

# DESTINATION FRAMEWORK



This framework has been developed based on **consumer insights** derived from a series of primary research projects conducted by Kantar Public (previously TNS) on behalf of Tourism WA across four years (2014 to 2017). These insights have been derived from research with residents from the target domestic markets of Perth, Sydney and Melbourne.



The insights provide destinations with a framework for **identifying and understanding their relative strengths and weaknesses** so that appropriate strategies can be put in place to **maximise visitation**.

Research into WA destinations shows that the path to discovering a destination exists along a **spectrum** from **General** sources of appeal (exploring, discovering) to **Specialist** sources of appeal (particular experiences such as food and wine, sport, history etc.)



This spectrum aligns with the motivations to visit a destination, from those **Intrinsic** to the destination (specific experiences), to more **External** or individual factors (e.g. VFR, events)

There are **three primary barriers** which can prevent potential visitors choosing our destinations ...



**TIME / DISTANCE  
(ACCESSIBILITY)**



**COST  
(AFFORDABILITY)**




**(LACK OF) KNOWLEDGE**



These barriers impact individually and in combination, and exacerbate the impact of competitors.


**Three main factors** are required to overcome these barriers and each has a slightly different function in driving visitation:



**DENSITY**  
A **sufficient number** of experiences  
↓  
Drives time in-region/ repeat visitation



**DIVERSITY**  
Different **types** of experiences  
↓  
Broadens the audience to whom the destination appeals



**UNIQUENESS**  
**Exclusivity** of experience to location  
↓  
Is the “hook” for visiting and the most powerful driver of visitation



The outcome of weighing the barriers against the motivators is the perception of value (or a lack thereof) for a destination – whether or not it is “worth it”.

Ideally, a destination would be strong in all three motivating factors, and not encumbered by the barriers. Such a destination would be **optimally positioned** to drive and support tourism.



ACCESSIBILITY

AFFORDABILITY

KNOWLEDGE

DENSITY

DIVERSITY

UNIQUENESS



However, in reality destinations have strengths and weaknesses and a weakness in any of the areas results in a destination that is not optimally positioned for tourism.



The ability to diagnose the areas of relative weakness and strength for a given destination provides an understanding of where the focus should be to improve visitation.



It identifies which strengths to leverage, which opportunities to develop, which gaps need filling and how to promote the destination for itself and as part of destination Western Australia.

### THE FINE PRINT

Research was conducted in a series of 7 projects, from June 2014 through August 2017. The design of the research projects for each destination encompassing:

1. Exploratory qualitative research
2. Confirmatory quantitative research

Participants included past visitors and non-visitors to each destination from the domestic target markets of Perth, Sydney and Melbourne, as applicable.

Throughout the research project series, nearly 100 qualitative groups and interviews were conducted and more than 3700 potential visitors were surveyed.



## Hypothetical Case Study: Undifferentiated Destination



A typical “undifferentiated” destination might be a city or large town that has many experiences of different types - culinary, cultural, historical, some nature and perhaps light adventure. However, these experiences will not be strongly differentiated from similar offerings in other large metropolitan centres. In other words, plenty to see and do, but little that’s truly unique, that a visitor couldn’t do a similar version of somewhere else.

Because this city lacks a “hook” in its own offer, in order to drive visitation such a destination would need to ensure they can capitalise on “external” motivations. This might mean a strong focus on developing and promoting events, ensuring high quality facilities for business travellers, and leveraging their own local population to make the most of VFR travellers.

In addition, this undifferentiated city could partner with a nearby destination that has a more unique, but less dense and diverse tourism offer. This could take the form of a combined travel itinerary that pairs the destinations as complementary stops on a single holiday. Each then benefits by leveraging the other’s strengths and together present are more optimal offer.

## Hypothetical Case Study: Specialist Destination



A “specialist” destination does one particular, unique experience or experience theme well, but doesn’t have a range of other experience types supporting this “main attraction”. As a result, this destination will be able to attract visitors who have a strong inherent interest in its unique experience(s), but will struggle to be considered “worth it” for other potential visitors.

While simply adding to the range and number of experiences on offer in a specialist destination can appear the most straightforward way to address the destination’s weaknesses, this can require significant long-term investment and can also risk failure, if current visitation levels are not adequate to support new endeavours and if development does not remain authentic to the destination.

Instead, this destination can aim to improve the quality of its “speciality” and expand the variety of ways in which it can be experienced by visitors. This can build the degree to which the destination is perceived as unique and attract the maximum number of “specialist” travellers. Eventually, the greater number of visitors can be used as a launching pad for a more diverse tourism offer.

Key to this strategy is taking a targeted approach to destination promotion – speaking directly to those potential visitors with an inherent interest in the destination’s speciality, rather than to the general travelling population.