Motives of circus attendees in South Africa: The case of Cirque du Soleil Dralion

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A B S T R A C T

The purpose of this research was to determine the motives of attendees to Cirque du Soleil's Dralion production in a developing country. The results revealed five key motives, namely uniqueness, enchantment and aesthetics, fun and entertainment, socialisation and social status and act affiliation. Clustering based on these motives revealed three distinct clusters namely Enthusiasts, Novices and Observers. These clusters show that attendees are not homogeneous in terms of their socio-demographic and behavioural profiles. While the Enthusiasts and Observers displayed similar characteristics to other clusters found in previous research, this research made a clear contribution in identifying Novices as a new emerging segment and suggesting the implications of retaining and expanding this market. The findings of this research can greatly assist marketers of these types of production to expand interest in the arts and increase accessibility to a larger audience.

Key words: Cirque du Soleil, motives, circus performance, South Africa

Circuses date back to the Roman Empire when the emperor held events filled with lions, elephants and chariot racing at the Circus Maximus and the Coliseum in Rome. With the fall of the Roman Empire, circus-type entertainment did not disappear completely, and jugglers, horse trainers, clowns and acrobats continued to entertain at fairs and castles (Zanola 2007). A circus represents a physical and visual art form that exists in its own right (not as an adjunct to theatre and dance) and is one of the most accessible art forms that exist today. Internationally, circus is flourishing with Canada, Russia, China, France, Belgium and Australia having notable circus schools, while Portugal, Sweden and Belgium have independent schools (Zanola 2007; 2008). Circuses have also changed significantly over time

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and are still undergoing major changes. The modern circus originated in 1768, when Philip Astley built the New British Riding School or Amphitheatre Riding Ring. It combined several exhibitions such as cavalry, horsemanship, clowning and vaulting. This form spread worldwide and became known as 'circus' (Burgess 1974). Nowadays, circus remains a popular form of art, and one of the most popular international circus companies is the Cirque du Soleil.

The Cirque du Soleil, based in Montreal, is an acrobatic circus company with 1500 acrobatic and non-acrobatic performers for its current touring and resident shows (Lamme 2011; Leslie & Rantisi 2011). Cirque du Soleil rose to prominence from their beginning in a mix of street theatre and circus in the early 1980s. This circus company has grown into a global corporation with over 3000 employees world-wide and $620 million in revenues (Lamey 2007). The Cirque is now one of Canada's largest cultural exports, and its success is particularly noteworthy considering the general decline in the circus arts over recent years (Kim & Mauborgne 2004). The Cirque entered this landscape not by competing with the traditional circus, but by redefining it altogether (Leslie & Rantisi 2011). It has become the most visible example of a 'new' form of circus, replacing animal acts with an all-human cast of dancers, acrobats, aerialists and clowns as well as world beat music, costumes, lighting and sets, woven together with a 'theme or guiding inspiration' (Albrecht 2006; Harvie & Hurley 1999; CirqueduSoleil.com 2014). The Cirque is therefore credited with having forged a hybrid – and in many ways post-modern – art form, combining the circus elements of dance, theatre, music and television. Each show is created from different circus styles from around the world, and performances are also transnational – shows contain no spoken language in order to appeal to international audiences (Leslie & Rantisi 2011). Cirque du Soleil is undoubtedly one of the most successful travelling circus acts; more than 100 million spectators have seen a Cirque du Soleil show since 1984, and close to 15 million people would have seen a Cirque du Soleil show in 2013 (CirqueduSoleil.com 2014).

While traditional circus is expanding internationally, there is a decline in traditional circuses, especially in South Africa. One of the most notable travelling circuses in South Africa was the family-based Boswell-Wilkie Circus which opened in 1882 and closed in 2002 due to difficult financial times and a decline in public support (Ricketts 2003). Davis (2002: 60) explains that "over the course of the 20th century, the rise of the urbanised, corporatised circuses and, later, the rise of a contemporary circus movement, replaced or altered the rationale of the family-based company". Increased pressure from animal rights activists also negatively affected the use of animals, a key feature in circuses (Einwohner 2002). Ricketts (2003:14) furthermore explains that "when music halls opened towards the end of the nineteenth century,

the end of circus seemed at hand. This was intensified with the opening of cinemas, the technological age of television and computers." Since circus is essentially a live entertainment whose nuances are difficult to capture on film or television, attending circuses is no longer a fundamental part of the lives of South Africans (Ricketts 2003). Amidst the decline in traditional travelling circuses in South Africa, the popularity of sold-out Cirque du Soleil performances in the country raises some pertinent research questions: What kind of people make up these audiences? What are their motives for travelling to attend shows of this kind as opposed to the traditional travelling circus? How can these performances be made more accessible to the broader public and not only to more affluent audiences?

Kruger and Saayman (2013) suggest that in order to accurately identify those individuals who are likely to attend these types of performances, information is needed about their motives in order to devise effective marketing strategies. Swanson, Davis and Zhao (2008) agree and indicate that to actively shape and influence consumption behaviour via strategic marketing processes, art event managers/marketers must first understand why attendees act the way they do. McCarthy and Jinnet (2001) as well as Kruger and Saayman (2015) also note that it is important to understand and know individuals' motives, since these differences can help organisers increase the attendance of performances. This is especially important since, as Swanson et al. (2008: 317) note, "with an abundance of entertainment options at attendees' disposal and a finite amount of time in which to enjoy them, understanding the motives driving performing arts attendance is crucial as organizations strive to compete in an increasingly crowded market place".

On investigation, the present researchers found that empirical academic research into people's motives for attending performing art shows was scarce. As observed by McCarthy and Jinnet (2001: 11), "empirical academic research exploring arts attendance from an individual motivation perspective is nearly non-existent". This is especially true in the case of circuses. Despite the cultural importance of the arts, economists neglect to address this topic (Zanola 2007). Zanola (2007: 2) provides possible explanations for the lack of research, stating that "firstly the economics of arts has considered circus as a minor performing art and secondly, there are difficulties in the collection of reliable quantitative information on circuses". The purpose of this research is therefore to narrow this gap in current research by determining the motives of attendees at the Cirque du Soleil Dralion production in South Africa during 2013, and, based on these motives, identify and profile different market segments. To the authors' knowledge, this will be the first time that attendees at this acrobatic performance will be analysed in a developing country context, and this research will therefore provide valuable insights into the profile and motives of

these attendees as well as the aspects that contribute to the success and popularity of these performances in the country. This information can help circus managers and promoters of these performances to adapt their marketing strategies to attract and retain more attendees as well as satisfy the needs and expectations of the different market segments travelling to these types of performances.

Literature review

Market segmentation is a method of classifying groups of consumers with similar needs, characteristics and motives so as to be able to offer them specifically designed products or services (Walker & Walker 2011; Goeldner & Ritchie 2012). It offers benefits such as providing opportunities to expand the market by better satisfying the needs of particular attendees, increasing profitability and effectiveness, fine-tuning product offerings and suggesting appropriate distribution and communication channels (Chiu, Chen, Kuo & Ku 2009; Brown & Cave 2010; Tsiotsou & Ratten 2010; Pegg & Patterson 2010; Moeller, Dolnicar & Leisch 2011; Rogerson & Kotze 2011; Alebaki & Iakovidou 2011).

With these benefits in mind, it is imperative to identify the needs, motives and expectations of potential arts performance attendees through the process of market segmentation. Segmenting attendees based on their motives for attendance has proved to be a useful and valuable psychographic segmentation base, as it allows marketers/organisers/researchers to identify the different needs of visitors and how these influence their behaviour, and to adapt marketing strategies accordingly (Kruger & Saayman 2013; 2015). 'Motivation' has been defined as: "a state of need, a condition that exerts a push on the individual towards certain types of action that are seen as likely to bring satisfaction" (Moutinho 1987: 16; Decrop 2006: 9); an internal factor that directs and integrates an individual's behaviour (Iso-Ahola 1980; 1983); and a dynamic concept that may vary from one person to another, from one market segment to another, from one event to another, and from one decision-making process to the next (Kruger & Saayman 2015).

An alternative circus performance such as the Cirque du Soleil may therefore attract different markets that attend for different reasons. By measuring the main needs that attendees are seeking to satisfy at the performance, as well as the motivational factors that lead to the preference for this particular type of circus performance, a more detailed profile of attendees can be obtained, allowing managers and marketers to better address these needs with a tailor-made marketing programme and production line-up. Understanding visitor motives for attending Cirque du Soleil performances can ultimately help entice more visitors to attend (Kruger & Saayman 2013; 2015).

Further insights into visitors' motives can benefit Cirque du Soleil marketing with regard to market segmentation, product development, service quality evaluation, image development and promotional activities (Kruger & Saayman 2010; Kruger, Saayman & Ellis 2010; Kruger & Saayman 2013; 2015).

While various studies have attempted to profile theatre and performing arts attendees (see for example Throsby & Withers 1979; Bergadaá & Nyeck 1995; Kotler & Scheff 1997; Bennett, Emmison & Frow 1999; McCarthy, Ondaantje & Zakaras 2001; Swanson et al. 2008; Scollen 2007; Saayman & Saayman 2011), limited studies have focused on circus attendees. Research done on circuses (using Cirque du Soleil as the case study) have focused mainly on injury patterns and injury rates in circus acts (for example Shrier et al. 2009), injury prevention in circus performances, psychological predictors of injuries in circus artists (for example Shrier & Hallé 2011) and reviews of productions (for example, Lavender 2011). To the authors' knowledge, Zanola (2007; 2008; 2010) is the only study that has focused on circus from a consumer point of view. Zanola (2007) analysed the determinants of demand for a traditional travelling circus in Italy, and the results indicated a positive elasticity of demand with respect to income and ticket price. The number of animals was also shown to be important in attracting audiences. In a similar study, Zanola (2010) confirmed these results and found that the stringent legislation on animal welfare seems to have succeeded. The number of animals has a negative influence on demand in smaller circuses, while there is still a strong demand for more animals in larger circuses. Zanola (2008) furthermore clustered Italian circus attendees, and the results revealed two distinct and interpretable clusters, namely contemporary circus likers (strongly dislike animals in circus) and traditional and enthusiastic circus consumers (enjoy and prefer the entire experience with frequent attendances). The motives why these clusters chose to attend the circus included accompanying children; because they liked it; because of discounted tickets or other reasons. However, no studies have yet analysed the audience in terms of demographic and behavioural characteristics or their extensive motives to attend an alternative circus production and performance such as Cirque du Soleil.

Due to this lack in current research, we wanted to generalise the extent and utility of the profile and motives explored by authors who focused on performance arts attendees, particularly theatre attendees, since most previous research had focused on this form of art attendance. Various studies that have attempted to profile theatre attendees have revealed the prevalence of middle-aged, well-educated and high-income earners (Throsby & Withers 1979; Kotler & Scheff 1997; Bennett et al. 1999; McCarthy et al. 2001; Saayman & Saayman 2011; Kruger & Saayman 2015). With regard to the motives of theatre attendees, Bergadaá and Nyeck (1995) conducted one

of the first studies of theatregoers' motives. They found four motivational typologies for theatregoing: escapism/entertainment, 'edutainment', personal enrichment and social hedonism. Swanson et al. (2007) found that visitors to live performances of the arts are motivated by aesthetics (for example, beauty and grace found in artistic expression), education (for example, the desire to know more about the arts or learn about other cultures), escape (for example, a diversion from normal daily routine), recreation (for example, the desire to do something fun), enhancement of self-esteem (for example, maintenance of a positive social identity) and social interaction (for example, the opportunity to socialise or to be seen with others). Walmsley (2009) investigated the motives of visitors to the Melbourne Theatre Company and the West Yorkshire Playhouse and found, like Bergadaá and Nyeck (1995), that the visitors' main motives were the pursuit of emotional experiences and impact, followed by escapism and 'edutainment'. In the only South African study, Kruger and Saayman (2015) identified four motives for attendees at the musical theatre production of *RAIN! A tribute to the Beatles*, namely, entertainment and artist affiliation, social interaction, group affiliation and unique experience, from which they identified two types of attendee, which they labelled *Beatle maniacs* and *Music lovers*. The results revealed that the profile of attendees at this production was largely homogeneous, with the few differences being behavioural rather than socio-demographic. In another study, Kruger and Saayman (2013) revealed five motives for attendees at performances of *The Phantom of the Opera*, namely unique experience, socialisation, entertainment, group affiliation and fun as well as appraisal. Two clusters of attendees were identified and labelled *Phantom deluxe* and *Phantom lite*; the results showed that these attendees were not homogeneous in terms of their socio-demographic profile and behavioural characteristics.

In an analysis of the findings of the studies discussed, the results show collectively that theatre attendees can be regarded as a niche market with specific characteristics and motives. It is furthermore evident that even though the profiles of attendees seem similar and certain motives such as escape, entertainment and social interaction overlap, the type of production or arts performance influences and shapes attendees' motives and behaviour. These results emphasise that arts attendees cannot be regarded as homogeneous in terms of their motives. The present study therefore has much to contribute to the knowledge base regarding arts performance attendees, particularly circus attendees, in South Africa.

Method of research

A structured questionnaire was used to collect the data. This section describes the study focus, questionnaire, sampling method and survey, and statistical analysis.

Study focus

Dralion is a touring production by the Canadian entertainment company Cirque du Soleil. The show combines elements of traditional Chinese circus with Western contemporary circus, complementing the 'East-meets-West' theme implied in the title – the name is a portmanteau of 'dragon' (representing the East) and 'lion' (representing the West). It is Cirque du Soleil's 12th touring production, and has been seen by more than seven million people worldwide since it premiered in 1999 in Montreal, Canada (CirqueduSoleil.com 2014). Cirque du Soleil's Dralion production had ten shows in South Africa during 2013, selling more than 65 000 tickets and resulting in a total direct economic impact of over R27 million (Scholtz, Kruger, Saayman & Saayman 2013).

Questionnaire

The questionnaire was divided into two sections. Section A captured demographic details (gender, home language, age, occupation, home province, level of education, marital status) and spending behaviour (number of persons paid for, number of tickets purchased, length of stay and expenditure). Section B captured motivational factors, measuring 21 items on a five-point Likert scale, where 1=not important at all; 2=less important; 3=important; 4=very important and 5=extremely important. This section also requested information specific to visitors' behaviour during the performance (initiator of attendance, when the decision was made to attend, number of times attended similar performances, age exposed to these types of production and sources of information about the performance). The following steps, as proposed by Field (2003) as well as Tustin, Ligthelm, Martins and Van Wyk (2005), were followed to design and validate the questionnaire:

- Content validity: An in-depth literature analysis was done to identify the relevant motivational factors for attending arts performances and circus performances. Due to limited research focusing specifically on circus attendees, the questionnaire was based on Swanson et al. (2007) and Kruger and Saayman (2013; 2015) as well as the studies listed in the literature review, and the statements were adapted for this circus performance.

- Face validity: Statistical consultation services advised on the formulation of the statements as well as the measuring scales used.
- Construct validity: Factor analyses were performed on both the motivational and key success factors in order to determine the degree to which the statements measure what they claim, or purport, to measure (see the data analysis section for more detail).
- Reliability: To test the reliability of the identified factors, reliability coefficients (Cronbach's alpha) and inter-item correlations were calculated (see the data analysis section for more detail).

Sampling method and survey

A destination-based survey was undertaken and questionnaires were distributed at five of the Cirque du Soleil Dralion performances held at the Grand West Arena at the Grand West Casino in Cape Town (7 & 8 March 2013) and the Coca-Cola Dome in Johannesburg (21, 22 & 23 March 2013). The venues were divided into blocks, which determined the value of the different tickets purchased. For example, seats near the stage had a separate entrance from the attendees who bought cheaper tickets for the gallery, and from those who sat further from the stage. A stratified sampling method was therefore used, and in order to limit bias a simple random sampling method was used within the stratified sample, where trained fieldworkers followed specific guidelines as questionnaires were handed out to different non-homogeneous age groups, gender groups and ticket holders. Questionnaires were distributed to all visitors who were willing to participate before the shows. Fieldworkers approached the respondents and explained the goal of the survey and the questionnaire to ensure that visitors participated willingly. A total of 450 questionnaires were administered at each venue, and 339 (Cape Town venue) and 423 (Johannesburg venue) completed questionnaires were obtained for the respective shows. Due to the importance of completed motivational information, of the 762 questionnaires obtained in the surveys, 652 fully completed questionnaires were included in the analysis. In a population of 100 000 (N), 398 respondents (n) would be considered to be representative (Krejcie & Morgan 1979). Therefore, since approximately 65 000 attendees purchased tickets for the shows, the number of completed questionnaires (n=652) was more than adequate.

Statistical analysis

Microsoft Excel was used to capture the data and SPSS (SPSS 2013) to analyse it. The analysis was done in three stages: a factor analysis, a cluster analysis and an analysis of significant differences between motivational clusters of attendees at the Cirque du Soleil Dralion shows.

First, a principal axis factor analysis, using an Oblimin rotation with Kaiser normalisation, was performed on the 21 motivation items, to explain the variance-covariance structure of a set of variables through a few linear combinations of these variables. The Kaiser-Meyer-Olkin measure of sampling adequacy was used to determine whether the covariance matrix was suitable for factor analysis. Kaiser's criteria for the extraction of all factors with eigen values larger than one were used, because it was considered that they explained a significant amount of variation in the data. All items with a factor loading greater than 0.3 were considered as contributing to a factor, and all items with loadings less than 0.3 as not correlating significantly with this factor (Steyn 2000). Any item that cross-loaded on two factors with factor loadings both greater than 0.3 was categorised in the factor where interpretability was best. A reliability coefficient (Cronbach's alpha) was computed for each factor to estimate its internal consistency. All factors with a reliability coefficient above 0.6 were considered to be acceptable in this study. The average inter-item correlations were also computed as another measure of reliability – these, according to Clark and Watson (1995), should lie between 0.15 and 0.55.

Second, a cluster analysis was done based on the motives of attendees. Aaker, Kumar and Day (2007) emphasise that every market segment may display different product needs and may respond differently to marketing approaches. The value of cluster analysis thus lies in its ability to facilitate market segmentation so as to arrive ultimately at homogeneous segments that share similar needs, lifestyles or responses to marketing efforts (Malhotra 2007; Zikmund & Babin 2007). A cluster analysis, using Ward's method with Euclidean distances, was performed on the scores of the motives to attend the performance. A cluster analysis is a multivariate interdependence technique, the primary objective of which is to classify objects into relatively homogeneous groups based on the set of variables considered; it is mostly an exploratory technique (Hair, Bush & Ortinau 2000: 594). Hierarchical clustering makes no assumptions concerning the number of groups or group structure. Instead, the members are grouped together based on their natural similarity (Johnson & Wichern 2007: 671–673). This research did not take an a priori view of which data points should fall into which segment. Rather, a hierarchical cluster analysis was used to explore the natural structure of the data, by means of Ward's method with Euclidean distances.

Third, ANOVAs, two-way frequency tables and chi-square tests were used to investigate any significant differences between the identified market segments. Effect sizes and phi-values were used to further identify any significant differences between the clusters. The purpose of effect size is to establish whether any differences exist between the clusters; in this case, in which combination of clusters the mean values of the motives and the averages of the socio-demographic and behavioural variables had the smallest or largest effect. Cohen (1988), Ellis and Steyn (2003) and Steyn (2009) offer the following guidelines for the interpretation of effect sizes: small effect: d=0.2, medium effect: d=0.5 and large effect: d=0.8. Cohen (1988) gives the following criteria for interpreting phi-values: 0.1 for a small effect, 0.3 for a medium effect and 0.5 for a large effect. The results of the statistical analyses are discussed in the next section.

Results

This section discusses the results of the factor analysis (motives to see the Cirque du Soleil Dralion production) and presents the results of the cluster analyses, ANOVAs and cross-tabulations that chi-square tests to investigate significant differences.

Results from the factor analysis

As no similar studies of this nature have been conducted at this type of performance in South Africa, an exploratory factor analysis was conducted. The pattern matrix of the principal axis factor analysis using an Oblimin rotation with Kaiser normalisation identified five factors, and these were labelled according to similar characteristics (Table 1). These factors account for 61% of the total variance. All factors have relatively high reliability coefficients, ranging from 0.57 (the lowest) to 0.84 (the highest). The average inter-item correlation coefficients of between 0.23 and 0.53 also imply internal consistency for all factors. Moreover, all items loaded on a factor had a loading greater than 0.3, and the relatively high factor loadings indicate a reasonably high correlation between the factors and their component items. The Kaiser-Meyer-Olkin measure of sampling adequacy (0.84) indicates that patterns of correlation are relatively compact and yield distinct and reliable factors (Field 2005: 640). Barlett's test of sphericity reached statistical significance ($p < 0.001$), supporting the factorability of the correlation matrix (Pallant 2007: 197).

Table 1: Results of factor analysis of Cirque du Soleil Dralion: Attendees' motives (n=652)

Motivation factors and items	Factor loading	Mean value	Reliability coefficient	Average inter-item correlation
Factor 1: Enchantment and aesthetics		**3.69**	**0.84**	**0.44**
To be swept away to a magical and imaginative world	0.64			
To experience new things	0.58			
For a chance to be with people who are enjoying themselves	0.55			
To relax and escape from daily tension and my busy everyday environment	0.54			
To experience the thrill of daring acts	0.52			
To experience the combination of acrobatic performances, acting and dance	0.50			
For nostalgic reasons/memories	0.38			
Factor 2: Social status and act affiliation		**2.33**	**0.67**	**0.42**
Because of the social status in terms of being seen by others	0.69			
Because I have seen Cirque du Soleil before and wanted to do so again	0.59			
Because the attendance makes one feel part of the performance	0.58			
Factor 3: Socialisation		**3.12**	**0.57**	**0.23**
It is a sociable event	0.65			
To spend time with family, friends or someone special	0.41			
The event is value for money	0.35			
Because I got tickets for free or as a present	0.30			
Factor 4: Uniqueness		**4.05**	**0.81**	**0.53**
Cirque du Soleil is a well-known international act	0.79			
It is a unique, exciting, once-in-a-lifetime experience	0.75			
I always wanted to see Cirque du Soleil live	0.69			
To experience the popularity of Cirque du Soleil	0.57			
Factor 5: Fun and entertainment		**3.62**	**0.72**	**0.49**
To have fun and because I enjoy these types of special event	0.52			
These events are entertainment at its best	0.51			
I try to attend as many of these events as possible	0.35			
Total variance explained	**61%**			

Factor scores were calculated as the average of all items contributing to a specific factor in order to interpret them on the original five-point Likert scale of measurement. As Table 1 shows, the following motives were identified: *Enchantment and aesthetics* (Factor 1)*, Social status and act affiliation* (Factor 2)*, Socialisation* (Factor 3), *Uniqueness* (Factor 4) and *Fun and entertainment* (Factor 5). *Uniqueness* (Factor 4) obtained the highest mean value (4.05), was considered the most important motive for attending the performance, and had a reliability coefficient of 0.81 and an

average inter-item correlation of 0.53. *Enchantment and aesthetics* (Factor 3) had the second-highest mean value (3.69), followed by *Fun and entertainment* (3.62) and *Socialisation* (3.12). *Social status and act affiliation* (Factor 5) had the lowest mean value (2.33) and was rated as the least-important motive.

Results from the cluster analysis

An exploratory cluster analysis based on all cases in the data was performed on the motivational factors. A hierarchical cluster analysis, using Ward's method of Euclidean distances, was used to determine the structures of the clusters based on the motivation factors. A three-cluster solution was selected as the most discriminatory (Figure 1). The results of the multivariate analyses were used to identify the three clusters and to indicate that significant differences existed between them ($p<0.05$).
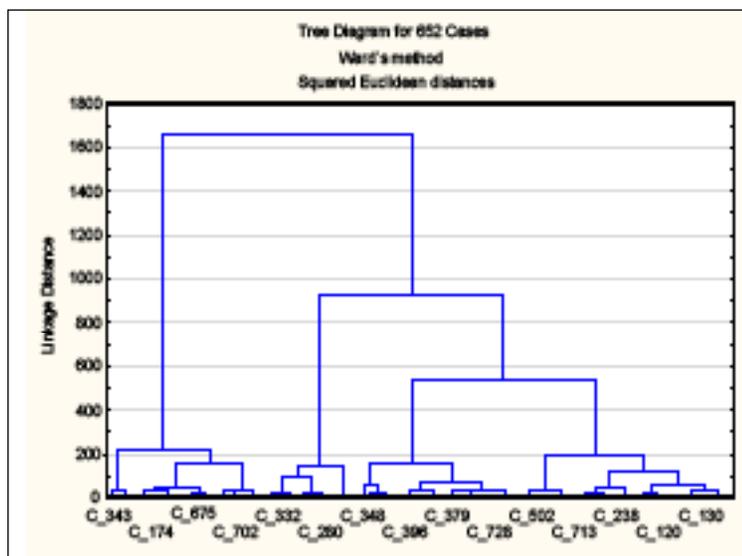

Figure 1: Three cluster solution: Ward's method with squared Euclidean distance measures

Identification of segmented clusters

As shown in Table 2, ANOVAs indicate that all five motivational factors contributed to differentiating between the three motivational clusters ($p<0.05$) with medium to large effect size differences. Cluster 1 contained the largest sample of respondents (288) and had the lowest mean scores for almost all the motivational factors. Although this cluster was attracted by the performance and the act of Cirque du

Table 2: Results of ANOVA and Tukey's post hoc multiple comparisons for motivational factors in the three clusters of Cirque du Soleil Dralion attendees

Motives for attending	Cluster 1 Observers (N=288)	Cluster 2 Novices (N=176)	Cluster 3 Enthusiasts (N=188)	F-ratio	Sig. level	Effect sizes Cluster 1 and 2	Cluster 1 and 2	Cluster 1 and 2
Enchantment and aesthetics	2.99[a]	4.13[b]	4.33[c]	318.13	<0.05*	1.67****	1.95****	0.33**
Social status and act affiliation	1.78[a]	1.76[a]	3.75[b]	469.93	<0.05*	0.03	2.43****	2.46****
Socialisation	2.69[a]	3.34[b]	3.64[c]	82.17	<0.05*	0.75***	1.16****	0.34**
Uniqueness	3.39[a]	4.74[b]	4.39[c]	269.16	<0.05*	1.61****	1.20****	0.61***
Fun and entertainment	2.93[a]	4.14[b]	4.19[b]	238.66	<0.05*	1.54****	1.60****	0.07

* Statistically significant difference: $p \leq 0.05$

Effect sizes: ** small effect: d=0.2; ***medium effect: d=0.5 and ****large effect: d=0.8

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

Soleil (*Uniqueness*), they seemed to only accompany someone to the performance; this cluster was thus labelled *Observers*. Cluster 2, the smallest cluster, contained 176 respondents and rated *Uniqueness* as the most important motive. This cluster was labelled *Novices* as they seemed to be attendees that were only starting to attend these types of performances (see also Table 3). Cluster 3, with 188 respondents, rated all five motivational factors as important and seemed to be the most enthralled by Cirque du Soleil. They had the highest mean values for *uniqueness*, *enchantment and aesthetics* and *fun and entertainment* and were therefore labelled *Enthusiasts*.

ANOVAs, Tukey's post hoc multiple comparisons and effect sizes results

ANOVAs, Tukey's post hoc multiple comparisons and effect sizes were used to determine the differences between the respondents on the basis of their socio-demographic and behavioural characteristics. As Table 3 shows, and based on the effect sizes (small effects), the three clusters of Cirque du Soleil attendees had statistically significant differences based on number of people paying for ($p = 0.039$), number of tickets purchased ($p = 0.002$), number of times attended similar events ($p = 0.010$), the spending category tickets ($p = 0.002$), total spending per group ($p = 0.007$) and all the various media ($p \leq 0.05$).

With regard to socio-demographic differences, *Enthusiasts* were financially responsible (paying for) for the most people (an average of 2.10 persons), while *Observers* paid for the least number of people (an average of 1.73 persons). Unsurprisingly, *Enthusiasts* purchased the most tickets (an average of 2.63) and consequently had the highest average spending for tickets (an average of R881.64) and total spending per group (an average of R1294.70), followed by *Novices* who purchased an average of 2.46 tickets. *Observers* purchased the fewest tickets (an average of 2.11) and as a result had the lowest average spending on tickets (an average of R648.02). *Enthusiasts* attended the most similar events (an average of 2.83 events) along with *Observers* (2.20 events), indicating that *Observers* were most likely accompanying *Enthusiasts* rather than *Novices*. Confirming that *Novices* were only starting to attend these types of production, this cluster had attended the least number of similar events. Regarding the influence of the various media, *Enthusiasts'* decision to attend the show was influenced most by the media, especially by word-of-mouth recommendations from family and friends (2.77), television (2.62), the Computicket website (2.34) and radio (2.23), followed by *Novices* who were also influenced by these media.

There were no statistically significant differences between the three clusters based on other characteristics. The average age of all three was early- and mid-thirties, with *Observers* being the oldest (an average of 36.11 years) and *Novices* the youngest (an

Table 3: Results of ANOVA, Tukey's post hoc multiple comparisons and effect sizes for visitor characteristics of age segments

Characteristics	Cluster 1 Observers (N=288)	Cluster 2 Novices (N=176)	Cluster 3 Enthusiasts (N=188)	F-ratio	Sig. level	Effect sizes Cluster 1 and 2	Cluster 1 and 2	Cluster 1 and 2
Socio-demographics								
Average age	36.11	34.33	34.79	1.156	0.315	0.13	0.10	0.03
Average group size	3.33	3.23	3.30	0.103	0.902	0.04	0.01	0.04
Number of people paying for	1.73[a]	1.97[ab]	2.10[b]	3.269	0.039*	0.15	0.22	0.08
Length of stay in the area (nights)	3.29	1.58	2.95	1.106	0.356	0.34**	0.04	0.17
Number of tickets purchased	2.11[a]	2.46[b]	2.63[b]	6.192	0.002*	0.22	0.29	0.10
Number of times attended similar shows	2.20[a]	1.98[b]	2.83[a]	4.623	0.010*	0.10	0.17	0.23
Age first exposed to this type of performance	20.98	16.49	17.63	1.056	0.349	0.09	0.07	0.10
Spending categories								
Tickets	648.02[a]	779.27[ab]	881.64[b]	6.335	0.002*	0.19	0.28	0.12
Accommodation	23.24	36.14	58.50	1.065	0.345	0.05	0.12	0.07
Food	120.67	160.18	139.08	1.302	0.273	0.07	0.09	0.15
Beverages	54.55	60.83	76.62	2.383	0.093	0.08	0.15	0.11
Transport	82.75	65.75	90.96	0.323	0.724	0.05	0.03	0.08
Souvenirs	16.08	17.53	15.78	0.026	0.974	0.02	0.00	0.03
Parking	12.02	11.08	12.14	0.329	0.720	0.07	0.01	0.07
Total spending per group	967.69[a]	1091.28[a]	1294.70[b]	5.052	0.007*	0.13	0.27	0.17
Spending per person	529.31	504.54	559.55	0.405	0.667	0.04	0.05	0.10
Influential media#								
Television	2.00[a]	2.43[b]	2.62[b]	13.667	0.000*	0.32**	0.48**	0.14
Radio	1.70[a]	1.95[a]	2.23[b]	10.820	0.000*	0.21	0.42**	0.23
"Big Concerts" website (promoters' website)	1.47[a]	1.88[b]	2.01[b]	14.774	0.000*	0.37**	0.45**	0.10
Magazines	1.41[a]	1.62[a]	1.85[b]	10.299	0.000*	0.22	0.40**	0.21
Newspapers	1.40[a]	1.51[a]	1.86[b]	12.034	0.000*	0.11	0.42**	0.33**
Word of mouth	2.35[a]	2.72[b]	2.77[b]	7.104	0.000*	0.28	0.33**	0.04
Facebook	1.44[a]	1.62[a]	1.83[b]	6.647	0.000*	0.16	0.33**	0.18
Twitter	1.24	1.38	1.44	3.254	0.039*	0.16	0.22	0.06
Internet blogs	1.27[a]	1.41[a]	1.49[b]	3.797	0.023*	0.17	0.24	0.09
Computicket website (online ticket-purchasing website)	1.99[a]	2.28[b]	2.34[b]	4.596	0.010*	0.23	0.27	0.04

° Expenditure per person, which was calculated by adding the spending of the respondent on the various components asked, and dividing the total by the number of people respondents' indicated they were financially responsible for

* Statistically significant difference: $p \leq 0.05$; Effect sizes: ** small effect: d=0.2; ***medium effect: d=0.5 and ****large effect: d=0.8

Respondents were asked to indicate the extent to which the various media had an influence on their decision to attend the Cirque du Soleil show, where 1=not at all; 2=to a lesser extent; 3=to a greater extent and 4=completely

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

average of 34.33 years). Respondents in each cluster's travelling groups comprised an average of three people, while *Observers* and *Enthusiasts* spent the most nights in the area where the shows were held (an average of three nights). *Observers* were exposed to these types of performances at the oldest age (an average of 20.98), while *Novices* and *Enthusiasts* were exposed at a younger age (an average of 16 and 18 respectively).

Cross-tabulations and chi-square test results

In interpreting the level of significance and the phi-values of the chi-squares, statistically significant differences were found between the segments only on the basis of gender ($p=0.005$, small phi-value of 0.127) and self as initiator of attendance ($p=0.018$, small phi-value of 0.111). Respondents were predominantly female in all three clusters (*Observers* 55%; *Novices* 69% and *Enthusiasts* 57%), while significantly more *Enthusiasts* initiated the attendance themselves (43%) compared to the other two clusters (31% and 38% respectively). There were no statistically significant differences in terms of the other variables; however, it can be seen that the highest percentage of respondents in each cluster were English-speaking (67%, 60% and 60% respectively), originated mainly from the provinces where the shows were held (44%, 33% and 34% respectively from Gauteng and 46%, 60% and 58% respectively from Western Cape), were married (45%, 43% and 44% respectively) with a high level of education (diploma or degree 39%, 42% and 40% respectively), in a professional line of occupation (51%, 55% and 46% respectively) and made the decision to attend the show long in advance (when it was announced) (31%, 34% and 41% respectively).

Findings and implications

The findings of this study were as follows. Firstly, the particular combination of motives found in this research has not been identified in previous research. This finding can be ascribed to the type and nature of the event and the fact that little research in this area has been conducted. These motives can therefore be regarded as distinct and especially important reasons for attendees at this type of performance. Five motives to attend the Cirque du Soleil Dralion production were identified (in order of importance): *Uniqueness*, *enchantment and aesthetics*, *fun and entertainment*, *socialisation* and *social status and act affiliation*. As discussed in the literature review, previous research has identified escape, aesthetics, socialisation, and fun and entertainment (Bergadaá & Nyeck 1995, Swanson et al. 2008, Walmsley 2009;

Kruger & Saayman 2013; 2015). *Uniqueness* is therefore distinctive to this research over and above the combination of motives. However, the identified motives differ significantly from the motives identified by Zanola (2008) for Italian circus attendees. This finding confirms the notion by Kruger and Saayman (2013; 2015) that arts performance attendees are complex and that the motives of attendees at one type of production (acrobatic circus in this case) cannot be applied to attendees at other types of production (for example, theatre).

Secondly, the cluster analysis based on attendees' motives identified three unique clusters: *Observers*, *Novices* and *Enthusiasts*. Corresponding with the results of the factor analysis, all three clusters regarded *uniqueness* as the most important motive, followed by *enchantment and aesthetics*. *Enthusiasts* regarded all five motives as important, followed by *Novices*, while *Observers* had the lowest mean values across all five motivational factors. This finding implies that for organisers and marketers of these types of arts performances to develop the circus segment, marketing messages should be based on each segment's motives for attending. In the case of Cirque du Soleil, emphasis should be placed on the fantasy, international standing and popularity of the company by citing, for example, their accolades, the daring and unique acrobatic and aerialist acts, the theme of the production, reviews as well as interviews with the director and performers. Since *fun and entertainment* and *socialisation* are also important motives, marketing campaigns should highlight the fact that attending performances of this type is an ideal pastime that can be enjoyed with family and friends. The clusters' preferred sources of information suggest that marketing messages should be communicated on television and radio as well as on the web (websites of the promoters and online booking sites). The majority of respondents in all three clusters made the decision to attend when it was announced more than a month before the show. However, in order to attract more spontaneous attendees, marketing campaigns should be done continuously from the time when the announcement is made. This could also lead to more word-of-mouth referrals, which are a valuable and influential medium for all three segments.

Thirdly, the profile of attendees at this production is not homogeneous, since the main differences are based on socio-demographic as well as behavioural characteristics. This contradicts the finding of Kruger and Saayman (2015), who found that differences between theatre attendees are based on behavioural characteristics rather than socio-demographics. However, the profile of Cirque du Soleil Dralion attendees is similar to that of theatre attendees. In support of the findings of Baumol and Bowen (1973), Throsby and Withers (1979), Gourdon (1982), Kotler and Scheff (1997), Bennett et al. (1999), McCarthy et al. (2001), Saayman and Saayman (2011) and Kruger and Saayman (2013; 2015), all three clusters are middle-aged, well-educated

and high-income earners. In terms of their higher spending, purchasing of more tickets, more frequent attendances and their influence on accompanying *Observers'* decisions to attend, *Enthusiasts* are the most lucrative market to retain. These two clusters display similar characteristics to the *Beatle maniacs* and *Music lovers,* and *Phantom deluxe* and *Phantom lite* clusters identified by Kruger and Saayman (2013; 2015) as well as the enthusiastic circus consumer identified by Zanola (2008). This research has, however, identified an additional cluster, *Novices*, which represent a new up-and-coming segment to expand, since they are starting to attend these types of production. Marketing efforts should therefore be aimed at attracting and expanding the *Enthusiasts* and *Novices*, as they are the primary decision-makers, interested in the arts and higher spenders. Since they are mainly accompanying persons, *Observers* will most probably always be a separate segment.

Apart from focusing on *Novices'* motives for attending in order to attract them, the research also indicates that this segment, along with *Enthusiasts*, have been exposed to the arts at a younger age. This finding also highlights the importance of early exposure to arts performances in order to grow a younger market and sustain the arts. Most research in the arts confirms that the growth of younger markets is imperative. The implication is that younger people need to be exposed to these types of production, confirming research by Kruger and Saayman (2013; 2015). This can be achieved by introducing and performing plays at schools, taking pupils to see plays or visit theatres as part of field trips, and supporting community theatre as well as providing discounts to families with children or cheaper tickets for persons under a certain age. Due to the appeal and the cost of hosting these types of production in developing countries where unemployment and high levels of poverty reign, local authorities, government institutions and arts and culture departments should work together to make such performances more accessible and invest in the growth of the arts in the country. For example, video recordings of the performance could be shown to less-privileged children in township communities in order to give them exposure to the arts. The variety of performers involved could also present 'workshops' or 'training camps' to aspiring dancers and acrobats to help improve their skills. This could inspire independent arts companies to produce similar travelling productions showcased at venues around the country and also create job opportunities.

Conclusion

The purpose of this research was to determine the motives of attendees at Cirque du Soleil's Dralion production in a developing country. It was the first time that such a survey was conducted at an alternative circus production of this nature in

South Africa, and the approach differed significantly from that of Zanola (2007; 2008; 2010) in a traditional travelling circus context. This was also, to the authors' knowledge, the first time that the audience at a Cirque du Soleil production had been analysed from the perspective of the consumer rather than the performer (see Shrier et al. 2009; Lamme 2011; Shrier & Hallé 2011). The results revealed five key motives, the combination of which had not previously been found in arts literature. The nature of the act furthermore revealed unique motives, namely *exceptionality* and *enchantment*. Clustering based on these motives revealed three distinct clusters, namely *Enthusiasts*, *Novices* and *Observers*. These clusters show that attendees are not homogeneous in terms of their socio-demographic and behavioural profile. This in itself was an interesting finding, since most similar research has clearly indicated differences in terms of only socio-demographic or behavioural characteristics, but not both. While the *Enthusiasts* and *Observers* displayed similar characteristics to other clusters found in previous research, this research made a clear contribution in identifying a new emerging segment, *Novices* and suggesting the implications of retaining and expanding this market. Although *Novices* are a valuable market to pursue in the future, they are already in their thirties. A major challenge arising from this research is the fact that this study, as with all similar research, showed that few young people attend these types of production. This implies that arts production managers and marketers as well as academics need to determine what young people enjoy, in other words, what motivates young people so that arts production houses can attract them. Young people furthermore need to be exposed to different forms of art, since research confirms that key markets have been exposed at a young age. Further research is therefore recommended, especially given the variety of arts on offer, and the fact that little research has been done on this topic from a marketing point of view. This study revealed another major challenge, namely the inaccessibility of most of these types of production to the majority of audiences in developing countries. Performances are mainly restricted to high-income and highly educated groups of society. Ticket prices are usually also very expensive and further restrict attendance by younger attendees. This research addresses this challenge by outlining the role that the government and arts and culture departments can play in making such performances more accessible and affordable, thereby also increasing exposure to the arts.

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