



Visitors to the Perth Hills

Presented to

Perth Hills Strategic
Marketing Group

June 2007

Research Purpose

- ▣ Importance and performance of tourism product offer elements
- ▣ Profile of current visitors to the region
- ▣ Purchase decision-making factors
- ▣ Destination attractions
- ▣ Destination facilities
- ▣ Accessibility.
- ▣ Image
- ▣ Price positioning/value for money on the total costs of the visit

Research Method

- 📌 Intercept visitors (434)
- 📌 Spread throughout Hills
- 📌 Weekends of may 5-6 (Harvest Festival)
- 📌 May 12-13, and May 19-20
- 📌 Call back interview over 4 days after each intercept w/e.
- 📌 250 total call-back interviews

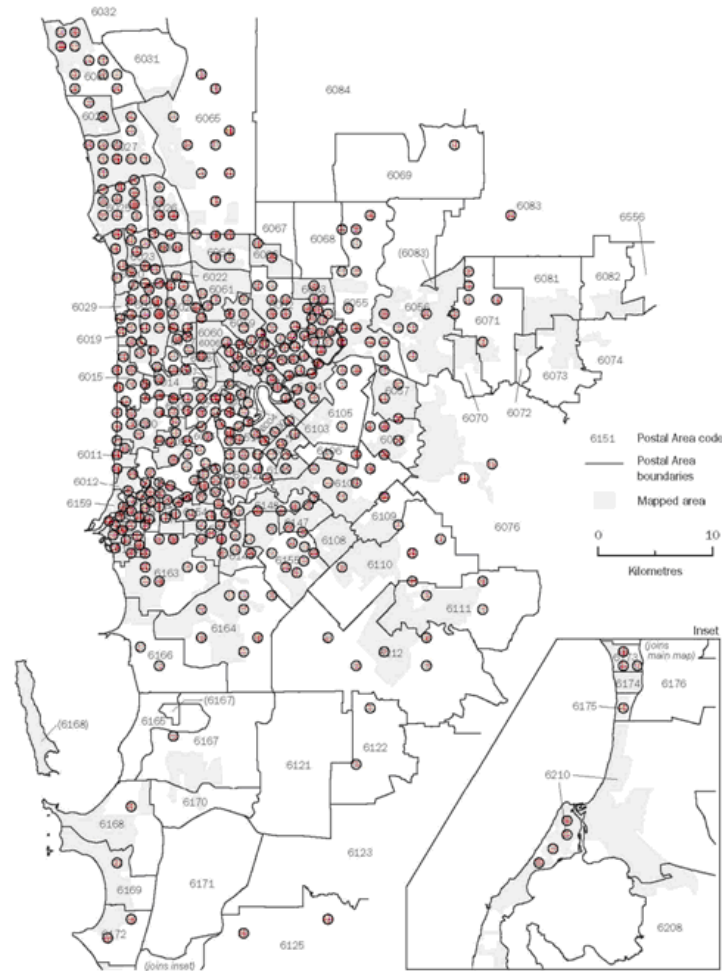
Visitor Profile – Travel Party

- 4 in 10 (38%) in family group
- 2 in ten (21%) as a couple
- 3 in 10 (29% a group of friends
- 11% “other” (mostly family visit)
- 1% a tour group

Visitor Profile – Age Group

Age group		ABS Profile
17-35	26	37
36-55	51	38
56+	22	25
	100	100

Visitor Origin



Visitor Profile – Hills Experience

- 1 in 5 visit first time
- 94% from Perth (remainder I/S - & O/S)
- 40% six or more times over 2 yrs (20% 12+)
- 37% 2-5 trips in 2 yrs

Day trip experience

Table T4.3

"Day trip experience"

	Total	Interview Period		Interview Location			
		Festival Weekend	Non-Festival	Kalamunda	National Park	Bickey/Camel	Mundaring
	N=432 %	N=183 %	N=249 %	N=119 %	N=161 %	N=114 %	N=38 %
001	20	15	24	11	29	19	18
2 to 5 trips	37	42	33	38	38	36	32
6 to 12 trips	20	22	19	18	20	21	24
More than 12 trips	20	18	21	30	12	20	16
TOTAL	100	100	100	100	100	100	100

Overnight Experience

Table T4.3.1

"Overnight stay experience"

	Total	Interview Period		Interview Location			
		Festival Weekend	Non-Festival	Kalamunda	National Park	Bidley/Camel	Mundaring
	N=432 %	N=184 %	N=249 %	N=119 %	N=161 %	N=115 %	N=38 %
Up to 5 times	13	14	13	16	8	14	24
More than 5 times	3	4	3	3	1	7	5
None	83	82	84	82	91	79	71
TOTAL	100	100	100	100	100	100	100

Visitor Profile – Potential to increase overnight Experience

- Evidence of Multiple Day Visits
- Little overnight stay activity
- “Distance” a major disincentive to more frequent visits
- But skew towards family group visits – possible due to lack of o’night product for young couples?

61% in group, 35% two together,
but only 21% a couple.

Table T4.9

Number of people in travel
group

	Total	Interview Period		Interview Location			
		Festival Weekend	Non- Festival	Kalamunda	National Park	Bickley/ Carmel	Mundaring
		N=250 %	N=162 %	N=88 %	N=95 %	N=69 %	N=76 %
Self/alone	4	4	5	7	1	1	20
One plus self	35	40	26	41	26	34	40
Two plus self	14	16	11	19	13	12	-
Three plus self	19	20	18	18	19	21	20
Four plus self	14	12	17	12	17	14	-
Five or more plus self	14	9	23	3	23	17	20
Totals	100	100	100	100	100	100	100

Appeal of Hills “Today”

Table T4.2

“Attraction to hills today”

	Total	Interview Period		Interview Location			
		Festival Weekend	Non-Festival	Kalamunda	National Park	Bickley/Carmel	Mundaring
	N=434 %	N=184 %	N=250 %	N=119 %	N=162 %	N=115 %	N=38 %
Visit Kalamunda Market	18	42	-	64	1	-	-
Harvest Festival activities	18	42	-	7	-	61	-
To visit specific attractions	3	1	5	2	5	2	8
Just came for day out	29	10	44	4	60	16	21
Visiting hotel	3	2	5	1	9	-	-
Visit family/friends	4	4	4	7	1	4	5
Visiting Wier	3	1	4	-	7	-	-
Fair/Varissima/Healing Festival	3	-	5	-	-	-	34
Walking/Hiking	3	-	5	3	4	1	-
TOTAL	100	100	100	100	100	100	100

Lack of specific activity focus, but They Stay a long time

- 7 out of 10 stay more than 3 hours
- One in five stay 2-3 hours
- Only 2% stay under 2 hours
- 6% stay overnight

Time in the Hills “This trip”

Table T4.4

“Time stayed in hills on this trip”

	Total	Interview Period		Interview Location			
		Festival Weekend	Non-Festival	Kalamunda	National Park	Bidkey/Camel	Mundaring
	N=250 %	N=162 %	N=88 %	N=95 %	N=69 %	N=76 %	N=10 %
Overnight stay	6	5	8	4	7	7	10
Less than 2 hours	3	1	7	3	3	3	10
From 2-3 hours	19	21	15	26	14	13	20
From 3-4 hours	32	32	33	34	36	29	20
More than 4 hours	40	41	38	33	39	49	40
TOTAL	100	100	100	100	100	100	100

Attractions of main venue

Table T4.5.1
Attractions of
regions visited

	Total	Kalamunda	Perth Hills/ National Park	Bicley/ Carmel Valley	Mundaring	Other
	N=250 %	N=97 %	N=30 %	N=68 %	N=47 %	N=8 %
Markets	29	72	-	1	2	-
Harvest Festival	18	5	-	57	-	-
Setting/scenery	14	14	13	10	13	38
Ambience/atmosphere	12	19	13	9	6	-
Family/friends in area	10	9	3	18	4	-
Drive/day out	10	6	17	3	19	25
Restaurant/café/pub	7	7	7	6	9	-
Mother's Day outing	6	1	27	1	11	-
Bush/bushwalking tracks	6	3	10	3	11	13
Weir/park at the weir	5	-	13	-	17	13
Take visitors	5	3	13	3	4	13
Historical aspect	4	1	13	1	6	13
Wine/vineyards	3	4	-	12	-	-
Expo/fair	3	-	3	-	15	-
Convenient/dose	3	-	10	1	6	-
Other	4	-	-	3	6	13

Satisfaction Levels

Table T4.6
Satisfaction

	Signage	Facilities	Standard of food or beverages	Overall value for money	Standard of service provided	Operating hours
	N=250 %	N=250 %	N=250 %	N=250 %	N=250 %	N=250 %
Neither one nor the other	8	10	4	2	4	5
Don't know	12	4	18	9	11	17
NET SATISFIED	70	73	75	87	84	74
NET DISSATISFIED	10	14	3	2	2	4
Totals	100	100	100	100	100	100

Satisfaction Levels - Signage

- 70% overall were satisfied with signage (18% less than satisfied)
- 28% less than satisfied with signage in Carmel/Bickley Valley
- 19% in Kalamunda
- 15% in Mundaring
- 0% indicated that they were dissatisfied with signage in the Perth Hills/National Park area

Satisfaction - Facilities

- 73% were satisfied, and 24% were Less than satisfied with facilities overall. The “not satisfied” figures for the four regions were:
- 37% Kalamunda (60% satisfied)
- 20% Carmel/Bickley Valley (75% satisfied)
- 8% Mundaring (87% satisfied)
- 7% Perth Hills/National Park area. (93% satisfied)

Satisfaction – Food & Bev

- 75% were satisfied with the standard of food & beverages, 7% less than satisfied. The “not satisfied” figures for the four regions were:
- 7% in Kalamunda (87% Sat)
- 5% Carmel/Bickley Valley (91% Sat)
- 8% Mundaring (51% Sat – 40% D.K.)
- 0% Perth Hills/National Park area. (91% Sat)

Satisfaction – Value for Money

- 87% were satisfied with the value for money aspect of their trip, 4% less than satisfied. The “not satisfied” figures for the four regions were:
 - 0% in Kalamunda (98% Sat)
 - 6% Carmel/Bickley Valley (90% Sat)
 - 6% Mundaring (66% Sat – 23% D.K.)
 - 0% Perth Hills/National Park area. (63% Sat, 37% D.K.)

Satisfaction – Standard of Service

- 87% were satisfied with the “value for money” aspect of their trip, 4% less than satisfied. The “not satisfied” figures for the four regions were:
 - 0% in Kalamunda (98% Sat)
 - 6% Carmel/Bickley Valley (90% Sat)
 - 6% Mundaring (66% Sat – 23% D.K.)
 - 0% Perth Hills/National Park area. (63% Sat, 37% D.K.)

Satisfaction – Operating Hours

- 74% were satisfied with the operating hours for their trip, 9% less than satisfied. The “not satisfied” figures for the four regions were:
- 9% in Kalamunda (75% Sat)
- 9% Carmel/Bickley Valley (84% Sat)
- 8% Mundaring (72% Sat – 19% D.K.)
- 14% Perth Hills/National Park area. (47% Sat, 40% D.K.)

Expenditure Patterns

- ▣ The patterns of expenditure for visitors to the hills were:
- ▣ 79% had bought some form of meal or coffee
- ▣ 56% had done some shopping
- ▣ 6% had bought fuel for a vehicle
- ▣ 2% had spent money on accommodation
- ▣ 14% had spent money on attractions and activities
- ▣ 7% had spent money on wine (this was mostly during the festival weekend).

Perceived Value for money “on the day overall”

- 64% “very good”
- 32% “quite good”.
- (4% “neither”)
- Not one respondent described the value for money of their trip to the hills as being poor value for money.

Promotions – how discovered

Venue / Activity

- 32% word of mouth
- 24% previous experience/regularly visit
- 11% family or friends in the area
- 10% a brochure or leaflet
- 6% an internet site
- 5% signage on the way
- 5% local paper or magazine
- 4% ads or an article in the newspaper
- 4% know a sponsor/personal contact
- 4% radio advertising
- 4% through their work or organisation
- 4% referral from another place visited.

Even the Harvest Festival mostly promoted by word of mouth

Table T4.8

Means of discovery of venue or event

	Total N=250 %	Interview Period		Interview Location			
		Festival Weekend N=162 %	Non- Festival N=88 %	Kalamunda N=95 %	National Park N=69 %	Bickley/ Carmel N=76 %	Mundaring N=10 %
		Word of mouth	32	33	28	44	30
Previous experience/go often	24	15	40	17	43	18	-
Family/friends in the area	11	14	6	9	4	20	10
Brochure/leaflet	10	14	2	8	-	20	20
Internet site	6	7	2	3	4	11	-
Used to live-work there	6	4	9	4	9	3	20
Signage on the way	5	7	2	8	1	5	-
Local paper/magazine	5	7	2	3	1	9	20
Ads/article in paper	4	7	-	7	-	5	-
Know sponsor/stallholder	4	5	2	5	-	4	20
Radio advertising	4	5	1	-	1	11	-
Through work/organisation/school	4	2	6	2	7	-	20
From other place visited eg. winery	4	6	-	6	-	4	-

What would make trip more attractive?

Table T4.7

What would make it more attractive?

	Total	Interview Period		Interview Location			
		Festival Weekend	Non-Festival	Kalamunda	National Park	Bickley/Carmel	Mundaring
		N=250 %	N=162 %	N=88 %	N=95 %	N=69 %	N=76 %
Fine as is/nothing	25	23	28	19	26	30	30
Better marketing/advertising	14	18	7	11	6	26	10
More information in/about area	12	13	10	13	9	16	-
Places to eat	10	10	10	11	7	9	30
More/better facilities	9	8	11	12	10	7	-
Better parking/need more at markets	6	9	1	13	1	3	-
More events/entertainment	4	6	1	8	-	3	10
Food (quality/variety)	3	3	3	3	3	3	10
Accommodation available	3	5	-	6	-	3	-
Cleaner/need to spruce up	3	1	7	3	7	-	-
More to do (shops/galleries etc)	2	2	2	3	1	3	-
Other	3	2	5	3	3	3	-

Promotions Summary

- High level of repeat visitation
- Low draw from southern suburbs
- Word of Mouth the main communication mechanisms
- Need to promote to the Southern Suburbs
- Community News the best vehicle?

Promotions Summary

- Non “Harvest festival” visitors have low reference to specific activities – general “day out” response
- Need for “promotable” events

Appeal Summary

- ▣ Good Value
- ▣ Relaxed Lifestyle
- ▣ Historic perspective
- ▣ “Village” atmosphere
- ▣ Natural environment

Observations

- Few “new” visitors
- Lack of awareness - why so few from southern suburbs?
- Family profile, but lack of young couple appeal?
- Meals, facilities and entertainment needed
- High Propensity to come again

Come again in next few months?

Table T4.11
Propensity to come again

	Total	Interview Period		Interview Location			
		Festival Weekend	Non-Festival	Kalamunda	National Park	Bickley/Carmel	Mundaring
		N=250 %	N=162 %	N=88 %	N=95 %	N=69 %	N=76 %
Very likely	58	59	55	67	48	54	60
Quite likely	28	26	31	23	35	26	30
Neither one nor the other	2	2	2	1	1	4	-
Quite unlikely	7	7	6	4	7	11	-
Very unlikely	5	5	5	3	6	5	10
Don't know	1	1	2	1	3	-	-
NET LIKELY	85	85	85	91	83	80	90
NET UNLIKELY	12	12	10	7	13	16	10
Totals	100	100	100	100	100	100	100

Obstacles to more frequent Visits

- 36% live too far away - it's too distant
- 27% lack of time/back to work/sport
- 18% it's not something we do often/only go to the Wine or Food Festival annually
- 18% only come when the weather is nice (Spring or Autumn)
- 9% prefer to spend time at the beach
- One respondent also suggested that it was not good for elderly people (lack of wheel chair access).



Thank you