



Australian Government
Austrade

Attachment 1



TOURISM
RESEARCH
AUSTRALIA

UNDERSTANDING
REPEAT VISITATION TO
WESTERN AUSTRALIA

SUMMARY

FEBRUARY 2018

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

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

KEY MESSAGES

There were differences between the drivers for WA and SA, 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.
- **Life stage 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 of age 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 return. 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 a holiday.
 - 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 visitors will likely frequent should be provided with targeted messaging about the destination.



KEY FINDINGS FOR WA

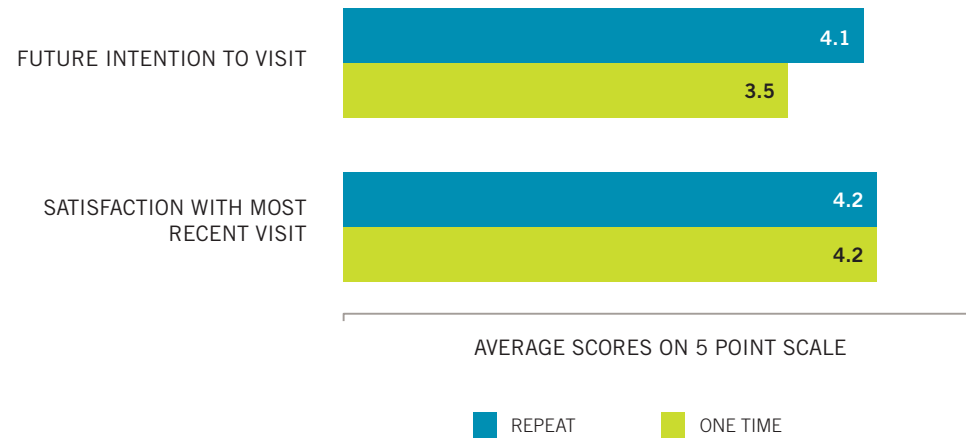
■ Repeat visitors outnumber one-time visitors.

- Over the past ten years, approximately 1.86 million adult Australians (11.6%) visited WA once, while 2.1 million (13.4%) visited more than once.
- Converting 10%* of those 1.86 million one-time visitors into ongoing repeat visitors would yield an estimated \$35.2m of direct spend per year (*half of the 20% who 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.

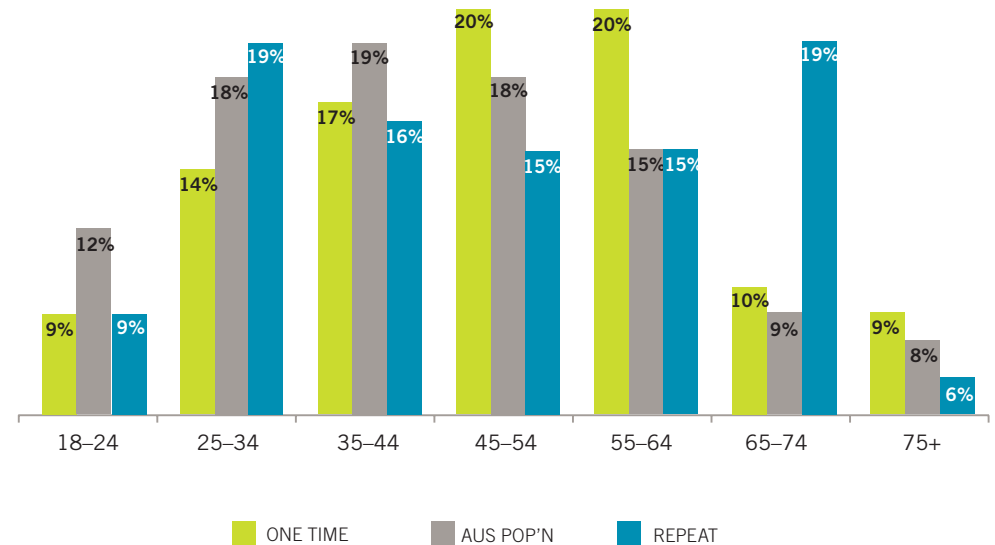
FIGURE 1 – INTENTION TO VISIT VS SATISFACTION WITH MOST RECENT TRIP



■ Repeat visitors are more likely to be:

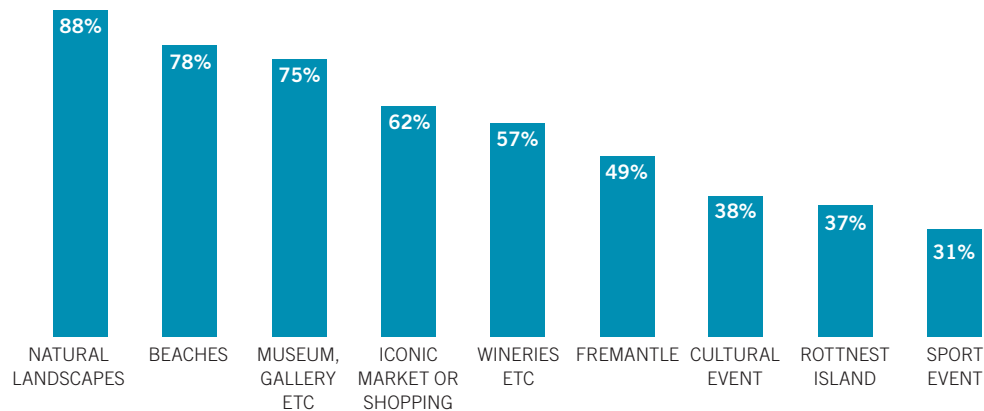
- 'Empty nesters' or 'SINKs and DINKs' (Figure 2)
 - The 65-74 year old age bracket, the majority of whom are retired 'empty nesters', see WA as a destination to return to more than other age groups. At this life stage, age-related health concerns haven't impacted significantly, and there is enough time and money to travel longer distances. The 25-34 age group also outperforms as repeat visitors. The majority of these people are the 'SINKs and DINKs' that are yet to have children and have less logistic and financial concerns when contemplating a trip to WA.

FIGURE 2 – VISITOR TYPE BY AGE



- more introverted and reflective.
 - Repeat visitors were more community-minded, introverted and reflective. They love combining the practical and the artistic. Further, they also identified themselves as being reserved and caring.
- drawn back to WA to experience its natural beauty time and again.
 - In total, 26% of repeat visitors cited ‘holiday’ as the main reason for their most recent two trips. For these travellers, the proportion that experienced each activity on both trips is shown in Figure 3. Almost 90% of those whose last two trips to WA were for a holiday experienced ‘*amazing natural landscapes or national parks*’ on both trips (as compared to 77% of one-time visitors).
 - Additionally, touchpoints that are closely linked to exploring nature, including weather, signage, and public facilities, are more important to repeat visitors than to one-time visitors. This highlights the extent to which WA’s natural beauty is a driver of repeat visitation.

FIGURE 3 – HOLIDAY REPEAT VISITORS WHO UNDERTOOK ACTIVITIES ON THEIR TWO MOST RECENT TRIPS



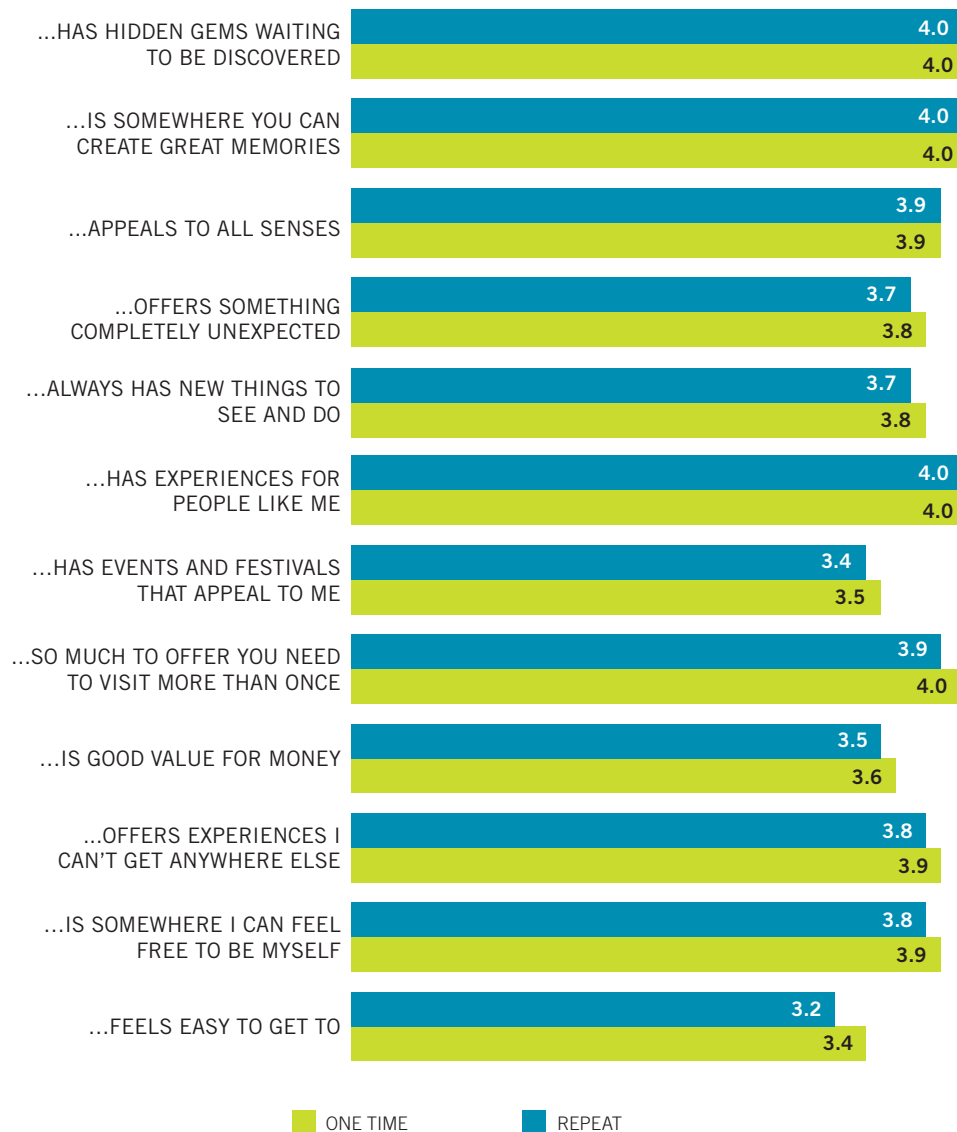
■ **There is little difference in WA’s brand perception between one-time and repeat visitors.**

- There were only two brand/image statements where the difference between the two groups was more than 4% (Figure 4). This was in contrast to SA where the difference was more than 4% for all of the 12 statements. This would indicate that WA’s image remains relatively stable, regardless of the number of times visited. It is more the traveller’s mindset and personality that determines whether they are likely to be a return visitor, as opposed to WA’s brand.
- Consistent with this finding, one of the few differences in brand perception between repeat and one-time visitors was with the statement ‘*WA is somewhere I can feel free to be myself*’. Of the 12 statements tested, this statement had the second biggest difference (4.6% difference between the two groups).



Image courtesy of Walk Into Luxury

FIGURE 4 – VISITOR PERCEPTIONS OF WESTERN AUSTRALIA



RECOMMENDATIONS

- To keep repeat visitors happy and ensure they are advocates for the state, keep investing in the functional touchpoints that are important to them, namely signage and public facilities.
- Marketing targeted at repeat visitors should appeal to their personality type and promote WA as a destination where they can be themselves, a place for reflection and reconnection with loved ones, while highlighting WA's natural assets.
- Provide cruise and business travellers with a great experience and, wherever possible, tactical campaigns that provide them with a specific reason to return.
- One-time visitors who fall outside of the typical repeat visitor lifecycle stage and personality type should be given a specific reason to return via tactical campaigns.
 - For example, a tactical campaign promoting one-off specific experiences and events could appeal to 45-64 year olds and convert them to being repeat visitors earlier than retirement. The major concerns for this age group are accessibility and affordability, so promoting family events packages could address these barriers.

RESEARCH APPROACH

This research is based on desktop research, quantitative research (with n = 1,000 visitors to WA of whom n = 600 were repeat visitors, while the remaining n = 400 were visitors who had only been once within the past 10 years) and qualitative research with a group of n = 36 participants of whom half had visited WA. The project focused on the largest interstate source markets for WA: New South Wales/Australian Capital Territory, Victoria, Queensland and SA. The full report is available from tourism.research@tra.gov.au