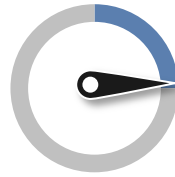


# NINGALOO

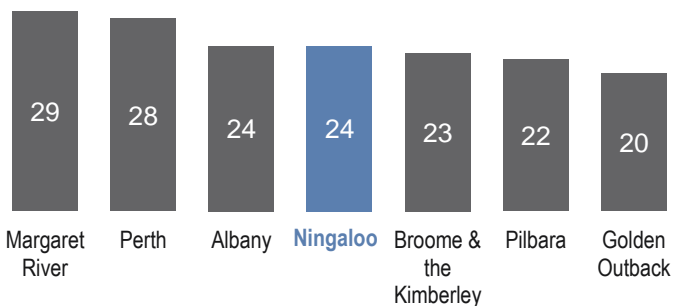
The following insights are derived from research with residents from the target domestic markets of Perth, Sydney and Melbourne ...



ACCESSIBILITY AFFORDABILITY KNOWLEDGE DENSITY DIVERSITY UNIQUENESS

The Ningaloo Region (NR) offers unique, quality coastal experiences in an environment that is relaxing and 'free', but also remote and hard to reach. Close encounters with unique marine life are highly appealing, but the region is seen as posing time, cost, logistic & functional barriers that are on-par with significant overseas travel.

## Knowledge of WA destinations:



% OF DOMESTIC MARKET WHO KNOW "QUITE A LOT" OR "A LOT" ABOUT EACH DESTINATION

## Perceptions of the Ningaloo Region:



### INTRASTATE:

An outdoor, coastal, relaxed, 'basic' holiday where you can 'chill out' and live at your own pace while exploring a **quality, accessible marine environment**.



### INTERSTATE:

An appealing environment offering rare experiences, but seen as posing **time, cost, logistic & functional barriers** that are on-par with significant overseas travel (e.g. U.S., Europe).

## Motivations to visit:



**Exploring the region at your own pace**



**Marine life** - unique in type (whale sharks) and degree of **interaction**



**Natural landscape** "Outback meets the sea"



**Reef and coastal activities** – Accessibility and quality of the reef, beaches and activities



**Gorges** - A taste of the Kimberley, but only half the distance

## Barriers to visitation:



There is a subset of people for whom the region's primarily coastal offer simply **does not appeal**



Distances in the region and hence time required to visit mean that it is a destination often **put off until later** in life



Time and cost required make competing destinations more attractive and the NR seems "**not worth it**" by comparison



**Difficulty** – lack of knowledge on 'how to do' a holiday in the region, heightened by sparse facilities and functional gaps

Addressing gaps in offer and **functional issues** could improve desirability and visitor experience:



Clean, comfortable, **reasonably-priced self-catering accommodation** options are wanted



**Improvements in food** (local produce) and **dining** (range and quality) could lower barriers and increase in-region spend



**Increased access options** – there is a desire among future likely visitors to fly to the region and hire a car



A desire for a **greater ability to hire** 'specialist' gear required to explore and experience region fully (e.g. 4WD, surfing and fishing equipment)

## Experiences:



**STRENGTHS TO LEVERAGE**



Marine life experiences



Seafood



Boat tours



**OPPORTUNITIES TO BUILD**



Accessibility of marine experiences – particularly to the reef itself



World heritage sites



Casual eating / local produce



Gorges

## TARGETED PROMOTION TO SPECIALIST AUDIENCES



Fishing



Camping

## Potential strategies to increase visitation include:

- Utilise a **targeted approach to marketing** by focussing on potential visitors with a pre-existing interest in coastal/ marine experiences
- Showcase marine life experiences** as a unique drawcard
- Utilise itineraries** to decrease perceptions of “difficult to plan and do”
- Showcase a **range of accommodation options** and ensure sufficient supply of good value self-catering options
- Improve range, quality and value of **culinary experiences** through product development
- Develop towns to create **regional hubs** that provide more dense and diverse tourism offerings (e.g. shopping, culinary offerings, accommodation options)

## THE FINE PRINT

Research was conducted in June-August, 2014. Research methodology comprised:

### Qualitative research

- 8 Focus groups and 4 in-depth interviews
  - Sydney, Melbourne and Perth
  - All holidaymakers
  - Mix of visitors and non-visitors to the Ningaloo Region

### Quantitative research

- Online Survey
  - N=600 respondents from Sydney, Melbourne and Perth
  - Inter & Intrastate holidaymakers
  - Sample aged 30-69, with an income of \$75K+
  - All aware of at least one destination within the Ningaloo Region