Swan Valley
Better Business Blitz
Research Presentation

Presented by
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Research and Analysis
Tourism WA
Who visits the City of Swan?

THE HARD STATS
How many visitors come to the City of Swan annually?

(2 year average - 2004 + 2005)

Overnight Visitors: 80,600
Visitor Nights: 416,600
Domestic Day Trippers 488,000
Total Spend: $83.9 million
The Bottom Line …..

How much do they spend?
(2 year average – 2004 + 2005)

Total Visitor Spend:
$83.9 million

Intrastate Visitors
$16.3

Interstate Visitors
$12.7

International
$10.0

CAUTION SHOULD BE USED WITH THE INTERSTATE SPEND FIGURE AS THE SAMPLE FOR THE INTERSTATE DATA IS TOO LOW TO BE CONSIDERED RELIABLE

Tourism Research Australia - International and National Visitor Survey
Regional Expenditure Estimates

Western Australia
Domestic Day Trippers to the City of Swan
Where are they coming from in WA?
2 year Average – 2004 + 2005

- 97% WA Visitors
- 2% Coral Coast
- 1% Golden Outback
- 2% North West

Tourism Research Australia - National Visitor Survey
Domestic Day Trippers to the City of Swan
Demographics (age and lifecycle group)
2 year Average – 2004 + 2005

- 18-34 yrs: 37% Young Single: 12%
- 35-54 yrs: 38% Young/Midlife No Kids: 19%
- 55 + yrs: 25% Parent with Child at home: 37%
- Older Married/Single: 32%

Tourism Research Australia - National Visitor Survey
Swan Valley
Better Business Blitz
2006 Day-trippers study
How the Research was Conducted
Methodology

• **Face-to-face recruitment over the 1st of April weekend, 2006**
  
  • WA residents
  • Did not stay overnight or live in the City of Swan
  • Not on an organised tour group
  • Quotas for age and gender

• **Computer assisted telephone interviews completed with 150 of the recruited visitors that week**
The study area...
Overall Sample: Who are they?

Gender Profile

- Male: 46%
- Female: 54%

Note that the age groups in this sample are very similar to the overall age breakdowns for day trip visitors to the City of Swan.

18-34 yrs: 31%
35-54 yrs: 38%
55 + yrs: 31%

(n=150)
Origin of Sample

Northern Suburbs 54%

Local Suburbs 15%

Southern Suburbs 22%

Other – 9%
Total Number of **Day Trips** Trips in the Last Two Years

- **7%** are first-time visitors.
- **21%** have been 2-4 times.
- **27%** have been 5-8 times.
- **14%** have been 9-16 times.
- **16%** have been 17-32 times.
- **15%** have been 33 or more times.

93% are repeat visitors.

n=150
Who Respondents Travelled With

- **Spouse/partner**: 44%
- **Friends**: 30%
- **Family (children under 12)**: 29%
- **Family (children over 12)**: 9%
- **Other family members**: 7%
- **Alone**: 3%

Almost 1/3 of respondents were visiting with friends.
Attractions Visited
The Margaret River Chocolate Company was far and away the most visited attraction in the Swan Valley.
Places Visited on Trip – Top 11-20

- Duckstein Brewery: 6%
- Caversham Wildlife Park: 5%
- Edgecomb Brothers: 5%
- Lamont Winery: 5%
- Milsten Garden Café: 5%
- Mono Nougat: 5%
- Old Cottage Café: 5%
- Mallard Duck Teahouse: 5%
- Ironbark: 5%
- Visitors Centre: 4%

n=150
Number of Times Attractions were Visited

- Caversham
- West Swan
- Whiteman
- Henley Brook
- Middle Swan
- Guildford

- More than 60
- 41-60
- 21-40
- 20 and below
Key Entry Points to the Swan Valley

Also - Gnangara Road

Reid Hwy

Great Eastern Hwy

Roe Hwy
First Attraction Visited
First Location Visited

- Whiteman Park: 8%
- Sandalford Estate: 7%
- Chocolate Factory: 7%
- Houghton Wines: 5%
- Mash Brewing: 5%

% of respondents

n=150
After the First Stop…
Only Location Visited

<table>
<thead>
<tr>
<th>Attraction</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whiteman Park</td>
<td>15%</td>
</tr>
<tr>
<td>Houghton Wines</td>
<td>9%</td>
</tr>
<tr>
<td>Ironbark</td>
<td>9%</td>
</tr>
<tr>
<td>Mash Brewing</td>
<td>9%</td>
</tr>
<tr>
<td>Milsten Garden Café</td>
<td>7%</td>
</tr>
</tbody>
</table>

Attractions with Picnic areas such as Whiteman Park and Houghton Wines tend to be more popular ‘one stop’ attractions.
Second Location Visited

- Chocolate Factory: 12%
- Caversham Wildlife Park: 5%
- Feral Brewing: 5%
- Lancaster Wines: 4%

n=104
Attractions with a food focus tend to be popular places to stop at before departing the Swan Valley.
The Importance of West Swan Road

Clearly the main Artery of the Swan Valley

• This is especially true for people coming from the Northern Suburbs (54% of all respondents)

• It is important that signage to and along the road is adequate and attractions have visual appeal (as we will see later in the presentation)

• Is the visitor’s centre is located in the busiest area of the Swan Valley?
  - Visitors centre had 6 visits
  - Attractions in Henley Brook and West Swan had 154 visits
Reasons for Visiting
Main Reason for Visit to the Swan Valley

Perhaps somewhat surprisingly, only 7% of respondents had visiting wineries as their main reason for visit.
All Reasons for Visit to the Swan Valley

- Went to have a meal or drink
- Visiting a specific place
- Showing visitors around
- Organised event/special occasion
- Visit wineries
- Close to home/Perth
- Out for a drive/ride

However, food and wine experiences tend to be the main drivers of visitation to the Swan Valley.
Experiences sought in the Swan Valley

- Dining out at a café/restaurant
- Wine tasting &/or buying
- Nature & Wildlife
- Being outdoor & active
- Visiting breweries
- Heritage & history
- Arts & crafts
- Sampling locally made food

This is reflected in the types of experiences sought by visitors to the Swan Valley.

% of respondents

n=150

Most interested
2nd most interested
Perth’s Valley of Taste

Quite clearly, Food and Wine are the two most sought after experiences in the Swan Valley.

The desire for these experiences confirms the use of ‘Perth’s Valley of Taste’ as a tagline for the Swan Valley.

Also confirms the continued marketing of the Swan Valley based on the desire for these two experiences. Specifically

• The use of Food and Wine Imagery
• The focus on unique Food and Wine experiences
• Marketing events at which to enjoy Food and Wine
Information Sources

Respondents were asked their source of information for each attraction visited. As a result, the total count may add up to more than the number of respondents as respondents may have had multi stop trips (and hence asked for information sources for each location visited).

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Been Before</td>
<td>176</td>
</tr>
<tr>
<td>Drove Past</td>
<td>63</td>
</tr>
<tr>
<td>Word of Mouth</td>
<td>62</td>
</tr>
<tr>
<td>Signage</td>
<td>13</td>
</tr>
<tr>
<td>swanvalley.com.au</td>
<td>11</td>
</tr>
<tr>
<td>Map picked up on trip</td>
<td>10</td>
</tr>
<tr>
<td>Media</td>
<td>8</td>
</tr>
</tbody>
</table>

However, despite the importance of marketing, previous visits and word of mouth tend to be the main sources of information for people visiting the Swan Valley.
Planned v Unplanned Trips
Top 10 Planned Stops

Was your trip to this attraction planned or unplanned?

- Chocolate Factory: 17%
- Sandalford Estate: 11%
- Whiteman Park: 10%
- Houghton Wines: 7%
- Feral Brewery: 7%
- Lancaster Wines: 6%
- Oggies Ice Cream Café: 6%
- Rose & Crown Hotel: 5%
- Mash Brewing: 5%
- Guilford Village: 4%

86% of respondents to the Swan Valley had planned a stop

n=129
Top 10 Unplanned Stops

Was your trip to this attraction planned or unplanned?

- Chocolate Factory: 10%
- Oggies Ice Cream Café: 5%
- Lancaster Wines: 5%
- Mash Brewing: 5%
- Duckstein Brewery: 4%
- Guilford Village: 4%
- Sandalford Estate: 3%
- Houghton Wines: 3%
- Feral Brewery: 3%
- Mondo Nougat: 3%

53% of respondents to the Swan Valley took a unplanned stop.

n=79
What Influences Unplanned Stops?

How much influence do each of the following have on whether you make unplanned stops when you are on a daytrip?

- Recommendations from other visitors
- Visual appeal of attractions from road
- Signage to tourist attractions
- Tourist Maps
- Brochures
- Recommendations from local businesses
- Recommendations from Visitor Centres

<table>
<thead>
<tr>
<th>Influence</th>
<th>1- No Influence</th>
<th>2</th>
<th>3 - Neutral</th>
<th>4</th>
<th>5- Very Strong Influence</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recommendations from other visitors</td>
<td></td>
<td>4</td>
<td>3 - Neutral</td>
<td>2</td>
<td>1- No Influence</td>
<td>n=150</td>
</tr>
<tr>
<td>Visual appeal of attractions from road</td>
<td></td>
<td>5</td>
<td>4 - Strong</td>
<td>3</td>
<td>2 - Moderate Influence</td>
<td></td>
</tr>
<tr>
<td>Signage to tourist attractions</td>
<td></td>
<td>4</td>
<td>3 - Neutral</td>
<td>2</td>
<td>1- No Influence</td>
<td></td>
</tr>
<tr>
<td>Tourist Maps</td>
<td></td>
<td>4</td>
<td>3 - Neutral</td>
<td>2</td>
<td>1- No Influence</td>
<td></td>
</tr>
<tr>
<td>Brochures</td>
<td></td>
<td>4</td>
<td>3 - Neutral</td>
<td>2</td>
<td>1- No Influence</td>
<td></td>
</tr>
<tr>
<td>Recommendations from local businesses</td>
<td></td>
<td>4</td>
<td>3 - Neutral</td>
<td>2</td>
<td>1- No Influence</td>
<td></td>
</tr>
<tr>
<td>Recommendations from Visitor Centres</td>
<td></td>
<td>4</td>
<td>3 - Neutral</td>
<td>2</td>
<td>1- No Influence</td>
<td></td>
</tr>
</tbody>
</table>
Is What You See, What You Get?

- Over 50% of visitors took an unplanned stop during their visit to the Swan Valley
- While word of mouth was rated the strongest influence on the decision to take an unplanned stop, signage and the visual appeal of attractions are just as important

Are visitors going to be attracted by the appearance of your premises?
Are all parts of the wine trail visually appealing enough to draw in visitors?
Is the visual appeal of some parts of the Valley sending mixed messages to visitors?
The Great Northern Highway

Example

- Whiteman
- West Swan
- Caversham
- Middle Swan
- Guildford

Number times attractions were visited:

- More than 60
- 41-60
- 21-40
- 20 and below
Suggested Additions to the Swan Valley

- Need more child friendly areas: 12%
- More food outlets: 7%
- More picnic areas: 4%
- More overnight accommodation: 4%
- More art/craft galleries: 3%
- No suggestions: 58%

n=150
Midweek and Overnight Trips
Total Number of **Midweek** Trips in the Last Two Years

- **44%** have never been.
- **11%** have been only once.
- **17%** have been 2-4 times.
- **9%** have been 5-8 times.
- **7%** have been 9-16 times.
- **11%** have been 17 or more times.

Surprisingly, 56% of respondents had visited the Swan Valley midweek.

n=150
There is a small proportion of visitors who may consider visiting the Swan Valley midweek but don’t know what may be happening in the area.
There are a large number of visitors to the Swan Valley, that have never stayed overnight. Is this an area for future growth? Does the Swan Valley have any mass appeal as an overnight destination?
As we can see, the number of people who have been on a daytrip is far greater than the number of people who have stayed overnight in the Swan Valley.
What We Have Covered Today...
Summary

• Looked at the most popular attractions and regions in the Swan Valley

• Highlighted the importance of West Swan Road as the ‘main artery’ of the Swan Valley

• Confirmed that food and wine are the main drivers of visitation to the ‘valley’
Summary

• Looked at planned v unplanned stops

• Illustrated that the visual appeal of attractions is a main driver of unplanned stops

• Confirmed that past experience and word of mouth are key information sources

• Also had a quick look at midweek and overnight trips
Appendix
Additional Information as requested at the presentation to Swan Valley Tourism Advisory Council – October 2006
A total of 37 sites were used to recruit the sample for this study.

Place of Recruitment – Top 8

- Visitors Centre
- Lancaster Wines
- Ironbark
- Oggies Ice Cream
- Sandalford
- Milsten
- Caversham Wildlife Park
- Chocolate Factory

Number of people recruited: n=150
Region of Recruitment

More than 25 recruits
16-25
6-15
5 and below
Possible Bias in the Results

Does the fact there are a high number of people recruited along attractions on West Swan Road lead to a bias in the results of this study?

Obviously there will be a slight bias in the results due to the number of people recruited along West Swan Road. However, this bias is counteracted in a number of ways.
1. There are a high number of attractions along West Swan Road, which automatically demands that a high number of people be recruited from attractions along this road.

2. A high number of people were recruited in Guildford, (i.e. a neutral area)

3. People were recruited over 37 locations in the Swan Valley

4. A maximum of 10 recruitments were allowed in any one location

5. Most importantly however, respondents were asked to list ALL of the attractions visited on their trip. So while people may have been recruited in one area, visitation to other areas was still measured in this study.
Possible Bias in the Results

It’s very hard to remove all biases in a study such as this which requires recruitment of respondents from a wide range of locations.

And with a high number of people recruited from attractions along West Swan Road, there will be a slight bias towards attractions in these areas.

However, with recruitment occurring over such a large range of attractions and limited to 10 in any one location, the effects of this bias have been minimised.
## Average Number of Attractions Visited

<table>
<thead>
<tr>
<th>Region</th>
<th>Number of People who visited region</th>
<th>Number of attractions visited in region</th>
<th>Average number of attractions visited in region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Henley Brook</td>
<td>56</td>
<td>84</td>
<td>1.5</td>
</tr>
<tr>
<td>West Swan</td>
<td>46</td>
<td>70</td>
<td>1.5</td>
</tr>
<tr>
<td>Guildford</td>
<td>33</td>
<td>58</td>
<td>1.8</td>
</tr>
<tr>
<td>Caversham</td>
<td>36</td>
<td>44</td>
<td>1.2</td>
</tr>
<tr>
<td>Middle Swan</td>
<td>27</td>
<td>34</td>
<td>1.3</td>
</tr>
<tr>
<td>Whiteman</td>
<td>18</td>
<td>31</td>
<td>1.7</td>
</tr>
<tr>
<td>Baskerville</td>
<td>19</td>
<td>20</td>
<td>1.1</td>
</tr>
<tr>
<td>Millendon</td>
<td>14</td>
<td>15</td>
<td>1.1</td>
</tr>
<tr>
<td>Herne Hill</td>
<td>10</td>
<td>14</td>
<td>1.4</td>
</tr>
<tr>
<td>Belhus</td>
<td>8</td>
<td>8</td>
<td>1.0</td>
</tr>
<tr>
<td>Upper Swan</td>
<td>6</td>
<td>7</td>
<td>1.2</td>
</tr>
<tr>
<td>Brigadoon</td>
<td>1</td>
<td>1</td>
<td>1.0</td>
</tr>
</tbody>
</table>
Statistical Differences between Groups

Are there any differences in results based on age?
Are there any differences in results based on where people live?

Statistical Significance determined at the 95% confidence level
Note About Statistical Significance

Please note that only relationships between groups that have a statistically significant difference (determined at the 95% confidence level) have been mentioned in the following slides.

No mention = No statistically significant difference between groups.
Origin of Sample

35-54 year olds were most likely to come from the Northern Suburbs.

18-34 year olds were more likely to come from the Southern Suburbs (when compared with the Northern Suburbs only).
Experiences sought in the Swan Valley

- Dining out at a café/restaurant
- Wine tasting &/or buying
- Family day out
- Visiting breweries
- Nature & Wildlife
- Being outdoor & active
- Heritage & history
- Arts & crafts
- Sampling locally made food

The only statistical difference in age groups was found with interest in heritage and history experiences. In this case the 35+ age groups were more likely to show interest in these types of experiences.

The Northern Suburbs and Local Suburbs were more likely to have an interest in heritage and history experiences.

The Northern Suburbs and Local Suburbs were more likely to have an interest in sampling locally made food products.

n=150
Total Number of **Day Trips** Trips in the Last Two Years

People from the Northern and Southern Suburbs were more likely to have visited between 2-4 times (when compared against those from Local Suburbs only).

People from Local Suburbs were more likely to have had high repeat visitation.

- First time: 7%
- 2-4 times: 21%
- 5-8 times: 27%
- 9-16 times: 14%
- 17-32 times: 16%
- 33 or more times: 15%

n=150
Total Number of **Midweek** Trips in the Last Two Years

- **44%** Never been
- **11%** Only once
- **17%** 2-4 times
- **9%** 5-8 times
- **7%** 9-16 times
- **11%** 17 or more times

People from the Southern Suburbs were more likely to have never visited the Swan Valley Midweek.

People aged 55+ were more likely to have high midweek visitation (when compared against those aged 18-34 only).

n=150