

## **SAND, SEA AND SURF: SEGMENTING SOUTH AFRICAN SURFERS**

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### **ABSTRACT**

*This exploratory research identified four segments of surfers in South Africa, namely beginner, weekender, amateur, and professional. The study corroborates the argument that surfers cannot be regarded as homogeneous and that they differ according to their socio-demographic characteristics, surfing behaviour and motives. The results of the research provided strategies to surfing beaches or destinations and competitions to expand this lucrative sport market in South Africa. The results further demonstrated that segmenting surfers based on how they classify themselves is a useful market segmentation tool, as it yields a clear and direct profile and understanding of different types of surfer and their preferences. This research, therefore, makes a distinct contribution to the literature on surfers, especially in a South African context.*

**Keywords:** Market segmentation; Surfing; South Africa; Typology.

### **INTRODUCTION AND BACKGROUND**

Surfboard riding, commonly referred to as ‘surfing’, is practised by millions and its popularity keeps increasing given the growing number of participants and a greater media attention at the recreational and the competitive levels (Farmer & Short, 2007; Ponting, 2008; Frank *et al.*, 2009; Ponting & McDonald, 2013; Hritz & Franzidis, 2016; Towner, 2016). Surfing now takes place in virtually every country with a coastline and expands to more locations every year (Tantamjarik, 2004; Ponting, 2008; Ponting & McDonald, 2013). Because of technological advances, such as more efficient and less expensive wetsuits, surfing is no longer an activity exclusive to those living in warm environments conducive to aquatic activities, but also suitable for those enduring cold water conditions (Carrasco, 2008). Although surfing dates back to before A.D. 400 – the date Margan and Finney (1970) and Finney and Houston (1996) speculate for the migration of Polynesians to Hawaii – its emergence as a subculture began after surfing’s renaissance in California during the 1950s (Lazarow, 2009). Surfing before this time was deeply embedded in Hawaiian mainstream culture. There are many suggestions as to what surfing is, as Mackert (2005:3) states: “on the one hand it is, of course, a sport, but on the other, it also represents a virtual spiritual world” and “surfing is a sport and a way of life”.

Surfing has become a worldwide multibillion-dollar industry that includes the sale of surf-branded clothing for surfers and non-surfers, the manufacturing of surfboards and accessories, and surf-related travel costs (Buckley, 2002, 2003). While there is no global dataset that provides an indication of the value of the surf industry, some approximations can be made from what data are publicly available (Lazarow, 2009). The report by Global Industry Analysis Inc. (2009-2017) shows that the major share of surf industry growth is expected in the United States

(US) and Europe. According to this report, the primary driver of this increase is the initiative being taken by surfing equipment makers, marketers, and associations in making surfing much more accessible to a broader demographic. Analysts predict that the global surf industry will account for \$13.22 billion by 2017, compared to \$6.24 billion in 2010. This means that more than \$13 billion will be spent on boards, wetsuits, sunglasses, and surf-related clothing and accessories.

While this is an impressive number, it is likely to significantly under-account for the total economic value of recreational surfing, since the number does not include revenue generated by the growing international surf travel business or the non-market value of breaks (Compare the Surfbrand, 2014). The rising consumption of surf-related gear (surfboards, wetsuits, traction pads and surf leashes), as well as accessories and surf-fashioned clothing associated with the growth of this recreational activity, has increased the supply and prices of goods and services for surfers and followers of this activity (Buckley, 2003; Nourbakhsh, 2008). Although surfers demand surfing gear, the consumption of accessories is especially strong among fans (surf followers who do not surf) for whom certain brands and fashions convey their surfing identity (Moutinho *et al.*, 2007) or are regarded as fashionable accessories by the public (Buckley, 2003).

Although surfing existed in Africa, there was a difference between surfing by the coastal people of Senegal and the Ivory Coast and surfing in Hawaii and Australia. Hawaiian surfing is thought to have reached South Africa via an African swimming coach (whose name is unknown) who had returned from Sydney, Australia, in 1938 after the Empire Games. Interest in surfing continued in South Africa through World War II. In the 1950s, the South Beach Surf Board Club was formed in Durban, in what is now KwaZulu-Natal (Finney & Houston, 1996). By 1965, the South African Surfing Association was formed (ISA, 2015). The first official South African Surfing Championships were held in Durban in 1966 (Knott, 2012). In 1969, the Durban 500 was staged. Sponsorship of the event by Gunston Cigarettes prompted a name change and made the Gunston 500, the world's longest running professional surfing event, ending 30 years later in 1999 (Knott, 2012).

Despite the difficulties of international travel and sanctions during the Apartheid years, surfing thrived in South Africa, with surf shops opening in coastal villages, inland cities and shopping malls. The dismantling of Apartheid brought about unity in the sport, with the formation of a unified amateur body in 1992: the United Surfing Council of South Africa (Knott, 2012). Today Surfing South Africa is the recognised governing body of the sport in the country. Events such as the Billabong Pro, the Mr. Price Pro (successor to the Gunston 500) and the Red Bull Big Wave Africa (a showcase of the country's big-wave talent), keep South African surfing on the world stage (ISA [International Surfing Association], 2015). South Africa offers surfers a nearly 2,000-mile coastline that ranges in diversity from powerful cold water surf in the Western Cape through to warm waters in KwaZulu-Natal (Knott, 2012; Staff, 2012). From March to December, a comparatively long period in the tourism industry, South Africa's surfing season takes centre stage, making it an important sport for continued economic growth and for maintaining long-term tourism income in the country (Staff, 2012).

While the economic and tourism value of surfing is evident, few studies have examined different market segments of the surfing industry (Booth, 1996; Ponting, 2009; Scarfe *et al.*,

2009; Martin & Assenov, 2012; Barbieri & Sotomayor, 2013), especially to disclose travel behaviours and destination preferences across different types of surfers. Research is especially needed to explore whether the behaviours and preferences surfers differ among participants with different levels of surfing commitment, as differences among recreationists with different experience levels have been reported among other types of recreational activity (Scott & Godbey, 1994; Cole & Scott, 1999; Scott & Lee, 2010). Various authors provide possible reasons why surf tourism may receive limited attention. Polzat-Newcomb (1999) and Buckley (2002) stated that perhaps it is due to the ambiguity of surfing as a 'legitimate' sport or that surfing is concentrated in only a few areas. Lazarow *et al.* (2007) postulate that it is because surfing is perceived as a recreational pastime. The authors later stated that another reason is that surfing is sometimes viewed as a sport participated in at places where people live, rather than at places people visit (Lazarow *et al.*, 2008). Nelson *et al.* (2007) suggested that surfing might not have received academic attention because of the laid-back characteristics or negative stigma attached to the surfing community.

## PURPOSE OF RESEARCH

Currently, there is no research on the profiling of surfers in South Africa. The purpose of this exploratory research is thus to narrow this gap in the current surfing tourism literature by segmenting South African surfers in Muizenberg (a popular surfing beach in the Western Cape) based on the type of surfer they regard themselves as (*beginner, weekender, amateur, or professional*) and to determine the differences between the segments regarding socio-demographic characteristics, surfing behaviour, as well as motives. This research will provide a better understanding of the South African surfer, which is vital in expanding the appeal of the sport in surfing destinations, as well as to broaden and sustain this lucrative, yet undervalued, sport and activity market in the country.

## LITERATURE REVIEW

Since the pioneering studies about Hawaiian surf breaks in the early 1970s by Walker and his colleagues (Scarfe *et al.*, 2009), scientific research related to surfing has evolved in the recreation and tourism disciplines. A systematic review of the literature suggests new and vibrant surf tourism research that has grown not only in quantity, but also in scope, moving from local descriptions to the more in-depth comprehension of the surf tourism industry, usually highlighting sustainability implications (Lazarow, 2009; Martin & Assenov, 2012). Surfing, as an industry, involves not only surfers but also a significant number of people who travel to domestic and international destinations as surf tourists, or to undertake surf tourism (Dolnicar & Fluker, 2003b).

Surf tourism, according to Fluker (2003:398), can be defined as “the act of people travelling to either domestic locations for a period not exceeding 6 months, or international locations for a period not exceeding 12 months, who stay at least one night, and where the active participation in the sport of surfing, where the surfer relies on the power of the wave for forward momentum, is the primary motivation for selection”. Ponting (2008) uses the term ‘surfing tourism’ to include those who do not practice the activity, particularly those who travel to follow others who do, to watch surf events or just to experience the atmosphere of surf, sponsored by surfers. The authors define surfing tourism as including those who primarily travel to surf or to support

surfers and surfing in whichever way. However, to take into account day tourists who may also surf, the definition is expanded to include also these tourists.

### **Motivation of surfers**

To have surfing variously described as a sport, a pastime, a profession, a religion, a spiritual communion with nature, and a way of life suggests that, for many, their relationship with surfing is, in fact, complex (Preston-Whyte, 2002; Lazarow, 2009; Reis & Jorge, 2012). Surfing is a unique recreational activity and differs from other sports mainly because competition against other individuals is not the main purpose; rather, the main challenger is the wave (Farmer, 1992; Tantamjarik, 2004; Buckley, 2012; Towner, 2016). However, competition with other surfers to catch the waves is reported in crowded situations or in areas with strong localism, where local surfers display territorialism over particular surf breaks or spaces (Walker, 2008; De Alessi, 2009; Scarfe *et al.*, 2009; Usher & Kerstetter, 2015). There is also a psychological surf obsession among most surfers, which seems to be related to a change in the emotional state, from tension to calm, that surfers experience while surfing (Farmer, 1992; Butts, 2001).

According to Neto (1995), the individuals' impacts and motivations for surfing are enormous and are oriented in six major indicators: (1) Confrontation with the natural and ecological environment, allowing a new individual and collective dynamic; a stronger sense of themselves and the others; (2) Unpredictability of the environment; the variation in weather conditions, the physical environment's characteristics, and the alternatives to overcome them; (3) Risk and adventure; perceiving physical limitations, which implies better organisation and self-discipline; (4) The freedom of choice, according to one's individual time and rules of action; (5) The development of a specific philosophy and culture; relations based on solidarity and conviviality, valuing the meeting and manifestation of collective projects; and (6) Fashion creation and daily habits; the importance given to appropriate dressing, language used (surfer slang), the type of equipment used, and the most characteristic means of transportation.

When examined in the sport discipline, studies conclude that although surfers also seek health and fitness rewards as other athletes do, they have a different set of motivations from mainstream athletes; surfers are primarily driven by the exhilaration of the experience and seek catharsis and aesthetic rewards rather than competition (Farmer, 1992; Buckley, 2012). In agreement, Preston-Whyte (2002) argues that for all surfers, surfing space is constructed around the idea of a surf break and the natural environment must be included in an understanding of surfing. Consistent with participants of other risk-recreation activities, surfers have high levels of sensation seeking traits that include the constant search for varied, novel, and complex sensations and experiences, especially for the thrill that this activity produces (Farmer, 1992; Stranger 1999, Diehm & Armatas, 2004; Ponting, 2008; Stranger, 2011; Buckley, 2012).

Reynolds and Hritz (2012) confirm this; they found that the craving for risk, thrill, the unknown, and daring experiences were the apparent motives of surfers and that male surfers, as opposed to females, participated in surfing to gain a sense of belonging, self-confidence, or to be creative. Farmer (1992) found that people either surfed for aesthetic, ascetic, cathartic,

health and fitness, social, or vertigo reasons. Similarly, Diehm and Armatas (2004:675) found that surfers engaged in the activity to provide “stimulation through the mind and senses”.

### **Market segmentation of surfers**

While the motives of surfers have to an extent been analysed, less information is available for different types of surfers or their characteristics. Surfers have been labelled as hippies, crazy, free spirits, or a “unique tribe of nomads” (Young & McGregor, 1983:189). Most research, however, agrees with the perception that the sport is male dominated. Farmer (1992), Dolnicar and Fluker (2003a, 2003b), Buckley (2002), Moore (2011), Reynolds and Hritz (2012), Barbieri *et al.* (2014), Hritz and Franzidis (2016) and Towner (2016) found that the majority of surfers were male, with an average age of 30 years. Similarly, Sotomayor and Barbieri (2016) found that surfers were male, in their mid-30s, and about a quarter lived alone. Barbieri and Sotomayor (2013) found corresponding results and further revealed that surfers have a very active travel behaviour being willing to travel at least once a year to a surfing destination where they stay for at least a week. Barbieri *et al.* (2014) revealed similar results and found on average they surfed 3.6 days per-week and travel at least once a year to a surfing destination.

Limited research to date has however segmented surfers to provide a better understanding of their heterogeneous nature, making market segmentation a valuable tool in strategic marketing to surfers. Marketing theory suggests that segments be composed of target customers who respond homogeneously to the marketers’ promotion activities (Mazanec, 2015). A segmentation strategy determines the number and size of the segments as well as classification criteria that are used for profiling segment members (Nickerson & Grau, 2015). Marketing managers then evaluate segment attractiveness and decide which and how many segments should be targeted and what promotional budget should be allocated. Market segmentation offers benefits such as providing opportunities to expand the market by better satisfying the needs of particular markets, increasing profitability and effectiveness, fine-tuning product offerings, and suggesting appropriate distribution and communication channels (Alebaiki & Iakovidou, 2011; Moeller *et al.*, 2011; Nickerson & Grau, 2015). With these benefits in mind, it is imperative to identify the profile, behaviour, and motives of surfers through the process of market segmentation.

Most of the surfing research has been in Australia, the United States, and Indonesia, with Indonesia the most-researched destination (Martin & Assenov, 2012). The types of surfers identified from previous literature included the Wannabe, the Soul Surfer and the Sponsored Surfer (Pearson, 1982; Williams, 2002). The Addendum summarises the findings of existing and relevant surfer segmentation studies in the past 20 years. It is evident that surfing segmentation studies have been applied to a variety of research disciplines ranging from sports behaviour, marketing, tourism, health and behavioural sciences. The research approach applied most frequently was online surveys followed by personal interviews. From the main findings, it is further clear that different segments or markets of surfers can be identified, and that surfers should not be regarded as homogeneous. The segments identified further differ depending on the segmentation approach applied, with the majority of studies using either socio-demographic characteristics (spending) and surfing behaviour, or expectation preferences with surfing destinations as segmentation bases. There is therefore currently no universal typology of surfers. In this respect, existing studies (Farmer, 1992; Dolnicar & Fluker, 2003a, 2003b, 2004;

Moutinho *et al.*, 2007; Nourbakhsh, 2008) provide strong evidence that surfers need to be differentiated further on their travel behaviour, for example by profiling surfers who are more lucrative from the industry perspective.

It is further evident from the Addendum that, to date, no studies on surfers have been conducted from a South African perspective. The segmentation studies included in the addendum focused on American, Australian, Asian and European surfers. While the results from these studies indicate the behaviour and preferences of surfers, it do not provide information on their intrinsic needs and motives. The present research is thus invaluable to fill this gap in the current literature as it provides an understanding of the local surfing market in South Africa: the demographic profile, surfing behaviour, spending, and especially the motives of local surfers. This information is critical to the development of marketing and destination management strategies as it aids in adjusting surfing destinations' available offer to the demand of different surfers (Reis & Jorge, 2012).

## METHODOLOGY

The present study focuses on segmenting Muizenberg surfers regarding their socio-demographic profile, motives for surfing, as well as their surfing behaviour, which includes their propensity to travel in the pursuit of their sport. The following section discusses the method of research followed in the study.

### Questionnaire

A two-section, structured questionnaire was used to collect the data. Section A captured demographic details (gender, home language, age, occupation, home province, surfing behaviour, type of surfer they regard themselves as, years active) and spending behaviour, while Section B captured the motivational factors for surfing. In the motivation section, 20 items were measured on a five-point Likert scale of agreement where 1=completely disagree, and 5=completely agree.

The following steps, as proposed by Field (2003) and by Tustin *et al.* (2005), were also followed to design and validate the questionnaire: (1) content validity: an in-depth literature analysis was done to identify motives for surfing and produce statements for the identification of the respondents' motives. The statements included in Section B were also based on the work of Farmer (1992); Diehm and Armatas (2004); Ponting (2008); Stranger (2011); Buckley (2012) and Reynolds and Hritz (2012); as discussed in the literature review; (2) face validity: statistical consultation services advised on the formulation of the statements and the measuring scales used; (3) construct validity: factor analysis was performed on the motivational factors to determine the degree to which the statements would measure what they purported to be measuring; (4) reliability: to test the reliability of the identified factors, reliability coefficients (Cronbach's alpha) and inter-item correlations were calculated. The data analysis section below provides more detail on points (3) and (4).

### Survey and sampling method

A destination-based survey was undertaken along the southern coast of Cape Town. The survey took place at Muizenberg Beach on March 31, 2016. Muizenberg is a well-known surfing beach

in South Africa. Since 1910 and throughout history, it has been at the heart of surfing in South Africa: from prone surfing on wooden belly boards to the first stand-up surfing recorded in South Africa and the establishment of local surfboard design and construction (Muizenberg Tourism, 2015).

During the survey, 200 questionnaires were distributed. However, only 147 usable responses were obtained. Purposive sampling was used in that fieldworkers approached potential respondents and first asked the screening question “are you currently an active surfer?” Upon a positive reply, the fieldworkers explained the purpose of the study to the respondents and asked them to complete the questionnaire. The questionnaire was distributed to people on the beach, those sitting at the promenade, as well as those in nearby shops. Of the 147 questionnaires, 142 were fully completed and could be included in the analysis. It was important to include only questionnaires in which the respondent indicated what type of surfer they regard themselves as (*beginner, weekender, amateur or professional*). It is at this stage impossible to determine the number of surfers in the Cape Town area, and this is exploratory research, but the results are nevertheless considered relevant and significant enough to be taken note of.

### **Statistical analysis**

No previous South African studies exist, and therefore there is little to no information available on the characteristics of surfers in the country. With no basis or measuring instrument to work from, apart from international studies at this stage, an exploratory study was the most appropriate. Microsoft® Excel® was used to capture the data and the Statistical Package for the Social Sciences (SPSS) Version 23 (2016) to analyse it. The analysis was performed in four stages: descriptive statistics to profile the respondents, an exploratory factor analysis of the motives, segmenting the respondents based on the type of surfer they regard themselves as, and an analysis of significant differences between the clusters. These analyses were applied to provide insight into the profile and needs of surfers in South Africa.

## **RESULTS**

### **Profile of respondents**

The majority of respondents were male (61%). While this result is in line with previous research findings that surfing is a male dominated activity, the present study surprisingly had a high percentage of female respondents (39%). Reynolds and Hritz (2012) also found in their study of US surfers, that females were well represented (24%). This could indicate that the activity is growing amongst female South Africans. The respondents had an average age of 30 years, were English speaking (49%) and residents of the Western Cape (89%). Respondents earned either less than R20,000 (38%) or between R20,001 and R140,000 (15%) per annum. Respondents spent an average of R7,184 annually on surfing, were exposed to surfing at an average age of 16 years mainly by friends (53%), had been surfing for an average of 11 years, and regarded themselves as either amateurs (36%) or weekenders (33%). Respondents indicated that they surfed at least four times per week (25%) for one to two hours (47%), and surfed year round (54%) or during the winter (25%). The majority of respondents did not participate in surfing competitions (88%), but those who did, competed in an average of six events during the year.

### Results from the factor analysis

Using an Oblimin Rotation with Kaiser Normalisation, the pattern matrix of the exploratory principal component factor analysis identified six motivational factors (Table 1). These were labelled according to similar characteristics and accounted for 66% of the total variance. All had relatively high reliability coefficients (above 0.6) while the average inter-item correlation coefficients also implied internal consistency for all factors. Moreover, all items loaded on a factor with a loading greater than 0.4; these relatively high factor loadings indicated a reasonably high correlation between the factors and their component items. The Kaiser-Meyer-Olkin measure of sampling adequacy of 0.77 also indicated that patterns of correlation were relatively compact and yielded distinct and reliable factors (Field, 2005).

**Table 1. RESULTS OF FACTOR ANALYSIS OF SURFING RESPONDENTS**

FACTORS	1	2	3	4	5	6
<b>Motives for surfing</b>	Skill & image	Experience & enjoym.	Wellness & lifestyle	Escape	Challenge & health	Socialisation & excitem.
Surfing is a way to display my skills and abilities	0.811					
I like being seen and recognised as a surfer (surfing image)	0.736					
To interact with other surfers	0.682					
Surfing for me is an expression of myself	0.649					
To earn respect from peers	0.553					
Drive to explore/discover new surf spots intensifies with time (creates opportunities to travel)	0.482					
Riding a wave is a breath taking experience		0.820				
Surfing is a fun & enjoyable pastime		0.770				
Surfing is an adrenaline rush		0.675				
Surfing improves my quality of life			0.756			
Surfing forms part of my lifestyle			0.688			
To get away from my normal routine				0.712		
For stress relief				0.629		
To relax				0.617		
Surfing is a spiritual experience				0.540		

*Continued*



**Table 1. RESULTS OF FACTOR ANALYSIS OF SURFING RESPONDENTS (cont.)**

FACTORS	1	2	3	4	5	6
Motives for surfing	Skill & image	Experience & enjoym.	Wellness & lifestyle	Escape	Challenge & health	Socialisation & excitem.
To feel closer to nature & ocean				0.434		
Surfing is a personal challenge					0.714	
To improve my health & fitness					0.682	
It is a sociable activity						0.787
It is a thrilling experience as every surf is unpredictable						0.468
Reliability coefficient	0.77	0.82	0.60	0.75	0.60	0.60
Average inter-item correlation	0.37	0.60	0.36	0.39	0.38	0.31
Mean value	3.27	4.44	4.06	4.20	4.17	3.88

Bartlett's test of sphericity also reached statistical significance ( $p < 0.001$ ), supporting the factorability of the correlation matrix (Pallant, 2007). Factor scores were calculated as the average of all items contributing to a particular factor to interpret them on the original five-point Likert scale (the degree of agreement). Table 1 records that *experience and enjoyment* (4.44) was the most important motive why respondents surfed. This was followed by *escape* (4.20), *challenge and health* (4.17), *wellness and lifestyle* (4.06), and *socialisation and excitement* (3.88). *Skill and image* (3.27) was regarded as the least important motive for surfing, however, it is still regarded as important when interpreted on the Likert scale.

### Identification of segmented clusters

Respondents were clustered (segmented) based on the type of surfer they described themselves to be. The classification was based on and adapted from the work by Dolnicar and Fluker (2003a) that distinguished between 'beginners', 'intermediate', 'advanced' and 'highly advanced surfers' and Nourbakhsh (2008) who added 'weekenders' to the distinction. Table 2 shows that the majority of respondents regarded themselves as amateurs (35%) and weekenders (33%). This was followed by beginners (20%) and lastly professionals (12%).

**Table 2. CATEGORIES OF SURFING TYPE**

Surfer type	n	Percentage
Beginners	29	20%
Weekenders	47	33%
Amateurs	50	35%
Professionals	16	12%

**Table 3. ANOVA AND TUKEY'S POST HOC MULTIPLE COMPARISONS**

<b>Cluster characteristics</b>	<b>Cluster 1 Beginner n=29</b>	<b>Cluster 2 Weekender n=47</b>	<b>Cluster 3 Amateur n=50</b>	<b>Cluster 4 Professional n=16</b>	<b>F- ratio</b>	<b>p- Value</b>
<i>Socio-demographic and behavioural</i>						
Average age	26.23	30.14	33.53	26.80	2.052	0.111
Ave. no. of years surfing	2.15 a	7.93 c	13.40 c	18.00 b	7.111	0.001 *
Ave. competitive events participated per year	3.00	5.67	6.50	5.85	0.611	0.562
Ave. age first exposed to surfing	22.04 a	16.98 a	15.91 a	9.07 b	7.458	0.001 *
<i>Spending categories (per annum) ZAR</i>						
Surfing gear and equipment	645.45 a	2900.00 ab	3511.54 ab	4527.27 b	1.924	0.132
Surfing clothes (wet suites)	827.27	1148.48	1715.26	2363.64	1.916	0.133
Maintenance of surfboard/gear	0.91	394.12	353.53	436.36	0.563	0.641
Transport to surfing spots	179.09	1353.58	2498.53	1683.64	1.693	0.175
Surfing lessons	59.09	68.18	57.14	0.00	0.142	0.935
Renting surfing gear/equipment	530.00 a	156.06 b	86.11 b	40.00 b	4.105	0.009 *
Participation in surfing events	0.00	7.35	69.44	220.00	2.023	0.117
Other	600.00	441.15	436.11	20.00	0.309	0.818
Total spending	1038.97 a	4559.94 ab	6064.16 b	6372.50 b	4.560	0.004 *
<i>Motives for surfing</i>						
Skill and image	2.82 a	3.16 a	3.37 a	4.01 b	6.339	0.001 *
Experience and enjoyment	4.20	4.49	4.43	4.71	1.349	0.261
<i>Motives for surfing (cont.)</i>						
Wellness and lifestyle	3.20 a	4.04 b	4.41 b	4.53 b	12.714	0.001 *
Escape	3.89	4.24	4.26	4.35	1.773	0.155
Challenge and health	4.09	4.25	4.15	4.18	0.189	0.904
Socialisation and excitement	3.85	3.88	3.72	4.30	1.467	0.227

\*  $p \leq 0.05$  Effect sizes: \*\* Small effect:  $d=0.2$ ; \*\*\*Medium effect:  $d=0.5$  and \*\*\*\*Large effect:  $d=0.8$  (Cohen, 1979)

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

The analysis of significant differences made use of ANOVAs, Tukey's (1949) post hoc multiple comparisons and effect sizes, to investigate any significant differences between the identified segments based on their socio-demographic and behavioural characteristics. As presented in Table 3, statistically significant differences were recorded based on the number of years surfing ( $p=0.001$ ), age first exposed to surfing ( $p=0.001$ ), the spending categories surfing gear and equipment ( $p=0.132$ ). However, Tukey's post hoc multiple comparisons indicated significant difference for renting surfing gear and equipment ( $p=0.009$ ), total spending ( $p=0.004$ ), and for the motives *skill and image* and *wellness and lifestyle* ( $p<0.05$ ).

Regarding socio-demographic and behavioural differences, expectedly, *professionals* were active for more years (an average of 18 years) compared to *beginners* who were only surfing for an average of two years. A possible reason could be that *professionals* were exposed to surfing from a younger age (an average of nine years) compared to the other three segments. Regarding spending, *professionals* spend more money annually on surfing gear and equipment (R4,527) compared to *beginners* (R645), while *beginners* spent more money on renting gear and equipment (R530) compared to the other three segments. *Amateurs* and *professionals* had the highest total spending per year (R6,064 and R6,373 respectively). Compared to the other three segments, *professionals* regarded *skill and image* as a more important motive (4.01), while *beginners* regarded *wellness and lifestyle* (3.20) as a less important motive compared to the other three segments.

### Cross-tabulations and chi-square tests results

Chi-square tests with phi-values ( $\phi$ ) were used to identify any significant differences between the segments. Statistically significant differences between the three segments were based on gender ( $p=0.001$ ;  $\phi=0.410$ ), frequency of surfing ( $p=0.001$ ;  $\phi=0.696$ ), preferred time to surf ( $p=0.001$ ;  $\phi=0.415$ ), and whether they participated competitively in surfing events ( $p=0.001$ ;  $\phi=0.378$ ). Regarding gender, *weekenders*, *amateurs* and *professionals* were mainly male (62%, 68% and 94%, respectively) while more *beginners* were female (75%). *Beginners* surfed less frequently, for example, a few times a year or once a year, or they surfed whenever the waves looked good (25%), or once a week (21%). *Weekenders* surfed once a week (30%) or over weekends (24%); *amateurs* surfed four or more times a week (43%) or twice a week (20%), and *professionals* surfed four or more times a week (64%). All four segments surfed year round (45%, 57%, 56% and 56% respectively) while more *beginners* preferred to surf in summer (48%) and more *professionals* in winter (38%). Predictably, more *professionals* participated in surfing competitions (44%) compared to the other three segments.

## FINDINGS AND IMPLICATIONS

### Demographic profile of surfers

The results support the perception that the sport of surfing is male dominated. Confirming the findings of previous research by Farmer (1992), Buckley (2002), Dolnicar and Fluker (2003a, 2003b), Moore (2011), Reynolds and Hritz (2012), Barbieri *et al.* (2014), Hritz and Franzidis (2016) and Towner (2016), the demographic profile of the respondents was males and in their early thirties. However, by analysing the respondents further through market segmentation, the

results substantiate that this perception should be treated with caution, as there is also a high percentage of female surfers in the current sample. This finding emphasises the need to apply market segmentation to understand the heterogeneous nature of the market better.

### **Surfing segments in South Africa**

The four identified surfing segments in the present study differ from the segments identified by previous research (see Addendum). Respondents were segmented based on the type of surfer they regard themselves as (*beginner, weekender, amateur and professional*) and not based on their demographic characteristics or their expectation preferences regarding surfing destinations, as in most previous research (Addendum). However, similarities are evident when compared to the *serious* and *less serious* surfers identified by Sotomayor and Barbieri (2016). The majority of respondents regarded themselves as *amateurs* (35%), followed by *weekenders* (33%) and *beginners* (20%), while *professionals* (12%) represented the smallest segment. This finding confirms that the type and number of segments identified depend on the kind of segmentation base applied. However, the present study proposes that the classification can be a useful typology of surfers, which is descriptive of the characteristics of each segment.

### **Distinct surfing motives**

Although previous studies have found similar motives for surfing, the importance and combinations of motives found in this study are distinct from those findings. The identified motivational factors further confirm that surfers' motives are more intrinsic than extrinsic. Six motives were identified in the present study (in order of importance): *experience and enjoyment, escape, challenge and health, wellness and lifestyle, socialisation and excitement, and skill and image*. Consistent with the findings of Farmer (1992) and Buckley (2012), health was identified as a motive, which confirms that surfers seek health and fitness benefits. However, Muizenberg surfers were motivated mainly by the exhilaration of the experience and to escape their everyday environment, confirming the findings of Farmer (1992), Buckley (2012), as well as Reynolds and Hritz (2012). A possible explanation for this finding is that most respondents were local residents and therefore used surfing as an escape mechanism from their daily routine. This confirms the notion that surfers have a different set of motives when compare to mainstream athletes. Image as part of the combined motive, *skill and image*, supports the finding by Neto (1995) that fashion creation and the importance of, for example, dressing appropriately, matter to surfers. The motive *wellness and lifestyle* corroborates Mackert's (2005) observation that surfing represents a spiritual world and is therefore regarded as a way of life. Marketers of the sport, as well as surfing competitions, can use the identified motives in their marketing to enhance the appeal of the sport. Emphasis should be placed on the distinct nature of the sport and the thrill of the experience that cannot be duplicated in any other sport.

### **Heterogeneous nature of surfers**

Supporting the general conclusion derived from the Addendum, the differences between the four identified segments confirm that surfers cannot be regarded as homogeneous. Statistically significant differences are evident in surfers' socio-demographic characteristics, surfing behaviour and motives. *Professionals* are active for more years than *beginners* and were exposed to surfing from a younger age. This finding confirms the importance of early exposure

to foster a love for and dedication to the sport, which is an important aspect of most sport participation (Myburgh *et al.*, 2014; Kruger *et al.*, 2015; Kruger & Saayman, 2015). From an economic point of view, *amateurs* and *professionals* are the most lucrative markets with the highest total spending per year to pursue their sport. *Beginners* spend more money on renting gear and equipment compared to the other three segments. Surfing shops can capitalise on this spending by offering discounts on certain gear and equipment, or perhaps by introducing a system where *beginners* can pay a weekly or monthly fee for gear and equipment, or even a lay-by agreement. This can encourage *beginners* to remain actively involved in the sport and progress to *amateurs*.

While the majority of *weekenders*, *amateurs*, and *professionals* are male, more *beginners* are female. This shows that the perception of surfing being male dominated should be treated with caution. It does, however, emphasise the need for more research on the needs of female surfers to enhance the appeal of the sport and activity among women. As expected, *beginners* surf less frequently than the other three segments, while *professionals* surf the most frequently during the week and participate more often in surfing competitions. From a tourism perspective, *professionals* are therefore the most viable market, as they are willing to travel in pursuit of their sport. *Professionals* are also the most lucrative market for surfing competitions on which to focus their marketing efforts.

All four segments surf year round, making them important from a tourism point of view, as their surfing behaviour can help sustain revenue from surfing tourism and counter seasonality. This finding is valuable for surfing destinations and beaches and shows the importance of continuous marketing throughout the year to attract surfers. Hosting surfing competitions or events over weekends can also encourage surfers in all four segments to travel to nearby beaches. Confirming the results of the factor analysis, all four segments regard *experience and enjoyment* as the most important motive for surfing; however, *professionals* regard *skill and image* as a more important motive than other segments do, while *wellness and lifestyle* is a less important motive to *beginners* than to others. This finding shows that the priority of the motives changes the longer surfers are involved in the sport, and that surfers' motives cannot be generalised because their priority differs from one segment to the next.

### **Methodological considerations**

From a methodological point of view, this research confirms that segmenting surfers based on what type of surfer they regard themselves to be, is a useful tool, especially for organisers and marketers of the sport wanting to understand the differences among surfers. This segmentation approach is practical and applicable and, therefore, offers an alternative segmentation base, which challenges the use of traditional socio-demographic and destination-preference segmentation bases. The four segments (typology) of surfers identified in the present study (*beginner*, *weekender*, *amateur*, and *professional*) are descriptive of the characteristics of each surfing market, thereby filling a gap in the South African surfing literature.

## CONCLUSION

This exploratory research identified four segments of Muizenberg surfers in South Africa, namely *beginner*, *weekender*, *amateur* and *professional*. The study corroborates the argument that surfers cannot be regarded as homogeneous and that they differ according to their socio-demographic characteristics, surfing behaviour and motives. Based on the results from the research, for the first time provide a picture of South African surfers at Muizenberg and offer strategies to surfing beaches, destinations and competitions to expand this lucrative sport and activity market in the country. Furthermore, the results demonstrate that segmenting surfers based on how they classify themselves, is a useful market segmentation tool, as it yields a clear and direct profile and understanding of different types of surfers and their preferences. This exploratory research, therefore, makes a distinct contribution to the literature on surfers, especially in a South African context. As the title of the research reflects, sand, sea, and surf are important to surfers. However, the importance of these aspects differs from market to market. This highlights the need for continued research into the distinct nature of surfers.

## LIMITATIONS OF RESEARCH AND DIRECTION FOR FUTURE RESEARCH

This study has some limitations in that it analysed only a small sample of surfers at one beach. Since no previous South African research on surfers exist, this exploratory research provides a reference point for future researchers. Future and ongoing research could expand further on the topic. It is recommended that similar research be conducted at other surfing beaches around the country to compare and validate results. Additionally, it is proposed that surfing competitions, such as the Billabong Pro in Jeffrey's Bay be included, especially to determine the appeal of South Africa to international surfers and how this can be enhanced. Future studies should also determine the key factors surfers regard as important, when selecting surfing destinations as this information will be valuable in the management and marketing of surfing destinations.

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ADDENDUM TO FOLLOW ON NEXT PAGE

**ADDENDUM**  
**PREVIOUS RESEARCH REGARDING SURFING SEGMENTS**

Author(s)	Study focus	Research discipline(s)	Research approach	Segmentation base	Finding(s) on surfer segments
Farmer (1992)	A surf shop manager operating on one of the Carolinas' beaches identified five types of surfers	Sports behaviour	Questionnaire survey and an interview	The values of surfing culture (California, US)	The <i>rowdy bunch</i> , mostly composed of novice surfers, whose main interest was to party with their surfer friends. The <i>schoolboys</i> , for whom surfing was an after-school pastime. The <i>weekend warriors</i> , who could only surf when they were not at work. The <i>hard core</i> , who lived and worked near the coast for surfing purposes. The <i>beach bums</i> , who dedicated their lives exclusively to surfing.
Dolnicar and Fluker (2003a)	Investigated demographic & psychographic characteristics of Surf Tourists. Identified 5 segments of surfers in Australia with distinct demographic, surf-related preferences (type of waves & challenges), and travel behaviour	Sports tourism marketing and Social and behavioural sciences	Online survey (quantitative approach)	Importance rating to various surf destination attributes and spending habits (Australia)	The <i>radical adventurers</i> , comprising the youngest surfers with the lowest income, were most concerned with the local culture and the surfing qualities of the destination regarding the time of the surfing season, secret locations, lack of crowd, and quality of the natural environment. The <i>luxury surfers</i> were most concerned with the service quality of the destination regarding accommodations, food, and safety while they were not bothered with the price or exchange rates. The <i>price-conscious safety seekers</i> , representing the oldest group with the most years involved in surfing and highest income, placed high importance on family facilities and the quality of accommodations. The <i>price-conscious adventurers</i> were constantly searching for new locations and discoveries as well as a lack of crowds. The <i>ambivalent tourists</i> did not appear to have any particular surfing or destination preference.

Author(s)	Study focus	Research discipline(s)	Research approach	Segmentation base	Finding(s) on surfer segments
Dolnicar and Fluker (2003b)	Behavioural market segments among surf tourists	Business and behavioural sciences	Online survey (quantitative approach)	Past surfing destination choice (Australia)	<p><i>Indonesia</i>– prefers challenging hollow waves, longest length of stay.</p> <p><i>American breaks</i> – older, more years’ experience, prefer fun beach breaks, shortest length of stay.</p> <p><i>Combination of Western Australian and Indonesian</i> - least number of years’ experience, shortest length of stay.</p> <p><i>Australia only</i> – more years’ experience, shorter length of stay, prefers easy points and reefs.</p> <p><i>Surf breaks world-wide</i> – older, more years’ experience, prefers challenging hollow waves.</p> <p><i>Queensland and the north coast of New South Wales</i> – least number of years’ experience, prefer fun beach breaks, shortest length of stay.</p>
Dolnicar and Fluker (2004)	The symptomatic nature of past destination choice among surf tourists	Tourism marketing	Online survey (quantitative approach)	Past surf destination patterns (Australia)	<p>“<i>Indo-centrics</i>” showed a greater tendency for visiting surf destinations, were among the youngest surfers with an average age of 27, and represented the group who stayed the longest.</p> <p>“<i>American-centric</i>” surfers represented some of the most experienced surfers, having surfed for more than 20 years and with an average age of 33, and preferred to seek new countries and new breaks.</p> <p>“<i>Western Australia/Indo-centrics</i>” preferred waves found at easy points and reefs and were very active surf tourists, regularly taking more than one surf holiday per year.</p> <p>“<i>Australian-centrics</i>” surfed more on average than the other groups in Australia and preferred traveling to new destinations where they could seek new surf breaks.</p> <p>“<i>Global-centrics</i>” appeared to surf at as many destinations as they could.</p> <p>“<i>QLD/NSW-centrics</i>” were local surfers but notable in that they took the most irregular surf holidays compared to the other segments.</p>

Author(s)	Study focus	Research discipline(s)	Research approach	Segmentation base	Finding(s) on surfer segments
Beaumont (2011) and Ford & Brown (2006)	Analysed the “local surfer” and identified other surfing types	Sport and health sciences	Personal interviews	Explored the links between the surfing types style and ideology (South West of England)	<p>The <i>local surfer</i> rejected large company brand names and resisted displaying large logos. Usually taught and encouraged by a member of their family, in particular their father, they had a strong relationship with their local waters, initiated by their proximity to them.</p> <p>The <i>wannabe</i> had a preoccupation with the fashion and group identity aspects of surf culture. The wannabe had a low participation rate in surfing, which indicated a low standard in surfing.</p> <p>The <i>soul surfer</i> held conceptual abstractions that emphasised the values of spirituality, aesthetics, and the quest for inner peace and authenticity.</p> <p>The <i>sponsored surfer</i> was seen as being actively involved in the commercial world. They went beyond their sponsorship and were involved in many business opportunities to exploit themselves and their surfing knowledge for money.</p>
Sotomayor & Barbieri (2016)	An exploratory examination of serious surfers identified two segments: serious and less serious surfer	Tourism	Online survey (exploratory study using snowball sampling)	Indicators of serious surfing and surf travel behaviour (Americas, Asia and Europe)	<i>Serious surfers</i> were more avid travellers in the quest for the perfect wave than <i>less serious surfers</i> .

