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:

<table>
<thead>
<tr>
<th>Destination</th>
<th>% of Domestic Market Who Know “Quite a Lot” or “A Lot” About Each Destination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Margaret River</td>
<td>29</td>
</tr>
<tr>
<td>Perth</td>
<td>28</td>
</tr>
<tr>
<td>Albany</td>
<td>24</td>
</tr>
<tr>
<td>Ningaloo</td>
<td>24</td>
</tr>
<tr>
<td>Broome &amp; the Kimberley</td>
<td>23</td>
</tr>
<tr>
<td>Pilbara</td>
<td>22</td>
</tr>
<tr>
<td>Golden Outback</td>
<td>20</td>
</tr>
</tbody>
</table>

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:

- **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:

- **Mining** - 24
- **Scenery** - 18
- **Outback** - 17
- **Karijini National Park** - 10
- **Nature** - 10

% of Spontaneous Mentions
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

### Experiences:

<table>
<thead>
<tr>
<th>STRENGTHS TO LEVERAGE</th>
<th>OPPORTUNITIES TO BUILD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wildlife</td>
<td>Karijini/Millstream-Chichester/Murujuga National Parks</td>
</tr>
<tr>
<td>Outback towns</td>
<td>Dampier Archipelago</td>
</tr>
<tr>
<td>Aboriginal culture</td>
<td>Beaches</td>
</tr>
<tr>
<td>(eg. Camping with Custodians, tours with locals)</td>
<td></td>
</tr>
</tbody>
</table>

### TARGETED PROMOTION TO SPECIALIST AUDIENCES

- Mining
- 4WD and fishing

### 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