

Does loyalty pay? First-time versus repeat visitors at a national arts festival

M. Kruger, M. Saayman & S.M. Ellis

ABSTRACT

The aim of this research is to segment visitors to one of South Africa's biggest arts festivals based on the frequency of visits in order to distinguish between first-time and repeat festival attendees. Both first-time and repeat visitor groups play a fundamental role in the overall well-being and success of a festival, and festival organisers must strive to achieve a balance between first-time and repeat visitors. Festival managers should therefore be aware of the festival attributes that differentiate between the first-time visitor group and repeat visitors attending the festival. These differences include socio-demographics, behavioural characteristics, destination perception, perceived value and travel motivations. This article therefore compares first-time and repeat visitors to the Klein Karoo National Arts Festival based on these categories. A questionnaire survey (N = 555) was conducted at the festival, and the findings indicate that there are significant differences between first-time and repeat visitors at the festival. First-time visitors spend a significant amount of money during the festival and are mainly motivated by *Relaxation and socialisation* and *Festival shows/productions*, while repeat visitors are loyal visitors who stay longer and spend more money, especially on tickets supporting the festival's shows/productions. Results reveal that both first-time and repeat visitor groups are important for the long-term sustainability of the festival. This method of segmentation has proved to be successful and is used as the basis for proposing managerial and marketing implications for the festival organisers.

Key words: first-time visitors, repeat visitors, arts festival

Ms M. Kruger & Prof. M. Saayman are in the Institute for Tourism and Leisure Studies, North-West University, Potchefstroom; Dr S.M. Ellis is in the Statistical Consultation Service at the same university. E-mail: 13018493@nwu.ac.za

Introduction

Governments and businesses, as well as residents and festival organisers, perceive festivals as a financial injection to local economies (Delamere 2001). Generating an estimated R97.8 million in 2009, the Klein Karoo National Arts Festival (hereafter referred to as the KKNK) is the largest arts festival in South Africa in terms of economic impact. (Slabbert, Kruger, Viviers, Saayman & Saayman 2009: 41). The KKNK is a celebration and enhancement of the arts through the medium of Afrikaans. Launched in 1994, the week-long festival, held annually in Oudtshoorn (in the Western Cape) during the March/April school vacation, features a range of pop, rock, cabaret, classical music, drama and dance (see map in Figure 1 showing the location). The festival presents over 200 productions, working with over 750 artists in 40 different venues attracting more than 100 000 visitors each year, making it one of the most popular arts festivals in the country (Kitshoff 2004: 240; Van Zyl 2005: 9).



Figure 1: Oudtshoorn (location of the KKNK)

According to Saayman (2004: 211), the contribution of events and festivals, such as the KKNK, to tourism in the country lies especially in the fact that they offer entertainment and serve as attractions. Prentice and Anderson (2003: 26) agree and point out that by interpreting attractions as sets of activity opportunities, festivals have acquired the characteristics of destinations in their own right (in part removed from the host city), since a festival can be regarded as a “polyphony of attractions, individually competing, but offering opportunities for joint consumption through the sheer volume of performance on offer”. Since festivals can therefore be regarded as creative destinations (Prentice & Anderson 2003: 27), any references made to destinations in this article thus also apply to festivals.

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

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

The aim of this research is thus to segment visitors to the KKNK based on the frequency of visits in order to distinguish between first-time and repeat festival attendees at the KKNK. To achieve this, the article is structured as follows: the literature review is followed by a description of the method of research, then a

discussion of the results, a discussion of the findings and their implications and, finally, concluding remarks.

Literature review

Festival marketers are using increasingly strong discretion in selecting promotions aimed at potential tourists (visitors) to maximise their marketing return on investment (Tang & Turco 2001: 34). According to Lau and McKercher (2004: 280), repeat visitation represents an attractive, cost-effective market segment for most festivals. Oppermann (2000: 78a) agrees, and highlights various reasons why repeat visitation has been regarded as a desirable phenomenon in marketing: (1) the marketing costs needed to attract repeat visitors are lower than those required for first-timers (Tang & Turco 2001: 34); (2) repeat visitation is considered a positive indication of tourist satisfaction; (3) repeat visitors are the type of tourists most likely to revisit a festival, which is linked to loyalty and economic sustainability (Dick & Basu 1994: 99; Caneen 2004: 265); and (4) repeat visitors might recommend the festival to friends and relatives, resulting in a positive word-of-mouth effect (Oppermann 2000a: 78; Li, Cheng, Kim & Petrick 2008: 289; Shoemaker & Lewis 1999).

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

According to Vogt, Stewart and Fesenmaier (1998: 69), attracting new visitors is a major concern for festivals that rely on tourism (visitors) as an agent for economic development and growth. Visitation levels are therefore difficult to maintain unless the festival marketing is continually reaching new visitors, making them aware of the festival, and convincing them to visit. Shanka and Taylor (2004: 135) add that, should a festival become increasingly successful over a number of years of staging, and hence increase its profile, it may then attract a greater proportion of first-time visitors. This may in turn change the nature of a festival in terms of programming

and the structure of offerings, which may then change the value of the festival for the local domestic market, which was previously considered as the core of the visitor group. It is therefore worth investigating whether there are differences between what repeat visitors and first-timers want from the festival (Shanka & Taylor 2004: 135). This is also the case in South Africa, where events, especially arts festivals, are an important part of the tourism industry, since the country bases much of its destination marketing effort on festivals and events (Saayman 2004: 211).

Oppermann (1999) and Li et al. (2008: 279) state that it is extremely important to understand these differences, since they provide management with more specific direction. This is because the tourism demand of repeat visitors is quite different from that of first-time visitors (Wang 2004: 115). Correia, Oliveira and Butler (2008: 198) add that festival managers must make a distinction between marketing strategies for first-time and repeat visitors and also that they should pay attention to visitors' specific preferences in order to attract them. Jang and Feng (2007: 587) warn that, if festivals focus only on repeat visitors, festival marketers and managers (organisers) may misunderstand the movement of their market and allocate resources inefficiently. To avoid inefficiency, festivals should further understand their entire market structure, which consists of other segments, including repeat visitors and first-time visitors (Jang & Feng 2007: 587). An implication is that travel and festival managers (organisers) need to consider these differences and to propose different programmes for these two potentially different market segments (Vogt et al. 1998: 69; Wang 2004: 115). Specifically, information concerning tourists' status as first-time or repeat visitors can be useful in market segmentation (Formica & Uysal 1998), signalling destination familiarity (Tideswell & Faulkner 1999), and determining a destination's position in its life cycle (Oppermann 1998: 136; Priestly & Mundet 1998).

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

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

- Gitelson and Crompton (1984: 199) as well as Lau and McKercher (2004: 284) found that first-time visitors were more likely to be younger, while repeat visitors were more likely to be older. This result was confirmed by Li et al. (2008: 288), who found that first-time visitors tend to be younger and single. Li et al. (2008: 288) also revealed that first-timers were most likely to be long-haul visitors who travel greater distances, while repeaters were more likely to travel to visit friends and relatives and take weekend trips. Caneen (2004: 271) found that nationality, more than age and gender, significantly influenced visitors' decision to return to Hawaii. However, no significant differences were found in other studies in terms of gender, education and income (Li et al. 2008: 282). This supports the findings of McKercher and Wong (2004) that few demographic differences distinguish first-time and repeat visitors. First-time visitors stay for shorter periods than repeaters (Oppermann 1997: 178; Wang 2004: 108; Lau & McKercher 2004: 284; Oppermann 1998), while only Li et al. (2008: 289) found the opposite.
- While it is essentially argued that repeat visitors spent more money (Oppermann 2000a: 78), the findings within the context of first-time and repeat visitation studies are not as conclusive as one might expect (Li et al. 2008: 281). Wang (2004: 108) found that repeat visitors spend more than first-time visitors. A possible explanation for this finding is that repeat visitors perceive the overall value for money to be more satisfactory than first-time visitors (Kozak & Rimmington 2000), and satisfaction leads to repeat action (Baker & Crompton 2000; Kozak 2001: 784). Tang and Turco (2001: 39), Oppermann (1997: 178), Alegre and Juaneda (2006: 686), Li et al. (2008: 288) and Petrick (2004b: 469) all found in their respective research that first-time visitors spend significantly more than repeaters. Li et al. (2008: 288) and Petrick (2004b: 469) concluded that repeat visitors are more price sensitive and more apt to search for lower prices than first-time visitors.

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

- Consistently, first-timers are more likely to be seeking variety and new cultural experiences, while returning visitors are more likely to be seeking relaxation and spending time with, or visiting, family and friends (Gitelson & Crompton 1984; Hughes & Morrison-Saunders 2002). Fakeye and Crompton (1992: 366) further revealed that first-time visitors are likely to be more curious to see the area than repeaters whose curiosity motive has been satiated by previous visits, while socialisation is of major importance for repeaters. In addition, Alegre and

Juaneda (2006: 686) revealed that while first-timers are motivated by external factors (including the price of the holiday), repeaters favour factors inherent in the destination (such as the quality of the surroundings or accommodation) or factors that are a consequence of their previous stay there (a reduction in non-monetary costs such as the time and effort needed to acquire and assess information on destinations and the cost of planning or a sense of emotional attachment and loyalty to the destination based on the activities and attractions offered).

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

- Wang (2004: 108) found that first-time visitors were involved in more activities, while repeat visitors were engaged in fewer tourist activities. This is supported by Fakeye and Crompton (1991), Kemperman, Joh and Timmermans (2004: 159), Lau and McKercher (2004: 284) as well as Oppermann (1997: 178), who also found that first-time visitors visit more attractions within a destination area; explore a destination more widely and participate in a variety of activities, with particular interest in large icons and events. Repeat visitors visit a smaller number of attractions (Wang 2004: 108), but spend their time more intensively (Oppermann 1997: 178), since they are destination-aware tourists, who are aware of the range of activities available (Lau & McKercher 2004: 279). Li et al. (2008: 280) showed that repeat visitors tend to make more congruent plans than first-time visitors, and are less likely to change their plans because of their experiences with the destination. Wang (2004: 114) found that repeat visitors are furthermore engaged in activities related to local culture and life and prefer more social activities, such as shopping, dining or visiting friends and relatives. Rosenbaum (2006: 294), conversely, found that Japanese repeat visitors to Hawaii are more interested in engaging in personal pleasure and relaxation activities, and less intent on taking part in cultural or sightseeing tours.

The tourism literature furthermore suggests that previous festival experience and familiarity significantly impact visitors' decision-making processes, perceptions and image of the festival, as well as their levels of satisfaction (Oppermann 1998; Prentice & Andersen 2003):

- Fakeye and Crompton (1991) and Correia et al. (2008: 185) found that first-time visitors have more complex and differentiated *images of destinations* than repeat visitors. This is probably because repeat visitors typically develop their images out of previous actual experiences, while first-time visitors establish their images of

the destination through information obtained from external sources (for example, tourism suppliers, family and friends) (Reid & Reid 1993). First-time visitors identified natural and cultural amenities and accommodation as more important image components, whereas repeaters found some factors associated with social opportunities – such as food, friendly people, bars and evening entertainment – more important than other image components (Fakeye & Crompton 1991).

- Repeat and first-time visitors were found to have different *perceptions of satisfaction* with a destination (Wang 2004: 103). Kozak and Rimmington (2000) determined that repeat visitors' perceived destination attributes were more satisfactory than those of first-time visitors. These attributes included overall value for money, standard of accommodation, feelings of safety and security, hospitality and cleanliness. Shanka and Taylor (2004: 142) found in their study of visitors to the Taste of the Valley food and wine festival in Perth that repeat visitors had more positive attitudes towards parking and service attributes of the festival compared to first-time visitors, while Li et al. (2008: 289) found that repeat visitors were significantly more satisfied with attractions, accommodation and restaurants than first timers. However McKercher and Wong (2004) and Anwar and Sohail (2004: 165) found that repeaters are less likely to be satisfied, but have a stronger intention to revisit in the future than first-time visitors (Juaneda 1996; Petrick & Backman 2002; Sonmez & Graefe 1998; Mohr, Backman, Gahan & Backman 1993; Gyte & Phelps 1989; Petrick, Morais & Norman 2001). However, repeaters might have a lower level of satisfaction because of higher expectations in some cases (Anwar & Sohail 2004: 167; McKercher & Wong 2004), which means that satisfaction may not be directly correlated with revisit intention (Li et al. 2008: 281).
- Repeat visitors also use a wide range of *information sources* (Shanka & Taylor 2004: 142). Letho, O'Leary and Morrison (2002) reported that visitors' information search efforts do not necessarily decrease as their experiences with a specific destination increase. Oppermann (1997) adds that, contrary to the general risk reduction hypothesis, previous experience with the destination may lead to a more diversified and detailed demand for information and activities sought. However, Li et al. (2008: 288) showed that first-timers appear to be active travel planners who start collecting information much earlier. Their travel planning behaviour and consumption patterns seem to be 'tourism/travel' oriented, meaning that most of their decision activities and money are spent on travel arrangements (in other words, travel and accommodation). They also rely more on family and friends, as well as professionals, to make their travel decisions (Li et al. 2008: 288). In contrast, repeaters seem to rely more on their own experiences to make travel decisions than on other information sources, and hence spend less time in

planning. Many of them travel to visit friends and family or simply for a short break. Their visits are therefore more 'recreation/activity' oriented.

Based on the foregoing discussion, it is clear that differences exist between first-time and repeat visitors, which makes this innovative method of segmentation worth using at a national arts festival. It would also be the first time that this approach to segmentation is applied to visitors at a national arts festival in South Africa.

Method of research

The method of research will be discussed under the following headings: (1) the questionnaire and (2) statistical analysis.

Questionnaire

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

festival to give a more detailed account of visitor spending. Microsoft® Excel® was used for data capturing and basic data analysis.

Statistical analysis

There were three stages in the analysis of data in this study. Firstly, a general profile of visitors to the KKNK was compiled by using SPSS (SPSS Inc. 2007).

Secondly, principal component factor analysis on 21 motivation items and 13 evaluation items was performed by means of SPSS (SPSS Inc. 2007) to explain the variance-covariance structure of a set of variables through a few linear combinations of these variables. Eigenvalues were used as a criterion for extracting factors. In this research, all factors with eigenvalues greater than unity were extracted because they were considered significant. In addition, all items with a factor loading above 0.25 were included, whereas all items with factor loadings lower than 0.25 were considered as not correlating significantly with other factors. Also, any item that cross loaded on two factors with factor loadings greater than 0.25 was categorised in the factor where interpretability was best. The Kaiser-Meyer-Olkin measure of sampling adequacy was used to indicate whether sufficient data had been collected to ensure compact factor structures. A reliability coefficient (Cronbach's alpha) was computed for each factor to estimate the reliability of each scale. All factors with a reliability coefficient above 0.6 were considered to be acceptable in this study. The average inter-item correlations were also calculated as another measure of reliability. According to Clarke and Watson (1995), all inter-item correlations between 0.15 and 0.55 are considered to be acceptable levels of reliability.

Thirdly, visitors were analysed based on the number of years they had visited the festival. Two-way frequency tables and chi-square tests as well as ANOVAs and Tukey's multiple comparisons were used to investigate any significant differences between the groups with respect to each factor. The phi coefficient was also determined to indicate any differences between the groups. The phi coefficient can range from 0 to 1, with higher values indicating a stronger association between variables (Pallant 2007: 217), and Cohen's (1988) criteria was used where .01 indicates a small effect, 0.30 a medium effect and 0.50 a large effect. Cross tabulations with chi-square were furthermore employed to profile these groups demographically. The study employed demographic variables (gender, home language, age, occupation and province of origin) as well as behavioural variables (length of stay, preferred type of shows/productions, expenditure, other festivals attended, decision to visit and media usage) to examine whether statistically significant differences existed among different groups.

Results

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

Visitor profile of the KKNK

Based on the results captured and displayed in Table 1, more visitors to the KKNK are female, they are predominantly Afrikaans speaking, on average 44 years old and they originate mainly from the Western and Eastern Cape provinces. The largest group of visitors are furthermore in professional occupations, financially responsible for an average of three persons during their visit, and stay an average of four days and three nights in Oudtshoorn. Visitors are loyal to the festival and have visited KKNK an average of six times. Visitors spend an average of R4 732.10 per group during their visit and purchase an average of eight tickets, mostly for music theatre and cabaret, drama and comedies.

Table 1: KKNK visitor profile (2009)

Category	Profile of visitors
Gender	Male 38%; Female 62%
Home language	Afrikaans (93%)
Age	Average age: 44 years
Province of residence	Western Cape (52%); Eastern Cape (19%); Gauteng (14%)
Occupation	Professional (21%)
Number of days	Average of 4.2 days in Oudtshoorn
Number of nights	Average of 3.5 nights in Oudtshoorn
Group size	Average of 5 persons
Number of people paid for	Average of 2.57 persons
Number of visits to festival	Average of 6.1 times (23% were first-time visitors)
Average spending per group	R4 732.10
Number of tickets purchased	Average of 8.1 tickets
Preferred shows/productions	Music theatre and cabaret (45%); Drama (43%); Comedies (40%)

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

The factor analysis (Pattern Matrix) identified five motivation factors (Table 2) and three evaluation factors (Table 3) that were labelled according to similar characteristics. The five motivation factors accounted for 57.4% of the total variance, while the three evaluation factors accounted for 63.6% of the total variance. All motivation and evaluation factors had relatively high reliability coefficients ranging respectively from 0.55 (the lowest) to 0.79 (the highest) for the motivation factors and from 0.76 (the lowest) to 0.78 (the highest) for the evaluation factors. The average inter-item correlation coefficients with respective items varied between 0.29 and 0.50 for the motivation factors and between 0.45 and 0.52 for the evaluation factors. This also implies internal consistency for all factors. Moreover, all items loaded on a factor with loadings greater than 0.25. Relatively high factor loadings indicate a reasonably high correlation between the delineated factors and their individual items. Any items that cross-loaded on two factors with factor loadings greater than 0.25 were categorised in the factor where interpretability was best.

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

Festival management (Factor 3) received the highest mean value (3.93) of all the evaluation items (see Table 3). The reliability coefficient was 0.78 and the average

Table 2: Factor analysis results of the KKNK visitors' motivations

Motivation factors and items	Factor loading	Mean value	Reliability coefficient	Average inter-item correlation
Factor 1: Festival attributes		3.71	0.77	0.37
It is primarily an Afrikaans festival	0.740			
The festival provides a unique holiday experience	0.736			
The festival is value for money	0.445			
It is a sociable festival	0.423			
To see well-known performers	0.367			
It is an annual commitment	0.312			
Factor 2: Family togetherness		2.61	0.63	0.30
To the benefit of my children	0.651			
It is the closest festival for me	0.575			
To support the stalls	0.266			
To buy art	0.289			
Factor 3: Escape and socialisation		3.62	0.67	0.36
To relax	0.702			
To get away from my routine	0.637			
To spend time with friends	0.467			
To spend time with family	0.379			
Factor 4: Festival shows/productions		3.64	0.79	0.50
Variety of productions	0.940			
Quality productions	0.846			
ABSA KKNK is different from other festivals	0.389			
The introduction of new flagship productions at the festival	0.364			
Factor 5: Exploration		2.85	0.55	0.29
To explore the environment	0.570			
To meet new people	0.479			
The festival promotes cultural inclusiveness	0.356			
Total variance explained	57.4%			

Table 3: Factor analysis results of visitors' evaluation of KKNK

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

inter-item correlation was 0.49. It is therefore clear that the overall organisation and management of the festival have a significant influence on visitors' satisfaction levels, and the festival organisers should therefore keep striving to set high standards that exceed visitors' expectations. *Productions* (Factor 2) had the second highest mean value of 3.9, a reliability coefficient of 0.76 and an average inter-item correlation of 0.52. This indicates that visitors are satisfied with the quality and the services associated with the shows/productions showcased at the festival. Since this is also one of the main motives for visitors to attend the festival (see Table 2), the maintenance of satisfaction levels should remain a priority for the festival organisers. *Service and prices* (Factor 1) received the lowest mean value (3.53), with a reliability coefficient of 0.76 and an inter-item correlation of 0.45. The festival organisers should therefore ensure the affordability, especially of the tickets for the shows/productions, since the success and profitability of the festival is dependent on ticket sales.

First-time visitors compared with repeat visitors

It has been established from the literature review that, at a very general level, one can divide visitors to the KKNK into two categories: first-time visitors and repeat visitors. However, there are vast differences in what constitutes a repeat visitor. At one end of the spectrum, it could be somebody who returns to the festival year after year. At the other end, it could be somebody who had visited the festival only once before, many years ago. Whereas first-time visitors seem to be homogeneous, repeat visitors are not (Oppermann 1999: 56). To address this problem, visitors were divided into four groups based on the number of times they had visited the festival. Table 4 gives an indication of the size of each group, and it can be seen that there is a fairly even distribution between the groups. The majority of respondents are loyal and have visited the festival between two and nine times or more. It is also clear that a reasonable percentage of visitors to the KKNK are first-time visitors (23%).

Table 4: Visitor groups at the KKNK based on the number of times they had visited the festival

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

ANOVAs were employed to determine the differences between motivation and evaluation factors for first-time and repeat visitors to the festival. To delineate the differences in festival motivation and evaluation between the four groups, means for each motivation and evaluation item were calculated. Table 5 shows differences in means between the four groups and reveals the agreement with each of the factors for members of each group. The results of the analysis showed that repeat visitors seem to be motivated mainly by the *Festival attributes* and *Festival shows/productions*, while first-time visitors seem motivated by *Relaxation and socialisation*. *Relaxation and socialisation* received the highest mean value (3.83) for visitors attending the KKNK for the first time, while repeat visitors who have attended the festival many times (5-9 and 10+ times) are motivated more by *Festival shows/productions*. Concerning the evaluation of the festival, repeat visitors who have attended the festival the most times (10+ times) are most satisfied with the *Productions* at the festival, while first-time visitors and other repeat visitors are especially content with the *Festival management*. Repeat visitors seem more satisfied with the festival than first-time

visitors. Specifically, concerning certain aspects such as *Festival management* and *Production*, repeat visitors (especially those who have attended the festival the most times) seem to be more satisfied. However, none of the evaluations were statistically significantly different for the four groups.

Table 5: Comparing first-time and repeat visitors' motivation to attend the festival and evaluation of the festival

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

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

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

Two-way frequency tables were employed to provide a complete demographic profile for each of the four groups. Chi-square statistical tests were used to determine whether significant socio-demographic and behavioural differences existed between the four groups. The results in Table 6 indicate that age, the number of days and nights spent in Oudtshoorn, as well as the number of tickets bought differ significantly between the groups. First-time visitors and repeat visitors who have attended the festival 2–4 and 5–9 times are younger compared to repeat visitors who have attended the festival more than ten times. Visitors who have attended the festival

the longest are the oldest visitors at the KKNK with an average age of 51 years. First-time visitors and as well as visitors who have attended the festival 2–4 times and 5–9 times spend fewer days and nights at the festival and purchase significantly fewer tickets compared to visitors who have attended the festival ten or more times. There were no significant differences between the groups based on the number of people in the travel party, number of people paid for, expenditure per person and the number of free shows attended. First-time visitors, however, seem to travel in larger groups and, surprisingly, spend a significant amount of money during their visit. Furthermore, first-time visitors tend not to support the free shows at the festival. Visitors that have attended the KKNK ten or more times seem to travel in smaller groups, but pay for more people during the festival and, as a result, spend more at the festival. Repeaters also attend a fair number of free shows. It is interesting to note that repeat visitors who have attended the festival 2–4 times seem to spend the least at the festival. Based on the phi coefficient, only small to medium practically significant differences were found for the other demographic characteristics. Appendices A and B provide a summary of the profile of the five clusters based on various demographic and behavioural variables as well as the shows/productions attended.

Findings and discussion

This study segmented visitors to the KKNK according to the number of times they had visited the festival in order to compare first-time and repeat visitors with respect to five aspects – socio-demographics, behavioural characteristics, motivation to attend the festival, overall satisfaction with the festival and type of shows/productions attended. The results revealed significant differences between first-time and repeat visitors to the festival (especially visitors who have attended the festival ten or more times) based on the four main categories identified from the literature review, socio-demographics, behaviour characteristics, destination perceptions, satisfaction and image as well as travel motivations. These differences include that first-time and occasional visitors tend to be slightly younger, which is consistent with previous research done by Gitelson and Crompton (1984); Lau and McKercher (2004); Tiefenbacher, Day and Walton (2000) and Li et al. (2008). First-time and occasional visitors also spend fewer days and nights at the festival; this finding is supported by Lau and McKercher (2004) and Oppermann (1998). The results also indicate that first-time visitors do not spend less per person compared to repeat visitors, which is supported by the results of Wang (2004), but contradicts research carried out by Oppermann (1997), Tiefenbacher et al. (2000), Wang (2004: 108), Petrick (2004a), Alegre and Juaneda (2006) as well as Li et al. (2008).

Table 6: Behavioural comparison between first-time and repeat visitors

Characteristics	Number of previous visits				F ratio	Sig. level
	1 First time (N=63)	2 2-4 times (N=60)	3 5-9 times (N=74)	4 10+ times (N=54)		
Age	42.93 ^a	42.88 ^a	43.40 ^a	50.54 ^b	6.09	0.000*
Number of people in travel party	4.73	4.53	4.68	3.52	1.79	0.148
Number of people paid for	2.31	2.65	2.49	2.71	1.34	0.260
Length of stay						
Days	3.61 ^a	3.78 ^a	4.56 ^b	5.56 ^c	17.25	<0.05
Nights	3.55 ^a	3.39 ^a	4.16 ^a	5.90 ^b	15.59	<0.05
Expenditure per person ^o	R2 259.64	R1 792.53	R2 307.33	R2 309.41	1.25	0.290
Number of tickets bought	6.25 ^a	6.84 ^a	7.79 ^a	14.26 ^b	12.22	<0.05
Number of free shows attended	3.12 ^a	3.21 ^a	4.99 ^b	4.93 ^b	4.12	0.007*

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

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

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

The results, however, show that both first-time and repeat visitors are economically viable markets at the festival. This result is also contradictory to the findings of Petrick (2004b) and Li et al. (2008) that repeat visitors are more price sensitive. Repeaters, furthermore, stay longer, which is confirmed by Tiefenbacher et al. (2000). Similar to the research findings of Li et al. (2008) and Mohr et al. (1993), repeat visitors had a higher level of satisfaction with the festival; this result is supported by Juaneda (1996), Petrick and Backman (2002), Sonmez and Graefe (1998), Petrick et al. (2001) and Kozak (2001). Repeat visitors (who have attended the festival five and more times) also purchase significantly more tickets to support the festival's shows/productions. Contradictory to research done by Gitelson and Crompton (1984), Hughes and Morrison-Saunders (2002) and Fakeye and Crompton (1991), first-time visitors are mainly motivated by *Relaxation and socialisation*, while repeaters are motivated by *Festival attributes*.

Although only small to medium practically significant differences (based on the phi coefficients) were found between first-time and repeat visitors based on other

socio-demographic and behavioural characteristics (as indicated in Appendices A and B), some interesting findings have surfaced. Firstly, first-time visitors tend to travel longer distances to attend the festival (many coming from Gauteng province) compared to repeat visitors who are mostly local residents or from surrounding provinces (Western Cape and Eastern Cape). This is supported by Li et al. (2008). Both the first-timers and repeaters attend a variety of shows and productions at the festival. First-time visitors mostly attend music theatre and cabaret, comedies, classical music and rock productions, whereas repeat visitors attend drama, music theatre and cabaret, comedies and classical music productions. Repeat visitors who have attended the festival the longest attend the greatest variety of shows/productions. This is contradictory to the findings of Gitelson and Crompton (1984) and Wang (2004) that first-time visitors participate in a wider variety of activities than repeaters. First-time visitors also rely more on word-of-mouth than repeat visitors, who have heard about the festival through newspapers and the radio. This finding is supported by Li et al. (2009) and Reid and Reid (1993), who found that first-time visitors rely more on family and friends to make their travel decisions. Corresponding with previous research done by Juaneda (1996), Petrick and Backman (2002), Sonmez and Graefe (1998), Mohr et al. (1993), Gyte and Phelps (1989) and Petrick et al. (2001), repeat visitors have a greater intention to revisit the festival in the future. First-time visitors either plan their visit more than a year in advance or spontaneously, whereas visitors who have attended the festival between two and four times tend to make their decision impulsively. Visitors who have attended the festival the longest (ten or more times) also make their decision to attend the KKNK well in advance. This is supported by research done by Li et al. (2008) that first-timers are active travel planners. However, repeat visitors who have attended the festival the longest make their decision to attend the festival well in advance. Visitors who have attended the festival the longest (ten or more times) are mostly local residents, and the festival is therefore not their main reason for visiting Oudtshoorn.

Implications

The findings of this research imply that, from a sustainability and marketing point of view, the organisers and marketers of the KKNK should follow a two-pronged marketing approach, considering both groups of visitors as important for the future of the festival. First-time visitors spend a significant amount of money at the festival and will travel longer distances to attend, while visitors who have attended the festival ten or more times are local residents who are loyal visitors, stay longer and buy a considerable number of tickets to support the festival's shows and productions.

However, Gitelson and Crompton (1984: 201) warn that marketing efforts that are directed primarily at persuading new visitors to visit a destination (in this case a festival) may be entirely inappropriate for encouraging repeat visitors to return. The KKNK's marketers should therefore design their marketing campaigns in such a way that they will include both new visitors to the festival as well as retaining repeat visitors. Based on the latter, the following marketing implications are made:

- Firstly, since first-time visitors are mainly motivated by *Relaxation and socialisation* followed by *Festival shows/productions*, these aspects should be prominent features in the promotional material aimed at attracting new visitors. The KKNK should be presented as an all-inclusive festival showcasing quality and affordable productions with a diversity of award-winning and popular artists. The latter will also persuade repeat visitors to attend the festival in the future, since they are also motivated by *Festival shows/productions*. However, the marketing campaign aimed at repeat visitors should place a higher emphasis on *Festival attributes*, since this is their main motivation to attend the festival. *Festival attributes* include aspects such as it being an Afrikaans festival that offers a wide variety of genres for the whole family, and this should therefore be highlighted.
- Secondly, since first-time visitors tend to be long-haul visitors travelling from Gauteng, marketing efforts should be aimed at that province in an attempt to attract more first-time visitors. Festival packages that include accommodation and shows should be on offer. Repeat visitors are mainly from the Western and Eastern Cape and should therefore be targeted in these provinces, taking into consideration that today's first-timers are tomorrow's repeat visitors.
- Thirdly, continuous promotion throughout the year should be applied to cater for both markets, as indicated in the findings. Both first-time and repeat visitors make use of newspapers, television and radio to gain information about the festival, and these marketing media should be used to promote the festival to these visitors.
- Fourthly, increased ticket sales and length of stay should be the main priority of the festival organisers for both visitor markets. The affordability, quality, variety and 'value for money' shows/productions should be stressed in marketing material. The preferred type of shows/productions (as indicated in the findings) should be prominent features in the marketing material and should also be linked to well-known artists and critical reviews.
- Lastly, a loyalty scheme should be considered, where visitors who have, for example, attended the festival for five or more years get a discount for certain shows/productions. Another advantage of increased frequency of visits to arts festivals is higher attendance of shows as well as a greater variety of shows.

Conclusion and recommendations

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

It is, however, important for festivals such as the KKNK to achieve and maintain a balance between first-time and repeat visitors. This aspect will become more challenging in the future, taking into consideration both the number of festivals or events and the level of competitiveness. According to Lau and McKercher (2004: 284), the generation of repeat visitation relies on the ability of festivals to successfully convert first-time visitors into returning visitors. This successful conversion depends on the ability of the festival to provide visitors (markets) both with activities and with a festival programme tailored to satisfying their needs. The research also highlights a number of implications that could assist festival organisers in achieving greater long-term sustainability and growth. It is further recommended that this type of research be done on an ongoing basis, since it provides useful information about the needs and characteristics of first-time and repeat visitors and the way that the festival programme/marketing can be adapted to meet these needs. This type of research should also be applied to other festivals in the country in order to compare results.

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

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

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

Appendix B: Comparing first-time and repeat visitors' preferred type of show/productions

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

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