Repeat visitation is an important element of the domestic visitor economy, and one that presents opportunities for tourism authorities. By understanding the factors that draw visitors back to a destination, tourism regions can effectively market to this significant segment.

Tourism Research Australia, in partnership with the South Australian Tourism Commission and Tourism Western Australia, commissioned MyTravelResearch.com to conduct a study to investigate the potential for repeat visitation. This summary reports on the key findings from research for South Australia (SA).

The research (conducted between April and June 2017) focuses on the largest interstate source markets for SA: New South Wales, Victoria, Queensland and Western Australia (WA).

**KEY MESSAGES**

There were differences between the drivers for SA and WA, however, there were also some common themes that apply to both, such as:

- **Repeat visitors outnumber first-time visitors** in both states. Repeat visitation is already a successful and growing sector.

- **Repeat visitors are a varied group.** There were differences between repeat visitors for each state, by age, personality type, and motivation to travel.

- **Lifestage is strongly correlated with repeat visitation.** The strongest groups for repeat visitation were those with a good balance of both time and money: those aged 25-34 years and those aged over 55. Peak child-rearing years are not generally conducive to repeat interstate travel – especially as distance to the destination increases.

- **Repeat visitors also have a different personality type and attitudes to travel.** Generally, repeat visitors tend to be more introverted and more community minded. They are more likely to see differences within destinations as well as between them. They are less likely to think of Australian destinations as being all the same.

- **Repeat visitation can be motivated by either emotional or functional reasons to travel. Understanding which has the greatest growth potential for the destination can help with marketing.** One group of repeat visitors tends to return a destination because of how it makes them feel. Others are driven by triggers: events or new products and experiences. Growth in the short term is perhaps easier with functional repeat visitors and will be driven by highlighting new products or experiences and focusing on tactical calls to action.

- **Satisfaction is a pre-condition of repeat visitation but not a driver in its own right.** There is little difference in satisfaction rates between those who intend to return and those who do not. While getting the offer right is important, it is not sufficient on its own without the emotional or functional triggers mentioned above.

- **The emotional factors driving repeat visitation are unique to the destination and the types of visitors it attracts.**

- **Three types of first-time trips provide an opportunity to drive future visitation:**
  - Cruising provides an opportunity to showcase a destination and to convert cruisers into repeat visitors, bearing in mind that a proportion of this market are likely to be ‘cruise loyalists’ rather than ‘destination loyalists’. Cruise visitors tend to rely on the information gained on their first visit to plan future trips, rather than seeking new information for return visits. Providing all visitors with an understanding of the depth of experience available in the destination (via targeted marketing) can help drive future visitation.
  - Attending a conference provides an opportunity to showcase a destination and its experiences with some evidence that there is a link to returning for events.
  - Visiting on business enables travellers to sample a destination, and they are also likely to build contacts who can facilitate or encourage further visits. Businesses that they will likely frequent should be provided with targeted messaging about the destination.
KEY FINDINGS FOR SA

- **Repeat visitors outnumber first-time visitors.**
  - Over the past ten years, approximately 1.81 million adult Australians (11.3%) visited SA once, while 3.47 million (21.7%) visited more than once.
  - Converting 9%* of those 1.81 million one-time visitors into ongoing repeat visitors would yield an estimated $32.7m of direct spend per year (*half of the 18% that say they will ‘definitely return’ for a leisure trip within ‘a couple of years’).

- **Satisfaction is a pre-condition of repeat visitation, but not a driver in its own right.**
  - Overall satisfaction with the most recent trip is almost identical when comparing the one-time and repeat visitor groups (Figure 1). As such, satisfaction drives memories, and perhaps advocacy, but does not on its own drive repeat visitation. It is, however, a pre-condition for a repeat visit to be considered in the first place.

**FIGURE 1 – INTENTION TO VISIT VS SATISFACTION WITH MOST RECENT TRIP**

- **There were differences between repeat visitors and those who visited just once, such as:**
  - likelihood to travel, based on life stage (Figure 2).
    - Those aged 55-74 years, either approaching retirement or recently retired, see SA as a destination to return to more than other age groups. The 55-64 age bracket appears to be the window of time in which age-related health concerns haven’t impacted significantly, and there is enough time and money to travel. The 25-34 age group also outperforms as repeat visitors. The majority of these people are ‘SINKs and DINKs’ that are yet to have children and have less logistic and financial concerns when contemplating a trip to SA.

**FIGURE 2 – VISITOR TYPE BY AGE**
personality types, with each having particular needs from a holiday.

- Generally, one timers tended to see themselves as down to earth, while repeat visitors saw themselves as community-minded and responsible. Repeat visitors were more likely to volunteer (including those who were still working) and they had a broader awareness of the world. This is well-aligned with SA’s offer: more contemplative and relaxed.
- their attitude towards, and perception of, SA.

- Repeat visitors rated SA more positively across all statements (Figure 3). Unlike the case in WA where the disconnect between visitor type was noticeable for only a couple of statements, the disconnect in SA is across all statements. This indicates that the difference between a ‘true’ one-time, and ‘true’ repeat visitor is a fundamental, emotional difference in brand perception rather than being functional. It’s not about what you are doing in SA specifically, it is about how you feel when you are there.

- Repeat visitors are not a standardised group.

- Different experiences will drive different groups to visit a destination more than once.
- Key tactical campaigns targeted at different groups within the broader ‘one-time’ and ‘repeat’ visitor groups will be most effective in optimising repeat visitation.

### FIGURE 3 – VISITOR PERCEPTIONS OF SOUTH AUSTRALIA

<table>
<thead>
<tr>
<th>Statement</th>
<th>One Time</th>
<th>Repeat</th>
</tr>
</thead>
<tbody>
<tr>
<td>...HAS HIDDEN GEMS WAITING TO BE DISCOVERED</td>
<td>3.7</td>
<td>3.9</td>
</tr>
<tr>
<td>...IS SOMEWHERE YOU CAN CREATE GREAT MEMORIES</td>
<td>3.8</td>
<td>4.0</td>
</tr>
<tr>
<td>...APPEALS TO ALL SENSES</td>
<td>3.7</td>
<td>3.9</td>
</tr>
<tr>
<td>...IS SOMEWHERE I CAN FEEL FREE TO BE MYSELF</td>
<td>3.6</td>
<td>3.9</td>
</tr>
<tr>
<td>...HAS EXPERIENCES FOR PEOPLE LIKE ME</td>
<td>3.7</td>
<td>4.0</td>
</tr>
<tr>
<td>...ALWAYS HAS NEW THINGS TO SEE AND DO</td>
<td>3.5</td>
<td>3.8</td>
</tr>
<tr>
<td>...OFFERS EXPERIENCES I CAN’T GET ANYWHERE ELSE</td>
<td>3.4</td>
<td>3.6</td>
</tr>
<tr>
<td>...OFFERS SOMETHING COMPLETELY UNEXPECTED</td>
<td>3.4</td>
<td>3.6</td>
</tr>
<tr>
<td>...HAS EVENTS AND FESTIVALS THAT APPEAL TO ME</td>
<td>3.4</td>
<td>3.6</td>
</tr>
<tr>
<td>...SO MUCH TO OFFER YOU NEED TO VISIT MORE THAN ONCE</td>
<td>3.6</td>
<td>3.9</td>
</tr>
<tr>
<td>...IS GOOD VALUE FOR MONEY</td>
<td>3.6</td>
<td>3.8</td>
</tr>
<tr>
<td>...FEELS EASY TO GET TO</td>
<td>3.6</td>
<td>4.0</td>
</tr>
</tbody>
</table>

Image courtesy of South Australian Tourism Commission
RECOMMENDATIONS

- Given the relatively small financial benefit of specifically targeting the conversion of one-time visitors into ‘typical’ repeat visitors, the South Australian Tourism Commission could make key tactical changes to their existing campaign to maximise the number of one-time visitors that convert into lifelong repeat visitors.

- Current SA brand campaigns are resonating well with ‘emotional’ repeat visitors, so maintaining that focus on the laid-back lifestyle remains important. The campaigns could be supported with reminders to visitors to come back and experience the lifestyle.

- SA could consider using more tactical campaigns to reach potential ‘functional repeat visitors’. These should link to specific events or be heavily focused on new products or experiences to trigger return visits. Such campaigns could focus on:
  - the one-time visitor (35-44 year olds with kids) by presenting a series of options that provide different, uniquely SA experiences (i.e. events, shark diving, Kangaroo Island).
  - the 55+ age group by delivering key messages on how SA’s accessibility, affordability, comfort and safety enables young-at-heart travellers to keep travelling and have great experiences. Liveability of SA is a key proof point, as are practical details.

- Repeat visitors tend to use a much narrower range of information sources than one-time visitors to SA, which can be addressed by:
  - ensuring that in-destination communications are consistent with branding (not just those from SATC) – visitor servicing is very important in imprinting key messages that will drive future visitation.
  - focusing on disruptive marketing strategies in campaigns that target repeat visitors from existing databases or via social media profiling, in order to drive attention.
  - targeting local businesses who host interstate visitors with a campaign that encourages them to act as advocates and encourage visitors to stay on.

RESEARCH APPROACH

This research is based on desktop research, quantitative research (with n = 1,000 visitors to SA of whom n = 600 were repeat visitors) and qualitative research with a group of n = 36 participants of whom half had visited SA. The project focused on the largest interstate source markets for SA: New South Wales, Victoria, Queensland and WA. The full report is available from tourism.research@tra.gov.au