

THE PILBARA

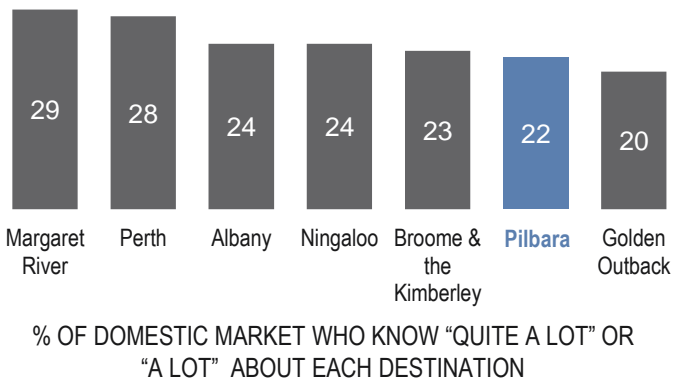
The following insights are derived from research with residents from the target domestic markets of Perth, Sydney and Melbourne ...



ACCESSIBILITY AFFORDABILITY KNOWLEDGE DENSITY DIVERSITY UNIQUENESS

The Pilbara is seen more as a centre of industry (mining) than as a true tourism destination. While some potential visitors are attracted by the natural beauty and solitude offered by the region, in reality there is **only a select group to whom the current offering appeals**. For many, the Pilbara will only ever be visited as part of a larger trip in WA.

Knowledge of WA destinations:



The Pilbara is viewed more as part of a **bigger trip in WA** than as a stand-alone destination.

Therefore, the key triggers for visiting the Pilbara are largely external:



Work trip



Part of a larger trip



VFR

Barriers to visitation:

Barriers to visitation are large and not easily overcome, creating an overall **lack of appeal**:



Time/distance - Takes too long to get to & too far to drive from place to place once you've arrived



Cost/value - Flights are expensive and there are more appealing and affordable options elsewhere offering better value for money

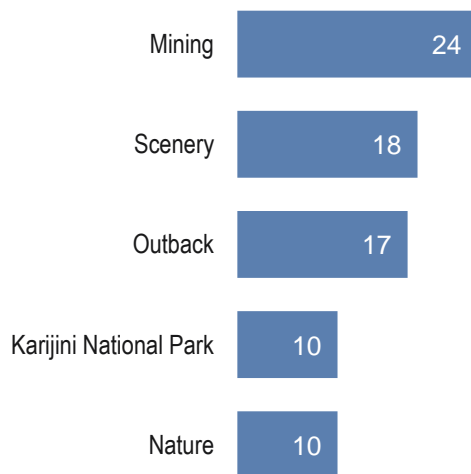


Negative associations - mining, dust, flies, heat, nothingness



Difficulty - 4WD and preparation required, safety concerns and general lack of comfort

The Pilbara is best known for:



% OF SPONTANEOUS MENTIONS

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



Widespread **desire for greater range of accommodation** – beyond camping and caravanning



High desire for more luxurious/**resort style accommodation**



Distance to **access via Perth** is intimidating for interstate visitors – preference for accessing via Broome



Promote access and accommodation options that **emphasise comfort** to combat overshadowing perceptions of “roughing-it”

Experiences:



STRENGTHS TO LEVERAGE



Wildlife



Outback towns



Aboriginal culture
(eg. Camping with Custodians, tours with locals)



OPPORTUNITIES TO BUILD



Karijini /Millstream-Chichester/ Murujuga National Parks



Dampier Archipelago



Beaches

TARGETED PROMOTION TO SPECIALIST AUDIENCES



Mining



4WD and fishing

Potential strategies to increase visitation include:

- Promote **individual locations and specific experiences** rather than the Pilbara as a whole to avoid negative associations
- Promote the region at **other key WA locations** such as Broome and Exmouth, to entice self-drive visitors who are already travelling 'nearby' to stop, stay and spend in the Pilbara
- Utilise **targeted promotion** of individual National Parks among specialist audiences
- Develop and promote the **coastal experience** to expand diversity of experiences
- Make **extensive use of water in promotions** to combat associations with red, hot, dry

THE FINE PRINT

Research was conducted in April-August, 2017. Research methodology comprised:

Qualitative research

6 Focus Groups & 3 In-depth Interviews

- Melbourne & Perth
- All holidaymakers
- Mix of visitors and non-visitors to the Pilbara

Quantitative research

Online Survey

- N=400 respondents from Sydney, Melbourne & Perth
- Inter & Intrastate holidaymakers
- Sample aged 30-75, with an income of \$75K+
- All aware of at least one destination within the Pilbara