



Australian Government
Austrade



**TOURISM
RESEARCH
AUSTRALIA**

**THE INFLUENCE OF
WESTERN AUSTRALIAN
VISITOR CENTRES ON
TOURIST BEHAVIOUR**

SUMMARY

SEPTEMBER 2015



THE INFLUENCE OF WESTERN AUSTRALIAN VISITOR CENTRES ON TOURIST BEHAVIOUR

INTRODUCTION

Visitor centres continue to play a crucial role in informing and educating tourists about local areas and tourism products, despite increasing numbers of consumers using digital channels for searching, selecting and booking travel.

Tourism Research Australia (TRA)—in partnership with Tourism WA—contracted Metrix Consulting to research the effectiveness of visitor centres in Western Australia (WA), their impact on visitor behaviour, and how their offering can be improved.

Key findings from the research include information on:

- visitor centre use
- importance of visitor centres
- current performance of visitor centres
- opportunities that exist.

KEY MESSAGES

- Visitor centre use is driven by situation, not visitor type. Most tourists will stop at visitor centres if they require information, and most stops are pre-planned.
- Tourists most often use a visitor centre when they are a first-time visitor to a location; when they have had insufficient access to information before their arrival; or when they are staying more than one night.
- The most common motivators for stopping at a visitor centre are to access information on attractions, obtain maps or find information on activities.
- Respondents who had not used a visitor centre in the location interviewed, are not rejecting them, as most have used them in the right situation previously.
- Visitor centres make an immediate financial contribution in their local area, and more broadly enhance the quality of visitor experiences and encourage future advocacy by visitors to the region.
- There is a modest positive impact on the length of stay and spend for visitor centre users, particularly in more remote regional locations.
- Western Australian visitor centres are performing well, and the local perspective that staff provide with regard to things to see and places to eat being particularly valued.
- Overall, 94% of respondents using a visitor centre in this study are satisfied with their experience, including 70% very satisfied.

RESEARCH APPROACH

The research was conducted through intercept interviews with tourists at selected visitor centres¹ and major tourism attractions across each of WA's five tourism regions² between January and May 2015. This provided a sample of 379 users and 350 non-users of visitor centres.

To supplement the intercept interviews, staff at visitor centres across WA collected email addresses from 876 tourists who were sent an online version of the survey. This survey was completed by a further 328 users of visitor centres.

The information in this summary was taken from the full report which is available on request from tourism.research@tra.gov.au.



¹ The full report provides a listing of visitor centre interview locations and locations represented in the online sample.
² Experience Perth (147 users and 102 non-users); South West (224 users and 123 non-users); Coral Coast (90 users and 32 non-users); Golden Outback (180 users and 42 non-users); and North West (66 users and 51 non-users).

VISITOR CENTRE USE

Use of visitor centres is driven by situation, not visitor type.

TRA data from the International Visitor Survey (IVS) and National Visitor Survey (NVS) indicate that international visitors (39%) to WA most often use a visitor centre on their trip. Domestic interstate visitors (17%) are nearly twice as likely as intrastate visitors (9%) to use a visitor centre³.

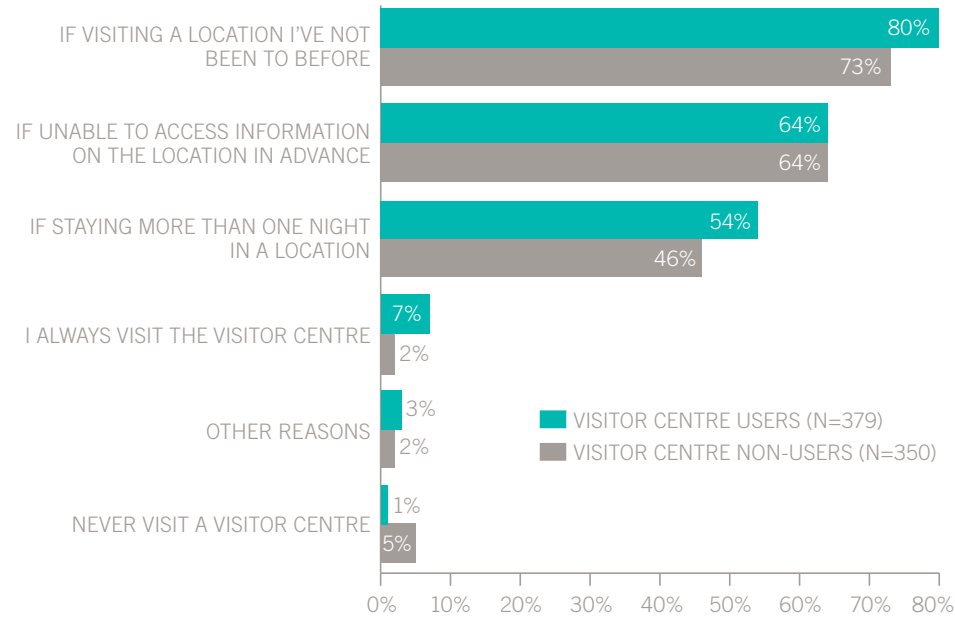
The study indicates that visitor centre use is needs based. Commonly, respondents stopped at a visitor centre when they were:

- a first-time visitor to a location
- unable to access sufficient information on a location before arrival
- staying at a destination for more than one night (Figure 1).

The types of people who used a visitor centre were broad ranging and no different to the profile of those who had not used a visitor centre⁴.

³ The rates of use are for the year ending December 2012. However, it should be noted that in some cases the visitor centre(s) used by international and domestic visitors to WA will have been located elsewhere in Australia. ⁴ The demographic characteristics collected included gender, age group, household type, and household income.

FIGURE 1: SITUATIONS IN WHICH A VISITOR CENTRE IS VISITED



Overall, three in four respondents who used a visitor centre planned their visit in advance (75%). The rate of pre-planned stops at visitor centres was highest in regional areas, led by the North West (85%) and Golden Outback (83%) (Figure 2).

For those who used a visitor centre, the most common motivators for stopping were to access information on attractions (62%); obtain maps (53%); and find out information on activities (34%) (Figure 3). Intrastate visitors were the most likely to seek information on local events (22%), while more than one-third of interstate visitors to a visitor centre were looking for directions (35%).

FIGURE 2: SHARE OF PRE-PLANNED VISITS TO VISITOR CENTRES

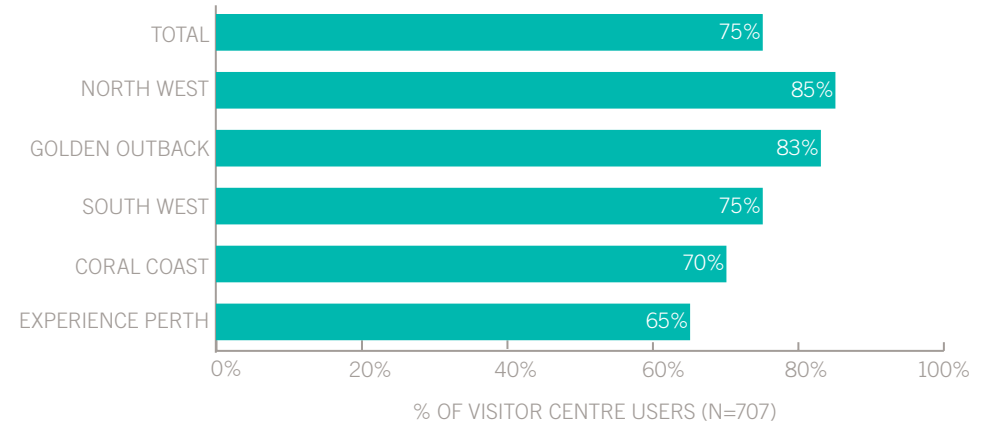
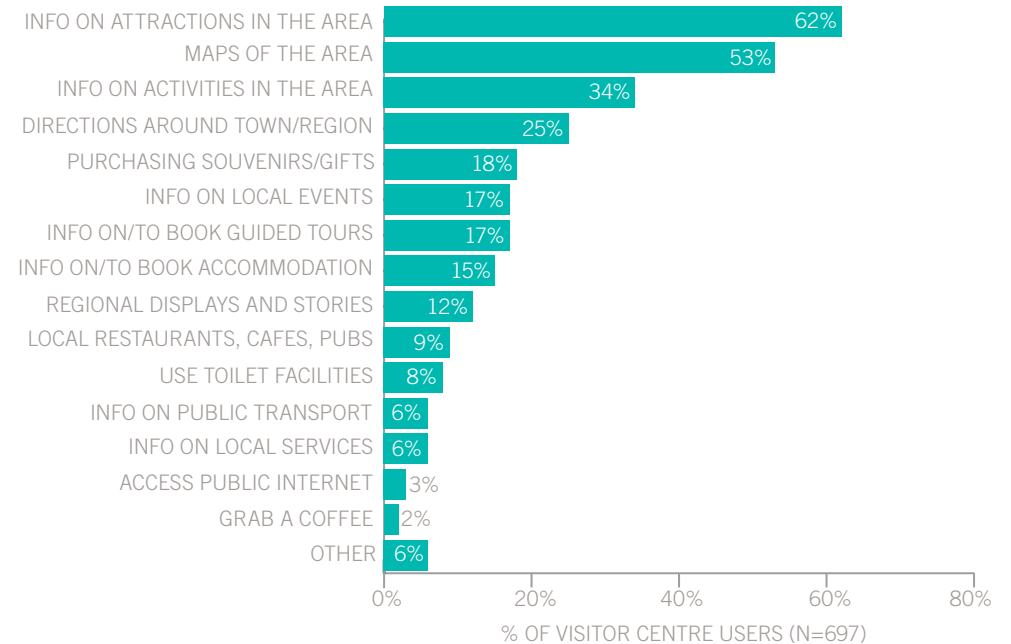


FIGURE 3: REASONS TO VISIT A VISITOR CENTRE



The non-users of visitor centres⁵ were not necessarily rejecting visitor centres. Nearly all (95%) said they would stop at a visitor centre in the right situation, and 81% had been to a visitor centre in the past three years. Nearly one-quarter (24%) were also intending to stop at a visitor centre later in their stay.



⁵ Non-users of visitor centres were respondents who had not used a visitor centre in the location they were intercepted or recruited to the online survey. However, 28% of these respondents had previously used a visitor centre elsewhere on their trip.

THE IMPORTANCE OF VISITOR CENTRES

Visitor centres make an immediate financial contribution in their local area. More broadly, they enhance the quality of visitor experiences and promote future advocacy.

Using data from this research and the IVS and NVS for overnight visitors only, it is estimated that visitor centres generated around \$116 million in overnight visitor spend in WA in 2014⁶. This is equivalent to approximately 2% of total overnight visitor spend in WA.

Further, the research shows that tourists value the presence of visitor centres and the contribution they make to their visitor experience.

- Nearly all users of visitor centres (95%) reported that the visitor centre was an important part of their overall visitor experience.
- The majority of users of visitor centres (87%) said they knew more about things to see and do in the location as a result of their stop.
- More than eight in ten (84%) indicated that the visitor centre had a positive influence on how they viewed the location.
- Almost three-quarters (74%) heard about an activity through their visitor centre stop, while 70% organised to participate in an activity while at the visitor centre.

Respondents who stopped at a visitor centre were more likely than non-users of these facilities to have visited national and state parks (36% compared with 26%); heritage buildings or sites (30% compared with 23%); museums and art galleries (24% compared with 16%); and/or undertaken an organised tour (20% compared with 12%) in the area visited.

⁶ Refer to full report for details on how this value was estimated.

Nearly two in ten (19%) users of visitor centres reported making a booking through the visitor centre. Guided tours were the most common type of booking made.

Overall, 13% of those who used a visitor centre extended their stay in a location as a result. This occurred most often in the Golden Outback (21%) and North West (20%). The average increase in length of stay was two nights.

Depending on the region and visitor centre, the amount of expenditure that survey respondents directly attributed to their visitor centre stop ranged between 10% (Golden Outback) and 38% (Experience Perth) of their total spend (Table 1).

TABLE 1: VISITOR CENTRE USERS' ESTIMATED DIRECT SPEND (PER PERSON PER DAY)

	SPEND ATTRIBUTED TO VISITOR CENTRE	SPEND NOT ATTRIBUTED TO VISITOR CENTRE	TOTAL SPEND	SHARE OF TOTAL SPEND ATTRIBUTED TO VISITOR CENTRE
All WA visitor centre users ^(a)	\$18.57	\$108.22	\$126.78	15%
Experience Perth	\$37.77	\$60.36	\$98.13	38%
North West	\$36.54	\$118.03	\$154.58	24%
South West	\$18.40	\$105.69	\$124.10	15%
Coral Coast	\$14.17	\$117.57	\$131.74	11%
Golden Outback	\$13.81	\$127.03	\$140.85	10%

(a) Results for all WA visitor centres are an indicative measure, based on averaging of responses across the five regions. This means that the data has not been weighted to reflect actual visitor centre numbers by region.

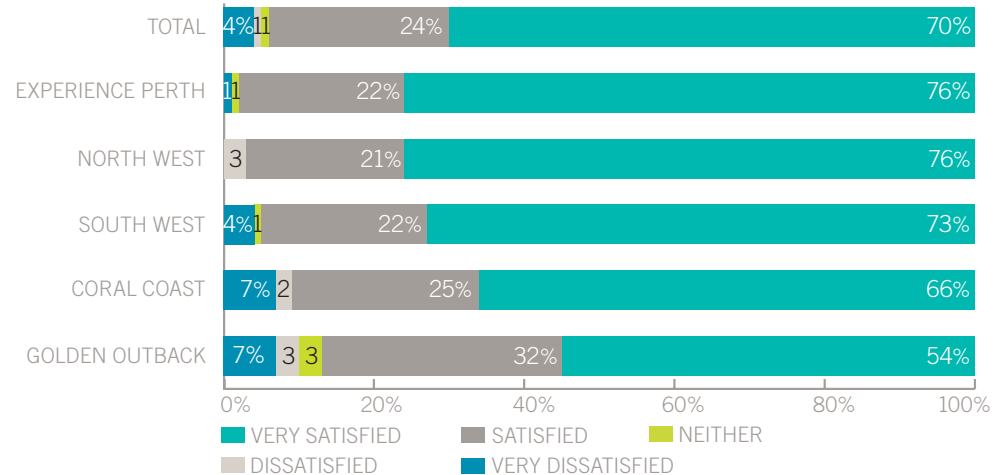


CURRENT PERFORMANCE OF VISITOR CENTRES AND FURTHER OPPORTUNITIES

WA visitor centres are performing well and the local perspective that staff provide is particularly valued.

The majority of users were satisfied with their experience at WA visitor centres. Overall, 94% were satisfied, which included 70% who were very satisfied. There was some variation by location, with rates of satisfaction highest in the Experience Perth, North West and South West regions (Figure 4).

FIGURE 4: SATISFACTION WITH VISITOR CENTRES



There was also a strong likelihood that users would recommend the visitor centre they visited to others. Nearly two-thirds (65%) were classified as promoters (i.e. a recommendation score of 9 or 10). Visitor centre staff were particularly appreciated, with 68% of users making a positive comment about a staff member.

Encouragingly, 71% of users were unable to think of a way to improve the visitor centre they visited. Of those who did provide suggestions, the most common were specific information on tours, maps and restaurants, and improved visitor centre amenities such as cafes, bike hire or toilets.

Non-users indicated that they would be encouraged to stop at visitor centres if they provided local information that is not easily accessible elsewhere. They were not just looking for brochures, but advice from a local perspective on the best tours, things to see and do and places to eat.

CONCLUSION

Visitor centre use is not limited to particular visitor groups. Most stops at visitor centres are pre-planned.

Tourists' visitor centre usage is needs based. They are most likely to stop at a visitor centre when visiting a location for the first time; they have insufficient access to information before arrival; or they are staying more than one night. Three-quarters (75%) planned their stop at a visitor centre in advance.

Visitor centres support local economies, improve the visitor experience for tourists and boost advocacy for the region.

The research shows a modest positive impact on length of stay and spend, particularly in more remote locations among users of visitor centres. Visitors also widely reported improvements in their knowledge, perceptions and experience in an area as a result of their visitor centre stop.

Visitor centres are valued by tourists, particularly for the local knowledge that staff provide.

More than two-thirds of users spoke positively about the calibre of staff at visitor centres which contributed to a high rate of satisfaction with the visitor centre experience (94%). Results also indicated visitor centres are most valued when they go beyond providing maps and guide books to give additional local knowledge. This not only enhances the visitor experience, but also improves their recollection of the area.

