (6 – 11 April 2009) by means of availability sampling. According to Cooper and Emory (1995:207) for any population of 100 000 (N) the recommended sample size (S) is 384. Since a total of 116 759 visitors attended the KKNK in 2009 (Slabbert *et al.*, 2009:2), the number of completed questionnaires is greater than the required number of questionnaires. All questionnaires were completed at the main festival grounds and various venues in Oudtshoorn where fieldworkers moved around to minimise bias. Questionnaires were also progressively handed out towards the end of the festival to give a more detailed account of visitor spending. Microsoft® Excel® was used for data capturing and basic data analysis.

### 5.3.2 Statistical analysis

There were three stages in the analysis of data in this study: Firstly, a general profile of visitors to the KKNK was compiled by using SPSS (SPSS Inc., 2007). Secondly, principal component factor analysis on 21 motivation items and on 13 evaluation items were performed by means of SPSS (SPSS Inc., 2007) to explain the variance-covariance structure of a set of variables through a few linear combinations of these variables. Eigenvalues were used as a criterion for extracting factors. In this research, all factors with eigenvalues greater than unity were extracted because they were considered significant. In addition, all items with a factor loading above 0.25 were included, whereas all items with factor loadings lower than 0.25 were considered as not correlating significantly with other factors. Also, any item that cross loaded on two factors with factor loadings greater than 0.25 was categorised in the factor where interpretability was best. The Kaiser-Meyer-Olkin measure of sampling adequacy was used to indicate whether sufficient data was collected to ensure compact factor structures. A reliability coefficient (Cronbach's alpha) was computed for each factor to estimate the reliability of each scale. All factors with a reliability coefficient above 0.6 were considered to be acceptable in this study. The average

inter-item correlations were also calculated as another measure of reliability. According to Clarke and Watson (1995), all inter-item correlations between 0.15 and 0.55, are considered to be good.

Thirdly, visitors were analysed based on the number of years the festival has been visited. 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 the groups with respect to each factor. Cross tabulations with chi-square were employed to profile these groups demographically. The study employed demographic variables (gender, home language, age, occupation and province of origin) as well as behavioural variables (length of stay, preferred type of shows/productions, expenditure, other festivals attended, decision to visit and media usage) to examine whether statistically significant differences existed among different groups.

## 5.4 RESULTS

The results will be discussed in three sections. Firstly, an overview of the profile of visitors to the KKNK will be presented. Secondly, the results of the two-way frequency tables and ANOVAs (travel motives and festival evaluation) will be discussed, followed by the profiles of first-time and repeat visitors.

### 5.4.1 Visitor profile to the KKNK

Based on the results captured and displayed in Table 5.1, more visitors are female, they are predominantly Afrikaans-speaking, on average 44 years old and they originate mainly from Western and Eastern Cape provinces. The largest group of visitors are furthermore in professional occupations, financially responsible for an average of three persons during their visit and stay an average of four days and three nights in Oudtshoorn. Visitors are loyal to the festival and have visited KKNK an average of six times. Visitors spend an average of R4 732.10 per group during their visit and purchase an average of eight tickets, mostly for music theatre and cabaret, drama and comedies.

*Table 5.1: KKNK visitor profile 2009*

Category	Profile of visitors
Gender	Male 38%; Female 62%
Home language	Afrikaans (93%)
Age	Average age: 44 years
Province of residence	Western Cape (52%); Eastern Cape (19%) and Gauteng (14%)
Occupation	Professional (21%)
Number of days	Average of 4.2 days in Oudtshoorn
Number of nights	Average of 3.5 nights in Oudtshoorn

Group size	Average of 5 persons
Number of people paid for	Average of 2.57 persons
Number of visits to festival	Average of 6.1 times (23% were first-time visitors)
Average spending per group	R4 732.10
Number of tickets purchased	Average of 8.1 tickets
Preferred shows/productions	Music theatre & cabaret (45%); Drama (43%) and Comedies (40%)

#### 5.4.2 Results from the factor analysis: Visitor motivation and evaluation at the KKNK

The factor analysis (Pattern Matrix) identified five motivational factors (Table 5.2) and three evaluation factors (Table 5.3) that were labelled according to similar characteristics. The five motivational factors accounted for 57.4% of the total variance while the three evaluation factors accounted for 63.6% of the total variance. All motivational and evaluation factors had relatively high reliability coefficients ranging respectively from 0.55 (the lowest) to 0.79 (the highest) for the motivation and between 0.76 (the lowest) to 0.78 (the highest) for the evaluation factors. The average inter-item correlation coefficients with respective items varied between 0.29 and 0.50 for the motivations and between 0.45 and 0.52 for the evaluation. This also implies internal consistency for all factors. Moreover, all items loaded on a factor with loadings greater than 0.25. Relatively high factor loadings indicate a reasonably high correlation between the delineated factors and their individual items. Any items that cross-loaded on two factors with factor loadings greater than 0.25 were categorised in the factor where interpretability was best.

Table 5.2: Factor analysis results of the KKNK visitors' motivations

Motivation factors and items	Factor loading	Mean value	Reliability coefficient	Average inter-item correlation
<b>Factor 1: Festival attributes</b>		3.71	0.77	0.37
It is primarily an Afrikaans festival	0.740			
The festival provides a unique holiday experience	0.736			
The festival is value for money	0.445			
It is a sociable festival	0.423			
To see well-known performers	0.367			
It is an annual commitment	0.312			
<b>Factor 2: Family togetherness</b>		2.61	0.63	0.30
To the benefit of my children	0.651			
It is the closest festival for me	0.575			
To support the stalls	0.266			
To buy art	0.289			
<b>Factor 3: Escape and socialisation</b>		3.62	0.67	0.36

To relax	0.702			
To get away from my routine	0.637			
To spend time with friends	0.467			
To spend time with family	0.379			
<b>Factor 4: Festival shows/productions</b>		3.64	0.79	0.50
Variety of productions	0.940			
Quality productions	0.846			
ABSA KKNK is different to other festivals	0.389			
The introduction of new flagship productions at the festival	0.364			
<b>Factor 5: Exploration</b>		2.85	0.55	0.29
To explore the environment	0.570			
To meet new people	0.479			
The festival promotes cultural inclusiveness	0.356			
<b>Total variance explained</b>	<b>57.4%</b>			

Factor scores for both the motivation and evaluation items were calculated as the averages of all items contributing to a specific factor so that mean scores can be interpreted on the original 5-point Likert scale of measurement (1 = not at all important; 2 = less important; 3 = important; 4 = very important and 5 = extremely important for motivations, and 1 = totally disagree; 2 = do not agree; 3 = neutral; 4 = agree and 5 = totally agree for evaluations). As shown in Table 5.2, according to the mean, *Festival attributes* (Factor 1) was the most important motivation for visitors to attend KKNK and had the highest mean value (3.71). The reliability coefficient was 0.77 and the average inter-item correlation was 0.37. *Festival shows/productions* (Factor 4) had the second highest mean value of 3.64, a reliability coefficient of 0.79 and an average inter-item correlation of 0.50 followed by *Escape and socialisation* (Factor 3) with a mean value of 3.62, a reliability coefficient of 0.67 and an inter-item correlation of 0.36. *Family togetherness* (Factor 2) and *Exploration* (Factor 5) received the lowest mean values (2.61 and 2.85 respectively). The reliability coefficients were respectively 0.63 and 0.55 and the average inter-item correlations were respectively 0.30 and 0.29. It is therefore clear that visitors to the KKNK consider the unique character of the festival, the associated shows/productions and relaxing atmosphere as very important when attending the festival. These motives can furthermore be regarded as unique motives for travelling to an arts festival such as KKNK.

*Festival management* (Factor 3) received the highest mean value (3.93) of all the evaluation items (see Table 5.3). The reliability coefficient was 0.78 and the average inter-item correlation was 0.49. It is therefore clear that the overall organisation and management of the festival have

a significant influence on visitors' satisfaction levels and the festival organisers should therefore incessantly strive to set high standards to exceed visitors' expectations. *Productions* (Factor 2) had the second highest mean value of 3.9, a reliability coefficient of 0.76 and an average inter-item correlation of 0.52. This indicates that visitors are satisfied with the quality and the services associated with the shows/productions showcased at the festival. Since this is also one of the main motives for visitors to attend the festival (see Table 5.2), the maintenance of satisfaction levels should remain a priority for the festival organisers. *Service and prices* (Factor 1) received the lowest mean value (3.53) with a reliability coefficient of 0.76 and an inter-item correlation of 0.45. The festival organisers should therefore ensure the affordability, especially of the tickets for the shows/productions since the success and profitability of the festival is dependent on ticket sales.

*Table 5.3: Factor analysis results of visitors' evaluation of KKNK*

Motivation factors and items	Factor loading	Mean value	Reliability coefficient	Average inter-item correlation
<b>Factor 1: Services and prices</b>		3.53	0.76	0.45
Service/prices at restaurants are good	0.721			
Ticket prices are reasonable	0.632			
Price of accommodation is reasonable	0.620			
Adequate entertainment for children	0.536			
<b>Factor 2: Productions</b>		3.92	0.76	0.52
Front-of-house service at productions is effective	0.899			
Ticket sales are accessible	0.518			
The quality of shows is excellent	0.369			
<b>Factor 3: Festival management</b>		3.93	0.78	0.49
ABSA KKNK is well organised	0.589			
Information about the festival is available	0.584			
Layout of the festival area is good	0.411			
Parking is well organised	0.258			
<b>Total variance explained</b>	63.6%			

### 5.4.3 First-time versus repeat visitors

It has been established from the literature review that, on a very general level, one can divide visitors at the KKNK into two categories: first-time visitors and repeat visitors. However, there are vast differences in what constitutes a repeat visitor. On one side of the spectrum, it could be somebody who returns year after year to the festival. On the other end, it could be somebody

who had visited the festival only once before, many years ago. Whereas first-time visitors seem to be homogeneous, repeat visitors are not (Oppermann, 1999:56). To address this problem, visitors were divided into four groups based on the number of times the festival has been visited. The table below (Table 5.4) gives an indication of the size of each group and it can be seen that there is a fairly even distribution between the different groups. The majority of respondents are loyal and have visited the festival two to nine or more times. It is also clear that a reasonable percentage of visitors to KKNK are first-time visitors (23%).

*Table 5.4: Visitor groups at the KKNK based on the number of times the festival has been visited*

<b>Number of times KKNK has been visited</b>	<b>Count</b>	<b>Percent</b>
1 (first time)	122	23%
2-4 times	174	33%
5-9 times	146	28%
10+ times	86	16%

ANOVAs were employed to determine the differences between motivational and evaluation factors for first-time and repeat visitors at the festival. To delineate the differences in festival motivation and evaluation between the four groups, means for each motivation and evaluation item were calculated. Table 5.5 shows differences in means between the four groups and reveals the agreement with each of the factors for members of each group. Results of the analysis revealed that repeat visitors seem to be mainly motivated by the *Festival attributes* and *Festival shows/productions* while first-time visitors seem motivated *Relaxation and socialisation*. *Relaxation and socialisation* received the second highest mean value (3.62) for visitors who have been at the KKNK 2-4 times while first-time visitors and repeat visitors who have attended the festival more years (5-9 and 10+ times) are motivated by *Festival shows/productions*. Concerning the evaluation of the festival, repeat visitors who have attended the festival the longest (10+ times) are most satisfied with the *Productions* at the festival, while first-time visitors and other repeat visitors are especially content with the *Festival management*. Repeat visitors seem more satisfied with the festival compared to first-time visitors. Specifically, concerning certain aspects such as *Festival management* and *Production*, repeat visitors (especially those who have attended the festival the longest) seem to be more satisfied. None of the evaluations were, however, statistically significant different for the four groups.

Table 5.5: Comparing first-timers and repeaters' motivation to attend the festival and evaluation of the festival

Characteristics	Number of previous visits				F-ratio	Sig. level
	1 First time (N=63)	2 2-4 times (N=60)	3 5-9 times (N=74)	4 10+ times (N=54)		
<b>Festival motivations</b>						
Factor 1: <i>Festival attributes</i>	3.32 <sup>a</sup>	3.65 <sup>b</sup>	3.93 <sup>b</sup>	3.92 <sup>b</sup>	13.16	2.780
Factor 2: <i>Family togetherness</i>	2.32 <sup>a</sup>	2.69 <sup>b</sup>	2.47 <sup>a</sup>	2.92 <sup>b</sup>	6.91	0.000*
Factor 3: <i>Relaxation and socialisation</i>	3.83	3.62	3.71	3.66	2.42	0.066
Factor 4: <i>Festival shows/productions</i>	3.41 <sup>b</sup>	3.54 <sup>b</sup>	3.80 <sup>a</sup>	3.84 <sup>a</sup>	5.44	0.001*
Factor 5: <i>Escape</i>	2.90	2.79	2.87	2.88	0.30	0.827
<b>Festival evaluation</b>						
Factor 1: <i>Service and prices</i>	3.54	3.53	3.54	3.52	0.03	0.995
Factor 2: <i>Productions</i>	3.87	3.88	3.98	4.10	0.91	0.436
Factor 3: <i>Festival management</i>	3.89	3.90	4.00	3.94	0.55	0.651

Note: Respondents were asked to indicate how they evaluate each motivation item on the scale (1 = not important at all; 2 = less important; 3 = important; 4 = very important and 5 = extremely important) as well as for each evaluation item on the scale (1 = totally disagree; 2 = do not agree; 3 = neutral; 4 = agree and 5 = totally agree). Statistically significant differences exist among the groups with different superscripts. For example, in terms of *Festival attributes*, differences were found between the first-time visitors (with superscript a) and those who have visited the festival 2-4 times, 5-9 times and more than 10 times (with superscript b and c). There was no statistically significant difference between the four groups based on the evaluation of the festival.

Two-way frequency tables were employed to provide a complete demographic profile for each of the four groups. Chi-square statistical tests were used to determine whether significant socio-demographic and behavioural differences existed between the four groups. The results in Table 5.6 indicate that age, the number of days and nights spent in Oudtshoorn, as well as the number of tickets bought differ significantly between the groups. First-time visitors and repeat visitors who have attended the festival fewer times (1-9 times) are younger compared to repeat visitors who have attended the festival more than ten times. Visitors who have attended the festival the longest are the oldest visitors at the KKNK with an average age of 51 years. First-time visitors and as well as visitors who have attended the festival 2-4 times and 5-9 times spend fewer days and nights at the festival and purchase significantly fewer tickets compared to visitors who have attended the festival ten or more times. There were no significant differences between the groups based on the number of people in the travel party, number of people paid for, expenditure per person and the number of free shows attended. First-time visitors, however, seem to travel in larger groups and, surprisingly, spent a significant amount of money during their visit. First-time visitors are furthermore not prone to support the free shows at the festival. Visitors who have attended the KKNK ten or more times, on the other hand, seem to travel in smaller groups, but pay for more people during the festival and, as a result, spend more at the festival. Repeaters also attend a fair number of free shows. It is interesting to note that repeat

visitors who have attended the festival 2-4 times seem to spend the least at the festival. Only small to medium practical significant differences were found based on other demographic characteristics and Appendixes 5A and 5B provide a summary of the profile of the five clusters based on various demographic and behavioural variables as well as the shows/productions attended.

*Table 5.6: Behavioural comparison between first-time and repeat visitors*

Characteristics	Number of previous visits				F-ratio	Sig. level
	1 First time (N=63)	2 2-4 times (N=60)	3 5-9 times (N=74)	4 10+ times (N=54)		
Age	42.93 <sup>a</sup>	42.88 <sup>a</sup>	43.40 <sup>a</sup>	50.54 <sup>b</sup>	6.09	0.000*
Number of people in travel party	4.73	4.53	4.68	3.52	1.79	0.148
Number of people paid for	2.31	2.65	2.49	2.71	1.34	0.260
Length of stay						
Days	3.61 <sup>a</sup>	3.78 <sup>a</sup>	4.56 <sup>b</sup>	5.56 <sup>c</sup>	17.25	< 0.05
Nights	3.55 <sup>a</sup>	3.39 <sup>a</sup>	4.16 <sup>a</sup>	5.90 <sup>b</sup>	15.59	< 0.05
Expenditure per person <sup>o</sup>	R2259.64	R1792.53	R2307.33	R2309.41	1.25	0.290
Number of tickets bought	6.25 <sup>a</sup>	6.84 <sup>a</sup>	7.79 <sup>a</sup>	14.26 <sup>b</sup>	12.22	< 0.05
Number of free shows attended	3.12 <sup>a</sup>	3.21 <sup>a</sup>	4.99 <sup>b</sup>	4.93 <sup>b</sup>	4.12	0.007*

Statistically significant differences exist among the clusters with different superscripts. For example, in terms of the age, differences were found between the first-time visitors, visitors who have respectively attended the festival 2-4 times, and 5-9 times (with superscript a) and visitor who have visited the festival more than ten times (superscript b).

<sup>o</sup> Spending per person, which was calculated by adding the spending of the respondent on the various components asked, and subtracting transport cost to the festival from the number obtained since the inclusion of transport cost would automatically cause a bias for visitors further away from Oudtshoorn.

\* Statistically significant difference:  $p \leq 0.05$

## 5.5 FINDINGS AND DISCUSSION

This study segmented visitors at the KKNK based on the number of times the festival has been attended to compare first-time and repeat visitors at the KKNK based on five aspects – socio-demographics, behavioural characteristics, motivations to attend the festival, overall satisfaction with the festival and type of shows/productions attended. The results revealed that there are significant differences between first-time and repeat visitors at the festival (especially visitors who have attended the festival ten or more times) based on the four main categories as depicted in the literature review, socio-demographics, behaviour characteristics, destination perceptions, satisfaction and image as well as travel motivations. These differences include that first- and occasional visitors tend to be slightly younger, which is consistent with previous research done by Gitelson and Crompton (1984); Lau and McKercher (2004); Tiefenbacher, Day and Walton (2000) and Li *et al.* (2008). First-time and occasional visitors also spend fewer

days and nights at the festival which is supported by Lau and McKercher (2004) and Oppermann (1998). Results also indicate that first-time visitors do not spend less per person compared to repeat visitors, which is supported by the results of Wang (2004) but contradictory to research carried out by Oppermann (1997); Tiefenbacher, Day and Walton (2000); Wang (2004:108); Petrick (2004a,b); Alegre and Juaneda (2006) as well as Li *et al.* (2008).

Results, however, show that both first-time and repeat visitors are economically viable markets at the festival. This result is also contradictory to the findings of Petrick (2004a,b) and Li *et al.* (2008) that repeat visitors are more price sensitive. Repeaters, furthermore, stay longer, which is confirmed by Tiefenbacher *et al.* (2000). Similar to research findings by Li *et al.* (2008) and Mohr *et al.* (1993), repeat visitors had a higher level of satisfaction with the festival and this result is supported by Juaneda (1996); Petrick and Backman (2002); Sonmez and Graefe (1998); Petrick *et al.* (2001) as well as Kozak (2001). Repeat visitors (who have attended the festival five and more times) also purchase significantly more tickets to support the festival's shows/productions. Contradictory to research done by Gitelson and Crompton (1984), Hughes and Morrison-Saunders (2002) and Fakeye and Crompton (2004), first-time visitors are mainly motivated by *Relaxation and socialisation*, while repeaters are motivated by *Festival attributes*.

Although only small to medium practical significant differences were found between first-time and repeat visitors based on other socio-demographic and behavioural characteristics, some interesting findings have surfaced. Firstly, first-time visitors tend to travel longer distances to attend the festival (Gauteng province) compared to repeat visitors who are mostly local residents or from surrounding provinces (Western Cape and Eastern Cape). This is supported by Li *et al.* (2008). Both the first-timers and repeaters attend a variety of shows and productions at the festival. First-time visitors mostly attend music theatre and cabaret, comedies classical music and rock productions, whereas repeat visitors attend drama, music theatre and cabaret, comedies and classical music productions. Repeat visitors who have attended the festival the longest attend the greatest variety of shows/productions. This is contradictory to the findings by Gitelson and Crompton (1984) and Wang, (2004) who revealed that first-time visitors participate in a wider variety of activities compared to repeaters. First-time visitors also rely more on word-of-mouth compared to repeat visitors who have heard about the festival through newspapers and the radio. This finding is supported by Li *et al.* (2009) and Reid and Reid (1993) who revealed that first-time visitors rely more on family and friends to make their travel decisions. Corresponding with previous research (see Juaneda (1996), Petrick and Backman (2002), Sonmez and Graefe (1998), Mohr *et al.* (1993), Gyte and Phelps (1989) and Petrick *et al.* (2001)), repeat visitors have a greater intention to revisit the festival in the future. First-time visitors either plan their visit more than a year in advance or spontaneously, whereas visitors

who have attended the festival 2-4 times tend to make their decision instinctively. Visitors who have attended the festival the longest (10+ times) also make their decision to attend the KKNK well in advance. This is supported by research done by Li *et al.* (2008) that first-timers are active travel planners. However, repeat visitors, who have attended the festival the longest, make their decision to attend the festival well in advance. Visitors who have attended the festival the longest (10+ times) are mostly local residents and the festival is therefore not their main reason for visiting Oudtshoorn.

## 5.6 IMPLICATIONS

The findings of this research imply that, from a sustainability and marketing point of view, the organisers and marketers of the KKNK should follow a two-pronged marketing approach, considering both groups of visitors as important for the future of the festival. First-time visitors spend a significant amount of money at the festival and will travel longer distances to attend, while visitors who have attended the festival ten or more times are local residents who are loyal visitors, who stay longer and buy a considerable number of tickets to support the festival's shows and productions. However, Gitelson and Crompton (1986:201) warn that marketing efforts that are directed primarily at persuading new visitors to visit a destination (in this case a festival) may be entirely inappropriate for encouraging repeat visitors to return. Therefore the KKNK's marketers should design their marketing campaigns in such a way that they will include both new visitors to the festival as well as retaining repeat visitors. Based on the latter, the following marketing implications are made:

- Firstly, since first-time visitors are mainly motivated by *Relaxation and socialisation* followed by *Festival shows/productions*, these aspects should be prominent features in the promotional material aimed at attracting new visitors. The KKNK should be presented as an all-inclusive festival showcasing quality and affordable productions with a diversity of award-winning and popular artists. The latter will also persuade repeat visitors to attend the festival in the future since they are also motivated by *Festival shows/productions*. However, the marketing campaign aimed at the repeat visitors should place a higher emphasis on *Festival attributes* since this is their main motivation to attend the festival. *Festival attributes* include aspects such as it being an Afrikaans festival that offers a wide variety of genres for the whole family, and this should therefore be highlighted.
- Secondly, since first-time visitors tend to be long-haul visitors travelling from Gauteng, marketing efforts should be aimed at this province in an attempt to attract more first-time visitors. Festival packages that include accommodation and shows should be on offer. Repeat visitors are mainly from the Western and Eastern Cape and should therefore be targeted in these provinces taking into consideration that today's first timers are tomorrow's repeat visitors.

- Thirdly, continuous promotion throughout the year should be applied to cater for both markets as indicated in the findings. Both first-time and repeat visitors make use of newspapers, television and the radio to gain information about the festival and these marketing mediums should be used more effectively to promote the festival.
- Fourthly, increased ticket sales and length of stay should be the main priority of the festival organisers for both visitor markets. The affordability, quality, variety and 'value for money' shows/productions should be stressed in marketing material. The preferred type of shows/productions (as indicated in the findings) should be prominent features in the marketing material and should also be linked to well-known artists and critical reviews.
- Lastly, a loyalty scheme should be considered, where visitors who have, for example, attended the festival for five or more years, get a discount for certain shows/productions. The other advantage is that a greater frequency of visits to arts festivals leads to higher attendance of shows as well as a greater variety of shows.

## 5.7 CONCLUSION AND RECOMMENDATIONS

The question raised by this paper is, 'Does loyalty (repeat visitation) pay?' and the answer to this question is both yes and no. Yes, in terms of repeat visitors staying longer and spending a significant amount, especially on tickets for shows and productions. No, in terms of first-time visitors also spending a significant amount during their stay and being motivated mainly by the *Festival shows/productions*. Therefore, corresponding with Shanka and Taylor (2004:135), both first-time and repeat visitors are significant in ensuring the long-term sustainability of the KKNK. Results also clearly suggest that this type of segmentation can be applied successfully and is therefore useful. This is the first time that this innovative approach has been applied to visitors at a national arts festival in South Africa, which makes it difficult to compare the results with results from other South African festivals. This, in itself, is indicative of the gap in this type of research in South Africa, and also serves as a benchmark in festival research. Compared to research done internationally, these findings both contradict and support other research, as indicated in the section on findings, and prove that this is an alternative approach to market segmentation of visitors to arts festivals.

It is, however, important for festivals such as the KKNK to achieve and to maintain a balance between first-time and repeat visitors. This is an aspect that will become more challenging in the future, taking into consideration both the number of festivals or events, and the level of competitiveness. According to Lau and McKercher (2004:284), the generation of repeat visitation relies on the ability of destinations (festivals) to successfully convert first-time visitors into returning visitors. This successful conversion depends on the ability of the festival to provide both visitors (markets) with activities and with a festival programme tailored to satisfying

their needs. The research also highlights a number of implications that could assist festival organisers in achieving greater long-term sustainability and growth. It is further recommended that this type of research is done on an ongoing basis, since it provides useful information about the needs and characteristics of first-time and repeat visitors and the way that the festival programme/marketing can be adapted to meet these needs. This type of research should also be applied to other festivals in the country to compare results.

Appendix 5A: Socio-demographic comparison between first-time and repeat visitors

Demographic characteristics	Number of previous visits				Chi-square value	df	Significance level	Phi-value
	1 First-time (N=122)	2 2-4 times (N=174)	3 5-9 times (N=146)	4 10+ times (N=86)				
<b>Gender</b>					2.741	3	0.433	0.072
Male	42%	41%	36%	33%				
Female	58%	59%	65%	67%				
<b>Language</b>					18.422	3	0.000*	0.187
Afrikaans	85%	93%	98%	97%				
Other	15%	7%	2%	3%				
<b>Province</b>								
Western Cape	Yes=33%;No=67%	Yes=48%;No=52%	Yes=55%;No=45%	Yes=72%;No=28%	33.343	3	0.000*	0.251
Gauteng	Yes=23%;No=77%	Yes=13%;No=87%	Yes=11%;No=89%	Yes=12%;No=88%	9.260	3	0.026	0.132
Eastern Cape	Yes=15%;No=85%	Yes=25%;No=75%	Yes=23%;No=77%	Yes=9%;No=91%	12.052	3	0.007*	0.151
<b>Heard about festival</b>								
Television	Yes=43%;No=57%	Yes=61%;No=39%	Yes=60%;No=40%	Yes=51%;No=49%	10.592	3	0.014*	0.142
Radio	Yes=44%;No=56%	Yes=37%;No=63%	Yes=40%;No=60%	Yes=45%;No=55%	2.575	3	0.462	0.070
Website	Yes=19%;No=81%	Yes=19%;No=81%	Yes=23%;No=77%	Yes=16%;No=84%	1.919	3	0.589	0.060
E-mail	Yes=7%;No=93%	Yes=9%;No=91%	Yes=14%;No=86%	Yes=11%;No=89%	4.281	3	0.233	0.090
Magazines	Yes=34%;No=66%	Yes=33%;No=67%	Yes=44%;No=56%	Yes=35%;No=65%	4.645	3	0.200	0.094
Newspapers	Yes=43%;No=57%	Yes=46%;No=54%	Yes=47%;No=53%	Yes=52%;No=48%	1.915	3	0.590	0.060
Word of mouth	Yes=67%;No=33%	Yes=55%;No=45%	Yes=46%;No=54%	Yes=40%;No=60%	19.433	3	0.000*	0.192
<b>Festival as main reason for visit to Oudtshoorn</b>					28.273	6	0.000*	0.233
Yes	78%	81%	82%	61%				
No	21%	17%	17%	28%				
Local resident	1%	1%	1%	11%				
<b>Attend again?</b>					27.916	6	0.000*	0.231
Yes, definitely	76%	85%	95%	94%				
No, definitely not	1%	2%	0%	1%				
Perhaps	23%	13%	5%	5%				
<b>Free shows</b>					3.011	3	0.390	0.077
Yes	62%	68%	71%	64%				
No	38%	32%	29%	36%				
<b>Decision to visit</b>					40.052	9	0.000*	0.294
Spontaneous decision	23%	19%	17%	24%				
Less than a month ago	21%	14%	9%	3%				
More than a month ago	52%	60%	53%	50%				
More than a year ago	24%	3%	21%	23%				
<b>Other festivals attended</b>								
Aardklop	Yes=24%;No=76%	Yes=18%;No=82%	Yes=25%;No=75%	Yes=20%;No=80%	2.375	3	0.498	0.067
Grahamstown	Yes=10%;No=90%	Yes=15%;No=85%	Yes=10%;No=90%	Yes=12%;No=88%	2.802	3	0.423	0.073
Volksblad	Yes=4%;No=96%	Yes=6%;No=94%	Yes=10%;No=90%	Yes=6%;No=94%	3.448	3	0.326	0.081
Innibos	Yes=7%;No=93%	Yes=9%;No=91%	Yes=8%;No=92%	Yes=12%;No=88%	1.727	3	0.631	0.057

Appendix 5B: Comparing first-time and repeaters' preferred type of show/productions

Shows/productions attended	Number of previous visits				Chi-square value	df	Significance level	Phi-value
	1 First time (N=122)	2 2-4 times (N=174)	3 5-9 times (N=146)	4 10+ times (N=86)				
<b>Drama</b>					11.624	3	0.009*	0.148
Yes	39%	37%	47%	57%				
No	61%	63%	53%	43%				
<b>Dance theatre</b>					6.612	3	0.085	0.112
Yes	7%	5%	8%	14%				
No	93%	95%	92%	86%				
<b>Word art and poetry</b>					14.418	3	0.002*	0.165
Yes	5%	3%	3%	13%				
No	95%	97%	97%	87%				
<b>Children's theatre</b>					5.063	3	0.167	0.098
Yes	12%	7%	5%	11%				
No	88%	93%	95%	89%				
<b>Theatre discussions</b>					2.373	3	0.499	0.067
Yes	5%	2%	6%	5%				
No	95%	98%	94%	95%				
<b>Music theatre and cabaret</b>					9.784	3	0.020*	0.136
Yes	47%	36%	47%	56%				
No	53%	64%	53%	44%				
<b>Classical music</b>					14.094	3	0.003*	0.163
Yes	19%	7%	16%	22%				
No	81%	93%	84%	78%				
<b>Choir and Ensemble</b>					13.385	3	0.004*	0.159
Yes	4%	3%	5%	14%				
No	96%	97%	95%	86%				
<b>Rock</b>					2.082	3	0.556	0.063
Yes	15%	12%	16%	11%				
No	85%	88%	84%	89%				
<b>Visual arts and exhibitions</b>					2.227	3	0.527	0.065
Yes	5%	5%	6%	9%				
No	95%	95%	94%	91%				
<b>Comedies</b>					13.957	3	0.003*	0.163
Yes	34%	36%	44%	57%				
No	66%	64%	56%	43%				
<b>Jazz</b>					4.781	3	0.189	0.095
Yes	3%	3%	6%	8%				
No	97%	97%	94%	92%				

# CHAPTER 6:

## DIFFERENT SHOWS, DIFFERENT MARKETS - A DIFFERENT SEGMENTATION APPROACH



*"Build a dream and the dream will build you." ~ Robert H. Schuller*

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### ABSTRACT

Previous research indicated that the future of festivals is dependent on the number of show tickets sold and festivals therefore need to attract more genre supporters. The purpose of this article was thus to segment festival visitors at the KKNK and Aardklop based on the genres attended. This was done to determine the profile of genre supporters so that effective marketing strategies can be developed and the festival programme designed to attract more genre supporters and increase ticket sales. To achieve this goal, questionnaire surveys ( $N=494$  for Aardklop and  $N=555$  for the KKNK) were conducted, whereafter a cluster analysis was performed to segment the visitors at both festivals based on the ticketed shows/productions attended. Although the KKNK and Aardklop have similar festival programmes and attract a predominantly Afrikaans-speaking market, the results of this study indicate that, based on the genres attended, there are three different clusters of visitors for each festival. Therefore the results confirm that the festival market is not homogeneous and that different types of genres appeal to different types of festival visitors. Marketing and management implications for effectively increasing ticket sales were also indicated. Segmenting visitors based on the genres attended therefore proved to be a useful method to comprehensively segment the festival market and especially to increase tickets sales.

*Key words: Market segmentation, genre segmentation, cluster analysis, festivals*

# DIFFERENT SHOWS, DIFFERENT MARKETS – A DIFFERENT SEGMENTATION APPROACH

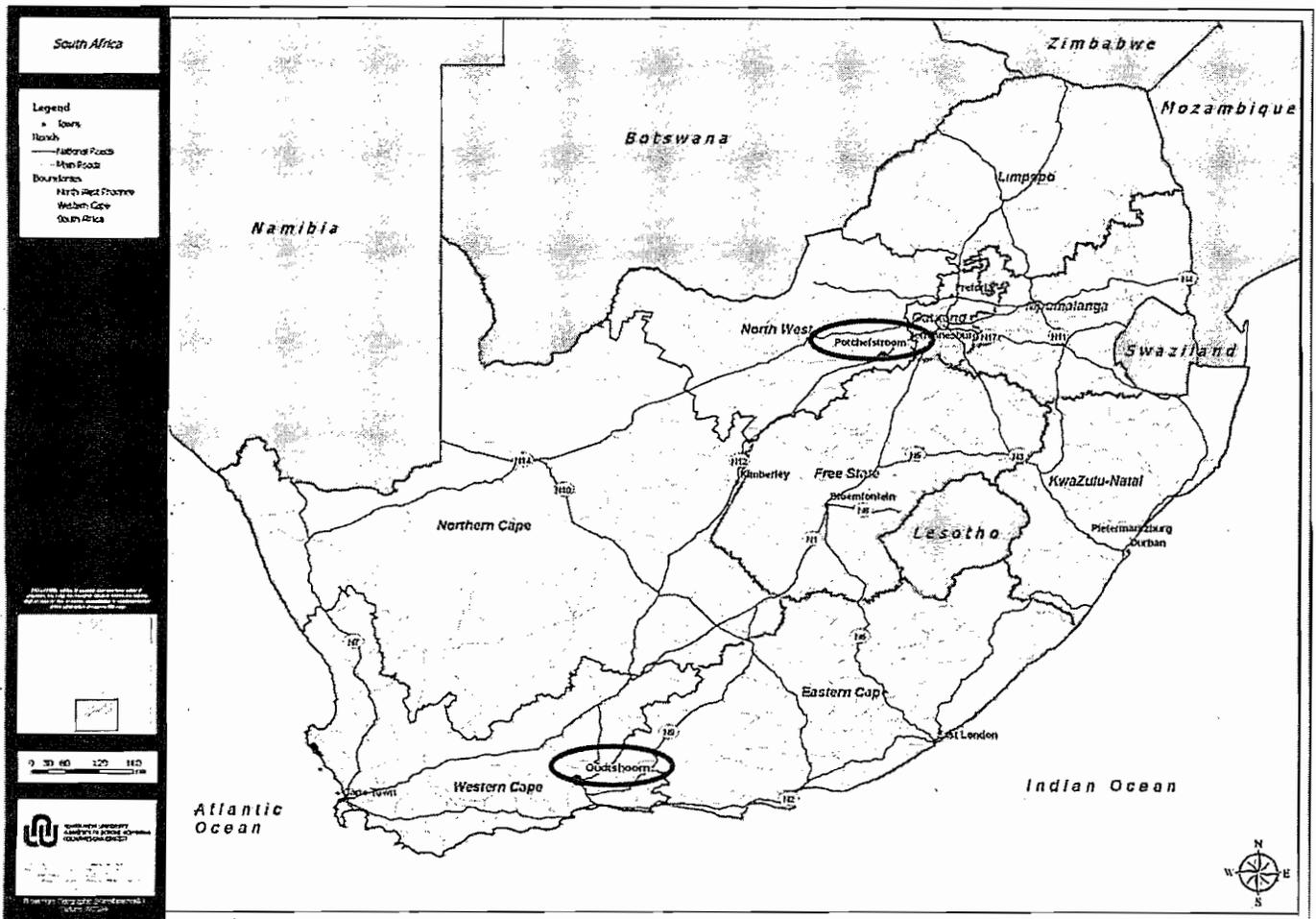
## 6.1 INTRODUCTION

Among the fastest growing segments of tourism in the world are festivals and events (Goeldner, Ritchie & McIntosh, 2000:234; Lee, Lee & Wicks, 2004:61; Chacko & Schaffer, 1993:475). Festivals and special events are furthermore the underpinning of tourism in many communities and are frequently being used for tourism development (Felsenstein & Fleischer, 2003; Dimmock & Tiyce, 2001). Faulkner, Fredline, Larson and Tomljenovic (1999:157) and Getz (2008:403) add that festivals and events furthermore figure predominantly in the development and marketing plans of most destinations. This is also the case in South Africa, where festivals, and especially arts festivals, are an important part of the tourism industry (Tassiopoulos, 2005:4) and approximately 300 events/festivals of various kinds are held throughout the festival year - each with its own unique feel, programme and festival-goer.

Two of the biggest and most popular Afrikaans festivals in South Africa are the Klein Karoo National Arts Festival (hereafter referred to as the KKNK) held annually during the March/April school holidays in Oudtshoorn (located in the Western Cape) and the Aardklop National Arts Festival (hereafter referred to as Aardklop) held during September in Potchefstroom (located in the North West Province) (see Map 6.1). Both these festivals attract an array of visitors and artists and accommodate both visual and performing arts including: drama, cabaret, musical theatre, classical music, jazz, classical music, theatre, children's and street theatre, dance, cabaret, rock, literature and the visual arts (Van Heerden, 2003:11-12; Van Zyl & Strydom, 2007:127). These festivals furthermore have a substantial economic impact on their host regions, attracting thousands of visitors and generating millions each year. However, the escalating introduction of new festivals/events to the festival calendar has led to an overabundance in the festival market, which has a direct impact on the sustainability of these two festivals (Van Zyl & Strydom, 2007:121).

According to Mehmetoglu and Ellingsen (2005:119), for festivals to survive, there is a need to improve their products (programmes) constantly and to market them successfully to visitors. Faulkner, Fredline, Larson and Tomljenovic (1999:157) add that identifying the needs that visitors seek to satisfy when attending a festival is an essential component in planning a festival, developing the associated product (programme), and marketing it. A festival's continued viability therefore depends on the festival organisers' ability to ensure that what they have to offer is continuously attuned to the benefits visitors seek to obtain from their attendance (Mayfield & Crompton, 1995). For this reason, market segmentation needs to be applied, since marketers

must recognise that not all visitors are the same with respect to their interests and needs and, as a result, divide potential visitors into identifiable groups who share similar characteristics and exhibit common behaviours' (Kotler, 1993).



Map 6.1: Map of Oudtshoorn (KKNK) and Potchefstroom (Aardklop)

The aim of this research is to apply market segmentation to two similar, but very distinct, South African national arts festivals. To achieve this goal, this article is structured as follows: the literature review follows the introduction, thereafter the method of research, which is followed by the results and implications, after which certain conclusions are drawn and recommendations are made.

## 6.2 LITERATURE REVIEW

It is not always possible for festival organisers/marketers to tailor messages for each and every visitor (Tkaczynski, Rundle-Thiele & Beaumont, 2009:169). Therefore festival marketers require tools to assist their decision making and marketing and refine their thinking. Market segmentation is a management strategy which assists in framing management thinking (Aguas,

Costa & Rita, 2000). Market segmentation is said to be the cornerstone of the marketing effort (Kotler, 1993) and essential for marketing success (Lillien & Rangaswamy, 2003). The process involves portioning heterogeneous markets into smaller, more homogeneous market segments that can be distinguished by different consumer needs, characteristics and behaviour (Lawton, 2001:114; Middleton & Clarke, 2001; Kyle, Kerstetter & Guadagnolo, 2002:5; Park & Yoon, 2008:100).

The primary goal of market segmentation is to identify the segments that are most interested in specific goods and services and to focus marketing efforts on them in the most effective way (Jang, Morrison & O'Leary, 2002:36; Park & Yoon, 2008:100). Identifying market segments is critical to the successful development of management strategies based on marketing mix components (i.e. product, distribution, price and promotion) (Havitz, Dimanche & Bogle, 1994; Koc & Altinay, 2007:228). Market segmentation therefore allows festival marketers to understand the needs and wants of different travel (visitor) groups and to efficiently and cost-effectively communicate with them (Jang, Morrison & O'Leary, 2002:367), while simultaneously expanding their potential visitor base by identifying similar and/or underrepresented markets (Becherel; 1999; Morrison, 1996; Weaver & Oppermann, 2000).

Segmentation provides a basis for (festival) product development, promotion and management, and emphasises that the same (festival) product can be experienced in different ways (Prentice, Witt & Hamer, 1998). Distinguishing markets can also lower costs and increase the effectiveness of advertising and promotional efforts (Snepenger, 1987) and has become a major part of any marketing plan and a critical element in developing and distributing promotional material (Uysal & McDonald, 1989). The process has therefore been used by managers to market a destination (festival) effectively (Pike, 2005) and to assist organisations (festivals) to maximise their financial resources (Perdue, 1996). Hence, festival segmentation is a valuable tool for promotion and understanding segment characteristics (Lee, Lee & Wicks, 2004:61) and one of the most crucial long-term strategic marketing decisions a festival makes (Dolnicar, 2004:248).

Based on these benefits, market segmentation can assist arts festivals such as the KKNK and Aardklop, to achieve the following:

- Compiling a complete profile of festival visitors
- Identifying visitors' and especially genre supporters' interests, needs, motivation and spending behaviour
- Designing and adapting the festival programme according to visitors' needs to increase ticket sales
- Retaining current visitors and identifying new visitors

- Strengthening the position that the festivals have in their current and potential visitors' minds
- Identifying cost-effective marketing strategies aimed at the most viable target markets
- Gaining a competitive advantage resulting in a more sustainable festival

With these benefits in mind, Middleton and Clarke (2001) point out that a requirement of market segmentation is to find meaningful differences and/or similarities among the segments within a total market, since this will provide tourism (festival) marketers with a greater understanding of individual markets and more precise ideas for product development. Schewe and Meredith (2004:51) add that, when similarities exist, marketers can offer the same (or very similar) product distribution and/or communication programmes to a large number of potential visitors who are more likely to respond in the desired manner. One of the common ways to identify differences and/or similarities is to profile the segments of the total markets.

Within tourism research, many approaches have been used to determine and profile visitor segments, and the possible number of variables/approaches is unlimited (Dodd & Bigotte, 1997:47). The most popular variables or bases for visitor segmentation include geographic (nations, states, provinces, regions, counties, cities, or neighbourhoods), demographic (age, language, family size, family life cycle, gender, religion, race, generation and nationality), socio-economic (income, education, occupation, and social class), psychographics (psychological/personality traits, lifestyle, travel motivation or values), and behavioural characteristics (occasions, benefits, user status, usage rate, loyalty status, buyer readiness stage, attitude and visitor expenditure) (Armstrong & Kotler, 2005:54; Bothma & Burgess, 2007:37; Burke & Resnick, 2000:41; Cooper & Wahab, 2001:89; Fill, 2007:329; Horner & Swarbrooke, 2001:159; Moutinho & Witt, 1994:306; Youell, 1996:138; Dibb & Simkin, 1996:14; Kara & Kaynak, 1997:873; Hanlan, Fuller & Wilde, 2006:17; Nyaupane, White & Budruk, 2006:84).

Although these variables have been recommended as viable segmentation bases, researchers seem to agree that there is no single ideal segmentation base that fits every situation (Morrison, 2002; Jang, Morrison & O'Leary, 2002:367). However, several researchers have suggested that activity-based segmentation is one of the best segmentation bases for tourism (Hsieh, O'Leary & Morrison, 1992; Rao, Thomas & Javalgi, 1992). Activity-based segmentation is predicated on the assumption that different tourism (festival) products appeal to different types of tourists (visitors) and defines groups of tourists (visitors) by their activity preferences, behaviour, or visitation patterns (Schneider, Vogt & Smith, 2006:4).

The rationale behind this segmentation approach is that activity segmentation helps with the bundling of travel (festival) activities into packages with greater market appeal (Jang, Morrison & O'Leary, 2004:20) and thereby offer more direct marketing efforts (Schneider *et al.*, 2006:4). Spotts and Mahoney (1993) also found that there is a close relationship between travel activities and expenditures and activities can therefore be connected with the economic benefits to the destination (festival) (Jang *et al.*, 2004:19). Morrison (2002) added that the application of activity segmentation in vacation (festival) package development and marketing may improve profitability by enhancing the appeal to specific target segments. Frochot and Morrison (2000) and Ahmed, Barber and Astous (1998) furthermore argued that activity-based segmentation is most helpful in designing and modifying facilities and attractions, vacation (festival) packaging, activity (festival) programming, and service quality measurement.

With the latter in mind, among the most important visitor characteristics at an arts festival is the number of tickets purchased as well as the type of shows/productions (genres) attended. The reason being that research by Kruger (2009) and Kruger, Saayman and Ellis (2009) revealed that ticket sales and the genres attended can be used as an indicator of visitor interest in a festival and how successfully the programme addresses and fulfils visitors' needs. Ticket sales are also directly linked to the product life cycle of the festival and are furthermore the festivals' primary source of income. Therefore it is crucial for festivals to sustain their growth in ticket sales by attracting more genre supporters since these 'festival enthusiasts' seem to be the most viable and profitable target market (Saayman & Saayman, 2006:218-219; Kruger, 2009).

Based on this, the aim of this exploratory research is to apply activity-based segmentation and cluster visitors to South Africa's two largest Afrikaans arts festivals based on the genres attended. It is furthermore predicted that the festival market is not homogeneous and that different types of genres will appeal to different types of festival visitors. Through activity segmentation, the festivals' marketers can develop appropriate festival programmes (with the most appropriate selection of genres) for their selected target markets and estimate the economic benefits of each genre. This will ultimately lead to an increase in ticket sales and more sustainable festivals.

### **6.3 METHOD OF RESEARCH**

For the purpose of this article, the data obtained in 2008 will be used for Aardklop and the data obtained in 2009 will be used for the KKNK. The method of research used will be discussed under the following headings: (i) the questionnaire and (ii) statistical analysis.

### 6.3.1 The questionnaire

The questionnaire used to survey visitors to Aardklop in September 2008 and the KKNK in April 2009 both consisted of four sections. Section A captured demographic details (gender, home language, age, occupation, home province and preferred accommodation) as well as spending behaviour (number of persons paid for, length of stay and expenditure of visitors on different spending components). The spending questions were detailed by spending category, including accommodation, shows, food and beverages, shopping, recreation and transport. Section B captured all the information with regard to the festival (type of shows at the festival, the number of tickets bought, other festivals attended, and the number of years attended) while Section C focused on the visitors' specific motivations for attending the festivals as well as the preferred type of accommodation and media. The section on travel motivations was based on the work of Crompton (1979) and Crompton and McKay (1997) and was adapted for Aardklop and the KKNK. Similar to the spending questions, the type of shows (genres) at the festivals were also categorised and included: Drama, Dance theatre, Word art and poetry, Children's theatre, Theatre discussions, Music theatre and cabaret, Choir and ensemble, Rock, Visual arts and exhibitions and Comedy. Due to the festival programme, Jazz was also included for the KKNK.

Section D measured the respondents' evaluation of certain aspects of the festival. Eleven items were also evaluated for both festivals on a 5-point Likert scale and respondents were asked to indicate to what extent they agreed with each item (1 = totally disagree; 2 = do not agree; 3 = neutral; 4 = agree and 5 = totally agree). For the purpose of this article, the information obtained from all the sections (A, B and C) was used. In total, 495 questionnaires were completed for Aardklop over a period of five days (30 September – 3 October 2008) and 555 questionnaires were completed for the KKNK over a period of six days (6 – 11 April 2009) by means of availability sampling. According to Cooper and Emory (1995:207) for any population of 100 000 (N) the recommended sample size (S) is 384. Since a total of 55 518 visitors attended Aardklop in 2008 (Kruger *et al.*, 2008:27), and a total of 116 759 visitors attended KKNK in 2009 (Slabbert *et al.*, 2009:2), the number of completed questionnaires is greater than the required number of questionnaires. All questionnaires were completed at the Main Festival Grounds and various venues in Potchefstroom and Oudtshoorn where fieldworkers moved around to minimise bias. Microsoft® Excel® was used for data capturing. Most questions have multiple choice responses or were answered on a 5-point Likert scale.

Section C of the questionnaire measured visitors' motives to attend Aardklop and the KKNK. Nineteen items were measured in the motivation section for Aardklop and twenty-one items were measured in the motivation section for the KKNK. Both festivals' motivation sections were measured on a 5-point Likert scale and respondents were asked to indicate how important they considered each item on the scale (1 = not at all important; 2 = less important; 3 = important; 4

= very important and 5 = extremely important). Five motivation factors were identified for both festivals. These motivation factors, as indicated by Kruger *et al.* (2009a,b), included in the analysis are displayed in Table 6.1. Factor scores were calculated as the average of all items contributing to a specific factor and results indicated that *Escape* was the most important motive for visitors to attend Aardklop. This was consistent with research done by Lee, Lee and Wicks (2004:66) and De Guzman (2006:864-865). This was followed by *Festival productions/shows* and *Festival attractiveness*. *Family togetherness* and *Exploration* received the lowest mean scores and were therefore not central motives to attend the festival (Kruger *et al.*, 2009). In contrast, *Festival attributes* was the most important motivation for visitors to attend the KKNK and had the highest mean value followed by *Festival shows/productions* and *Escape and socialisation*. *Family togetherness* and *Exploration* received the lowest mean values. Although these two festivals are very similar, it is clear that their visitors have different motives. This is supported by Scott (1996) and Rachael and Douglas (2001) who found that motivations of visitors vary from one event and festival to another. These results furthermore support the notion by Crompton and McKay (1997) and Lee (2000) that some core dimensions of motivation appear to be similar in different festival research, while the order and the components of motivational factors vary according to the type of festival.

Table 6.1: Motivations for Aardklop and the KKNK

Aardklop	Mean value	Reliability coefficient	Average inter-item correlation	KKNK	Mean value	Reliability coefficient	Average inter-item correlation
<b>Festival productions/shows</b> Quality productions Variety of productions Ticket prices are reasonable	3.59	0.80	0.57	<b>Festival shows/productions</b> Variety of productions Quality productions ABSA KKNK is different to other festivals The introduction of new flagship productions at the festival	3.64	0.79	0.50
<b>Family togetherness</b> To the benefit of my children To buy arts To spend time with family	2.62	0.64	0.37	<b>Family togetherness</b> To the benefit of my children It is the closest festival for me To support the stalls To buy art	2.61	0.63	0.30
<b>Exploration</b> To explore the environment To meet new people Aardklop is different to other festivals	2.67	0.61	0.34	<b>Exploration</b> To explore the environment To meet new people The festival promotes cultural inclusiveness	2.85	0.55	0.29
<b>Escape</b> To relax To get away from my routine To spend time with friends Sociable festival	3.77	0.72	0.41	<b>Escape and socialisation</b> To relax To get away from my routine To spend time with friends To spend time with family	3.62	0.67	0.36
<b>Festival attractiveness</b> To support the food stalls To support the stalls To see well-known performers It is primarily an Afrikaans festival It is an annual commitment It is the closest festival for me	3.46	0.71	0.29	<b>Festival attributes</b> It is primarily an Afrikaans festival The festival provides a unique holiday experience The festival is value for money It is a sociable festival To see well-known performers It is an annual commitment	3.71	0.77	0.37

Table 6.2: Evaluations for Aardklop and the KKNK

Aardklop	Mean value	Reliability coefficient	Average inter-item correlation	KKNK	Mean value	Reliability coefficient	Average inter-item correlation
<p><b>Services, prices and amenities</b></p> <p>Ticket sales are effective</p> <p>Service at production are effective</p> <p>Price of accommodation is reasonable</p> <p>The quality of shows is excellent</p> <p>Service/prices of restaurants are good</p> <p>Variety of productions are good</p> <p>Ticket prices are reasonable</p> <p>The taxi service is excellent</p>	3.83	0.83	0.38	<p><b>Services and prices</b></p> <p>Service/prices at restaurants are good</p> <p>Ticket prices are reasonable</p> <p>Price of accommodation is reasonable</p> <p>Adequate entertainment for children</p>	3.53	0.76	0.45
<p><b>Festival organisation</b></p> <p>Layout of the festival area is good</p> <p>Aardklop is well organised</p> <p>Information about the festival is available</p>	4.12	0.81	0.59	<p><b>Festival management</b></p> <p>ABSA KKNK is well organised</p> <p>Information about the festival is available</p> <p>Layout of the festival area is good</p> <p>Parking is well organised</p>	3.93	0.78	0.49
				<p><b>Productions</b></p> <p>Front of house service at productions are effective</p> <p>Ticket sales are accessible</p> <p>The quality of shows is excellent</p>			

As shown in Table 6.2, from the eleven evaluation items measured for both festivals, two evaluation factors were identified for Aardklop, while three factors were identified for the KKNK (Kruger *et al.*, 2009b). *Festival organisation* received the highest mean value of the two evaluation factors for Aardklop while *Festival management* also received the highest mean value for the KKNK. This was followed by *Productions*, while *Services and prices* received the lowest mean value. It is therefore clear that the overall organisation and management of these two festivals have a significant influence on visitors' satisfaction levels.

### **6.3.2. Statistical analysis**

There were three stages in the analysis of data in this study. Firstly, a general profile of visitors to Aardklop and the KKNK was compiled by using SPSS. Secondly, a cluster analysis using Ward's method with Euclidean distances was performed based on the genres attended at the respective festivals. Multivariate statistics were used to examine any statistically significant differences between clusters. A cluster analysis is defined as a multivariate interdependence technique whose primary objective is to classify objects into relatively homogeneous groups based on the set of variables considered (Hair, Bush & Ortinau, 2000:594). Thirdly, ANOVAs and Tukey's multiple comparisons were employed to investigate any significant differences between clusters with respect to each factor. Cross tabulations with chi-square tests were employed to profile the clusters demographically. The study employed demographic variables (gender, home language, age, occupation and province of origin) as well as behavioural variables (length of stay, expenditure, other festivals attended and repeat visitation) to examine whether statistically significant differences existed among different clusters.

## **6.4 RESULTS**

The results will be discussed in three sections. Firstly, an overview of the profile of visitors to Aardklop and the KKNK will be presented. Secondly, the results of the cluster analysis (genres attended) will be discussed, followed by the profiles of the clusters.

### **6.4.1 Visitor profile to Aardklop and the KKNK**

Based on the results captured and displayed in Table 6.3, visitors at Aardklop are female, predominantly Afrikaans-speaking, have an average age of 42 years and originate mainly from Gauteng and North West provinces. The largest group of visitors are in a professional occupation, financially responsible for an average of two persons during their visit and stay an average of three days and three nights in Potchefstroom. Visitors are loyal to the Festival and have visited Aardklop an average of four times. Visitors spend an average of R2799.97 per group, purchase an average of 5 tickets and prefer to attend drama, music theatre and cabaret as well as comedy shows/productions. Compared to Aardklop, visitors to the KKNK are also

female, predominantly Afrikaans-speaking, on average 44 years old and originate mainly from Western and Eastern Cape Provinces. The largest group of visitors are also in a professional occupation, financially responsible for an average of three persons during their visit and stay an average of four days and three nights in Oudtshoorn. Visitors are loyal to the Festival and have visited KKNK an average of six times. Visitors spend an average of R4732.10 per group during their visit and purchase an average of 8 tickets mostly for music theatre and cabaret, drama and comedies.

*Table 6.3: Profiles of visitors to the KKNK and Aardklop*

Category	Profile of visitors to the KKNK	Profile of visitors to Aardklop
Gender	Male 38%; Female 62%	Male 42%; Female 58%
Home language	Afrikaans (93%)	Afrikaans (94%)
Age	Average age: 44 years	Average age: 42 years
Province of residence	Western Cape (52%); Eastern Cape (19%) and Gauteng (14%) Provinces	Gauteng (43%) and North West (32%) Provinces
Occupation	Professional (21%)	Professional (31%)
Number of days	Average of 4.2 days in Oudtshoorn	Average of 3.1 days in Potchefstroom
Number of nights	Average of 3.5 nights in Oudtshoorn	Average of 3.3 nights in Potchefstroom
Group size	Average of 5 persons	Average of 4 persons
Number of people paid for	Average of 2.6 persons	Average of 2.3 persons
Number of visits to festival	Average of 6.1 times	Average of 4.3 times
Average spending per group	R4732.10	R2799.97
Number of tickets purchased	Average of 8.1 tickets	Average of 5.2 tickets
Preferred shows/productions	Music theatre & cabaret (45%); Drama (43%) and Comedies (40%)	Comedy (48%); Drama (44%) and Music theatre and Cabaret (40%)

#### **6.4.2 Results from the cluster analysis for Aardklop and the KKNK**

A hierarchical cluster analysis, using Ward's method of Euclidean distances, was used to determine the clusters' structures based on the different genres. The cluster analysis indicated that a three-cluster solution might be the most appropriate for the data of both the KKNK and Aardklop. Two-way frequency tables were constructed to provide a complete profile of each of the three clusters for the respective festivals based on the genres attended. Chi-square tests were used to determine whether significant differences existed between the clusters.

##### **6.4.2.1 Results from the cluster analysis based on genres attended**

Table 6.4 indicates that Aardklop Cluster 1 is mainly characterised by visitors who attend Drama, Rock and Comedies, but the low percentages indicate that they are not particularly interested in attending shows/productions at the festival. This cluster will attend the odd show/production and was therefore labelled the *Indifferent genre attendees*. Cluster 1

furthermore represents the largest sample of respondents. Cluster 2 contained only 46 respondents and is represented by visitors who attend a variety of genres and thus this cluster was labelled the *General genre attendees*. Cluster 3 contained 133 respondents and was labelled the *Meticulous genre attendees* since Choir and ensemble, Music theatre and cabaret, Classical music, and Visual arts and exhibition attendees are most represented in this cluster. For Aardklop, it is clear that only a small number of visitors attend a variety of shows/productions at the festival (Cluster 2), while a larger number of visitors attend selected genres (including Choir and ensemble, Music theatre and cabaret, Classical music, and Visual arts and exhibition) which are not seen as the festivals' mainstream, popular or commercial productions (Cluster 3). The majority of visitors to the festival, however, do not attend a significant number of shows/productions and, apart from drama and comedies, they do not appear to be interested in the other genres included in the festival programme. The most popular genres for Aardklop appear to be Drama, Comedies and Music theatre and cabaret.

**Table 6.4: Results of the cluster analysis for Aardklop based on type of show/productions (genres)**

Shows/productions attended	Aardklop			Chi-square value	df	Significance level	Phi-value
	Cluster 1 <i>Indifferent genre attendees</i> (N=314)	Cluster 2 <i>General genre attendees</i> (N=46)	Cluster 3 <i>Meticulous genre attendees</i> (N=133)				
Drama				67.719	2	0.000*	0.317
Yes	36%	100%	42%				
No	64%	0%	58%				
Dance theatre				27.318	2	0.000*	0.235
Yes	11%	33%	5%				
No	89%	67%	95%				
Word art and poetry				29.075	2	0.000*	0.243
Yes	5%	28%	7%				
No	95%	72%	93%				
Children's theatre				4.302	2	0.116	0.093
Yes	5%	13%	5%				
No	95%	87%	95%				
Lecturers and discussions				11.733	2	0.003*	0.154
Yes	5%	17%	9%				
No	95%	83%	91%				
Choir and ensemble				11.513	2	0.003*	0.153
Yes	5%	9%	14%				
No	95%	91%	86%				
Music theatre and cabaret				332.537	2	6.174	0.821
Yes	9%	91%	93%				

No	91%	9%	7%				
Classical music				44.899	2	0.000*	0.302
Yes	5%	22%	27%				
No	95%	78%	73%				
Visual arts and exhibitions				14.737	2	0.001*	0.173
Yes	6%	17%	17%				
No	94%	83%	83%				
Rock				38.219	2	0.000*	0.278
Yes	27%	7%	4%				
No	73%	93%	96%				
Comedies				55.764	2	0.000*	0.336
Yes	41%	100%	45%				
No	59%	0%	55%				

As shown in Table 6.5, Cluster 1 for the KKNK also represents the largest sample of respondents ( $N=390$ ) and are mainly characterised by drama, music theatre and cabaret as well as comedy attendees and was therefore labelled the *Popular genre attendees*. The other genres are also not well-represented in this cluster. Cluster 2 was labelled the *Children and variety genre attendees* since children's theatre, music theatre and cabaret, comedy and rock attendees are represented in this cluster. This cluster contained the second largest sample of respondents ( $N=131$ ). Cluster 3 contained only 34 respondents and is well represented by all genre attendees. This cluster was thus labelled *Extreme genre attendees*. Compared to Aardklop (Table 6.4), visitors to the KKNK also prefer to mainly attend drama, comedy and music theatre and cabaret shows/productions. Similar to Aardklop, only a small number of visitors attend a variety of genres at the festival. It is also clear that the majority of visitors to the KKNK only prefer certain genres (drama, comedies and music theatre and cabaret) while only a small number of visitors (Cluster 3) support almost all the genres showcased at the festival.

Table 6.5: Results of the cluster analysis based on type of show/productions (genres) at the KKNK

Shows/productions attended	KKNK			Chi-square value	df	Significance level	Phi-value
	Cluster 1 <i>Popular genre attendees</i> ( $N=390$ )	Cluster 2 <i>Children and variety genre attendees</i> ( $N=131$ )	Cluster 3 <i>Extreme genre attendees</i> ( $N=34$ )				
Drama				42.954	2	0.000*	0.278
Yes	45%	27%	88%				
No	55%	73%	12%				
Dance theatre				48.788	2	0.000*	0.296
Yes	7%	2%	38%				
No	93%	98%	62%				

<b>Word art and poetry</b>				17.745	2	0.000*	0.179
Yes	5%	3%	21%				
No	95%	97%	79%				
<b>Children's theatre</b>				31.834	2	0.000*	0.239
Yes	5%	20%	3%				
No	95%	80%	97%				
<b>Theatre discussions</b>				4.457	2	0.108	0.090
Yes	4%	4%	12%				
No	96%	96%	88%				
<b>Music theatre and cabaret</b>				57.727	2	0.000*	0.323
Yes	36%	52%	100%				
No	64%	46%	0%				
<b>Classical music</b>				184.269	2	9.692	0.576
Yes	6%	18%	91%				
No	94%	82%	9%				
<b>Choir and ensemble</b>				34.854	2	0.000*	0.251
Yes	6%	0%	27%				
No	94%	100%	73%				
<b>Rock</b>				65.417	2	0.000*	0.343
Yes	6%	34%	12%				
No	94%	66%	88%				
<b>Visual arts and exhibitions</b>				10.619	2	0.005	0.138
Yes	6%	3%	18%				
No	94%	97%	82%				
<b>Comedies</b>				116.688	2	4.587	0.459
Yes	26%	66%	97%				
No	74%	34%	3%				
<b>Jazz</b>				128.516	2	1.239	0.481
Yes	1%	5%	44%				
No	99%	95%	56%				

#### 6.4.2.2 Profile of clusters

Based on the above, ANOVAs and Tukey's post hoc multiple comparisons were employed to determine the differences in other characteristics of the visitors of both festivals (Tables 6.6 and 6.7). The results of this analysis revealed that age, the number of days spent at the festival, expenditure per person, the number of tickets bought, the number of years attended and some travel motives differ significantly between the clusters for Aardklop (Table 6.6). The *Indifferent genre attendees* spend fewer days (an average of three days) at the festival and have also attended Aardklop fewer times (an average of four times) compared to the *General genre attendees* who spend an average of four days at the festival and who have attended the festival an average of five times. The *Indifferent genre attendees* furthermore spend significantly less than the *General genre attendees* and *Meticulous genre attendees* with the *General genre*

attendees spending the most money at the festival. Although the *Meticulous genre attendees* and *General genre attendees* placed high importance on the *Festival productions/shows*, the *General genre attendees* had the highest mean score and are therefore mainly motivated by the festival's productions and shows. The *General genre attendees* purchase the most tickets at the festival (an average of nine tickets), while the *Meticulous genre attendees* purchase an average of seven tickets with the *Indifferent genre attendees* purchasing the least number of tickets (an average of six). There were furthermore significant differences between the clusters based on age with the *General genre attendees* and *Meticulous genre attendees* on average in their late forties while the *Indifferent genre attendees* are younger – in their late thirties. The clusters also differed significantly based on years attended; the *General genre attendees* have attended Aardklop more times compared to the other two clusters.

The group size, number of people paid for and number of nights spent in Potchefstroom are not significantly different for the three clusters, while there are also no significant differences between the clusters based on the festival evaluation factors and other demographic and behavioural variables as indicated in Appendix 6A. It is however worth noting that all three clusters mainly travel from Gauteng province while the *Indifferent genre attendees* also originate from the North West Province and are therefore more likely to be local residents. These results correlate with the general profile of the Aardklop visitor as outlined in Table 6.3. Television, radio, the website, magazines, newspapers and especially word-of-mouth are furthermore the preferred types of media for all three clusters while the KKNK and Innibos are the other festivals attended by three clusters.

Table 6.6: Results of ANOVA and Tukey's post hoc multiple comparisons for Aardklop's visitor characteristics of clusters

Aardklop characteristics	Cluster 1 <i>Indifferent genre attendees</i> (N=314)	Cluster 2 <i>General genre attendees</i> (N=46)	Cluster 3 <i>Meticulous genre attendees</i> (N=133)	F-ratio	Sig. level
Age	39 <sup>a</sup>	46 <sup>b</sup>	47 <sup>b</sup>	18.847	<0.05*
Number of people in travel party	3.57	3.64	3.76	0.189	0.828
Number of people paid for	2.29	2.22	2.38	0.225	0.798
Length of stay					
Days	2.95 <sup>a</sup>	3.69 <sup>b</sup>	3.25 <sup>ab</sup>	5.626	0.004*
Nights	3.21	3.44	3.27	0.345	0.709
Travel motives					
Factor 1: <i>Festival productions/shows</i>	3.46 <sup>a</sup>	3.86 <sup>b</sup>	3.80 <sup>b</sup>	7.004	0.001*
Factor 2: <i>Family togetherness</i>	2.60	2.58	2.66	0.122	0.885
Factor 3: <i>Exploration</i>	2.75 <sup>a</sup>	2.38 <sup>ab</sup>	2.62 <sup>b</sup>	2.961	0.053

Factor 4: <i>Escape</i>	3.79 <sup>a</sup>	3.45 <sup>ab</sup>	3.78 <sup>b</sup>	3.357	0.036*
Factor 5: <i>Festival attractiveness</i>	3.47	3.29	3.50	0.879	0.416
<b>Evaluation of festival</b>					
Factor 1: <i>Services, prices and amenities</i>	3.76	3.94	3.95	5.307	0.005*
Factor 2: <i>Festival organisation</i>	4.06	4.07	4.25	2.806	0.061
<b>Expenditure per person</b>	R1071.40 <sup>a</sup>	R1749.86 <sup>b</sup>	R1558.44 <sup>b</sup>	9.140	0.000*
<b>Number of tickets bought</b>	5.69 <sup>a</sup>	9.35 <sup>b</sup>	6.77 <sup>a</sup>	6.757	0.001*
<b>Number of free shows</b>	4.26	3.48	4.92	1.496	0.255
<b>Years attended</b>	4.07 <sup>a</sup>	5.17 <sup>b</sup>	4.40 <sup>a</sup>	2.711	0.068*

As shown in Table 6.7, age, length of stay (number of days and nights), some travel motives and festival evaluation as well as expenditure per person, years attended and the number of tickets bought, were the only characteristics which significantly differed between the clusters for the KKNK. The *Extreme genre attendees* spend the most days and nights at the festival (an average of six days and five nights) followed by the *Children and variety genre attendees* who stay an average of five days and four nights. The *Popular genre attendees* have the shortest length of stay (an average of four days and four nights). The *Extreme genre attendees* also spend on average the most per person (R4058.46) while the *Children and variety genre attendees* spend the least (R1832.59) at the KKNK. The *Extreme genre attendees* are the oldest visitors at the KKNK (an average of 55 years old) while the *Popular genre attendees* and the *Children and variety genre attendees* are in their early forties. The *Children and variety genre attendees* are the youngest visitors (an average of 41 years old). *Festival productions/shows* were furthermore the *Extreme genre attendees'* main motivation to attend the festival while they also seem to be more satisfied with the *Festival management* compared to the other two clusters. Concerning the number of tickets bought, the *Extreme genre attendees* purchase the most tickets (an average of 18) at the festival with the *Popular genre attendees* purchasing an average of 8 tickets and the *Children and variety genre attendees* purchasing the least number of tickets (an average of six). The *Extreme genre attendees* have furthermore attended the festival more years (an average of 7) while the *Children and variety genre attendees* and *Popular genre attendees* have attended the festival respectively four and five times.

There are further no significant differences between the clusters based on the number of people in the travel party, the number of people paid for, other motives and evaluation factors and the number of free shows attended. However, it appears that the most notable differences are between the *Extreme genre attendees* and the *Children and variety genre attendees*. It seems that the *Extreme genre attendees* travel with fewer people, are motivated more by *Festival attributes*, are more satisfied with *Services and prices* and *Productions* and attend the least

amount of free shows. The *Children and variety genre attendees* travel with more people (most probably due to children in the travelling party), seem to be motivated more by *Relaxation and socialisation* and *Escape* and attend a fair number of free shows at the festival. The *Popular genre attendees* pay for the most number of people at the festival and attend the most number of free shows (an average of four shows). Appendix 6B shows that there are a significant difference between the clusters based on gender, with the *Extreme genre attendees* represented by the largest percentage of female visitors and the smallest percentage of male visitors. There were further no significant differences between the clusters based on other demographic and behavioural characteristics. All clusters however originate mainly from the Western Cape with the *Popular genre attendees* and *Extreme genre attendees* also travelling from Gauteng province. All three clusters plan their festival visit well in advance (more than a month before the festival) and had heard about the festival through the television, radio, magazines, newspapers and word-of-mouth.

Table 6.7: Results of ANOVA and Tukey's post hoc multiple comparisons for the KKNK's visitor characteristics of clusters

KKNK characteristics	Cluster 1 <i>Popular genre attendees</i> (N=390)	Cluster 2 <i>Children and variety genre attendees</i> (N= 131)	Cluster 3 <i>Extreme genre attendees</i> (N= 34)	F - ratio	Sig. level
Age	45 <sup>a</sup>	41 <sup>a</sup>	55 <sup>b</sup>	13.354	0.000*
Group	4.32	5.07	4.03	1.832	0.161
Number of people paid for	2.59	2.58	2.29	0.390	0.677
Length of stay					
Days	4.02 <sup>a</sup>	4.50 <sup>a</sup>	5.62 <sup>b</sup>	8.677	0.000*
Nights	3.74 <sup>a</sup>	4.32 <sup>a</sup>	5.38 <sup>b</sup>	6.309	0.002*
Travel motives					
Factor 1: <i>Festival attributes</i>	3.67	3.74	3.97	1.906	0.150
Factor 2: <i>Family togetherness</i>	2.63	2.64	2.32	1.457	0.234
Factor 3: <i>Relaxation and socialisation</i>	3.59	3.72	3.56	0.921	0.399
Factor 4: <i>Festival shows/productions</i>	3.52 <sup>a</sup>	3.81 <sup>ab</sup>	4.27 <sup>b</sup>	13.215	0.000*
Factor 5: <i>Escape</i>	2.82	2.99	2.71	1.605	0.202
Evaluation of festival					
Factor 1: <i>Service and prices</i>	3.49	3.58	3.77	1.976	0.140
Factor 2: <i>Productions</i>	3.87	4.01	4.10	2.840	0.059
Factor 3: <i>Festival management</i>	3.84 <sup>a</sup>	4.05 <sup>ab</sup>	4.33 <sup>b</sup>	8.042	0.000*
Expenditure per person	R2036.81 <sup>a</sup>	R1832.59 <sup>a</sup>	R4058.46 <sup>b</sup>	9.371	0.000*
Number of tickets bought	7.94 <sup>a</sup>	6.16 <sup>a</sup>	17.81 <sup>b</sup>	21.158	<0.05
Number of free shows	4.11	3.96	2.93	0.531	0.589
Years attended	4.96 <sup>a</sup>	4.45 <sup>a</sup>	6.94 <sup>b</sup>	5.085	0.006*

## 6.5 FINDINGS AND IMPLICATIONS

Although Aardklop and the KKNK have similar festival programmes and attract a predominantly Afrikaans-speaking market, the results of this study indicate that based on the genres attended there are three different clusters of visitors for each festival. Therefore the results confirm that the festival market is not homogeneous and that different types of genres appeal to different types of festival visitors. Based on the latter the following important marketing implications can be identified for each festival:

Firstly, based on the results, and given the intensively competitive situation in the festival sector today, the *General genre attendees* and the *Extreme genre attendees* are the most important genre attendees respectively at Aardklop and the KKNK. These visitors spend more days at the festivals, are motivated more by the *Festival productions/shows*, purchase the most tickets, has the highest expenditure and have attended the festivals' more times. Both festivals' managers/organisers should therefore place high emphasis on attracting and sustaining these visitors especially with the aim of increasing ticket sales in mind. The festival programme should therefore highlight the preferred genres (as indicated in the results) in order to attract these visitors. However, even though these visitors are the most loyal and advent genre supporters, they are represented by the smallest number of visitors at both festivals and they are also the oldest visitors at the KKNK. From a sustainability point of view, the latter is a serious reason for concern. Secondly, with the latter in mind, both festivals should convince the other clusters of visitors to purchase more tickets and support the festivals' genres. This can be achieved through special festival packages including discounts on other entertainment at the festivals or food and beverage tokens if for example six or more tickets are purchased at the festivals. The most popular genres at the festivals (drama and comedies) should be included in the packages since this will also encourage younger visitors to support the arts and attend more shows/productions at the festivals. Thirdly, Aardklop should emphasise its festival programmes' previous neglected genres (choir and ensemble, classical music and visual arts and exhibitions) since the *Meticulous genre supporters* at the festival also stay longer, purchase a significant number of tickets and spend a significant amount of money during their visit. The marketing campaign should focus on quality productions and well-known artists involved. Since these genres are overlooked and not seen as popular genres, the festival organisers should consider including more of these types of genres in the festival programme. Lastly, in order to attract and retain current visitors, both festivals should intensively market their drama, music theatre and cabaret as well as comedy productions since they are the most popular genres and are supported by the most number of visitors. Award-winning and flagship productions should form the basis of the marketing campaigns using the marketing mediums identified in the results.

## 6.6 CONCLUSION

The aim of this research was to apply activity-based segmentation and cluster visitors to South Africa's two largest Afrikaans arts festivals based on the genres attended. This study produced three non-homogeneous visitor groups at Aardklop and the KKNK: *General genre attendees*, *Indifferent genre attendees* and *Meticulous genre attendees* for Aardklop and *Extreme genre attendees*, *Children and variety genre attendees* and *Popular genre attendees* for the KKNK. It is clear that although the KKNK and Aardklop have a similar festival programme; visitors have different preferences concerning the genres at each festival. Based on the results, it is further evident that both festivals should customise its festival programme in order to attract the most viable target market(s). Specific but differentiated marketing strategies should be applied by both festival organisers to make effective promotional efforts towards the different cluster of visitors and to satisfy their different needs. This method of segmentation has furthermore proved to be a successful and viable way to segment the festival market. With the main aim of the festivals in mind (i.e. preserving and enhancing the Afrikaans language and culture) this method of segmentation has the following benefits:

- The most popular and financially viable genres can be identified at each festival
- The most advent genre supporters at the festivals can be identified and profiled
- Ticket sales can be increased with a customised festival programme
- Differentiated and cost-effective marketing strategies can be developed in order to attract the right target market(s)

The above-mentioned benefits can lead to a competitive advantage and, ultimately, to more sustainable arts festivals. It is recommended that this type of segmentation is applied on a continuous basis in order to keep up with the changing needs of visitors and in order to design the festivals' programmes accordingly. This type of research should also be applied to other festivals in South Africa in order to compare results and adapt each festival programme and marketing campaign to each festival visitor's unique needs and preferences.

Appendix 6A: Socio-demographic comparison between genre clusters for Aardklop

Demographic characteristics	Genre clusters			Chi-square value	df	Significance level	Phi- value
	Cluster 1 <i>Indifferent genre attendees</i> (N =314)	Cluster 2 <i>General genre attendees</i> (N =46)	Cluster 3 <i>Meticulous genre attendees</i> (N = 133)				
<b>Gender</b>				8.294	2	0.016	0.130
Male	46%	24%	39%				
Female	54%	76%	61%				
<b>Language</b>				3.242	4	0.518	0.081
Afrikaans	93%	100%	93%				
English	5%	0%	5%				
Other	2%	0%	2%				
<b>Province</b>				18.529	18	0.421	0.194
North West	35%	22%	29%				
Gauteng	42%	46%	49%				
Free State	8%	11%	10%				
Limpopo	4%	4%	6%				
Other	11%	17%	6%				
<b>Heard about festival</b>							
Television	Yes=59%;No=41%	Yes=46%;No=54%	Yes=48%;No=52%	6.443	2	0.040	0.114
Radio	Yes=53%;No=47%	Yes=52%;No=48%	Yes=47%;No=53%	1.628	2	0.443	0.057
Website	Yes=21%;No=79%	Yes=30%;No=70%	Yes=29%;No=71%	4.993	2	0.082	0.101
E-mail	Yes=6%;No=94%	Yes=15%;No=85%	Yes=14%;No=86%	8.050	2	0.018	0.128
Newsletter	Yes=6%;No=94%	Yes=7%;No=93%	Yes=6%;No=94%	0.025	2	0.988	0.007
Magazines	Yes=34%;No=66%	Yes=48%;No=52%	Yes=32%;No=68%	3.864	2	0.145	0.089
Newspapers	Yes=50%;No=50%	Yes=52%;No=48%	Yes=41%;No=59%	3.011	2	0.222	0.078
Word of mouth	Yes=61%;No=39%	Yes=67%;No=33%	Yes=53%;No=47%	3.865	2	0.145	0.089
<b>Festival as main reason for visit to Potchefstroom</b>				8.952	4	0.062	0.136
Yes	68%	81%	76%				
No	19%	17%	11%				
Local resident	13%	2%	13%				
<b>Other festivals attended</b>							
KKNK	Yes=25%;No=75%	Yes=28%;No=72%	Yes=28%;No=72%	0.357	2	0.836	0.027
Grahamstown	Yes=5%;No=95%	Yes=7%;No=93%	Yes=4%;No=96%	0.612	2	0.736	0.035
Volksblad	Yes=5%;No=95%	Yes=7%;No=93%	Yes=5%;No=95%	0.288	2	0.866	0.024
Innibos	Yes=15%;No=85%	Yes=11%;No=89%	Yes=15%;No=85%	0.525	2	0.769	0.033

Appendix 6B: Socio-demographic comparison between genre clusters for the KKNK

Demographic characteristics	Genre clusters			Chi-square value	df	Significance level	Phi- value
	Cluster 1 Popular genre attendees (N=390)	Cluster 2 Children and variety genre attendees (N=131)	Cluster 3 Extreme genre attendees (N=34)				
<b>Gender</b>				12.828	2	0.002*	0.152
Female	61%	60%	91%				
Male	39%	40%	9%				
<b>Language</b>				1.327	2	0.515	0.049
Afrikaans	93%	92%	97%				
Other	7%	8%	3%				
<b>Province</b>							
Western Cape	Yes=54%;No=46%	Yes=42%;No=58%	Yes=53%;No=47%	5.934	2	0.051	0.103
Gauteng	Yes=15%;No=85%	Yes=12%;No=88%	Yes=15%;No=85%	0.494	2	0.781	0.030
Eastern Cape	Yes=18%;No=82%	Yes=27%;No=73%	Yes=12%;No=88%	6.690	2	0.035	0.110
<b>Heard about festival</b>							
Television	Yes=45%;No=55%	Yes=41%;No=59%	Yes=53%;No=47%	1.558	2	0.459	0.053
Radio	Yes=39%;No=61%	Yes=44%;No=56%	Yes=41%;No=59%	0.960	2	0.619	0.042
Website	Yes=18%;No=82%	Yes=19%;No=81%	Yes=27%;No=73%	1.377	2	0.502	0.050
E-mail	Yes=9%;No=91%	Yes=10%;No=90%	Yes=15%;No=85%	1.062	2	0.588	0.044
Magazines	Yes=35%;No=65%	Yes=40%;No=60%	Yes=35%;No=65%	0.865	2	0.649	0.040
Newspapers	Yes=45%;No=55%	Yes=46%;No=54%	Yes=53%;No=47%	0.798	2	0.671	0.038
Word of mouth	Yes=49%;No=51%	Yes=60%;No=40%	Yes=56%;No=44%	5.761	2	0.056	0.102
<b>Festival as main reason for visit to Outdshoorn</b>				2.383	4	0.666	0.066
Yes	77%	74%	85%				
No	20%	22%	12%				
Local resident	3%	4%	3%				
<b>Decision to visit</b>				14.300	6	0.026	0.167
Spontaneous decision	22%	16%	16%				
Less than a month ago	14%	13%	0%				
More than a month ago	52%	59%	55%				
More than a year ago	12%	12%	29%				
<b>Other festivals attended</b>							
Aardklop	Yes=20%;No=80%	Yes=22%;No=78%	Yes=24%;No=76%	0.361	2	0.835	0.026
Grahamstown	Yes=10%;No=90%	Yes=15%;No=85%	Yes=21%;No=79%	6.123	2	0.047	0.105
Volksblad	Yes=6%;No=94%	Yes=7%;No=93%	Yes=6%;No=94%	0.056	2	0.972	0.010
Innibos	Yes=10%;No=90%	Yes=7%;No=93%	Yes=3%;No=97%	2.294	2	0.318	0.064

# CHAPTER 7:

## CONCLUSIONS AND RECOMMENDATIONS



*“What is not started today is never finished tomorrow.”*

*~ Johann Wolfgang von Goethe*

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### 7.1 INTRODUCTION

The aim of the study was to critically evaluate market segmentation at national arts festivals in South Africa by means of different segmentation variables and approaches. Since the main aim of arts festivals in South Africa is to increase tickets sales by attracting visitors who support the genres (shows/productions), this will be the main criteria used to critically evaluate each segmentation approach applied in this study. To achieve this, the following objectives were set in Chapter 1 and achieved in their respective chapters.

- The first objective was to segment visitors to Aardklop based on their travel motives. This was achieved in Chapter 2 (Article 1) of the study. The research clearly indicated that visitors have distinct motives for attending Aardklop and travel motives are a useful alternative method to segment festival visitors and to predict future behaviour.
- The second objective was to identify the socio-demographic and behavioural determinants of visitor spending at Aardklop. This goal was achieved in Chapter 3 (Article 2) and the research clearly indicated that a combination of determinants influence visitors' spending at the festival.
- The third objective was to distinguish between genre supporters and non-genre supporters at Aardklop and was achieved in Chapter 4 (Article 3). Results showed that genre attendees and non-attendees differed significantly based on socio-demographic and behavioural characteristics and gave a comprehensive profile of the two types of visitors at the festival.
- The fourth objective was to segment visitors to the KKNK based on the frequency of visitation to distinguish between first-time and repeat festival attendees. This goal was

achieved in Chapter 5 (Article 4) and results revealed that both first-time and repeat visitors are important for the long-term sustainability of the festival.

- The fifth objective was to cluster visitors to the KKNK and Aardklop based on the genres attended and this goal was reached in Chapter 6 (Article 5). Even though Aardklop and the KKNK are very similar, the research showed that visitors have different preferences for different types of genres and that this information can be applied constructively to differentiate festival visitors.
- The sixth and final objective was to draw conclusions, critically evaluate and make recommendations concerning the variables/approaches applied in this study in order to design the optimum market segmentation approach for arts festivals in South Africa. This chapter will conclude the findings of the research and use the research results from Chapters 2, 3, 4, 5 and 6 to design the criteria and make recommendations concerning future festivals and further research.

Based on the above-mentioned objectives, the contribution of this study lies in the following:

- The primary research objective of this study was to critically evaluate market segmentation at national arts festivals in South Africa which could be used by festival marketers/organisers to effectively and comprehensively segment the festival market so that a customised festival programme can be designed to attract the right target market and ensure the continuous growth in ticket sales that will lead to a greater economic impact as well as a more successful and sustainable festival.
- To achieve the main goal, visitors at two similar Afrikaans festivals were, for the first time, analysed and compared using various methods of segmentation.
- The methods used to segment the visitors were applied for the first time not only in this study, but also in the South African festival context. The following methods were applied for the first time in this study and can therefore be seen as a benchmark in South African festival research:
  - Travel motives were determined and used to segment the festival market. Results confirm that visitors have diversified needs and that it cannot be assumed that festival visitors attend a festival for the same reasons and to fulfil the same needs. Travel motives are therefore a useful way of applying market segmentation that can be used to give visitors what they want, thereby increasing ticket sales.
  - Distinguishing between genre attendees and non-genre attendees at an arts festival was also done for the first time. This method of segmentation provides useful insights into the profiles of the different genre attendees at a festival. This information can be used to retain loyal genre attendees and non-genre attendees

can be persuaded to purchase more tickets. This method is the only type of segmentation that effectively distinguishes genre attendees from non-attendees.

- Frequency of visitation was also applied for the first time to visitors at a national arts festival in South Africa. This method of segmentation shows the importance of both first-time and repeat visitor markets and can be used to ensure the continuous sustainability of arts festivals. The challenge for arts festivals therefore lies in the fact that there needs to be a balance between first-time and repeat visitors and innovative and creative methods need to be applied to achieve this.
- Festival visitors were furthermore segmented and clustered based on the genres attended. Based on the results, it is clear that arts festivals should customise their festival programmes to attract the right target market(s). Using the genres attended to segment the festival market proved to be a viable method of determining the most popular genres, the most ardent festival supporters as well as increasing ticket sales.
- The methods used in this study therefore add value to the tourism and festival industry and contribute to the body of knowledge about South African arts festival visitors and especially about the optimum approach to segment the festival market.
- This study can therefore greatly assist not only festival marketers/organisers but also future researchers.
- With the latter in mind, from a methodology point of view, this study has contributed to the following:
  - When it comes to the questionnaire, the variables included should be carefully considered and designed with the aim of the research as well as the type of statistical analysis in mind. The latter is important since it has an impact on the type and layout of the questionnaire. As many variables as possible should be rated without overcrowding the questionnaire, especially when research is attempted for the first time concerning a specific issue.
  - That a larger sample size is recommended irrespective of the statistical analysis used, since a larger sample of respondents provides a more accurate description of the results and better defines the target market.
  - That certain statistical analyses provide better information when used in combination than alone, hence a once-off survey could give a distorted result. It is therefore essential that continuous research be done not only to determine the right combination of market segmentation variables, but also the right combination of statistical analyses.

The aim of this chapter is to draw conclusions and make recommendations as well as to critically evaluate the different approaches to segmentation and identify aspects for future research.

## **7.2 CONCLUSIONS**

The conclusions will be discussed with regard to the literature review and the surveys, as reported in the five articles.

### **7.2.1 CONCLUSIONS FROM THE LITERATURE STUDY**

- Events like arts festivals are one of the fastest growing segments in tourism and help to promote arts, culture, understanding, and social upliftment as well as financial support, especially for local communities (c.f. 1.1).
- South Africa realises the benefits associated with arts festivals and hosts various events/festivals throughout the year (c.f. 1.1).
- All tourism products, including events/festivals, go through successive stages of growth but, because of increasing competition, their programme/product must respond to changes in demand (c.f. 1.2).
- The continuous sustainability of these events/festivals is therefore vital (c.f. 1.2).
- Two of the most popular and successful Afrikaans arts festivals in South Africa are the Klein Karoo National Arts Festival (KKNK) and the Aardklop National Arts Festival (c.f. 1.2).
- These festivals attract a similar market, which not only leads to continual competition between these festivals for visitors, sponsors and artists but also to serious concerns about their future profitability and sustainability. The latter is already evident in both festivals' product life cycles (c.f. 1.2).
- A sustainable marketing strategy is needed to maintain a steady growth and to ensure the continuous existence and success of the KKNK and Aardklop (c.f. 1.2).
- Knowledge of the needs and motivations of the market is vital for the festival marketers/organisers to successfully satisfy these needs and to ensure repeat use and visitation (c.f. 1.2).
- The travel market as a whole is too large to reach efficiently and too diverse to communicate with in any single way; therefore market segmentation needs to be understood to concentrate on more specialised segments with shared characteristics (c.f. 1.2).
- The information provided by market segmentation can be used to determine the profile of the market and to develop effective marketing strategies aimed at the right target market (c.f. 1.2).
- Various variables/bases are used to segment a market to understand visitors' needs, motives and expectations. These variables/bases of segmentation include demographics,

expenditure, psychographics, decision behaviour, geographic, product specific, interests, travel motivations and communication channels. These methods give a complete visitors profile and are used to identify and compare different segments (c.f. 1.2).

- However, although these variables have been recommended as viable segmentation bases, there seems to be no single ideal base or variable that is the most effective segmentation criterion, since each variable serves a specific purpose (c.f. 1.2).
- Therefore, the most appropriate variable or variables can only be selected if the objectives of the segmentation strategy are clearly defined (c.f. 1.2)
- For South African arts festivals, the primary aim is to increase ticket sales by attracting visitors who support the genres (shows/productions) at the festivals (c.f. 1.2).

With the latter in mind, travel motives, expenditure and visitor behaviour in terms of genre attendance and frequency of visitation were selected and used in conjunction to profile and compare different market segments at each festival.

- Results from the research studies discussed in the literature review indicated that the most common motives for attending festivals/events include socialisation, family togetherness, novelty, escape and excitement (c.f. 2.2).
- Travel motives have furthermore been used to a great extent to segment festival visitors (c.f. 2.2).
- Benefits derived from segmenting visitors based on their travel motives include (c.f. 2.2):
  - Better positioning of the festival
  - Effective marketing and planning of the festival programme
  - Predicting future travel patterns
  - Effective allocation of resources
  - Efficient monitoring of satisfaction
  - Greater understanding of visitors' decision processes
  - Ensuring visitor satisfaction by identifying strengths and opportunities
  - Increased visitor numbers by initiating improvements
  - A tailor-made festival programme designed to meet the needs of visitors
  - Increased ticket sales
  - Strengthening management and product development
- As indicated in the literature review, the following determinants have an influence on visitors' spending and distinguished the high spender from the medium and low spending segments (c.f. 3.2):
  - Age
  - Gender

- Level of education
- Length of stay
- Distance travelled to destination
- Discretionary disposable income
- Group size
- Trip purpose
- Location / Province of origin
- Repeat / First-time visits

● Establishing the determinants of visitor spending can therefore lead to the following (c.f. 3.2):

- Development of sustainable tourism products
- Strategic marketing
- Development of a market profile
- Identification of niche markets
- Formulation of policies
- Retail merchandising
- Customer service
- Better understanding of tourist spending behaviour and the underlying factors affecting such behaviour
- Identification of the high spenders

With this in mind, by determining the factors that influence visitor spending, the following factors can be increased: (1) the number of tickets purchased (2) the length of stay of visitors; (3) the amount of visitor expenditure per day, and (4) the frequency of visitation or repeat visitation.

● There are two types of visitors attending an arts festival, genre attendees and non-genre attendees (c.f. 4.2).

● By distinguishing genre attendees from non-genre attendees, the following benefits are a result (c.f. 4.6):

- A separate profile of each genre attendee and non-attendee
- A customised festival programme aimed at attracting more genre supporters and encouraging non-attendees to support the festival shows/productions
- Identification of limitations and gaps in the festival programme
- Identification of potential festival markets
- Increased ticket sales

- Previous research (as discussed in the literature review) shows that both first-time and repeat visitor groups play a fundamental role in the overall well-being and success of a festival (c.f. 5.2).
- Thus, investigating the differences between first-time and repeat visitors can lead to the following (c.f. 5.2):
  - Distinct marketing strategies aimed at first-time and repeat visitors
  - Better allocation of resources
  - Maintaining a balance between first-time and repeat visitors
  - Sustaining repeat visitation
  - A customised festival programme
  - Loyal visitors
- In addition, different shows attract different types of visitors to an arts festival (c.f. 6.2)
- Segmenting visitors based on genres attended therefore has the following benefits (c.f. 6.2):
  - Identification of the most popular and financially viable genres
  - Identification and profiling of the most ardent genre supporters
  - A customised festival programme
  - Increased ticket sales
  - Differentiated and cost-effective marketing strategies aimed at the right market

## 7.2.2 CONCLUSIONS FROM THE SURVEYS

In the literature review, various methods or approaches of market segmentation were discussed. Each of the variables/bases used in this study to segment the festival market will be critically evaluated in the next section. The advantages and disadvantages of each approach will be outlined to determine the effectiveness and viability of each approach.

### a) Segmenting festival visitors based on travel motives

Visitors' main motivations to attend Aardklop were determined with a factor analysis in Article 1, whereafter a cluster analysis was performed to segment visitors based on their travel motives. Five motivational dimensions emerged from the results, *Festival productions/shows*, *Family togetherness*, *Exploration*, *Escape* and *Festival attractiveness* and five distinct clusters were identified: *Families*, *Novelists*, *Culture seekers*, *Escapists* and *Festival junkies*.

#### Advantages:

- Segmenting visitors based on their travel motives allows the festival marketers/organisers to identify the different needs of visitors and how this influences their behaviour at the festival.

Each cluster identified by the cluster analysis is profiled and a distinction between them can be made.

- This information allows festival marketers/organisers to design marketing strategies aimed at each cluster based on their individual needs and preferences. More importantly, a customised festival programme can be designed which incorporates every clusters needs.
- This method of segmentation gives a detailed profile of festival visitors and allows festival marketers/organisers to effectively target visitors' needs. Giving visitors what they want will not only increase ticket sales but also ensure repeat visitation.

#### **Disadvantages:**

- Since this method of segmentation is based on visitors' travel motives, the section in the questionnaire measuring different motives should be carefully considered and formulated. It is important to use previous research on travel motives, such as the work of Crompton (1979), as well as Crompton and McKay (1997), to adapt the motives according to the unique characteristics of each festival. If the motivational items are not carefully considered, items will cross-load when doing the factor analysis, making it difficult to create and name the factors as well as to cluster the visitors. Designing the questionnaire is therefore a time consuming process.
- It is crucial that the section on travel motives is completed meticulously, and both the field workers and visitors should be informed about this.
- A large number of visitors should therefore be targeted, increasing the number of questionnaires and this also implies increased costs.

#### **b) Identifying the determinants of visitor spending at art festivals**

In Article 2, a regression analysis was applied to identify the most significant socio-demographic and behavioural determinants that influence visitor spending at Aardklop. Both socio-demographic (home language, gender, age, occupation and province of origin), behavioural (group size, number of people paid for, number of days and nights, years attended, attendance of other festivals and main reason) as well as travel motives, type of shows/productions attended and type of media were included in the analysis. The results revealed that the following determinants have a significant influence on higher spending at the festival:

- Higher discretionary disposable income has a positive influence on higher spending.
- Older visitors spend more than younger visitors.
- Visitors who travel in smaller groups and who attend other festivals spend more.
- Visitors who purchase more tickets and who prefer dance theatre shows/productions tend to spend more.

### **Advantages:**

- By determining the socio-demographic and behavioural determinants, the marketers/organisers are able to address certain factors influencing higher spending at the festival. If, for example, the main aim is to increase tickets sales for the festivals shows/productions, knowledge of the preferred type of shows/productions can assist the marketers/organisers to adapt the festival programme accordingly and showcase more of these types of shows/productions and associated artists. The same applies for other important issues such as increasing length of stay and overall personal expenditure.
- The information provided by this method of segmentation can be used in conjunction with any other segmentation approach to increase the overall expenditure of the identified market segments.

### **Disadvantages:**

- This method does not give a detailed profile of the high spenders or differentiate between different segments at the festival and only identifies certain characteristics which influence visitor spending.
- This method of segmentation gives a holistic view of the entire festival market and the determinants that influence their spending.
- This method is dependent on complete spending information and, if the section on visitor expenditure is not completed, that particular visitor's information is discarded resulting in fewer usable questionnaires.

### **c) Differentiating genre attendees and non-genre attendees**

An independent *t*-test was used in Article 2 to differentiate genre attendees and non-genre attendees at Aardklop. Non-genre attendees at Aardklop are characterised by their younger age, shorter stays, fewer years attended, fewer tickets purchased and lower spending. The genre attendees, on the other hand, can be distinguished from non-genre attendees by the following characteristics:

- They stay longer at the festival and, as a result, spend more money.
- They are older and buy tickets supporting the festival's shows/productions - especially drama, music theatre and cabaret and comedies.
- They are loyal visitors who have attended the festival more often and are motivated by *Festival productions*.

### **Advantages:**

- This method of segmentation gives a profile of each genre and non-genre attendee at the festival. With this information, a customised festival programme can be developed aimed at

genre supporters. This should increase ticket sales, ensure continuous growth and maximise the economic impact.

- Since a detailed description of the other segments is also given, the festival's marketers/organisers can identify other possible segments which can be targeted to ensure the future sustainability of the festival.
- Possible gaps in the festival programme can also be identified and addressed.
- More importantly, non-genre attendees can be persuaded to support more ticketed shows/productions.

#### **Disadvantages:**

- This method of segmentation does not profile visitors based on other demographic and geographic variables such as occupation, province of residence, media usage and other festivals attended. The information included in the analyses is therefore limited.
- However, cross-tabulations with chi-square can be employed to profile the visitors demographically. It is recommended that this information is attached as an appendix, since it will be quite lengthy.

#### **d) Discriminating between first-time and repeat visitors at art festivals**

In Article 4, frequency of visitation was used and a distinction was made between first-time and repeat visitors at the KKNK. First-time visitors are slightly younger, travel longer distances and spend fewer days and nights at the festival, are motivated more by *Relaxation and socialisation* and also spend a significant amount of money during their visit while repeat visitors stay longer, have a higher level of satisfaction with the festival, and are therefore more likely to attend again in the future, purchase significantly more tickets and are motivated more by *Festival attributes*. Both first-time and repeat visitors attend a variety of shows/productions which emphasises that both first-time and repeat visitors are viable markets.

#### **Advantages:**

- A detailed profile of both first-time and repeat visitors is given.
- This method of segmentation allows festival organisers/marketers to develop a two-pronged marketing strategy, recognising both groups of visitors as important for the future of the festival.

#### **Disadvantages:**

- This method of segmentation is dependent on a significant percentage of first-time visitors. If the festival does not attract a high number of first-time visitors, repeat visitors cannot be

divided into fairly equal groups. For the analysis to be successful, it is recommended that a minimum of 20% of the total visitors are first-time visitors.

- Distinguishing first-time and repeat visitors also works better when applied to younger festivals (15 years and less) since the grouping of visitors becomes more difficult with older festivals, resulting in more clusters with few or no significant differences between them.
- The questionnaire should furthermore include a question(s) which allows festival marketers/organisers to clearly distinguish between first-time and repeat visitors. Repeat visitors should, however, be asked to give the exact number of times they have attended the festival with an open question. Older festivals should consider giving categories since this will simplify the statistical analysis.

#### e) Clustering visitors based on genres attended

Visitors to the KKNK and Aardklop were clustered based on the types of genres attended at the festivals. Three clusters were identified for each festival: *Indifferent genre attendees*, *General genre attendees* and *Meticulous genre attendees* for Aardklop and *Alternative genre attendees*, *Children and variety genre attendees* and *Extreme genre attendees* for the KKNK.

#### Advantages:

- A detailed profile of each visitor segment is given and so not only can the most ardent genre supporters be identified, but previously neglected markets can also be identified and, with a customised festival programme, these visitors can be encouraged to purchase more tickets.

#### Disadvantages:

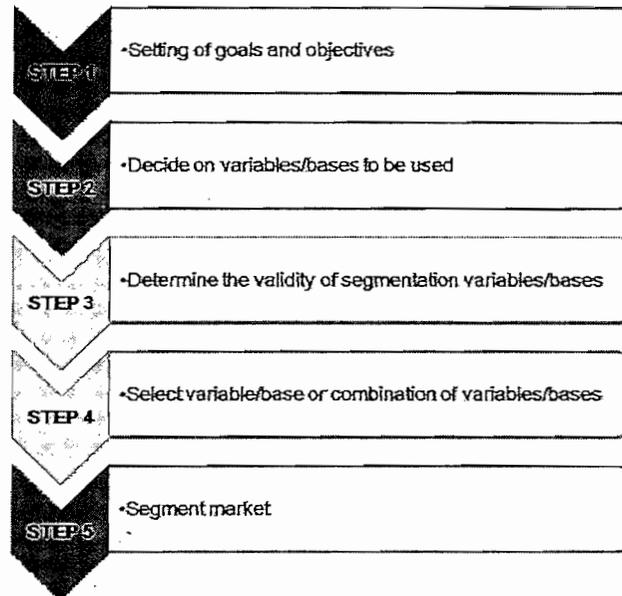
- Since each festival is unique, the section on the different genres attended at the festival is adapted for each festival. This makes it difficult to compare visitors to different art festivals.
- Visitors can choose all the genres attended during the festival, but do not indicate the number of tickets purchased for each genre. It is therefore difficult to determine the highest grossing genres and only the most popular genres can be assumed.

### 7.3 CONCLUSIONS FROM THE SURVEYS

- Based on the above-mentioned critical analysis, the following important findings have emerged:
- Firstly, the effectiveness of each analysis is dependent on a significant number of respondents, especially genre attendees, completing the questionnaires. It is therefore imperative that visitors are targeted at various show venues at the respective festival grounds. Visitors should also be informed about the importance of the survey and be encouraged to complete the questionnaire in as much detail as possible.

- Secondly, the questionnaire should be designed with the goal of the analysis in mind and careful consideration should be given to the type of questions and statements included. Previous research should be consulted and it is advised that a pilot study is done to determine whether the questions are understood correctly.
- Thirdly, it is also clear that certain analyses are based and dependent on the results from a previous analysis. This emphasises the importance of the first two findings as well as the fact that certain approaches provide better information when used in combination than alone.
- Lastly, there are many approaches that can be used to segment the festival market, but only a few that accurately answer the question: "Which target market(s) are the most viable to target to increase ticket sales?"

With the last finding in mind, the proposed criteria for an optimum market segmentation approach for arts festivals, as discussed below, is based on the conclusions of the study and forms an integral part of the recommendations emanating from the study. Based on the conclusions from this study, Figure 7.1 shows five steps which are needed to determine and select the right variable or combination of variables used to segment the festival market. Step 1 refers to the setting of goals and objectives since this is a prerequisite for successful market segmentation. The main goal of South African arts festivals such as the KKNK and Aardklop is to promote the arts in Afrikaans as well as to have a significant economic impact on their respective host regions. Therefore a primary objective of arts festivals is to increase ticket sales, since this will allow them to stay true to their main goal. Based on the goal and objective, festival managers/organisers must decide on the best variable/base or combination of variables/bases to segment the market (Step 2). Since a combination of variables/bases is often used, the validity of the chosen segmentation variables/bases must be determined (Step 3). It is only after the variables/bases are critically evaluated that festival marketers/organisers can select them (Step 4) and use them to segment the festival market (Step 5).



*Figure 7.1: Variable selection process*

Since Step 4 and Step 5 (and therefore successful segmentation) is dependent on Step 3, this step can be seen as the most important and critical part of the variable selection process. Therefore, based on the critical evaluation of the selected segmentation variables/bases discussed in the previous section (7.2.2), as well as on the main goal of the South African arts festivals, it is recommended that the variables outlined in Figure 7.2 are used in combination to effectively and comprehensively segment the festival market, especially to increase ticket sales.

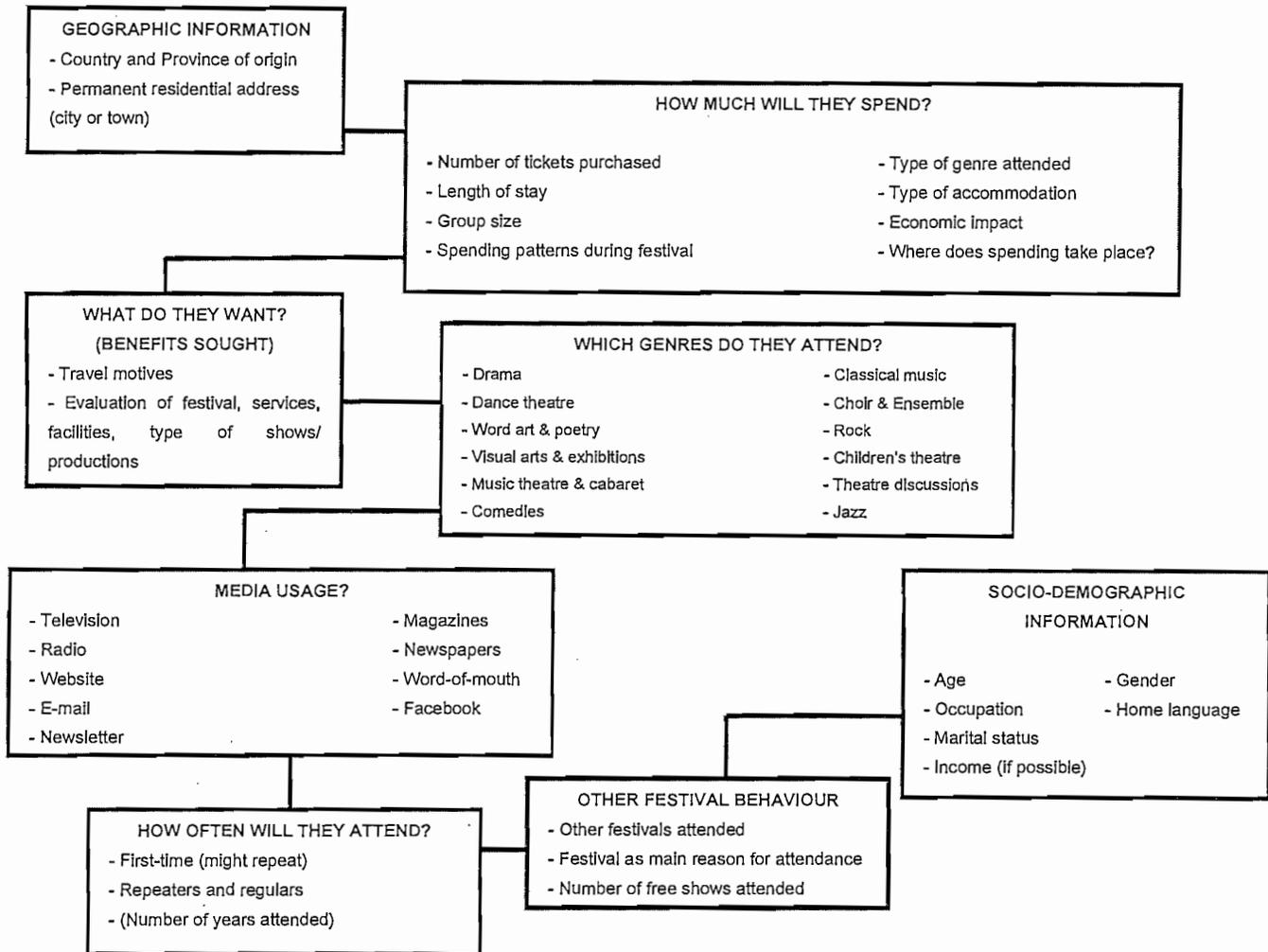


Figure 7.2: Variables/bases for successful market segmentation of visitors to arts festivals

#### 7.4 RECOMMENDATIONS WITH REGARD TO THE SURVEYS

This study critically evaluated various approaches to the segmentation of visitors to South African national arts festivals in order to comprehensively segment the festival market and to increase ticket sales. Based on the critical evaluation, it is clear that, for South African arts festivals, a combination of variables/bases is needed to comprehensively segment visitors - especially with the aim of increasing ticket sales. Based on the latter, visitors' travel motives seem to be the most important variable/base used in this study since this effectively profiles visitors based on their needs. In addition, this method of segmentation can be applied successfully to increase ticket sales by giving visitors what they want with a customised festival programme and marketing strategy. Travel motives were used in every other analysis applied in this study. It is therefore an imperative part of any segmentation analysis for arts festivals. Measuring the main desires visitors are seeking to satisfy at the festival and the motivational factors that lead to the preference of a particular festival gives a more detailed profile of the

visitors and enables marketers/organisers to better address their needs with a tailor-made festival programme.

However, to effectively increase ticket sales, the most efficient segmentation variable/base appears to be the genres attended. Distinguishing between genre attendees and non-attendees, clustering visitors based on the type of shows/productions attended at the festival, as well as travel motives, socio-demographic and behavioural variables, not only allows festival organisers to identify the most popular genres, but also helps to identify gaps in the festival programme. Diversified marketing strategies can be designed to attract and retain new and loyal visitors. This method of segmentation shows that all the genres included in the festival programme are regarded as important and therefore valued by the visitors. Some genres are, however, underestimated and neglected by festival organisers. With the information provided by these segmentation approaches, marketing strategies can be adapted to effectively promote the complete genre package at the festival. Conversely, the other variables/bases applied in this study (determinants of spending and frequency of visitation) provided invaluable information which is needed in the analysis of these segmentation approaches. The latter therefore emphasises that a combination of variables/bases (as outlined in Figure 7.2) should be used to comprehensively profile festival visitors. Market segmentation should furthermore be done on a regular basis to keep up with market trends.

## **7.5 RECOMMENDATIONS FOR FUTURE FESTIVALS**

Based on the conclusions discussed above and the research results, the following recommendations can be made:

- From a marketing point of view, the KKNK's focus should primarily be on four markets located in the Western Cape, Eastern Cape, Gauteng, and the immediate surroundings of Oudtshoorn as well as nearby towns. Aardklop, on the other hand, should focus its marketing strategy on two markets, Gauteng and North West Provinces. Although visitors from the Western Cape, North West and surrounding regions are mostly day visitors at the KKNK and Aardklop, marketing strategies should continue intensively in these areas as most of the festivals' current loyal market originates from here. Marketing efforts from both festivals should, however, be intensively focused on Gauteng province, since visitors from this province are willing to travel the distance to attend the festivals. KKNK's marketers/organisers could consider discounts for visitors travelling more than 300 km to attend the festivals. This could encourage visitors from other provinces to travel to Oudtshoorn. Visitors travelling from Gauteng to attend Aardklop could also be given special festival packages since this could encourage visitors to stay more days in Potchefstroom and to attend more shows/productions.

- A distinction should be made between the festival enthusiasts (who are interested in the arts and who buy tickets for the shows/productions) and the other visitors (who, for example, come for the shopping at the stalls), as the festival enthusiasts are more likely to travel for the main purpose of attending the festival, stay longer and spend more. The festival enthusiasts' main motivations for attending the festival should also be used to adapt and design the festival programme and product accordingly.
- With the growth of other festivals, it is important to position the KKNK and Aardklop very strongly in the minds of their current markets. The festivals have a strong base of loyal visitors, and the festivals should therefore focus on continuing to satisfy the needs of these loyal visitors. Results from this study revealed that visitors at both festivals prefer to buy tickets, especially for the drama, music theatre and cabaret and comedy shows/productions. These types of shows/productions, along with the artists involved, should be marketed more intensively. The wide variety of other Afrikaans shows/productions should also be marketed because visitors are developing an interest in a variety of shows/productions the more often they visit the festivals. The selection of the artists and types of productions should therefore be a high priority for the festivals' organisers. The majority of the visitors are Afrikaans-speaking and both festivals should continue to meet their needs and promote Afrikaans arts and culture by showcasing South Africa's best Afrikaans musicians and artists. This will also encourage more first-time visitors to the festivals.
- Market research should be carried out regularly for the festivals' marketers/organisers to stay aware of new trends and changes in visitor preferences so that they can adapt marketing efforts accordingly. Through effective marketing aimed at the right target markets, love for the arts can be increased and promoted. This will ultimately lead to a sustainable growth in ticket sales.
- The KKNK and Aardklop have loyal visitors, but the festivals' current and ardent genre supporting market is ageing with the festival. A new, younger market should be targeted to make the festivals sustainable in the future. The student market is a potential viable market which the festivals' marketers/organisers should consider. Market research should be carried out to determine the likes and dislikes of this market and to determine which types of shows and artists they are interested in, as well as how much they are willing to pay to see them perform. A differentiated marketing strategy is recommended to ensure continuous growth. Along with marketing efforts aimed at the current high spending and loyal market, the festivals' marketers should consider a separate marketing campaign aimed at the youth, promoting shows/productions that will interest them. These shows/productions should also be less expensive than the festivals' main productions.

- The festivals' organisers must keep the spending patterns of the visitors in mind as well as their genre preferences and should consider adapting ticket prices for certain types of shows/productions to make them more affordable. A diversified pricing strategy is recommended, where some shows/productions are charged at a higher price, while others are less expensive. The festivals' marketers/organisers should also consider discounts or a special festival package for pensioners, students, travelling groups of more than five, visitors buying more than 10 tickets/5 tickets and/or for visitors travelling more than 500 km to Oudtshoorn/200 km to Potchefstroom. This could encourage people to travel in larger groups and stay longer at the festivals resulting in a greater economic impact.
- More community theatre productions can be considered. Ticket prices will not only be less expensive but the local community of Oudtshoorn/Potchefstroom will also get a chance to benefit more from the festival. This could also encourage members of the community, who cannot normally afford to see paid productions, to experience the festival. The KKNK and Aardklop should, however, guard against becoming a community festival, since this will not encourage more visitors to attend the festival or buy more tickets for the shows/productions.

## 7.6 RECOMMENDATIONS FOR FUTURE RESEARCH

Based on this research, the following aspects need to be further researched:

- This research should also be conducted at the Grahamstown National Arts Festival to compare the results for the three major arts festivals in South Africa, and determine the unique characteristics of each festival's market. The demographic profile of festival visitors to the Grahamstown National Arts Festival differs significantly to those of the KKNK and Aardklop, since it is predominantly an English festival. Since the Grahamstown National Arts Festival is a community festival, mainly focusing on visual arts and dance theatre, it would be interesting to determine the most effective combination of variables/bases that could be used to increase ticket sales for this festival, and how this compares to those of the KKNK and Aardklop. The total festival market can thus be studied and gaps in the market can be identified. It can also be determined whether the market is already saturated before a festival reaches the decline phase in its product life cycle. The results can then be applied to ensure sustainable and competitive arts festivals in the country.
- The shows/productions attended at the festivals should be analysed in more detail and respondents should be allowed to specify the number of tickets purchased for each genre. This will give a better indication of the most preferred and popular genres attended at the festival. The main reasons visitors choose certain genres should also be studied, since it can then be determined whether visitors prefer these type of genres because they are more

affordable, or due to the well-known artists or impressive critical reviews. This will aid festival marketers/organisers to adapt and design a festival programme which includes the right combination of genres since this will encourage visitors to purchase more tickets.

- The effectiveness of the current marketing methods and campaigns as well as their influence on visitors' decisions to attend the festival, should also be analysed. This will provide invaluable information, since the results of market segmentation are mainly used to design tailor-made and cost-effective marketing strategies aimed at the right target market(s).
- The influence of the festivals' product life cycles on visitor numbers, interest and number of tickets purchased should also be researched since this information can be used to ensure more sustainable festivals by providing the right combination of festival elements.

From this study, it is evident that market segmentation must be done on a regular basis at South African arts festivals and that the combination of variables should be continually tested and adapted according to the unique characteristics of the festival as well as the festival market. The results provided by this innovative study are therefore invaluable for future market segmentation research.

# APPENDIXES

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## APPENDIX 1A: Aardklop visitor questionnaire

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# AARDKLOP BESOEKERSPROFIEL 2009 / AARDKLOP VISITOR SURVEY 2009

## AFDELING A / SECTION A

1. Geslag/ Gender?

M	1
V/F	2

2. Watter jaar is jy gebore? /

Which year were you born?

3. Huistaal/ Language?

Afrikaans	1
Engels/ English	2
Ander (Spesifiseer) / Other (Specify):	3

4. Beroep/ Occupation?

Professioneel/ Professional	1
Bestuur/ Management	2
Self-werkgewend/ Self-employed	3
Tegniese personeel/ Technical	4
Verkoopspersoneel/ Sales	5
Boer/ Farmer	6
Mynboul/ Mining	7
Administratief/ Administrative	8
Staatsdienswerknemer/ Civil service	9
Opvoeding / Education	10
Huisvrou/ House wife	11
Pensionaris/ Pensioner	12
Student	13
Werkloos/ Unemployed	14
Ander (Spesifiseer) / Other (Specify):	15

5. Insluitend uself, hoeveel persone is in u reisgeselskap? / Including yourself, how many people are travelling in your group?

Aantal/ Number

6. Insluitend uself, vir hoeveel persone betaal u tydens die fees? / Including yourself, how many people are you paying for at the festival?

Aantal/ Number

7a. Hoeveel dae spandeer u by die fees? / How many days are you staying at the festival?

Aantal/ Number

7b. Hoeveel nagte bly u in Potchefstroom? / How many nights do you stay over in Potchefstroom?

Aantal/ Number

8. Provinsie/ Province?

Noord-Wes/ North West	1
Gauteng	2
Oos-Kaap/ Eastern Cape	3
Vrystaat/ Free State	4
Wes-Kaap/ Western Cape	5
Mpumalanga	6
Noord-Kaap/ Northern Cape	7
KwaZulu-Natal	8
Limpopo	9
Buite RSA/ Outside RSA borders	10

9. Naastenby hoeveel Rand bestee u gedurende u besoek aan Aardklop op die volgende items? / Estimate how much you spend on the following items during your visit to Aardklop.

Toegangsgeld / Entrance fee	R
Akkommodasie/ Accommodation	R
Voedsel & Restaurante/ Food and restaurants	R
Alkoholiese drankies/ Alcoholic drinks	R
Nie-alkoholiese drankies/ Non-alcoholic drinks	R
Vertonings/ Shows	R
Inkopies by kleinhandelwinkels (Voedsel & drank uitgesluit)/ Retail Shopping (Excluding food & drinks)	R
Inkopies by stalletjies (Voedsel & drank uitgesluit) / Shopping at stalls (Excluding food & drinks)	R
Vervoer na Aardklop (Retoeer) / Transport to Aardklop (Return)	R
Vervoer tydens Aardklop/ Transport during Aardklop	R
Parkerings/ Parking	R
Ander (Spesifiseer) / Other (Specify):	R

10. In watter dorp of stad woon u permanent? / In which town or city do you live permanently?

11. Watter tipe verblyf gebruik u? / What type of accommodation do you use during your stay?

Woon in Potch/ Local resident	1
Familie of Vriende/ Family or Friends	2
Gastehuis & B&B/ Guesthouse or B&B	3
Hotel	4
Kampeer/ Camping	5
Huur volle huis/ Rent full house	6
Dagbesoeker/ Day visitor	7
Koshuis/ Hostel	8
Ander (Spesifiseer) / Other (Specify):	9

**AFDELING B/SECTION B**

12. Hoeveel kaartjies koop u vir vertonings /  
How many tickets will you purchase for shows?

Aantal / Number:

13. Vir watter tipe vertonings het u kaartjies gekoop? /  
For which type of shows did you buy tickets?

Drama	Ja/Yes	Nee/No
Woordkuns, poësie/ Word art & poetry	Ja/Yes	Nee/No
Kinderteater/ Childrens' theatre	Ja/Yes	Nee/No
Teatergesprekke / Theatre discussions	Ja/Yes	Nee/No
Musiekteater & kabaret/ Music theatre & cabaret	Ja/Yes	Nee/No
Klassieke musiek/ Classical music	Ja/Yes	Nee/No
Koor & Ensemble / Choir & Ensemble	Ja/Yes	Nee/No
Rock	Ja/Yes	Nee/No
Visuele kuns & uitstallings / Visual art & exhibitions	Ja/Yes	Nee/No
Komedie / Comedy	Ja/Yes	Nee/No
Ander (Spesifiseer) / Other (Specify):	Ja/Yes	Nee/No

14. Is die fees die hoof/enigste rede vir u besoek aan Potchefstroom? / Is the festival the only/main reason for your visit to Potchefstroom?

Ja / Yes	1
Nee / No	2
Inwoner / Local	3

15. Watter van die ander kunstefeeste het u die afgelope 3 jaar bygewoon? / Which of the following arts festivals did you attend in the past 3 years?

KKNK	Ja/Yes	Nee/No
Grahamstad / Grahamstown	Ja/Yes	Nee/No
Volksblad	Ja/Yes	Nee/No
Innibos	Ja/Yes	Nee/No
Ander (Spesifiseer) / Other (Specify)	Ja/Yes	Nee/No

16. Hoeveel gratis vertonings woon u by? /  
How many free shows do you attend?

Aantal / Number:

17. Spesifiseer watter gratis vermaak u gewoonlik bywoon. /  
Specify which free entertainment you normally attend.

Kunsuitstallings/ Art exhibitions	Ja/Yes	Nee/No
Boekeparadys/ Book exhibition	Ja/Yes	Nee/No
ATKV-verhoog / ATKV stage	Ja/Yes	Nee/No
Beeldtent	Ja/Yes	Nee/No
Ander (Spesifiseer) / Other (Specify):	Ja/Yes	Nee/No

18. Watter van die volgende betaalde verhoë/konserte gaan u bywoon? / Which of the following paid venues/concerts are you planning to attend?

Klipdrieff (musiekverhoog/music stage)	Ja/Yes	Nee/No
Rapport (musiekverhoog/music stage)	Ja/Yes	Nee/No
Klip inni Bos (musiekverhoog/music stage)	Ja/Yes	Nee/No
Oppi-Aarde	Ja/Yes	Nee/No
Gatskopkonsert	Ja/Yes	Nee/No
Anglo Gold Ashanti	Ja/Yes	Nee/No
Meduna Jazz Fountain	Ja/Yes	Nee/No

19. Watter van die volgende borge kan u met die fees assosieër? / Which of the following sponsors can you identify with Aardklop?

ABSA	Ja/Yes	Nee/No
Beeld	Ja/Yes	Nee/No
Kyknet	Ja/Yes	Nee/No
Media 24	Ja/Yes	Nee/No
National Lottery	Ja/Yes	Nee/No
O-Fm	Ja/Yes	Nee/No
SABC 2	Ja/Yes	Nee/No
Vodacom	Ja/Yes	Nee/No
Ander/ Other; Spesifiseer/ Specify	Ja/Yes	Nee/No

20. Hoe weet u dat hierdie instansies Aardklop borg? /  
How do you know that these organisations sponsor Aardklop?

Advertensies voor/tydens fees/ Adverts before and after festival	Ja/Yes	Nee/No
Plakkate/ Posters by/at venues	Ja/Yes	Nee/No
Borgtente op feesterrein/ Tents	Ja/Yes	Nee/No
Groot skerm by terrein/ Big screen	Ja/Yes	Nee/No
Gelees in feesboek/ Read in "feesboek"	Ja/Yes	Nee/No
Ander/ Other; Spesifiseer/ Specify	Ja/Yes	Nee/No

21. Insluitend 2009, hoeveel jare van te vore het u al Aardklop bygewoon? / Including 2009, how many years have you previously been at Aardklop?

Aantal / Number:

**AFDELING C / SECTION C**

22. Beoordeel volgens die skaal waarom u Aardklop besoek. / Rate on the scale of importance why you visit Aardklop.

	Uiters belangrik / Extremely important				
	Baie belangrik / Very important				
	Belangrik / Important				
	Minder belangrik / Less important				
	Glad nie belangrik / Not at all important				
a. om weg te kom van my normale roetine / to get away from my routine	1	2	3	4	5
b. om te ontspan / to relax	1	2	3	4	5
c. om tyd saam met familie te spandeer / to spend time with family	1	2	3	4	5
d. om tyd saam met vriende te spandeer / to spend time with friends	1	2	3	4	5
e. om nuwe mense te ontmoet / to meet new people	1	2	3	4	5
f. Aardklop is anders as ander feeste / Aardklop is different to other festivals	1	2	3	4	5
g. verskeidenheid produksies / variety of productions	1	2	3	4	5
h. kwaliteit produksies / quality productions	1	2	3	4	5
i. lekker sosiale fees / sociable festival	1	2	3	4	5
j. kaartjiepryse is billik / ticket prices are reasonable	1	2	3	4	5
k. dit is die naaste fees vir my / it is the closest festival for me	1	2	3	4	5
l. tot voordeel van my kinders / to the benefit of my children	1	2	3	4	5
m. om bekende kunstenaars te sien / to see well-known performers	1	2	3	4	5
n. om die kosstalletjies te ondersteun / to support the food stalls	1	2	3	4	5
o. om die stalletjies te besoek / to support the stalls	1	2	3	4	5
p. om kunswerke aan te koop / to buy arts	1	2	3	4	5
q. dit is 'n jaarlikse instelling / it is an annual commitment	1	2	3	4	5
r. om die omgewing te verken / to explore the environment	1	2	3	4	5
s. dit is primêr 'n Afrikaanse fees / it is primarily an Afrikaans festival	1	2	3	4	5

23. Hoe het u van Aardklop gehoor? / How did you hear about Aardklop?

Televisie/ TV	Ja/Yes	Nee/No
Radio	Ja/Yes	Nee/No
Aardklop Webwerf/ Website	Ja/Yes	Nee/No
Aardklop E-Pos/ E-mail	Ja/Yes	Nee/No
M-Web nuusbrieff / Newsletter	Ja/Yes	Nee/No
Tydskrifte/ Magazines	Ja/Yes	Nee/No
Koerante/ Newspapers	Ja/Yes	Nee/No
Hoorsê/ Word of mouth	Ja/Yes	Nee/No
Ander (Spesifiseer) / Other (Specify):	Ja/Yes	Nee/No

24. Sal u Aardklop weer besoek? / Would you visit Aardklop again?

Ja, beslis/ Yes, definitely	1
Nee, beslis nie/ No, definitely not	2
Miskien / Perhaps	3

**AFDELING D / SECTION D**

25. Hoe sal u Aardklop evalueer in terme van die volgende aspekte?/  
*How would you evaluate Aardklop according to the following aspects?*

	Stem glad nie saam nie / Totally disagree	Stem nie saam/ Do not agree	Neutraal / Neutral	Stem saam / Agree	Stem definitief saam / Totally agree
a. Kaartjie verkope is effektief / <i>Ticket sales are effective</i>	1	2	3	4	5
b. Diens by produksies is effektief / <i>Service at productions are effective</i>	1	2	3	4	5
c. Prys van verblyf is billik / <i>Price of accommodation is reasonable</i>	1	2	3	4	5
d. Kwaliteit van vertonings is uitstekend / <i>The quality of shows is excellent</i>	1	2	3	4	5
e. Diens/pryse van restaurante is goed / <i>Service/prices of restaurants are good</i>	1	2	3	4	5
f. Uitleg van feesterrein is goed / <i>Layout of festival area is good</i>	1	2	3	4	5
g. Aardklop word goed georganiseer / <i>Aardklop is well organised</i>	1	2	3	4	5
h. Inligting oor die fees is beskikbaar / <i>Information about the festival is available</i>	1	2	3	4	5
i. Verskeidenheid van produksies is goed / <i>Variety of productions are good</i>	1	2	3	4	5
j. Kaartjiepryse is billik / <i>Ticket prices are reasonable</i>	1	2	3	4	5
k. Pendeldiens is uitstekend / <i>The taxi service is excellent</i>	1	2	3	4	5

26. Enige ander voorstelle/ *Any other suggestions?*

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**Dankie vir u samewerking!!!  
 Thank you for your co-operation!!!**

## APPENDIX 1B: KKNK visitor questionnaire

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**AFDELING A / SECTION A**

1. Geslag / Gender?

Manlik / Male	1
Vroulik / Female	2

 2. In watter jaar is u gebore? /  
Year of birth

3. Huistaal / Home language

Afrikaans	1
Engels / English	2
isiXhosa	3
Ander (Spesifiseer) / Other (Specify):	4

4. Beroep / Occupation

Professioneel / Professional	1
Bestuur / Management	2
Self-werkgewend / Self-employed	3
Tegniese personeel / Technical	4
Verkoopspersoneel / Sales	5
Boer / Farmer	6
Mynbou / Mining	7
Administratief / Administrative	8
Staatsdienswerknemer / Civil service	9
Opvoeding / Education	10
Huisvrou / Housewife	11
Pensionaris / Pensioner	12
Student	13
Werkloos / Unemployed	14
Ander (Spesifiseer) / Other (Specify):	15

5. Insluitend u self, hoeveel persone is in u reisgeselskap? / Including yourself, how many people are in your group?

 Aantal / Number 

6. Insluitend u self, vir hoeveel persone betaal u tydens die fees? / Including yourself for how many people are you paying for at the festival?

 Aantal / Number 

7a. Hoeveel dae spandeer u by die fees? / How many days are you staying at the festival?

 Aantal / Number 

7b. Hoeveel nagte bly u in Oudtshoorn? / How many nights do you stay over in Oudtshoorn?

 Aantal / Number 

8. In watter dorp of stad woon u permanent? / In which town or city do you live permanently?

9. Provinsie / Province?

Wes-Kaap / Western Cape	1
Gauteng	2
Oos-Kaap / Eastern Cape	3
Vrystaat / Free State	4
Noordwes / North West	5
Mpumalanga	6
Noord-Kaap / Northern Cape	7
KwaZulu-Natal	8
Limpopo	9
Buite RSA-grense / Outside RSA borders	10

10. Naastenby hoeveel Rand bestee u gedurende u besoek aan Absa KKNK op die volgende items? / Estimate how much you spend on the following items during your visit to Absa KKNK

Akkommodasie / Accommodation	R
Voedsel & Restaurante / Food and restaurants	R
Alkoholiese drankies / Alcoholic drinks	R
Nie-alkoholiese drankies / Non-alcoholic drinks	R
Vertonings / Shows	R
Inkopies by kleinhandelwinkels (Voedsel & drank uitgesluit) / Retail Shopping (Excluding food & drinks)	R
Inkopies by stalletjies (Voedsel & drank uitgesluit) / Shopping at stalls (Excluding food & drinks)	R
Pretparke & Avontuuraktiwiteite / Amusement parks & Adventure activities	R
Vervoer na Absa KKNK (Retoeer) / Transport to Absa KKNK (Return)	R
Vervoer tydens Absa KKNK / Transport during Absa KKNK	R
Parkering / Parking	R
Ander (Spesifiseer) / Other (Specify):	R

11. Watter tipe verblyf gebruik u? / What type of accommodation do you use during your stay?

Inwoner van Oudtshoorn / Local resident	1
Familie of vriende / Family or friends	2
Geregistreerde gastehuis of B&B / Registered guesthouse or B&B	3
Feesgastehuis (net tydens fees) / Festival guesthouse (only during the festival)	4
Hotel	5
Kampeer / Camping	6
Huur 'n woning / Rent a house	7
Trein by stasie / Train at station	8
Dagbesoeker / Day visitor	9
Koshuis / Hostel	10
Ander (Spesifiseer) / Other (Specify):	11

12. Is u verblyf verder as 20km uit Oudtshoorn? / Is your accommodation more than 20km outside Oudtshoorn?

**AFDELING B / SECTION B**

13. Beoordeel volgens die skaal waarom u Absa KKNK besoek. / Rate on the scale of importance why you visit Absa KKNK.

	Uiters belangrik / Extremely important				
	Baie belangrik / Very important				
	Belangrik / Important				
	Minder belangrik / Less important				
	Glad nie belangrik / Not at all important				
1. om weg te kom van my normale roetine / to get away from my routine	1	2	3	4	5
2. om te ontspan / to relax	1	2	3	4	5
3. om tyd saam met familie te spandeer / to spend time with family	1	2	3	4	5
4. om tyd saam met vriende te spandeer / to spend time with friends	1	2	3	4	5
5. om nuwe mense te ontmoet / to meet new people	1	2	3	4	5
6. Absa KKNK is anders as ander feeste / Absa KKNK is different to other festivals	1	2	3	4	5
7. verskeidenheid produksies / variety of productions	1	2	3	4	5
8. kwaliteit produksies / quality productions	1	2	3	4	5
9. lekker sosiale fees / sociable festival	1	2	3	4	5
10. dit is die naaste fees vir my / it is the closest festival for me	1	2	3	4	5
11. tot voordeel van my kinders / to the benefit of my children	1	2	3	4	5
12. om bekende kunstenaars te sien / to see well-known performers	1	2	3	4	5
13. om die stalletjies te besoek / to support the stalls	1	2	3	4	5
14. om kunswerke aan te koop / to buy art	1	2	3	4	5
15. dit is 'n jaarlikse instelling / it is an annual commitment	1	2	3	4	5
16. om die omgewing te verken / to explore the environment	1	2	3	4	5
17. dit is primêr 'n Afrikaanse fees / it is primarily an Afrikaans festival	1	2	3	4	5
18. die fees bied 'n unieke vakansie-ervaring / the festival provides a unique holiday experience	1	2	3	4	5
19. die bekendstelling van nuwe hoofproduksies by die fees / the introduction of new flagship productions at the festival	1	2	3	4	5
20. die fees bevorder kulturele integrasie / the festival promotes cultural inclusiveness	1	2	3	4	5
21. die fees is waarde vir geld / the festival is value for money	1	2	3	4	5

**AFDELING C / SECTION C**

14a. Is dit u eerste besoek aan die fees? / Is this your first visit to the festival?

Ja / Yes	1
Nee / No	2

14b. Indien nee, insluitende 2009, hoeveel jare van te vore het u al Absa KKNK bygewoon? / If no, including 2009, how many years have you previously been at Absa KKNK?

Aantal / Number

15. Is die fees die hoof/enigste rede vir u besoek aan Oudtshoorn? / Is the festival the only/main reason for your visit to Oudtshoorn?

Ja / Yes	1
Nee / No	2
Inwoner / Local	3

16. Watter van die ander kunstefeeste het u die afgelope 3 jaar bygewoon? / Which of the following arts festivals did you attend in the past 3 years?

Aardklop	1
Grahamstad / Grahamstown	2
Volksblad	3
Innibos	4
Ander (Spesifiseer) / Other (Specify)	5

17. Wanneer is u besluit om die Absa KKNK by te woon, geneem? / When did you make your decision to visit Absa KKNK?

Spontane besluit / Spontaneous decision	1
Minder as 'n maand gelede / Less than a month ago	2
Meer as 'n maand gelede / More than a month ago	3
Ander / Other; Spesifiseer / Specify	4

18. Hoeveel kaartjies koop u vir vertonings /  
How many tickets will you purchase for shows?

Aantal / Number:

19. Vir watter tipe vertonings het u kaartjies gekoop? /  
For which types of shows did you buy tickets?

Drama	1
Danstheater & beweging / Dance theatre	2
Woordkuns, poësie / Word art, poetry	3
Kindertheater / Children's theatre	4
Teatergesprekke / Theatre discussions	5
Musiekteater & kabaret / Music theatre & cabaret	6
Klassieke musiek / Classical music	7
Koor & Ensemble / Choir & Ensemble	8
Rock	9
Visuele kuns & uitstallings / Visual arts & exhibitions	10
Komedie / Comedy	11
Jazz	12
Ander (Spesifiseer) / Other (Specify):	13

20a. Woon u gratis vertonings by? / Do you attend free shows?

Ja / Yes	1
Nee / No	2

20b. Indien Ja, hoeveel? / If yes, how many?

Aantal / Number:

21. Sal u Absa KKNK weer besoek? / Would you visit Absa KKNK again?

Ja, beslis / Yes, definitely	1
Nee, beslis nie / No, definitely not	2
Miskien / Perhaps	3

22a. Watter van die volgende borge kan u met die fees assosieer? / Which of the following sponsors do you associate with Absa KKNK?

Absa	Ja/Yes	Nee/No
Media 24	Ja/Yes	Nee/No
Die Burger	Ja/Yes	Nee/No
Vodacom	Ja/Yes	Nee/No
Toyota	Ja/Yes	Nee/No
Klipdrift	Ja/Yes	Nee/No
Kyknet	Ja/Yes	Nee/No
ATKV	Ja/Yes	Nee/No
RSG	Ja/Yes	Nee/No
Huisgenoot	Ja/Yes	Nee/No
Ander / Other; Spesifiseer / Specify	Ja/Yes	Nee/No

22b. Hoe weet u dat hierdie instansies Absa KKNK borg? / How do you know that these organisations sponsor Absa KKNK?

Advertensies voor/tydens fees / Adverts before and after festival	Ja/Yes	Nee/No
Plakkate / Posters by/at venues	Ja/Yes	Nee/No
Borgtente op feesterrein / Tents	Ja/Yes	Nee/No
Groot skerm by terrein / Big screen	Ja/Yes	Nee/No
Gelees in feeskoerant / Read in festival newspaper	Ja/Yes	Nee/No
Ander / Other; Spesifiseer / Specify	Ja/Yes	Nee/No

23a. Hoe het u van Absa KKNK gehoor? / How did you hear about Absa KKNK?

Telesie / Television	Ja/Yes	Nee/No
Radio	Ja/Yes	Nee/No
Absa KKNK-Webwerf / Website	Ja/Yes	Nee/No
Absa KKNK E-pos / Email	Ja/Yes	Nee/No
Tydskrifte / Magazines	Ja/Yes	Nee/No
Koerante / Newspapers	Ja/Yes	Nee/No
Hoorsê / Word-of-mouth	Ja/Yes	Nee/No
Ander (Spesifiseer) / Other (Specify):	Ja/Yes	Nee/No

23b. Tot watter mate het die volgende media u besluit om Absa KKNK by te woon, beïnvloed? / Please indicate the extent to which the following media influenced your decision to attend Absa KKNK.

	Volkome / Completely			
	Tot 'n meerdere mate / To a greater extent			
	In 'n geringe mate / To a lesser extent			
	Glad nie / Not at all			
Telesie / TV	1	2	3	4
Radio	1	2	3	4
Absa KKNK Webwerf / Website	1	2	3	4
Absa KKNK E-pos / Email	1	2	3	4
Tydskrifte / Magazines	1	2	3	4
Koerante / Newspapers	1	2	3	4
Hoorsê / Word-of-mouth	1	2	3	4
Ander (Spesifiseer) / Other (Specify):	1	2	3	4

24a. Toon aan waar u tans inligting van Absa KKNK kry. / Indicate where you currently obtain information with regard to Absa KKNK.

24b. Hoe sal u verkies om inligting rakende Absa KKNK te ontvang? / How would you prefer to receive information with regard to Absa KKNK?

Koerante / Newspapers	Ja/Yes	Nee/No
Die amptelike feesgids / The official festival guide	Ja/Yes	Nee/No
Absa KKNK webwerf / Absa KKNK website	Ja/Yes	Nee/No
Ander (Spesifiseer) / Other (Specify)	Ja/Yes	Nee/No

24c. Maak u gebruik van die amptelike feesgids? /  
Do you make use of the official festival guide?

Ja/ Yes	Nee/ No
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24d. Indien ja, hoe verkies u om die feesgids te ontvang? / If yes, how would you prefer to receive the official festival guide?

	Ja / Yes	Nee / No
Saam met 'n kommersiële tydskrif? / With a commercial magazine? Watter tydskrif? / Which magazine?	1	2
As intekenaar / As subscriber	1	2
Om dit elektronies van die Internet af te laai / To download it from the Internet	1	2
Ander (Spesifiseer) / Other (Specify)	1	2

25. Enige ander voorstelle? / Any suggestions?

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26. Hoe sal u Absa KKNK evalueer in terme van die volgende aspekte? /  
How would you evaluate Absa KKNK according to the following aspects?

	STEM GLAD NIE NIE SAAM NIE/ TOTALLY DISAGREE	STEM NIE SAAM/ DO NOT AGREE	NEUTRAAL/ NEUTRAL	STEM SAAM/ AGREE	STEM DEFINITIEF SAAM/TOTALLY AGREE
Kaartjie verkope is toeganklik / Ticket sales are accessible	1	2	3	4	5
Voorportaal diens by produksies is effektief / Front of house service at productions is effective	1	2	3	4	5
Prys van verblyf is billik / Price of accommodation is reasonable	1	2	3	4	5
Kwaliteit van vertonings is uitstekend / The quality of shows is excellent	1	2	3	4	5
Diens/pryse by restaurante is goed / Service/prices at restaurants are good	1	2	3	4	5
Uitleg van feesterrein is goed / Layout of festival area is good	1	2	3	4	5
Absa KKNK word goed georganiseer / Absa KKNK is well organised	1	2	3	4	5
Inligting oor die fees is beskikbaar / Information about the festival is available	1	2	3	4	5
Kaartjiepryse is billik / Ticket prices are reasonable	1	2	3	4	5
Vermaak vir kinders is voldoende / Adequate entertainment for children	1	2	3	4	5
Parkering is goed georganiseer / Parking is well organised	1	2	3	4	5
Ander (Spesifiseer) / Other (Specify):	1	2	3	4	5

Dankie vir u samewerking! / Thank you for your co-operation!

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