

# Tourism and Perth's Coast

Research conducted by Kantar Public on behalf of Tourism WA

2017/2018

## BACKGROUND AND METHODOLOGY

In 2017, Tourism WA contracted Kantar Public to undertake primary research to understand in which ways Perth's beaches and coastal precincts could be developed in order to increase visitation and maximize tourism benefits. The methodology involved n=353 quasi-qualitative face-to-face interviews with leisure visitors to Perth (intrastate, interstate, and international visitors) conducted across six coastal precincts of Perth between 10 March 03 April 2017. The precincts included Rockingham, Fremantle, Cottesloe, City Beach, Scarborough and Hillarys.

On completion of the research, a need was identified to undertake research with visitors to Perth who were not at the coast or had not or did not intend on visiting Perth's coast, to understand what perceptions and barriers may be preventing visitors from visiting the coast. Consequently, a second phase of the research was conducted between 18 January 18 and 6 March 2018, involving n=201 quasi-qualitative face-to-face interviews with leisure visitors conducted at non-coastal locations (Elizabeth Quay, Kings Park, Northbridge, South Perth, Whiteman Park, Swan Valley and Forrest Place). However, during fieldwork it became apparent that the vast majority of leisure visitors to Perth do visit the coast, so only n=27 of the n=201 interviews were conducted with visitors who had not and did not intend to visit the coast.

## SUMMARY OF RESEARCH INSIGHTS

A summary of learnings from both phases of the Perth's Coast research is provided below, categorised by perceptions and appeal, development opportunities, and functional issues. All learnings are based on insights directly derived from the visitors surveyed.

### Perceptions and Appeal

- Visiting Perth's coast is a **fundamental part of a holiday in Perth**
  - Almost all Perth visitors (nine in ten, or 89%), visit the coast at least once during their stay in Perth
  - There is opportunity to increase the frequency of visits and increase spend per visit at the coast.
- Current visitors to Perth's beaches value the cleanliness and clarity of the water, the white sand, and the natural environment. However, good beaches are an **'expected'** part of a holiday in Perth for tourists, they are **rarely the driving reason** for visiting Perth, as they have low perceived uniqueness.
  - There is opportunity to further promote the unique aspects of Perth's coast, such as watching the sunset over the Indian Ocean.
- The preservation of the **natural landscape** along Perth's coast is valued by visitors... as long as there are facilities, eateries, bars and shops nearby.
- Visiting Perth's coast is an experience, and it's **not just about the beach** specifically.
- The top two activities that visitors are most interested in at Perth's coast are the simplest and tied to the natural offering of Perth's coast; **watching the sunset and walking**.
  - There is opportunity to raise the profile of these experiences, as they are not top of mind for visitors, but have the highest appeal when prompted.
  - Grabbing a coffee / snack or having a meal at a casual café or restaurant at the coast are also high appeal activities.
- Aligned with the appeal of walking along the coast, it is worth noting recent *Cycle Tourism Segmentation* research undertaken by Tourism WA identified the coast is consistently considered the most appealing location to cycle within Perth (more so than along the Swan River, in National Parks, etc.).

### Development Opportunities

- **Activation & enhancement** is preferred, not large-scale development (consistent with learnings from Swan River development research conducted by Tourism WA in 2016).
  - This should be considered both in the daytime and the evening and directly linked to the beach e.g. 'Scarborough Beach Festival', 'Sundowners on the Sand', 'Hillarys Sunset Markets'.
  - Markets are highly desirable – even in locations where there are existing shops like Hillarys and Fremantle.

- Events are also frequently requested – music, cultural, theatrical, even exercise/sport. They bring a good atmosphere and vibe, enhancing the area without permanent impact.
- Water activities are often discussed – these should include all levels of ability (i.e. not just surfing or high skill activities) and be easily accessible.
- In terms of **food and drink** options, Perth's coast is perceived to offer a sufficient number of upper end (e.g. fine dining) and lower end (e.g. take-away) experiences, however there is opportunity for more mid-range, casual dining (and drinking).

### Functional Issues

- Improving **public transport** options to and from the coast will increase visitation, and likely associated spend.
  - Three in four visitors (73%) said they would be more likely to visit the coast if it was easier to access the coast via public transport.
  - A third of visitors (33%) believe it would be difficult to travel back from the coast to where they are staying after 8pm in the evening.
  - More routes, quicker links, and easier access to relevant information are required to maximise this opportunity.
- Readily available, **good information aimed at visitors**, especially online, will help drive visitation to the coast.
  - Two in five (39%) visitors agreed that more easily accessible information would have made their trip to the coast easier.
- Awareness and knowledge of **accommodation** options at the coast is low, and there is a misperception that coastal accommodation would be more expensive than city-based accommodation.
  - 39% of visitors thought the coast would be more expensive vs. 27% thought the city would be more expensive.

## KEY RECOMMENDATIONS

Based on these research findings, the following key recommendations have been derived:

1. Through marketing communications, increase knowledge of:
  - Opportunity to watch sunset over the ocean
  - Perth's coastal walks
  - Mid-range / casual food and wine options
  - Availability (and cost) of accommodation at Perth's coast
2. Raise the profile of Perth's coastal walks
  - Give names to Perth's coastal walks and descriptions such as length, how long it will take, suitability for children, key points of interest along the journey
  - Could be supported by low-impact infrastructure such as signposts
  - Consider developing coastal walk food and wine trails, to bring two key coastal activities together
  - Acknowledge any promotion or enhancement of Perth's coastal walks will have the dual benefit of raising opportunity to cycle along Perth's coast, which we know has high appeal amongst cycle tourists
3. Continue to champion improved public transport access to and along Perth's coast
  - Particularly evening access; returning from the coast to the city during the night
  - Development of public transport information specifically targeted at tourists should be a priority