

Exploring Opportunities for Wildflower Tourism in WA

October 2021



Contents

03

Background and Methodology

08

Executive Summary

15

Awareness and Perceptions of Wildflower Tourism

23

Wildflower Behaviours and Intentions

33

Wildflower Tourism Holiday Preferences

42

Exploring the Wildflower Country Experience

52

Wildflower Segmentation

Profiling Key Segments – *Australian Market*

Profiling Key Segments – *International Market*

A scenic landscape photograph featuring a field of wildflowers in the foreground, with a dense forest and rolling mountains in the background. The scene is bathed in warm, golden light, suggesting a sunset or sunrise. A bright sun flare is visible in the upper center. A yellow horizontal band is overlaid across the middle of the image, containing the text 'Background & Methodology'.

Background & Methodology

Background

Tourism WA was seeking more insights to inform the strategic development and marketing of WA as a wildflower destination across domestic and international markets.

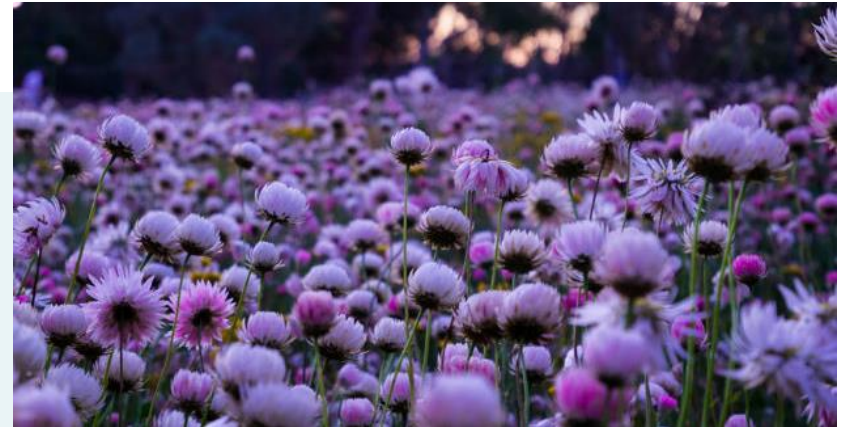
This research was conducted to inform key decisions and priorities by understanding the potential market, and build a picture of the different types of potential wildflower audiences in order to better prioritise, attract and target them.





Research objectives

Overall Objective: The overall objective of this research was to understand the market potential towards wildflower tourism in WA and build a picture of the different types of potential wildflower audiences in order to better prioritise, attract and target them.



The specific objectives of this engagement:

01

Understand the market size of the opportunity for wildflower tourism in key source markets, including testing latent demand

02

Identify meaningful and differentiated visitor segments and profile of each

03

Understand current and potential economic impact of wildflower tourism

04

Explore current awareness, perceptions, knowledge and attitudes to wildflower tourism

05

Uncover the key motivations and barriers to identify opportunities and levers for growth, including the specific role of wildflowers in driving visitation

06

Identify aligned experiences for cross-activity opportunities

Methodology

Intercept Interviews with visitors

15-minute face to face interviews were conducted in Western Australia's Wildflower Country. Interviews were conducted between **26 August and 29 September** with visitors who had engaged in wildflower tourism throughout their trip.

An online version of the survey was also distributed through flyers and posted in visitors centres and online.

A **final sample of n=244** was achieved, with **n=189 face to face interviews** and **n=55 online** completes.



Intercept Interview Sample Breakdown:

	n=	%
Male	109	45%
Female	135	55%
18-34	15	6%
35-54	34	14%
55+	195	80%
Total	244	100%



Methodology

Quantitative Online Survey

A **15-minute** online survey was conducted between **27 September and 13 October** nationally (WA, NSW, VIC, QLD) and internationally (Japan, Singapore and Malaysia). Surveys in Singapore and Malaysia were conducted in English, while those in Japan received a translated / in-language version of the survey.

A final sample of **n=2,803** was achieved, providing a **margin of error of ±4.9%** for each state / country. Outright rejectors of WA travel were excluded from the survey.

Australian sample was weight to ABS census data, while age and gender for international audiences were weighted to their respective country's census data.



Online Survey Sample Breakdown:

	n=	Weighted %
Male	1,370	49%
Female	1,433	51%
18-34	865	31%
35-54	1,021	36%
55+	917	33%
WA	400	14%
NSW	402	14%
VIC	400	14%
QLD	401	14%
Japan	400	14%
Singapore	400	14%
Malaysia	400	14%
Total	2,803	100%

A vibrant field of purple and white flowers, possibly lavender and geraniums, with a yellow banner across the middle. The background is a soft-focus green field of similar flowers.

Executive Summary

Key findings: The Wildflower Tourism Opportunity

Overall, there is **broad interest in wildflower tourism**. However, depending on **current knowledge and exposure**, potential travellers have **varying definitions** of wildflower tourism.

Those who are **less familiar** with wildflowers and wildflower tourism have a **general interpretation**. They consider wildflower tourism as almost any appreciation of **nature and the outdoors**.

The research identified two clear audiences for wildflower tourism:

1. Current Audience:



Definition:

- Niche audience
- Tend to be older (55 years plus)
- Wildflowers are a key driver of travel/trip decisions
- Rely on hyper local information (visitor centres)
- Knowledgeable about wildflowers and seasonal considerations

The Opportunity:

- Opportunity to increase trip frequency and length
- Opportunity to improve the visitor experience
- Limited ability to grow audience with the current product

2. Growth Audience:



Definition:

- Broad audience
- Tend to be younger (under 35 years)
- Driven by tourism, experience and the opportunity to see and do something new
- Wildflower aesthetics and photo opportunities are key
- Limited knowledge about wildflowers

The Opportunity:

- Opportunity to grow this audience and their wildflower engagement by positioning wildflower tourism as a complementary tourism activity

Key findings: Current Wildflower Tourism Audience

Summary

Considerations

Consider opportunities to engage pre-trip

The most engaged wildflower audiences stay up to date through Facebook groups, local communities and online forums. Visitor centres play a key role in planning for those in region.

The reliance on in-region information could be a barrier for some. Core wildflower tourists require detailed information about routes and flowers through websites, forums and local experience. Visitor centres must be informed and up to date throughout wildflower season.

Experience improvements to increase engagement

Wildflower experiences (e.g. viewing, photography, trails) are prioritised by current visitors, and while visitors to Wildflower Country were broadly satisfied with the experience, the variety of accommodation, and variety and quality of dining earn low satisfaction scores.

Wildflower fanatics are often willing to sacrifice dining and accommodation options for wildflower experiences, and many have set realistic trip expectations. However, addressing this barrier would likely broaden the audience and strengthen the visitor experience.

Prioritise towns with strong amenities

Among current visitors, there is strong engagement with Wildflower Country and towns. Visitors plan to visit 4-5 towns on average, with Mullewa, Dalwallinu, Three Springs, Moora and Minegreiv providing the most incremental uplift on visitation.

Prioritise itineraries and towns that already offer strong tourism facilities and experiences in addition to wildflowers. Clearly define and communicate the wildflower and tourism experience in each town.

Key findings: Growth Wildflower Tourism Audience

Summary

Considerations

Highlight activities and experiences

Growth audiences often take a simple view of wildflower tourism and consider it as part of a broader tourism offering.

For this audience, the quantity and general aesthetics of the wildflower offering is more important than the specific types of wildflowers on offer. Among the general public, most see wildflowers as a complementary tourism experience, rather than a primary reason to visit a destination.

Tourism facilities, amenities and complementary experiences are an important consideration for the growth audience.

Offer wildflower experiences with low barriers to entry (e.g. local, complementary activities). Consider opportunities to integrate or append wildflower tourism activities to other offerings, including dark sky tourism, agritourism, hikes, photo opportunities and the ability to engage in new and unique experiences.

The lack of accommodation and tourism facilities in key wildflower locations will likely be a barrier for emerging audiences and could limit growth. Ensure expectations are managed and consider creative ways to overcome this barrier.

Overcome awareness and information gaps

In the general population, awareness of specific WA wildflower locations (including Wildflower Country) and experiences is limited. Wildflower experiences can require significant base-level knowledge to engage and ensure a positive experience. With such limited familiarity, there is work to be done to get wildflower tourism in the consideration set.

Growth audiences would expect to receive information passively through social media or search. Clear and accessible information would be required from here to drive planning.

Address information gaps for the uninformed but interested. Educate about opportunities to better understand and participate in wildflower tourism overall and within key destinations.

Piggyback communications for other tourism activities to grow engagement. Focus on promoting the scale of the offering and overall aesthetics.

Broad information and imagery highlighting experience will be needed to drive consideration, with further detail required to assist in trip planning following initial exposure.

Key findings: Market Opportunities

Summary

Considerations

Australia

Interestingly, Australians have lower interest in wildflower tourism, and tend to be more polarised on the spectrum of interest. With wildflowers on our doorstep, some Australians appear to take wildflowers for granted.

Educate and inform Australian audiences of the full breadth and scope of wildflower tourism in WA, and opportunities to integrate with other natural wonders and tourism experiences. Convey a point of difference compared to other, more general outdoor experiences.

Malaysia

Malaysian audiences appear to have a strong affinity to wildflower tourism, with strong self reported interest and the greatest latent demand. Potential audiences skew younger, and they are open to a variety of tourism activities, including and outside of wildflowers.

Build awareness of WA's wildflower and integrated tourism opportunities. Promote guided tours to reduce barriers to access given lack of local knowledge.

Singapore

Singaporean travellers have a solid interest in wildflowers and WA's wildflower tourism offering. They are interested in typical Australian activities including beaches, walks, farm gates and dark sky tourism.

Consider the photo opportunities, and other unique Australian tourism and lifestyle experiences.

Promote regions / trails with more established accommodation and other tourism facilities.

Japan

With the furthest travel time, and most significant language and cultural differences, Japan has the most significant barrier to access. They are more open to tours, less interested in the outdoors and look for standard accommodation options (e.g. hotels).

Focus on growing the Japanese market through tour operators and travel agents. Promote regions / trails with more established accommodation and other tourism facilities and comfortable, visual and accessible complementary tourism activities.

Wildflower Segments

The research identified potential travellers can be grouped into five segments. Two of the segments would be motivated to travel for wildflowers and together equate to approximately one-third of travellers; Flower Fanatics and Wildflower Wunderlust. The former are more motivated by wildflowers themselves, while the latter are driven by new and unique experiences and have a desire to learn more about wildflowers.



Flower Fanatics

Wildflower driven

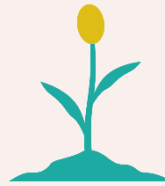
- Mix of ages
- Skew towards male
- More likely to engage in wildflower and nature based activities
- Strong knowledge and engagement with wildflowers
- Familiar with WA



Wildflower Wunderlust

Experience driven

- Mix of ages, but skew younger
- Skew towards female
- More likely to engage in tourism activities – attracted to new experiences
- Interested in wildflowers, but current knowledge and engagement is limited



Budding Enthusiasts

Information driven

- Mix of ages
- Skew towards female
- Interested in history and natural attractions
- Information seekers
- Interested in tours, need planning support



Firmly Planted

Convenience driven

- Skew older
- Males and females
- Knowledgeable about wildflowers, and interested
- Unlikely to travel for wildflowers, or engage in wildflower tourism



Wildflower Rejectors

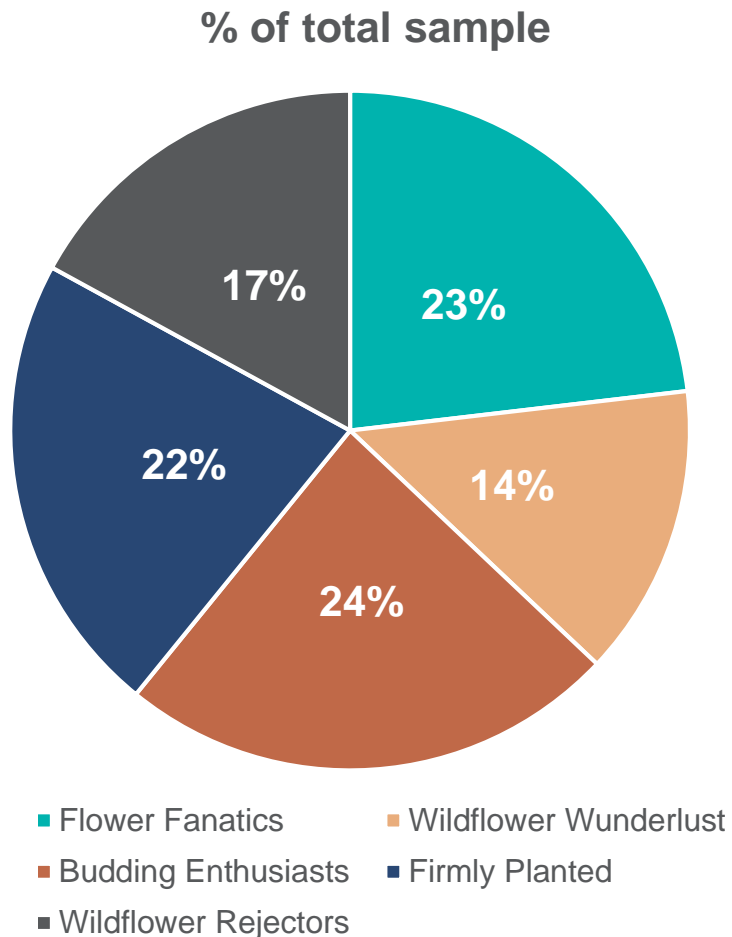
Comfort driven

- Skew older
- Males and females
- Not interested in wildflowers or the outdoors
- Prefer comfort and indulgence when on holiday

Primary audience
(37% of total sample)

Closed audience
(39% of total sample)

Primary segments were most prominent in Malaysia and Singapore



Flower Fanatics	21%	34%	28%	15%
Wildflower Wunderlust	12%	22%	16%	12%
Budding Enthusiasts	23%	20%	25%	32%
Firmly Planted	23%	16%	18%	27%
Wildflower Rejectors	21%	9%	12%	14%
Primary wildflower tourism audience	33%	56%	45%	27%
Adjusted to total market (including WA rejectors)	27%	44%	42%	15%



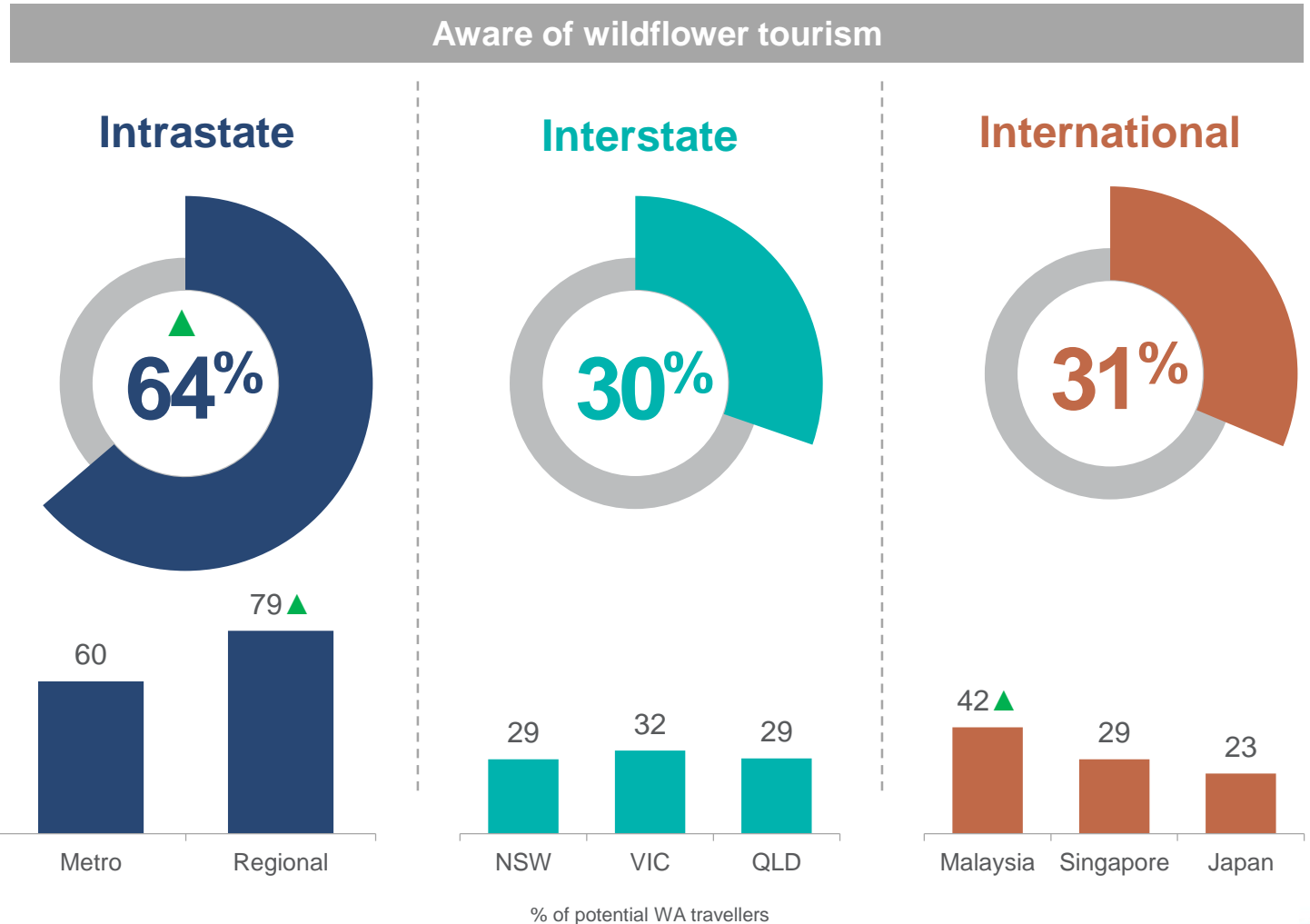
Awareness and Perceptions of Wildflower Tourism

There is opportunity to grow awareness of wildflower tourism in other states and countries

Awareness of wildflower tourism in **WA** is stronger among **older audiences** (77% among those 55+, 64% among those 35-54 and 49% among those 18-34).

Conversely, in **Malaysia** awareness is strongest among a **younger audience** (56% among those 18-34, 34% among those 35-54 and 25% among those 55+).

For other states and countries, awareness is broadly consistent across these age cohorts.

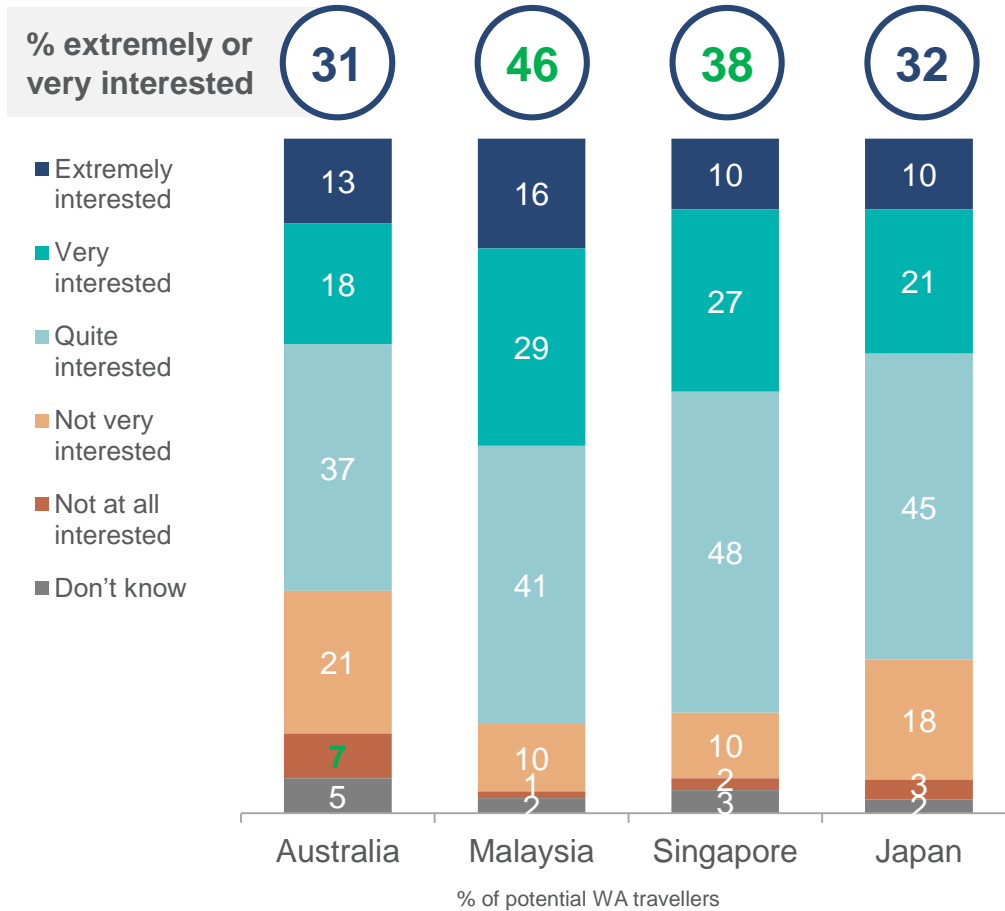


Base: Intrastate n=400 | Interstate n=1,203 | International n=1,200
 Q4. Have you heard of wildflower tourism before today?

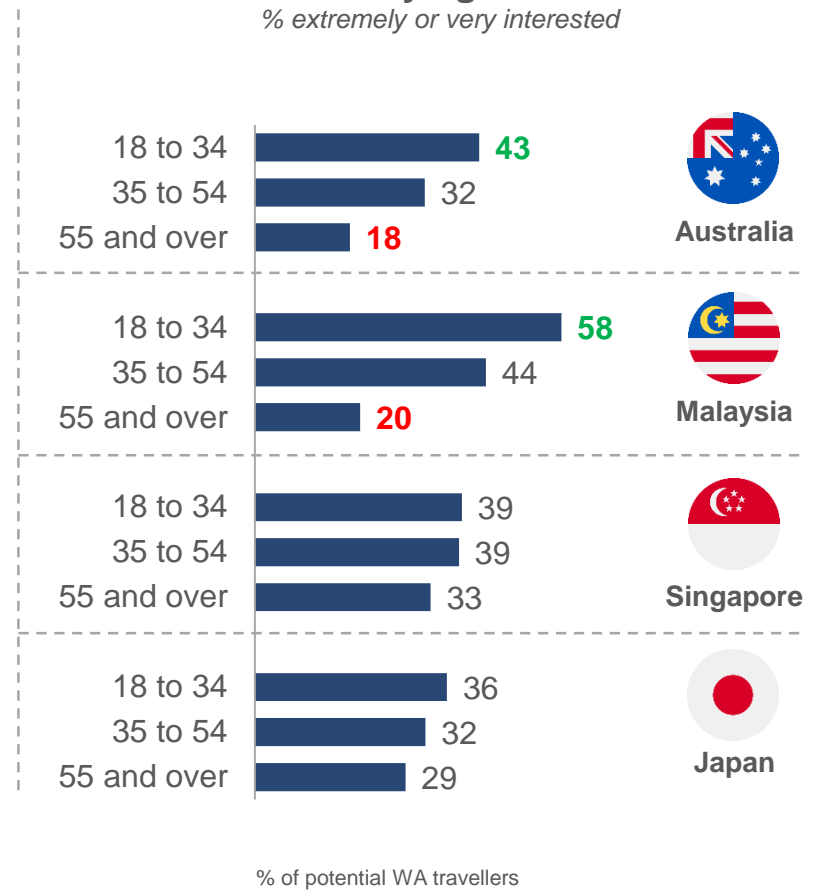
▲ ▼ significant difference between groups at the 95% confidence interval

There is substantial interest in wildflower tourism, particularly among younger potential travellers

Interest in wildflower tourism



Interest in wildflower tourism by age

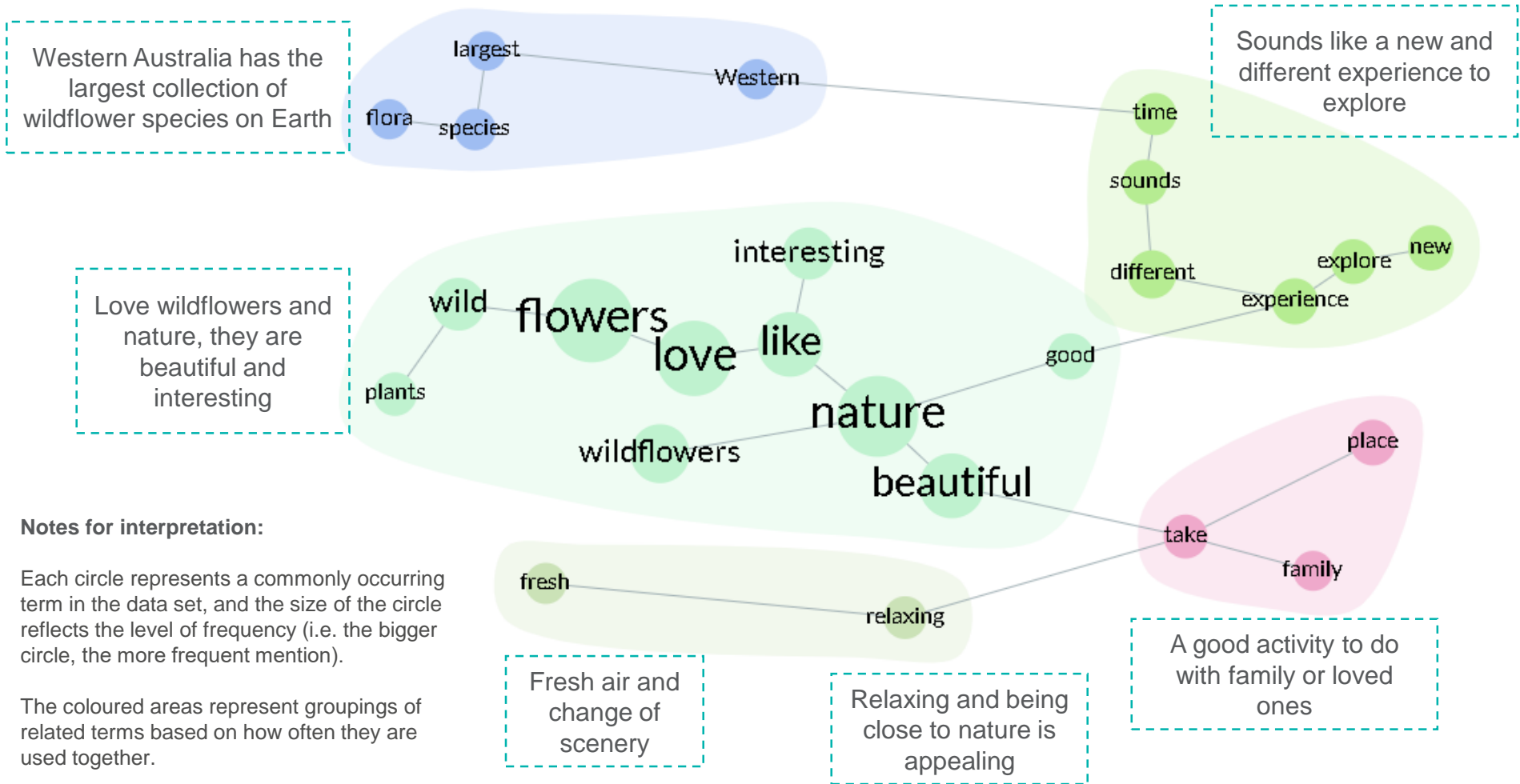


Base: Australia n=1,603 | Malaysia n=400 | Singapore n=400 | Japan n=400

Q6. How interested are you in wildflower tourism overall?

Green and red coloured text significant difference between groups at the 95% confidence interval

Reasons behind wildflower tourism interest



Notes for interpretation:

Each circle represents a commonly occurring term in the data set, and the size of the circle reflects the level of frequency (i.e. the bigger circle, the more frequent mention).

The coloured areas represent groupings of related terms based on how often they are used together.

The positioning of terms and concepts further illustrates how related they are.

Base: Potential travellers to WA interested in wildflower tourism n=875
 Q7. Tell me why you say you are interested in wildflower tourism? (Those very of extremely interested in wildflower tourism overall)
 ▲ ▼ significant difference between groups at the 95% confidence interval

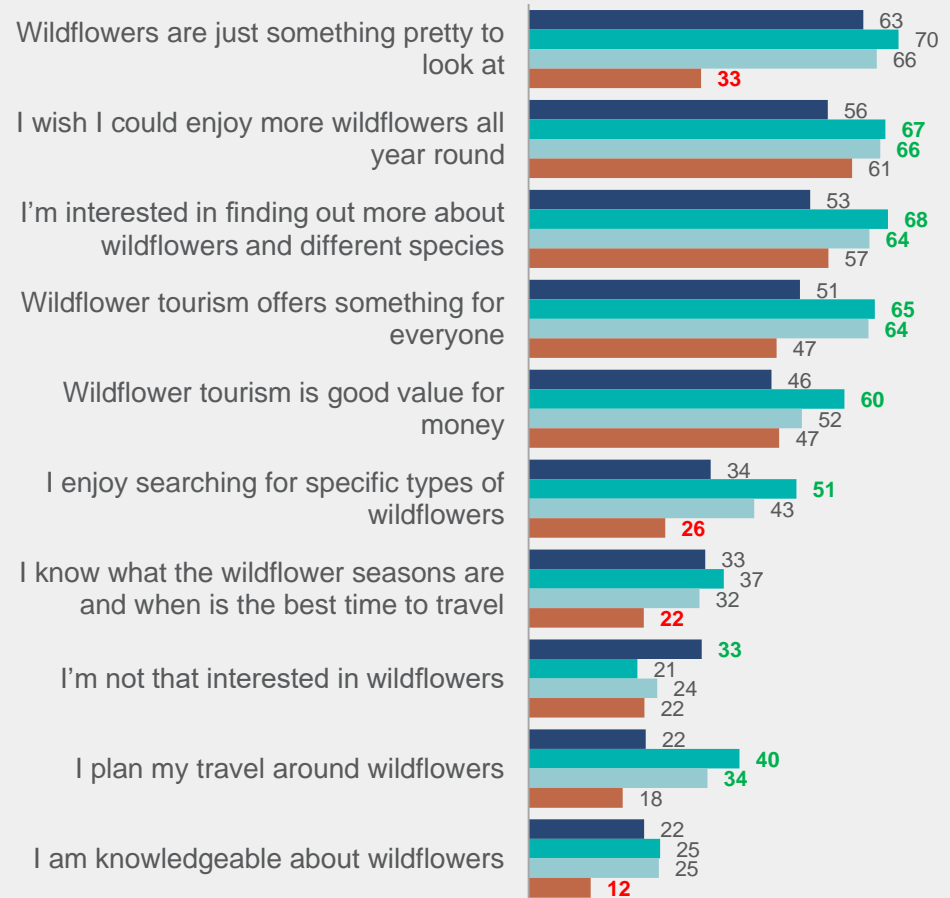
Potential travellers from Malaysia have the strongest affinity to wildflower tourism

Four in ten say they plan their travel around wildflower tourism, and there is strong interest in learning more. Current knowledge levels are on par with Australians.

Attitudes and perceptions to wildflower tourism

% agree or strongly agree

■ Australia ■ Malaysia ■ Singapore ■ Japan



% of potential WA travellers

Base: Australia n=1,603 | Malaysia n=400 | Singapore n=400 | Japan n=400

Q9. To what extent do you agree or disagree with the following statements about wildflowers and wildflower tourism?

Green and red coloured text significant difference between groups at the 95% confidence interval

Driver Analysis



Driver analysis is used to understand which aspects of wildflower tourism have the greatest impact on overall interest.

The basic objective of any driver analysis is to **rank a series of statements in order of importance**, based on their impact upon an overall performance variable, in this case interest in wildflower tourism.

This allows us to identify which **behaviours and attitudes toward wildflowers are levers of interest** to determine drivers that should be **prioritised** by Tourism Western Australia in communications and development to drive positive sentiment increased tourism to the region.

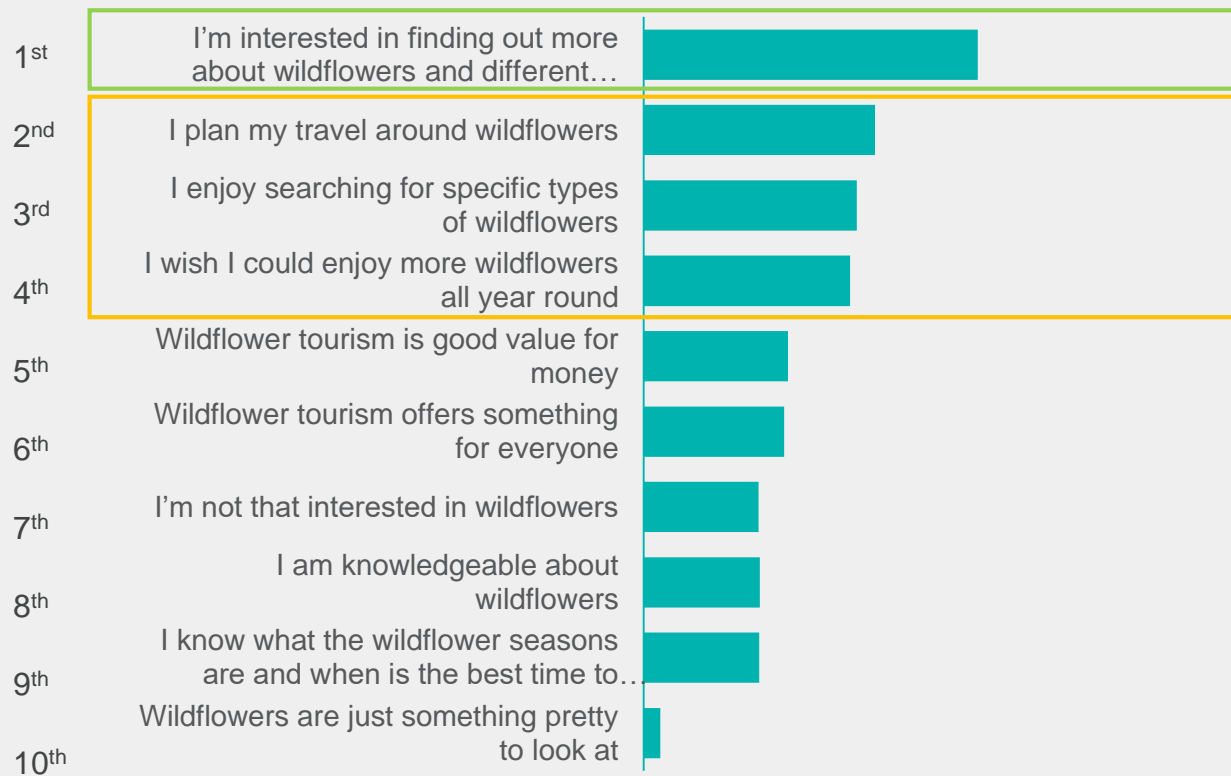
When interpreting the driver analysis, it is the ranking of individual statements that is of interest, not specific scores or results.



There is an appetite to learn more about wildflowers and the variety

While learning more about wildflowers and the different species is the strongest drive of interest, there are those who plan their trip around wildflowers, enjoy searching for specific types and those who want a year-round offering as well.

Importance scores for wildflower interest



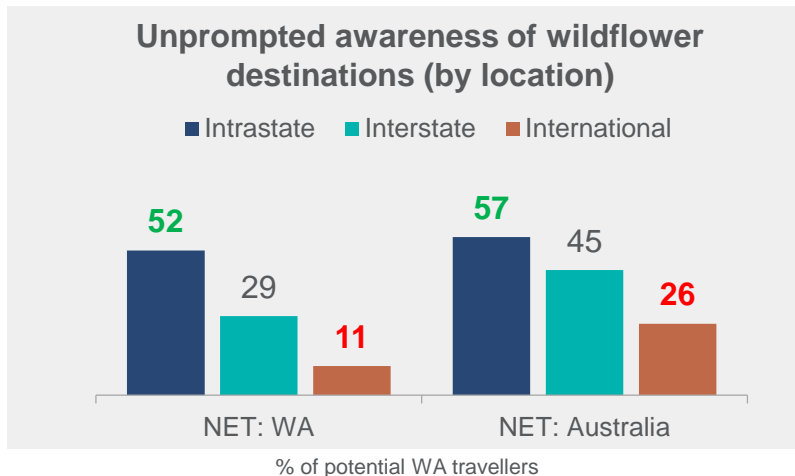
Base: Overall n=2,803

Q9. To what extent do you agree or disagree with the following statements about wildflowers and wildflower tourism?



Few intrastate and international travellers are able to recall specific locations or towns

A fifth of potential interstate travellers have a general association with WA and wildflowers, but it is often one of a few states that come to mind with Tasmania, Northern Territory and local offerings commonly mentioned.

Unprompted awareness is even lower among international travellers.



Unprompted awareness of wildflower destinations

	Intrastate	Interstate		
Other WA region, town or attraction	23	3	1	1
Wildflower country / mid-west	13	1	1	1
Perth	12	3	5	8
Western Australia - unspecified	10	22	6	4
General tourism / wildflower mention	9	6	7	5
Interstate location	6	21	3	6
Australia - unspecified	0	1	8	13
Singapore	0	0	0	2
Malaysia	0	0	15	1
Japan	0	0	6	10
Other international location	2	3	17	19
Other	3	1	0	0
Don't know	30	45	34	35

% of potential WA travellers

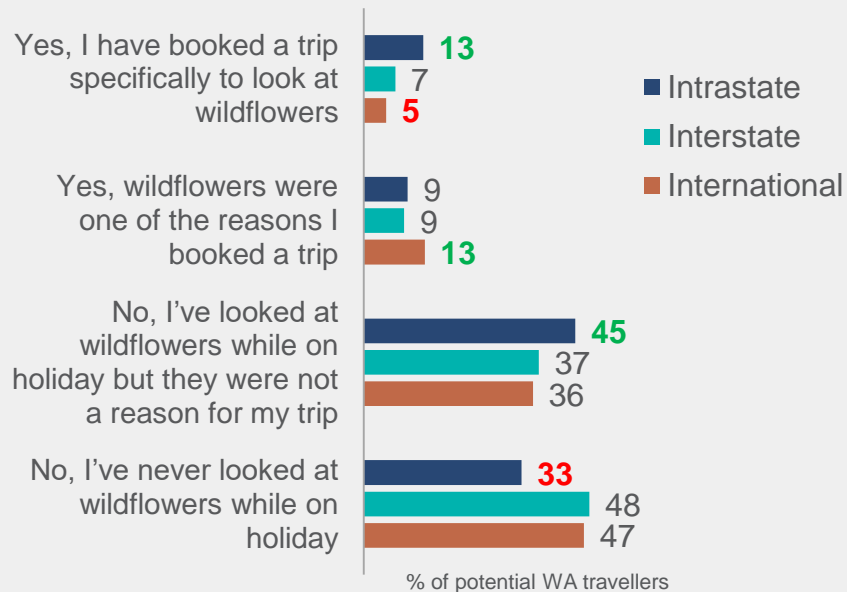
Base: Intrastate n=400 | Interstate n=1,203 | International n=800 | Malaysia n=400 | Singapore n=400
 Q5. What destinations come to mind when you think about wildflower tourism?
 Green and red coloured text significant difference between groups at the 95% confidence interval
 NOTE: Japan has been excluded from our analysis due to language barriers.

A close-up photograph of several red bottlebrush flowers (Callistemon) with green leaves. The flowers are in various stages of bloom, showing numerous stamens. The background is a soft, out-of-focus reddish-brown.

Wildflower Behaviours and Intentions

Three in ten would be motivated by wildflowers to some extent, but most would enjoy **passively**

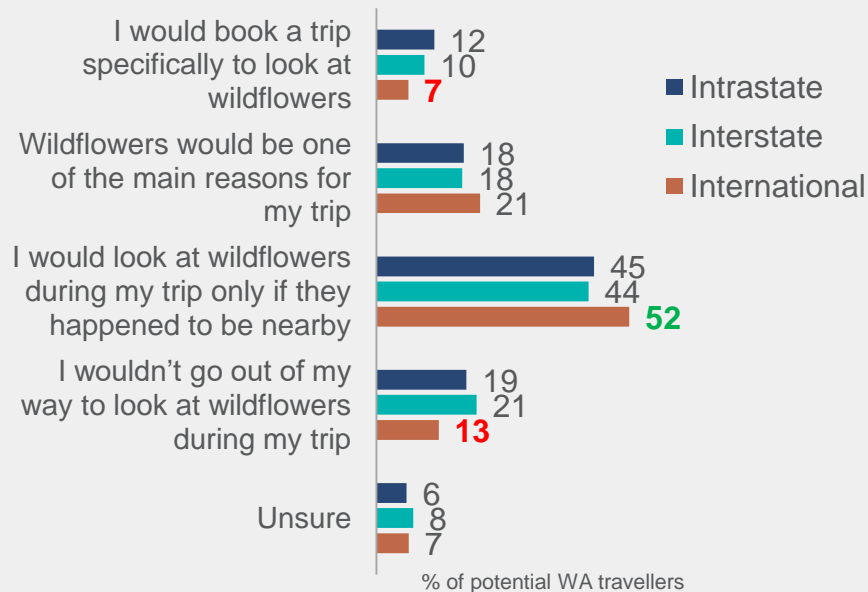
Wildflower tourism behaviour



% have booked a trip to look at wildflowers



Wildflower tourism intentions



% would book a trip to look at wildflowers



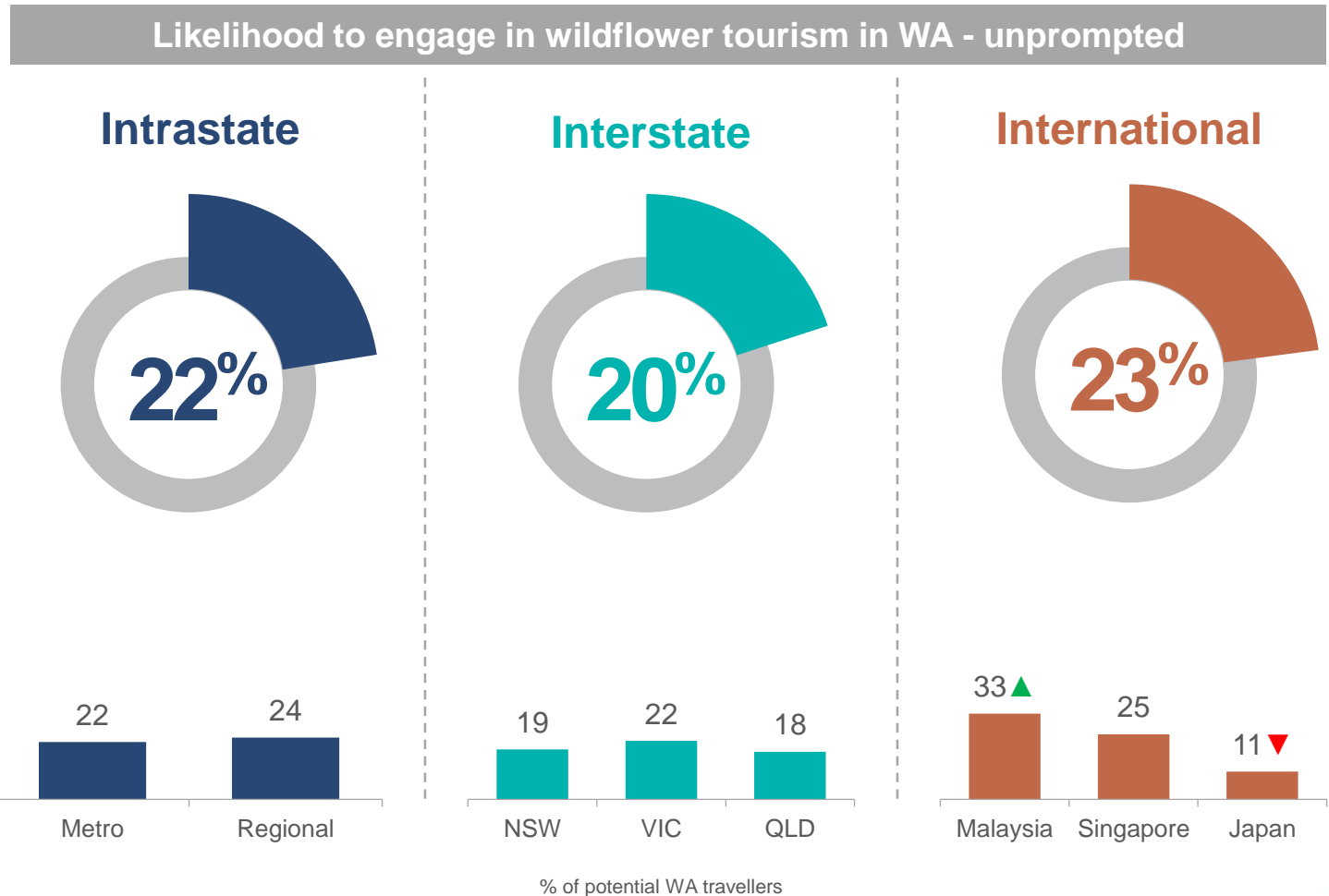
Base: Intrastate n=400 | Interstate n=1,203 | International n=1,200 | Malaysia n=400 | Singapore n=400 | Japan n=400
 Q8a. Have you ever booked a trip specifically to look at wildflowers?
 Q10. Which of the following best describes how you would participate in wildflower tourism?
 Green and red coloured text significant difference between groups at the 95% confidence interval

One in five would take a trip to or within WA to take part in wildflower tourism

Across all locations, openness to visiting WA for the purpose of wildflower tourism is strongest among younger audiences, with the potential audience at odds with current visitors.

Among Australians, intentions are strongest among those aged 30-39 (33%), dropping off among the over 50s (12%).

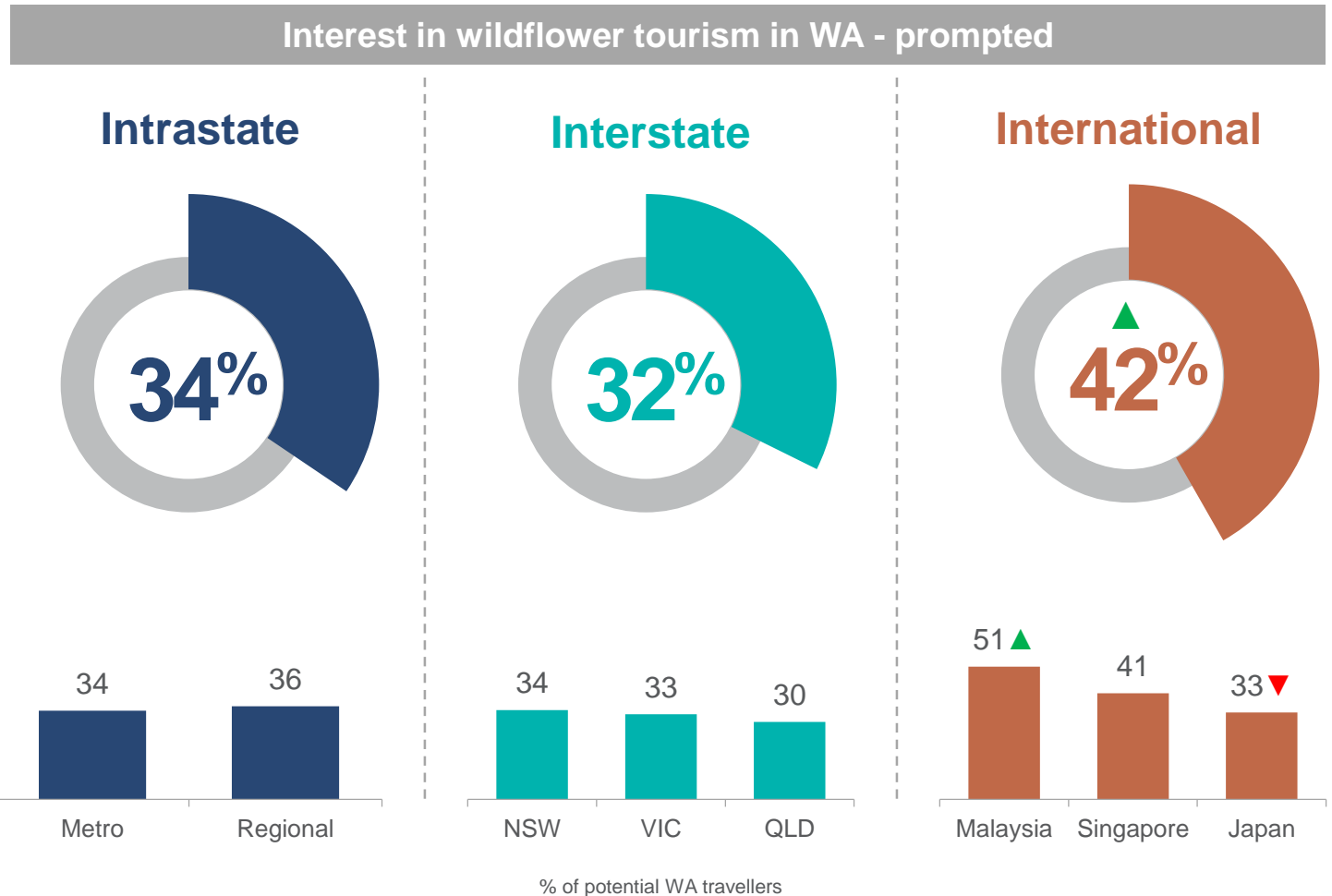
Among an international audience, intentions are strongest among younger Malaysians (48% among those aged 25-34), Singaporeans (33% among those 30-34) and Japanese aged (19% among those 25-39).



Base: Intrastate n=400 | Interstate n=1,203 | International n=1,200
 Q11. [INTERNATIONALS | INTERSTATE] How likely are you to visit Western Australia to take part in wildflower tourism?
 [INTRASTATE] How likely are you to take a trip or holiday in WA to take part in wildflower tourism?
 ▲ ▼ significant difference between groups at the 95% confidence interval

There is opportunity to engage Malaysian and Singaporean travellers through wildflower tourism

A third of Australian potential travellers are interested once prompted. This remains largely consistent across key states.



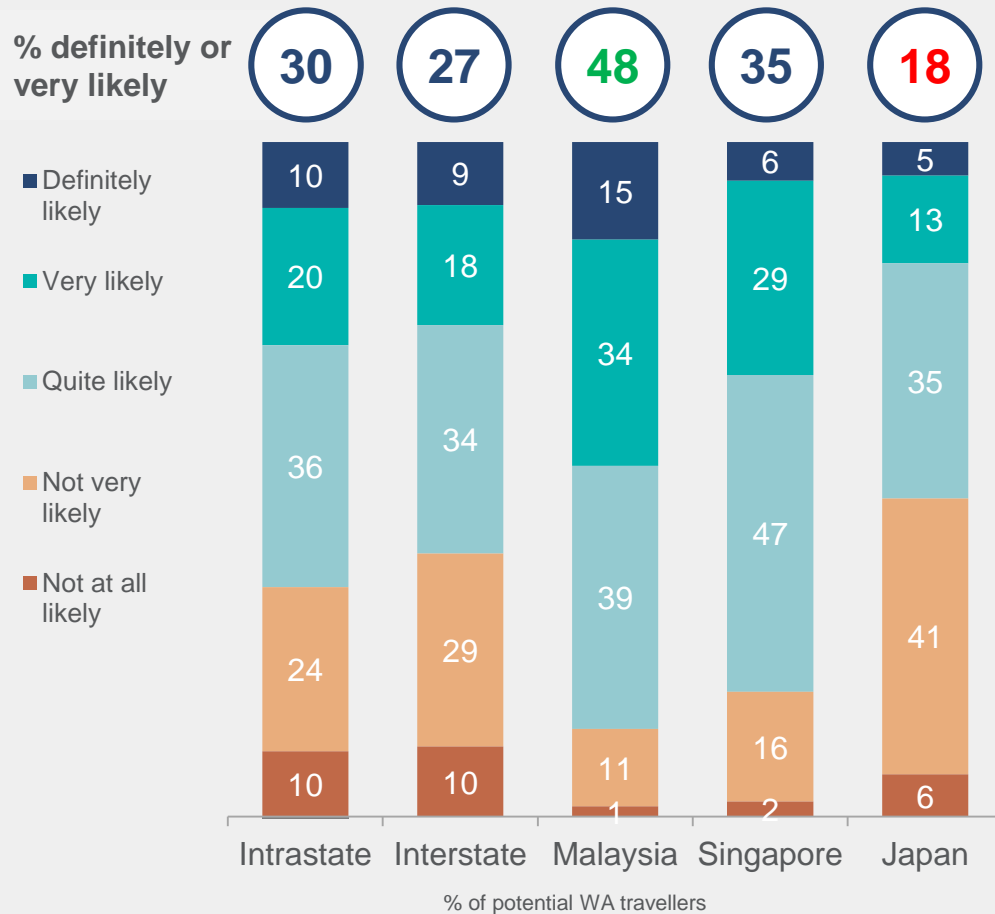
Base: Intrastate n=400 | Interstate n=1,203 | International n=1,200

Q13. Based on what you know, and what you have just read and seen, how interested are you in wildflower tourism in Western Australia?

▲ ▼ significant difference between groups at the 95% confidence interval

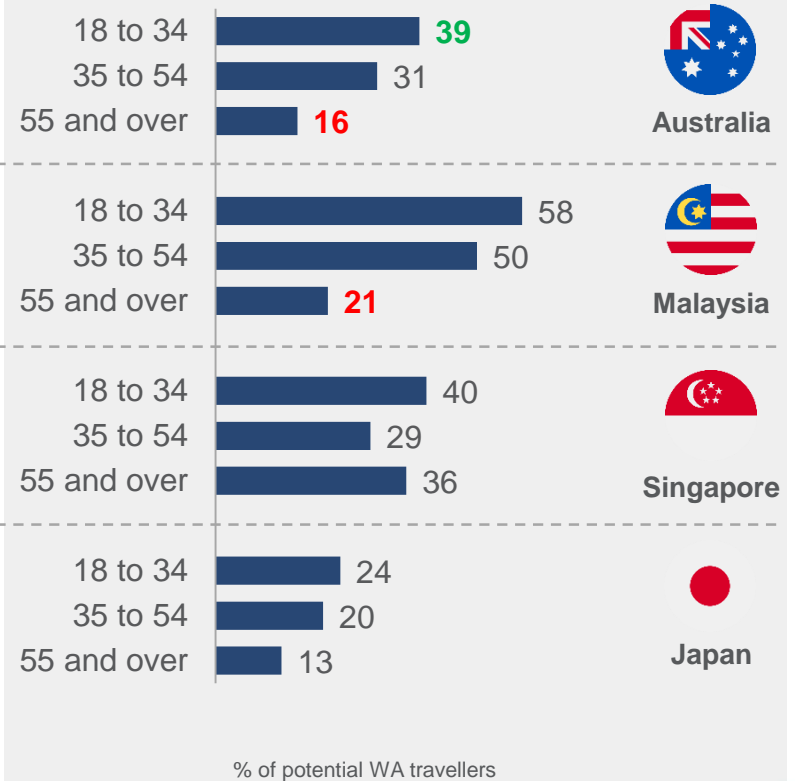
Younger potential travellers are more inclined to travel to engage in wildflower tourism once prompted

Likelihood to engage in wildflower tourism in WA - prompted



Likelihood to engage by age

% definitely or very likely

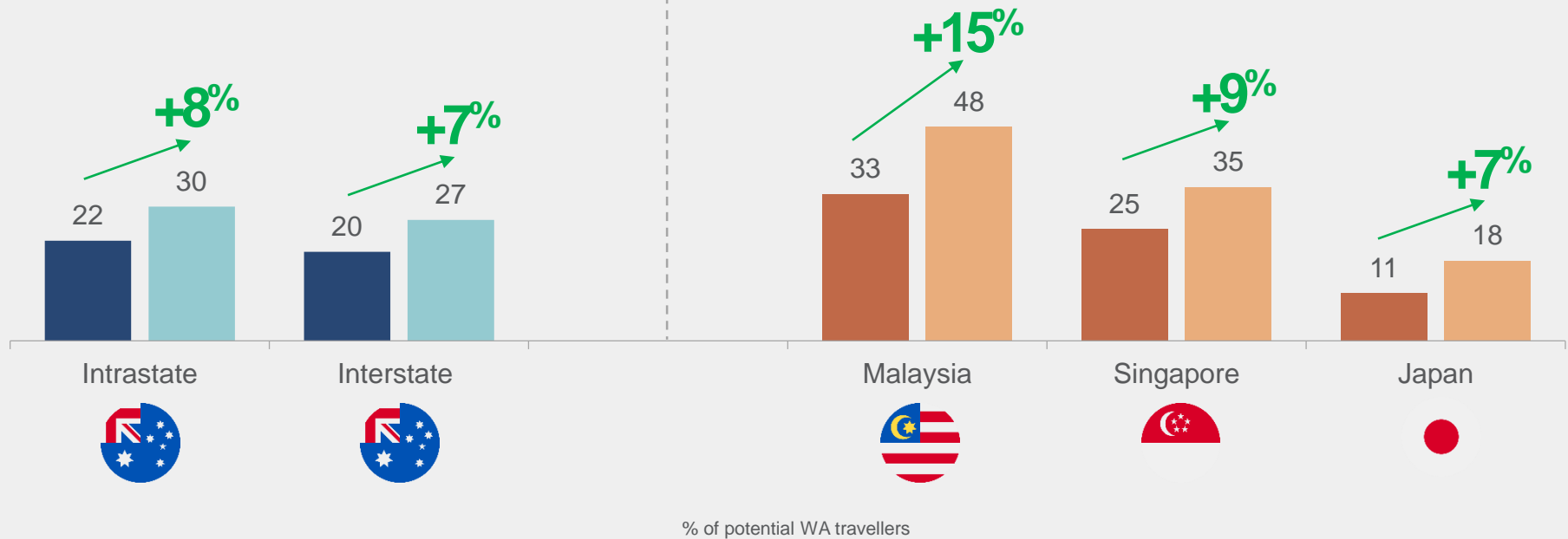


Base: Intrastate n=400 | Interstate n=1,203 | International n=1,200 | Malaysia n=400 | Singapore n=400 | Japan n=400
 Q14. [INTERNATIONALS | INTERSTATE] How likely are you to visit Western Australia to take part in wildflower tourism?
 [INTRASTATE] How likely are you to take a trip or holiday in WA to take part in wildflower tourism?
 Green and red coloured text significant difference between groups at the 95% confidence interval

There is a slight uplift in engagement intentions once prompted, most notably among Malaysian audiences

Latent demand Unprompted prompted uplift in visitation intentions

■ Definitely or very likely - unprompted ■ Definitely or very likely - prompted



Base: Intrastate n=400 | Interstate n=1,203 | International n=1,200 | Malaysia n=400 | Singapore n=400 | Japan n=400
 Q11. [INTERNATIONALS | INTERSTATE] How likely are you to visit Western Australia to take part in wildflower tourism? [INTRASTATE] How likely are you to take a trip or holiday in WA to take part in wildflower tourism? | Q14. [INTERNATIONALS | INTERSTATE] How likely are you to visit Western Australia to take part in wildflower tourism? [INTRASTATE] How likely are you to take a trip or holiday in WA to take part in wildflower tourism?

Wildflower aesthetics are the key motivator for potential travellers

This is particularly true among **international audiences**, who are more likely to mention the **colour and scope** of WA's wildflower offering as a reason to visit.

Local Australian travellers are more likely to connect to the notion of **outdoor experiences and exploration**.



Base: Australia n=993 | Malaysia n=347 | Singapore n=326
 Q15a. Why are you likely to visit Western Australia for wildflower tourism? What in particular is appealing?
 Green and red coloured text significant difference between groups at the 95% confidence interval
 NOTE: Japan has been excluded from our analysis due to language barriers.

Reasons to visit WA for wildflowers

The **beauty, colours, different species and seasonality** of wildflowers make them very appealing to some and are a reason to visit WA.

Exploring nature and outdoor activities are appealing to some, with this **new and unique experience** being compelling to nature-lovers.

WA is an appealing place to visit offering a coastline and other experiences, or having existing family to visit. Wildflower tourism may strengthen WA's attraction as a tourism destination.

“*Would get to see natural sights that are seasonal and cannot be found elsewhere, images **look beautiful** and **would like to see them in person.***”

*Wildflowers with their **large varieties, colours and shapes** would make viewing an **interesting experience.***

*The **beauty and rarity of wildflowers** in Western Australia would be breathtaking to see.*



Exploring and learning** more about flowers would be a **good activity to do during a holiday.

*I like the fact that it's **very different** from what I am use to. The colourful flowers are very attractive and enticing to me!*

*It's something I haven't done before and **would love to do.** To experience the **natural beauty of it would be so special.***



*Wildflowers are a phenomenal sight and well worth the effort of travelling there. Also **many other things to see and do in WA** during this time.*

*I could **visit relatives** at the same time.*

*Sounds like a **great adventure and way to explore the WA coastline.***

*Would be **something to do** while exploring Perth's attractions.*”



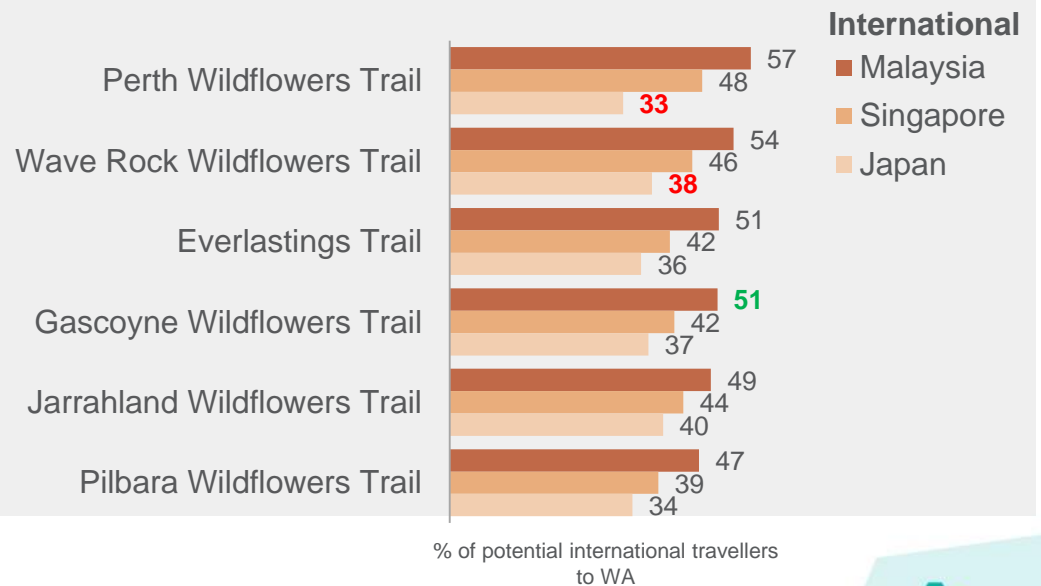
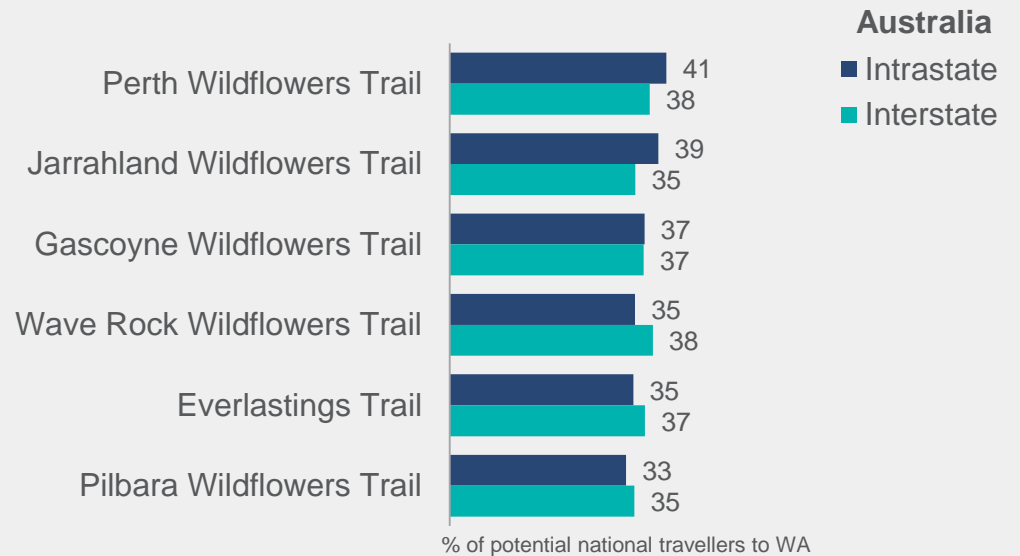
Interest is largely consistent across a variety of wildflower offerings

The Perth Wildflowers Trail is most appealing locally and internationally, but potential travellers are open to variety of wildflower and tourism experiences.

The Pilbara Wildflowers Trail is marginally less appealing compared to other trails.

Interest in wildflower trails

% definitely or very interested



Base: Intrastate n=400 | Interstate n=1,203 | Malaysia n=400 | Singapore n=400 | Japan n=400
 Q16. How interested are you in the following wildflower tourism experiences?

Green and red coloured text significant difference between groups at the 95% confidence interval

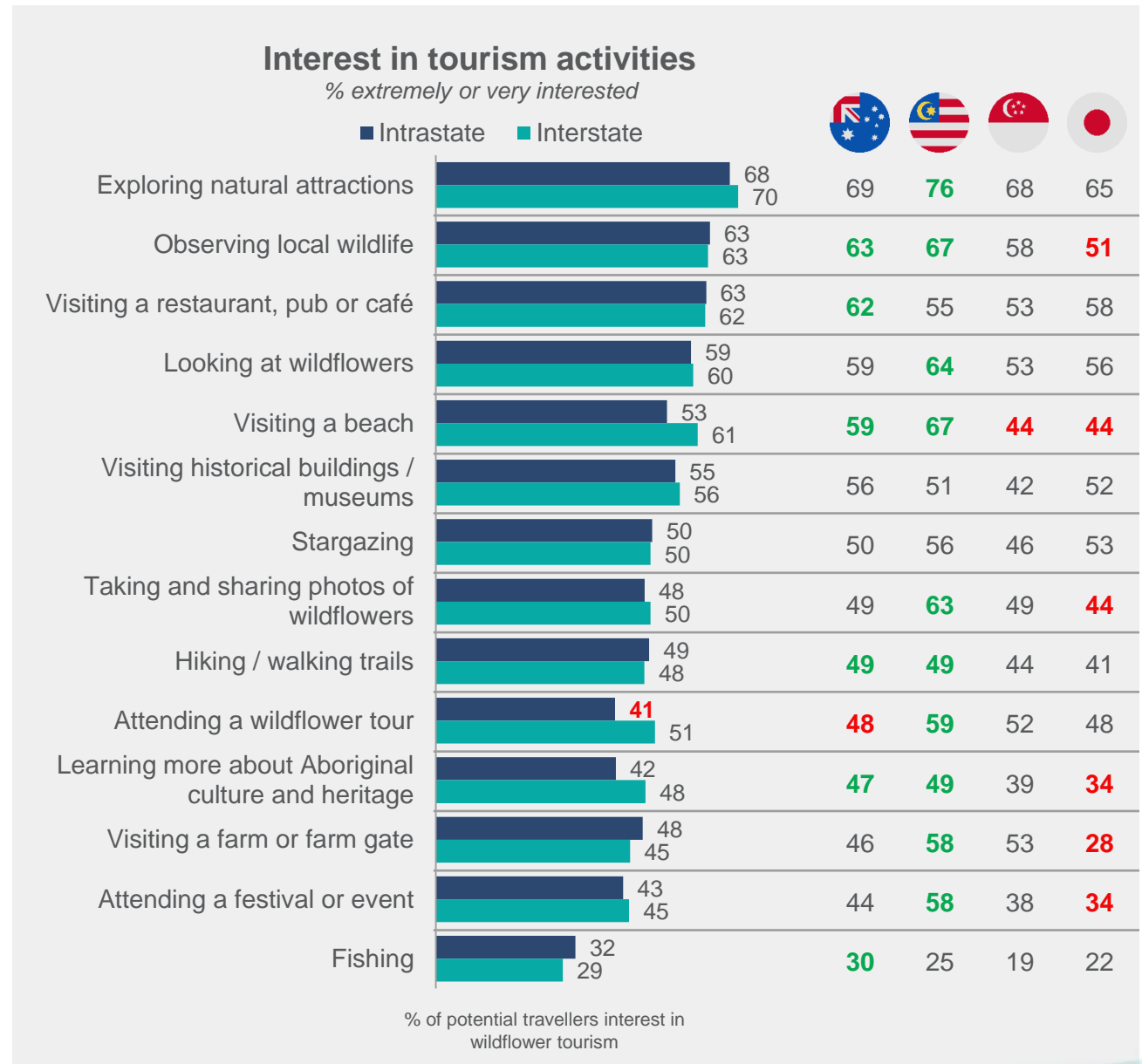


Wildflower Tourism Holiday Preferences



Those from Malaysia have the strongest interest in most complementary tourism activities

Exploring natural attractions, observing local wildlife, and visiting a restaurant, pub or café are the other experiences travellers would most like to undertake during a wildflower tourism holiday.

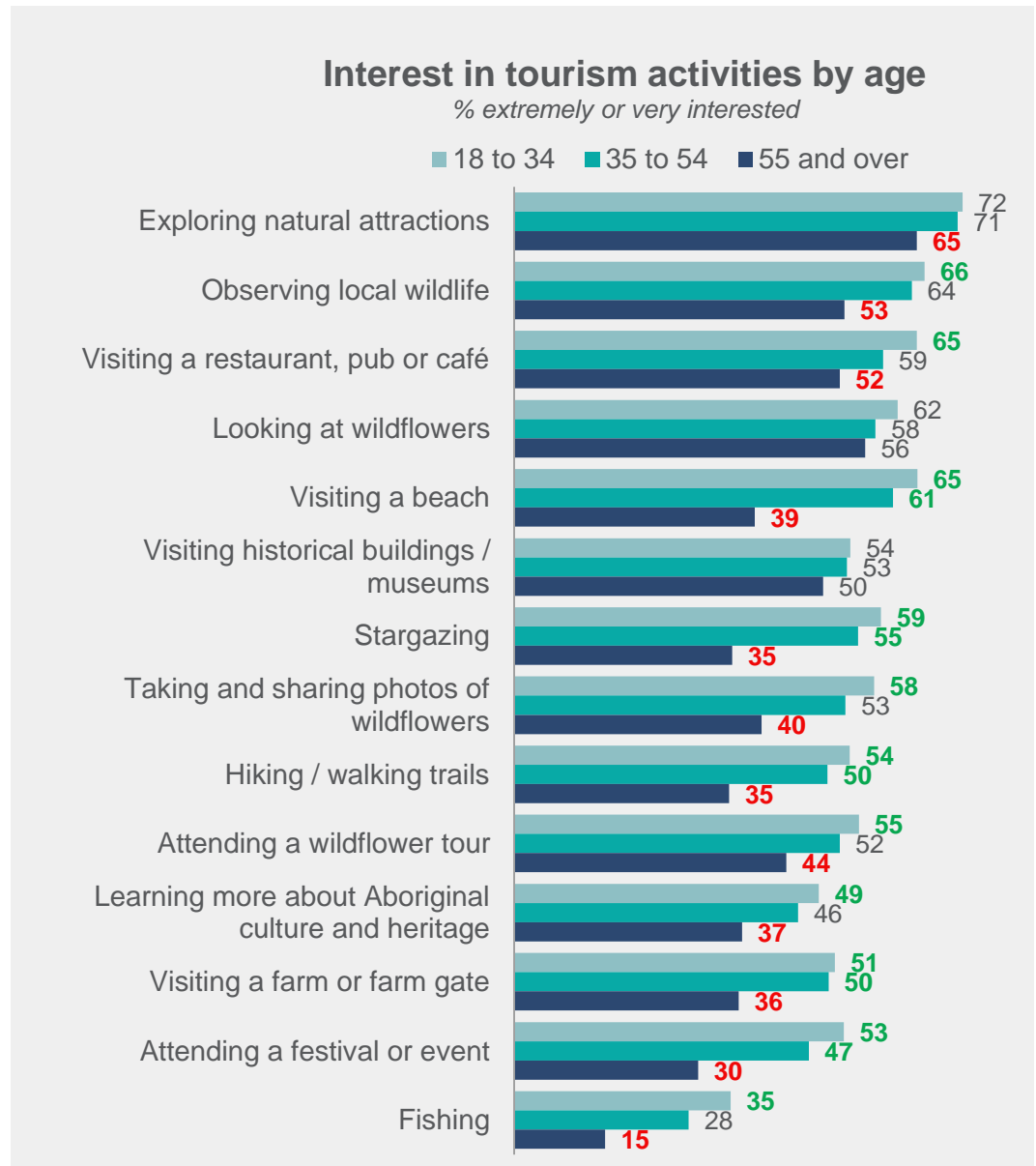


Base: Intrastate n=301 | Interstate n=870 | Malaysia n=373 | Singapore n=359 | Japan n=315
 Q18. Below is a series of tourism activities you could do as part of a wildflower tourism holiday. How interested are you in each of these?
 Green and red coloured text significant difference between groups at the 95% confidence interval

Those over 55 are less interested in tourism activities than other age groups



Overall interest is strong, even for wildflower specific activities for younger groups with eight in ten interested. This declines slightly for those 55 or older, with two thirds interested in wildflower activities.



% of potential travellers interest in wildflower tourism

Base: Overall n=2,218 | 18 to 34 n=746 | 35 to 54 n=812 | 55 and over n=660

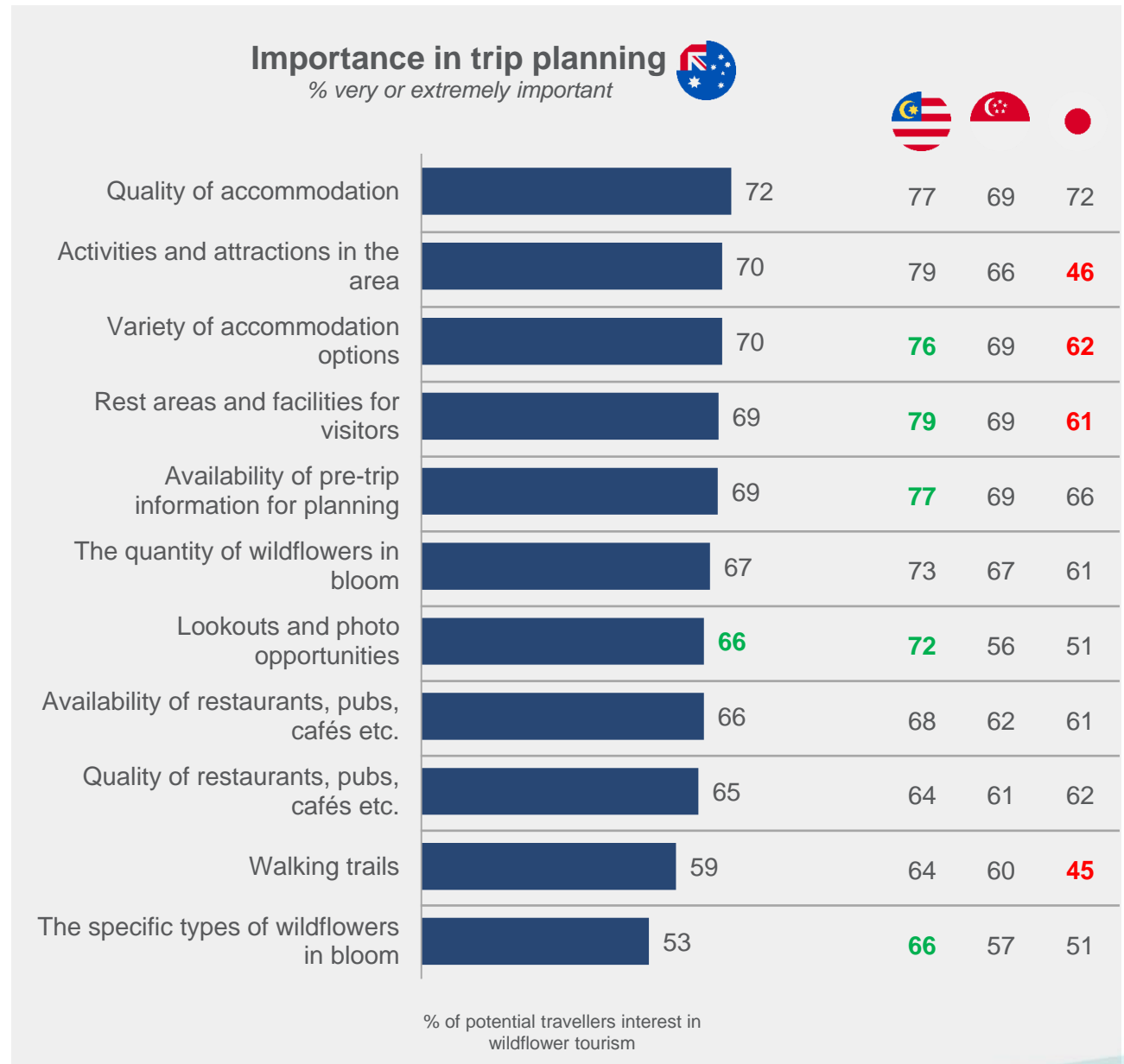
Q18. Below is a series of tourism activities you could do as part of a wildflower tourism holiday. How interested are you in each of these?

Green and red coloured text significant difference between groups at the 95% confidence interval

Quality accommodation and other activities and attractions in the area are key to attracting visitors.

The quantity of wildflowers is more important than the specific types in bloom

Lookouts and photo opportunities are of particular importance to Australian and Malaysian potential travellers.



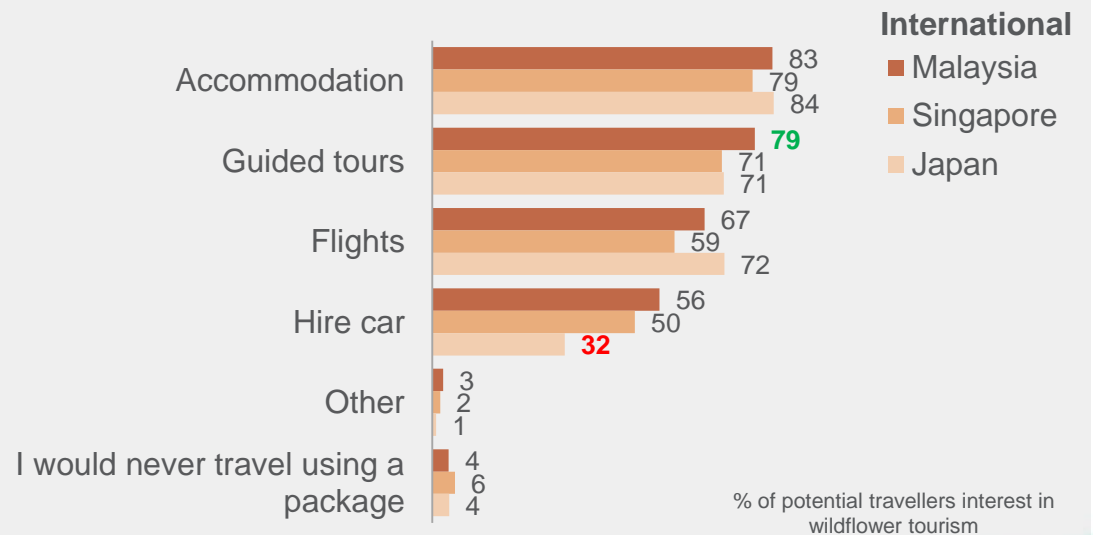
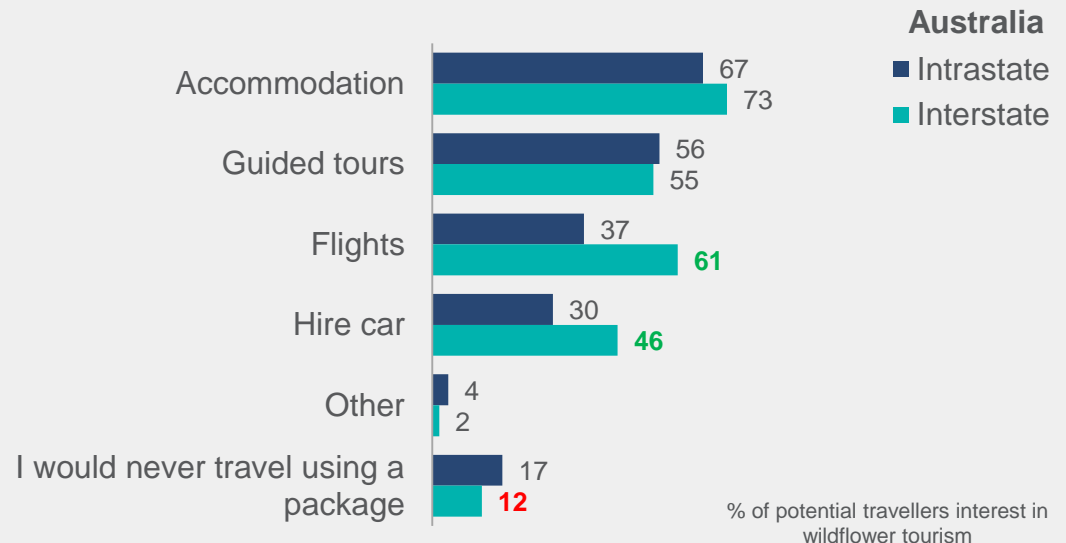
Base: Australia n=1,171 | Malaysia n=373 | Singapore n=359 | Japan n=315
 Q19. How important are each of the following when planning a wildflower tourism holiday in Western Australia?
 Green and red coloured text significant difference between groups at the 95% confidence interval

International audiences are more open to tourism packages, with accommodation and tours the most important

Young Australians are less likely to look to packages for accommodation and guided tours, with the latter more likely to appeal to the over 55s.

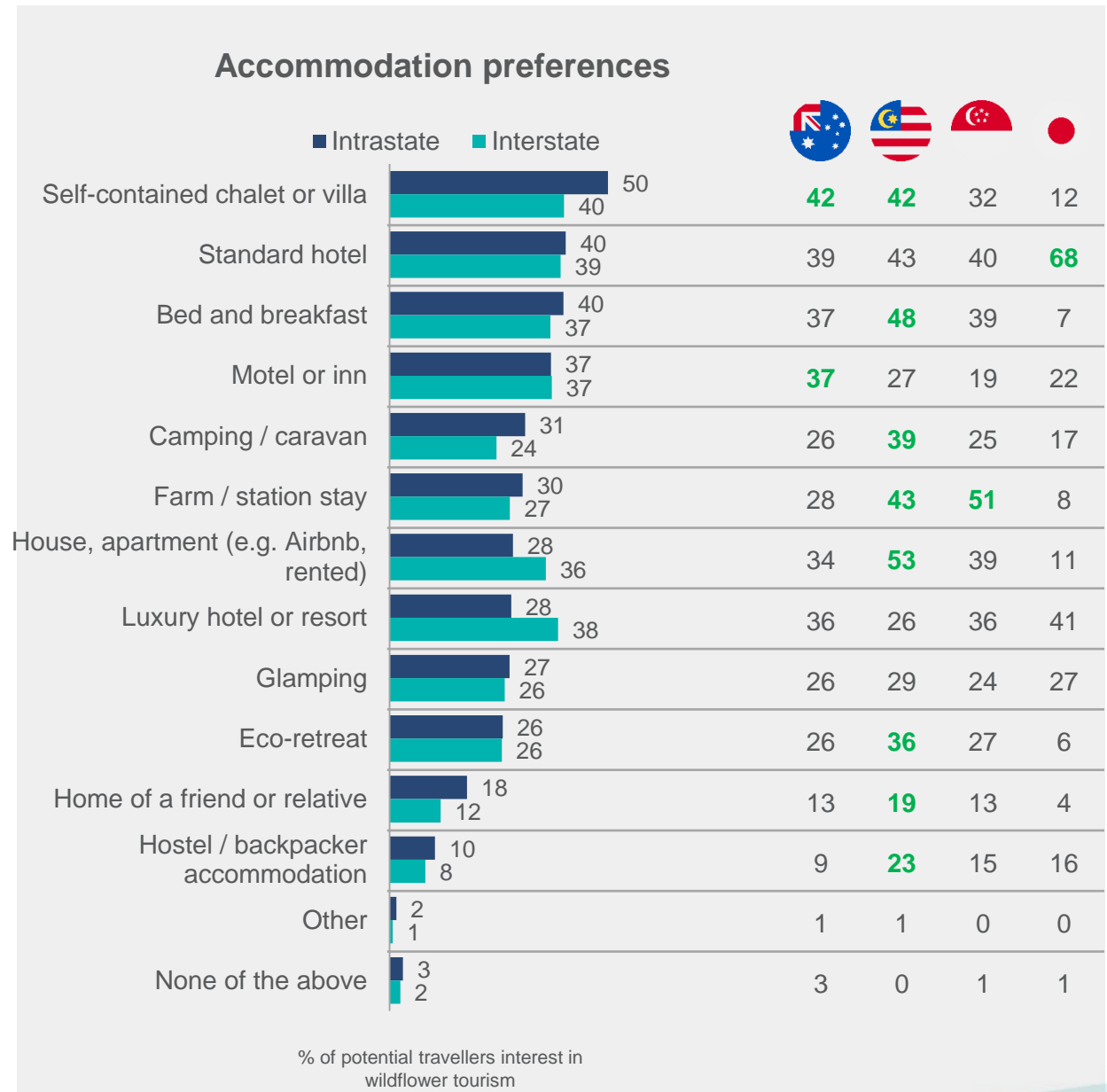
Package elements have more consistent appeal among international audiences of different ages, though hire cars are less appealing to older audiences (particularly those among those living in Japan).

Wildflower holiday packages



Base: Intrastate n=301 | Interstate n=870 | Malaysia n=373 | Singapore n=359 | Japan n=315
 Q20. If you were to design your ideal wildflower holiday package, which of the following would you include?
 Green and red coloured text significant difference between groups at the 95% confidence interval

Accommodation preferences varies by source markets



Base: Intrastate n=301 | Interstate n=870 | Malaysia n=373 | Singapore n=359 | Japan n=315
 Q21. Which of the following types of accommodation would you be most likely to stay in on a wildflower tourism holiday?
 Green and red coloured text significant difference between groups at the 95% confidence interval

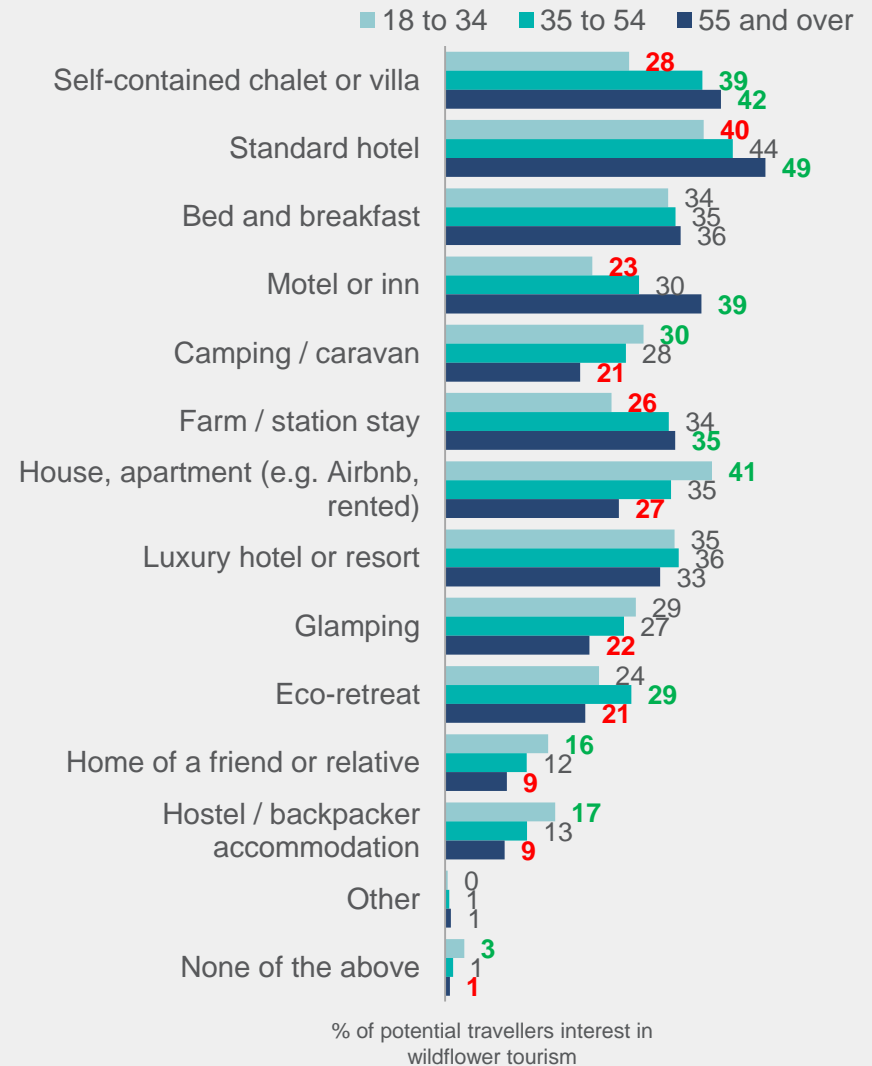
Accommodation type also varies by age, with more mature audiences and those 18-34 having conflicting preferences

Those aged 18 to 34 are likely to go camping, stay in a house or apartment, friend or relatives home or a hostel/backpacker accommodation.

While those 35 and over prefer to stay in more standard types of accommodation, such as a self-contained chalet or villa, or hotel.



Accommodation preferences by age



Base: Overall n=2,218 | 18 to 34 n=746 | 35 to 54 n=812 | 55 and over n=660

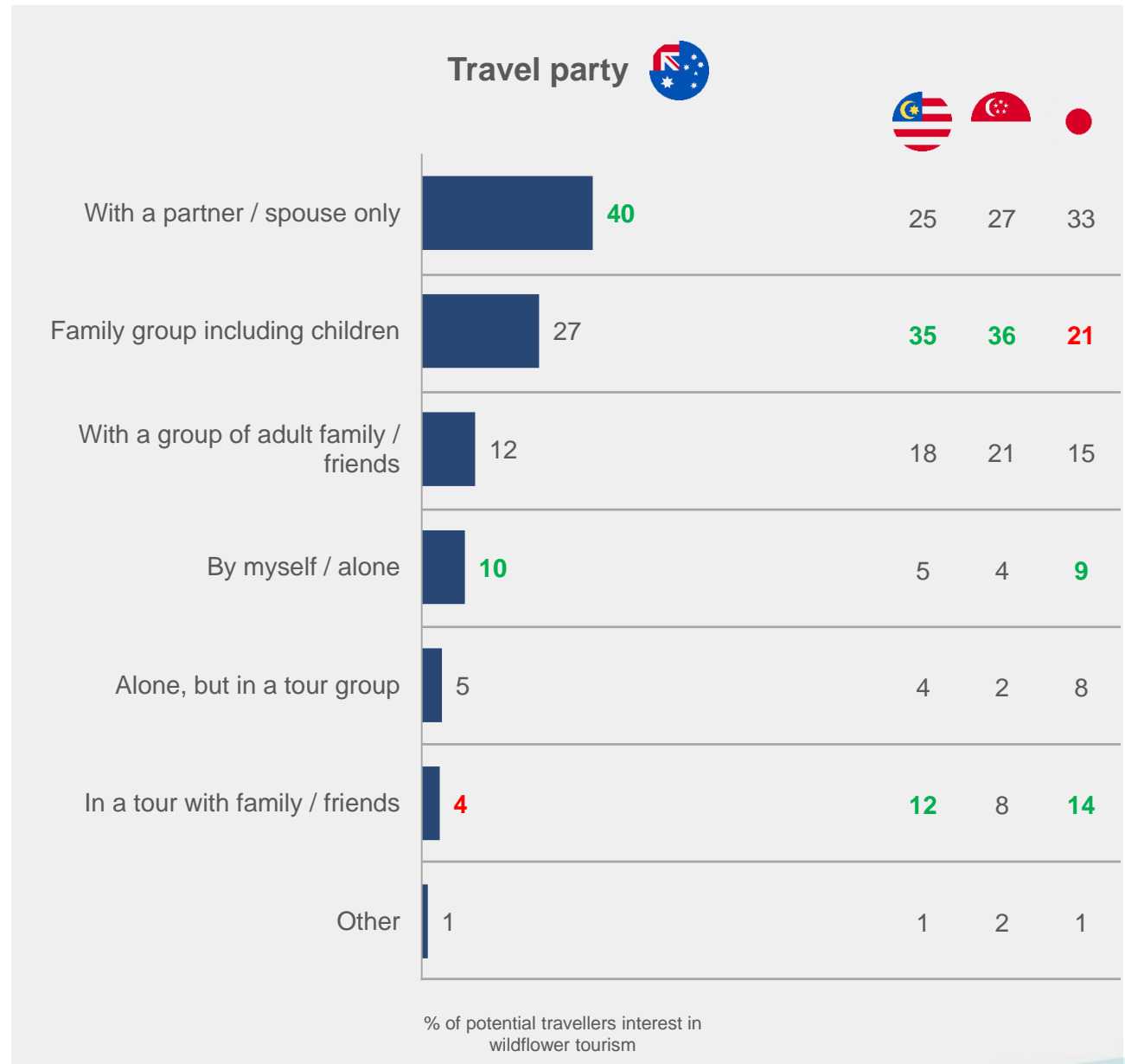
Q21. Which of the following types of accommodation would you be most likely to stay in on a wildflower tourism holiday?

Green and red coloured text significant difference between groups at the 95% confidence interval

Those in Japan and Malaysia are more likely to travel in a tour

Australian's are much more likely to travel with their partner/spouse (40%) compared to other countries.

While Singapore and Malaysia are more likely to travel in a family group, Japan is less so – instead opting to travel alone or in tours.

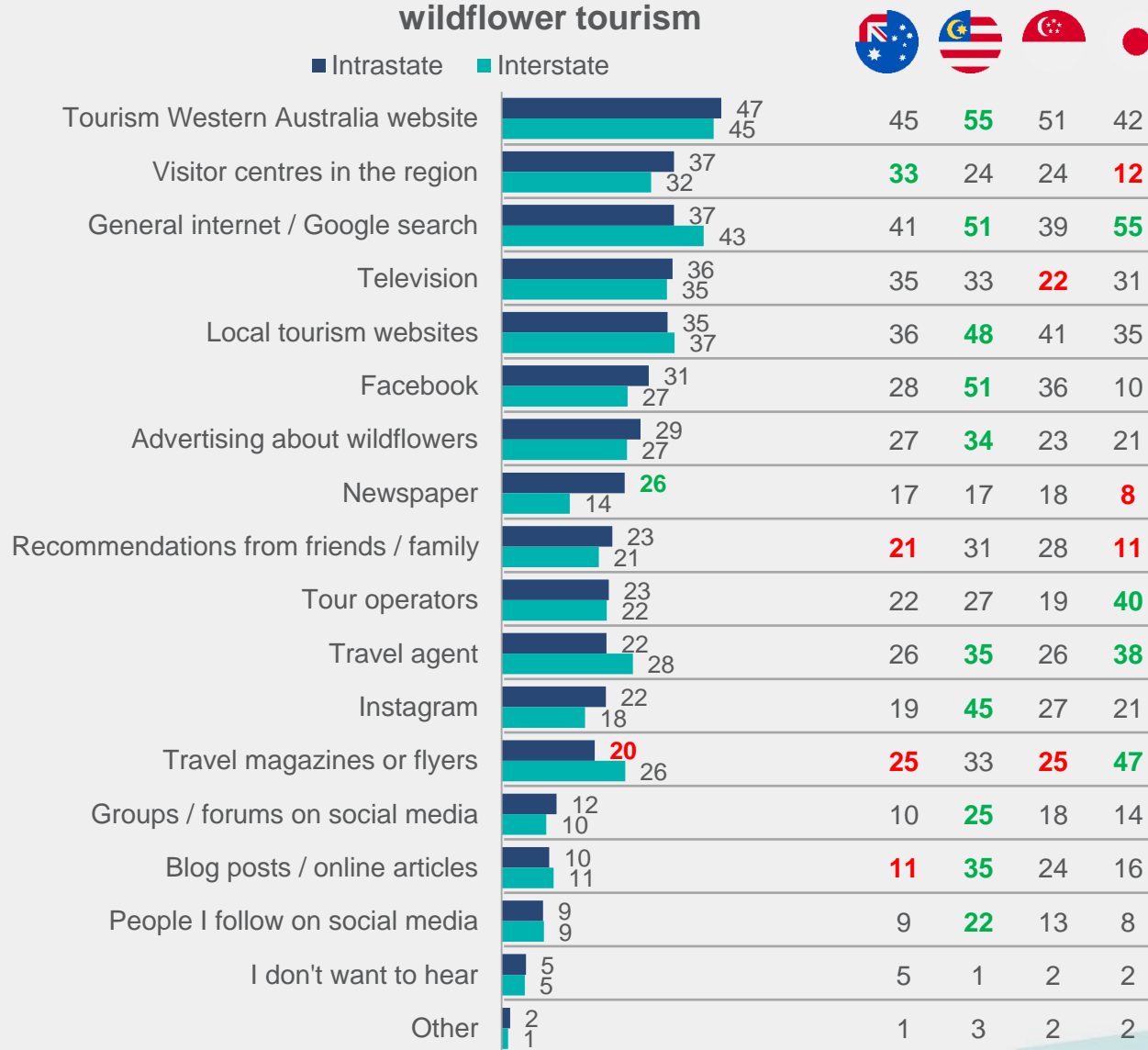


Base: Australia n=1,171 | Malaysia n=373 | Singapore n=359 | Japan n=315
 Q23. Who would you be most likely to travel with on a wildflower tourism holiday?
 Green and red coloured text significant difference between groups at the 95% confidence interval

Tourism WA's website is preferred by almost half Australians



Preferred source of information about WA wildflower tourism



Base: Intrastate n=301 | Interstate n=870 | Malaysia n=373 | Singapore n=359 | Japan n=315
 Q24. Where would you like to hear about, or see information on wildflower tourism in Western Australia?
 Green and red coloured text significant difference between groups at the 95% confidence interval

% of potential travellers interest in wildflower tourism

A scenic outdoor setting featuring a picnic basket in the foreground. The basket is filled with a bottle of red juice, a sandwich, and other picnic items. The background is a lush field of white wildflowers, with a yellow banner overlaid across the middle containing the title text.

Exploring the Wildflower Country Experience

Although interest in wildflowers is high among a younger audience, actual engagement within WA's Wildflower Country was stronger for those 55+

In general, younger people are more interested in outdoor tourism offerings and experiences, however the typical Wildflower Country visitor skews older.

Awareness of wildflower country among WA residents was higher for those over 55 (62%, compared to 42% aged 18 to 34 or 51% aged 35 to 54).

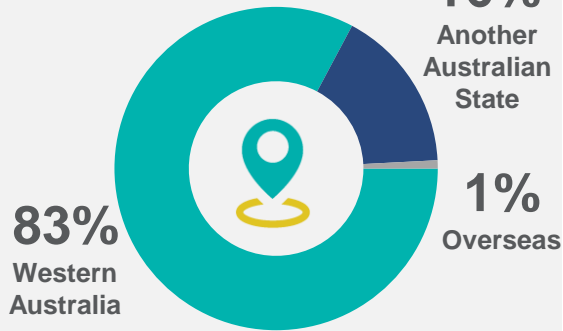
A knowledge gap seems to act as an entry barrier for the younger audience to become aware and engage fully, while those who have previous life experience have a deeper understanding and potentially more time to participate in wildflower activities.



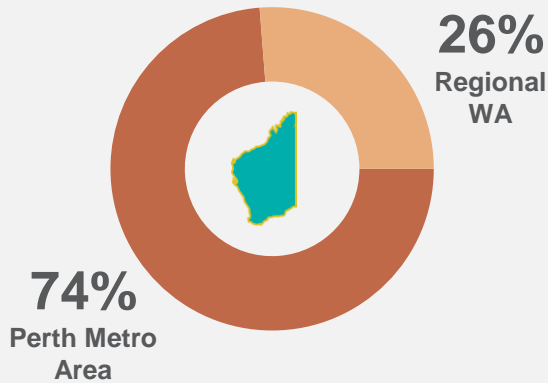


A typical visitor to Wildflower Country...

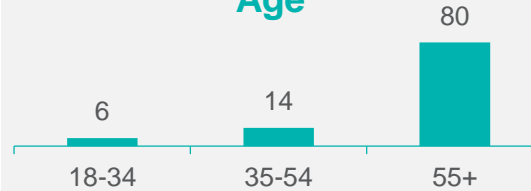
Origin location % visitors



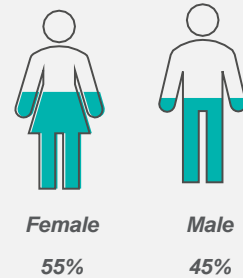
Origin location % of visitors from WA



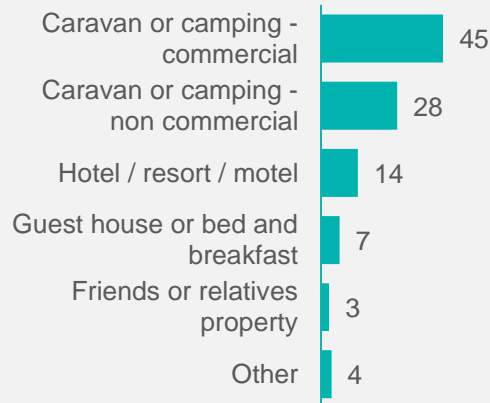
Age



Gender



Accommodation

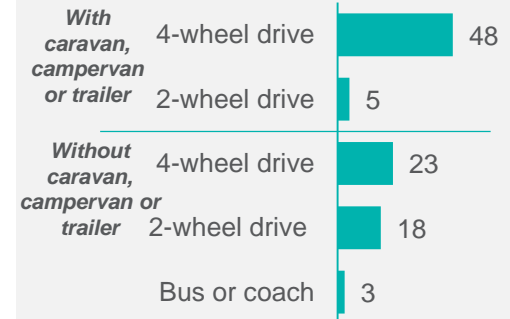


Average estimated spend
\$253

Travel Party



Vehicle Type

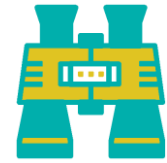


% of visitors to Wildflower Country

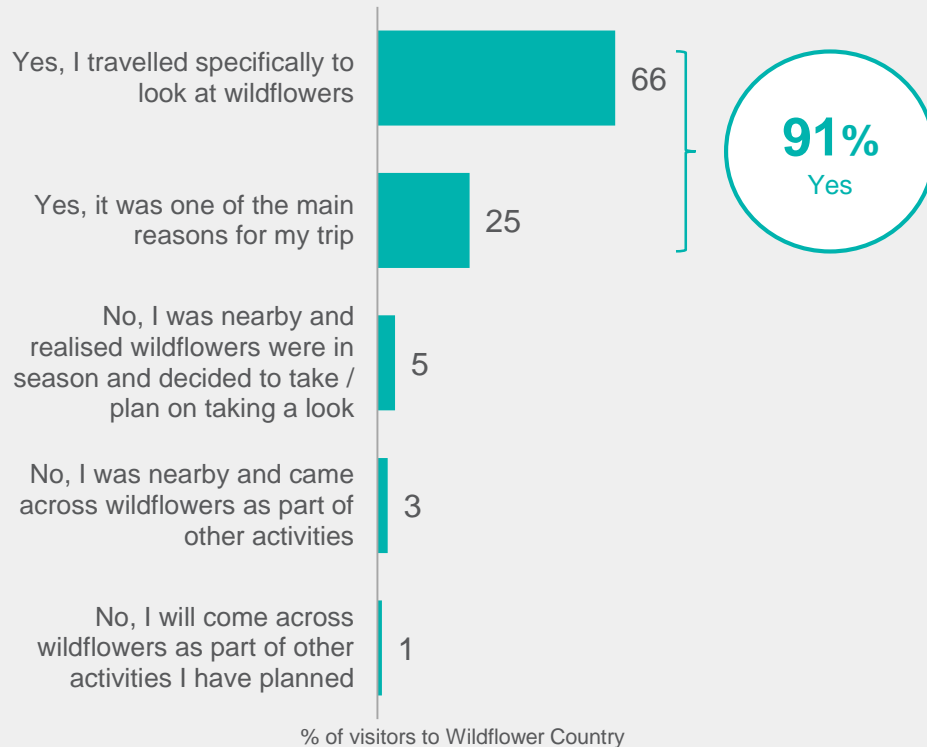
Base: Visitors n=244

S1. Do you live in Western Australia, or are you a visitor from another state? S2. And do you live in the Perth metro area, or somewhere else in WA? S3. What age group do you fit into? Q3a. Who are you travelling with on this trip? Q5. What type of accommodation are you staying in? Q8. What vehicle are you travelling in on this trip? Q11. As part of this trip, how much do you estimate your travel party will spend in total per person in WA's Wildflower Country?

Two thirds of visitors to Wildflower Country travelled specifically to look at wildflowers

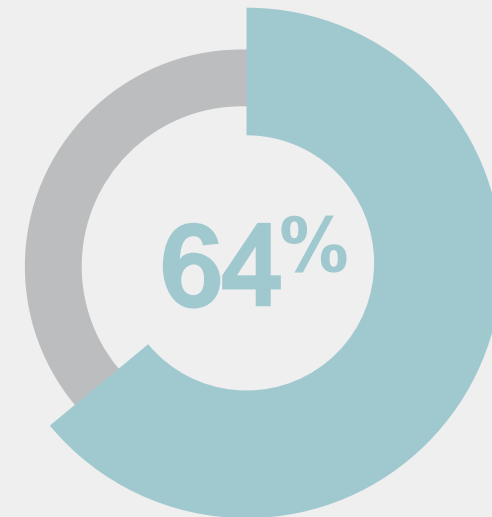


Travel specifically to look at wildflowers



I plan my travel around wildflowers

% agree + strongly agree



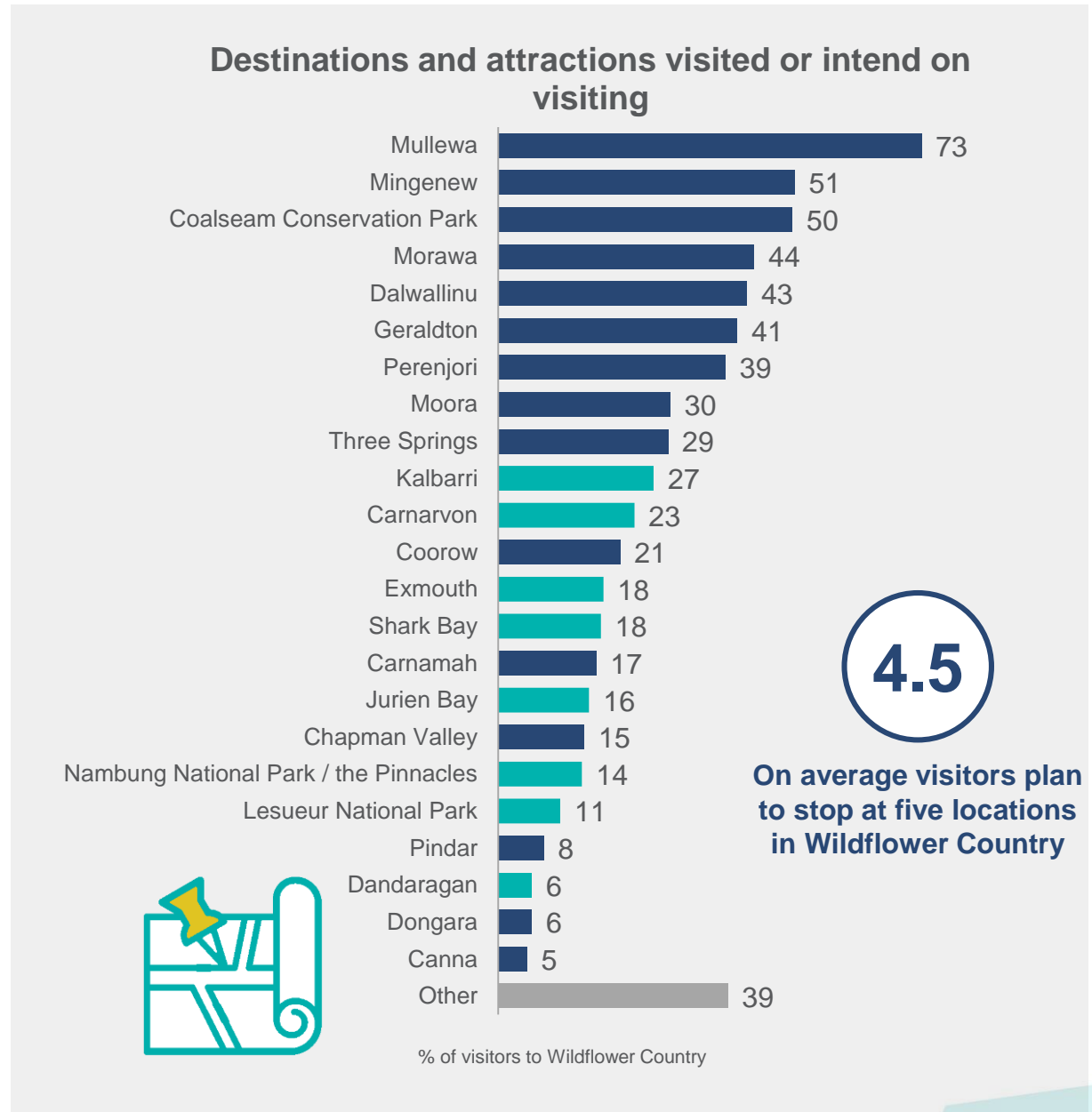
Base: Visitors n=244

Q1. Did you travel to <location in Wildflower Country> specifically to look at wildflowers?

Q16. To what extent do you agree or disagree with the following statements about wildflowers?

Most visitors intend to visit multiple towns in Wildflower Country

Nearly half have visited or plan to visit key wildflower destination, Coalseam Conservation Park.



Base: Visitors n=244

Q9. Which towns and attractions have you visited as part of your trip?

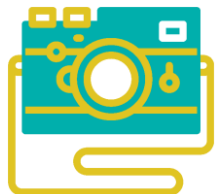
Q9a. And which towns and attractions do you intend on visiting as part of your trip?

NOTE: Majority of interviews were conducted in Mullewa and Dalwallinu

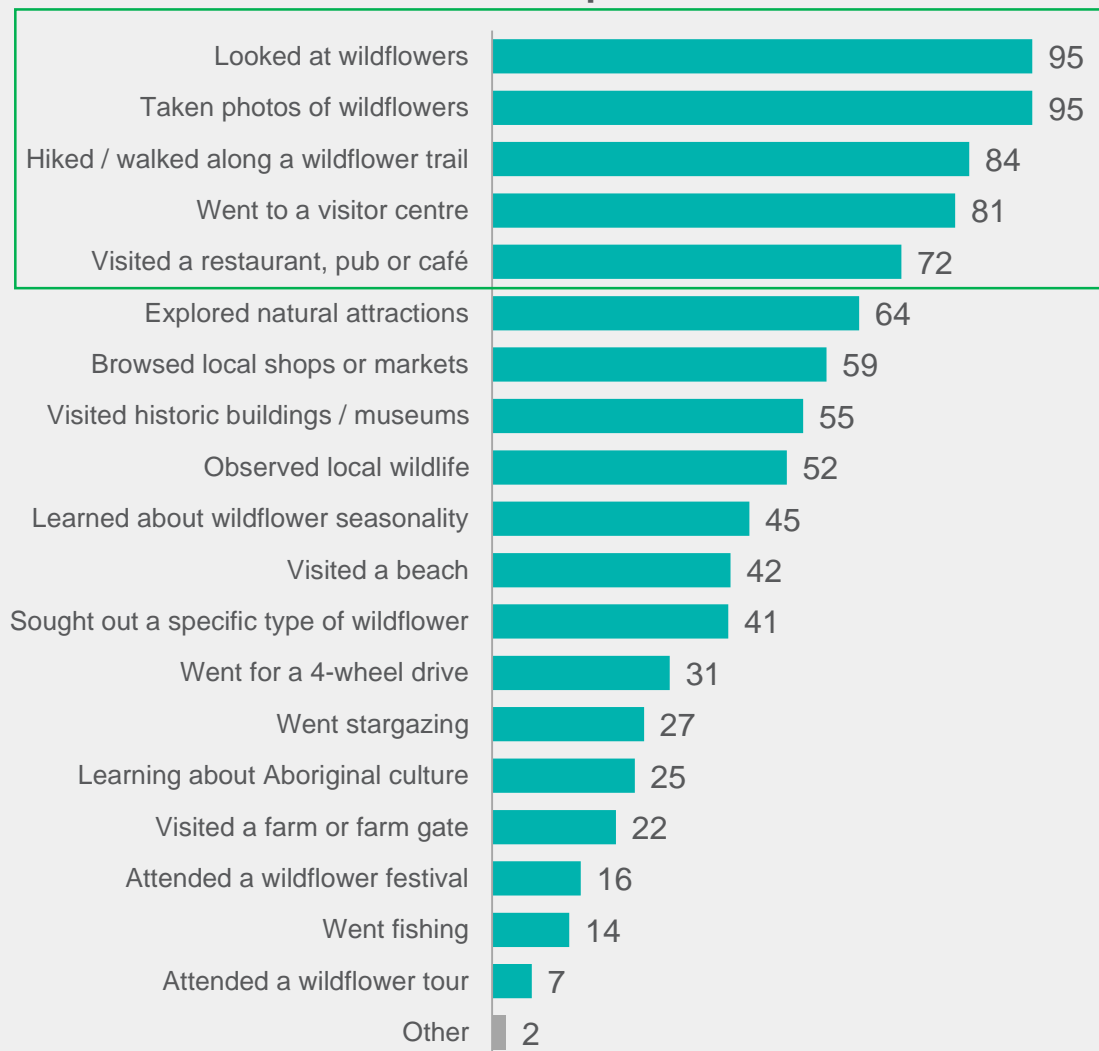
The most popular activities when visiting Wildflower Country include viewing and photography

These are closely followed up hiking wildflower trails, going to visitor centers and visiting restaurants / pubs or cafés.

Almost two thirds explored natural attractions.

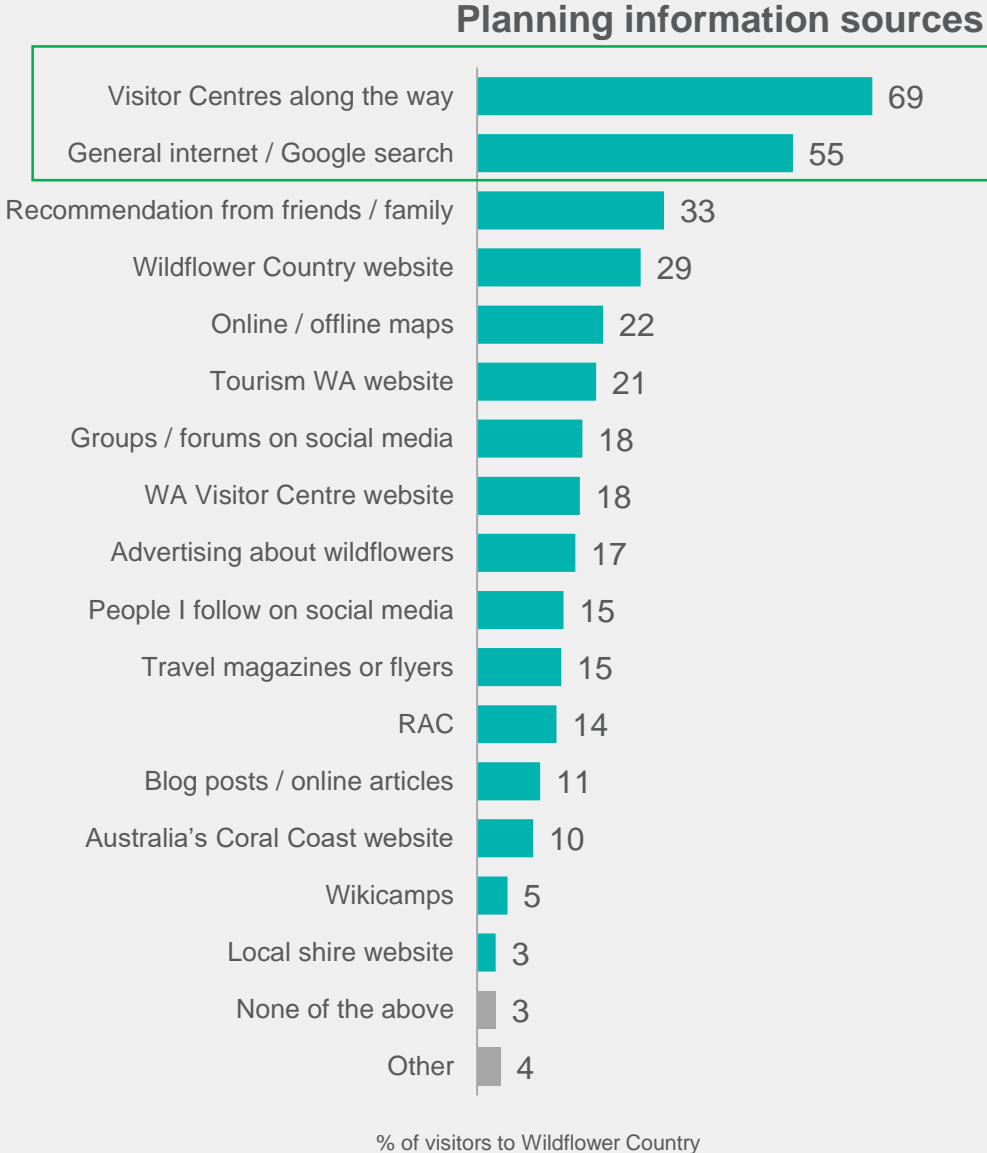
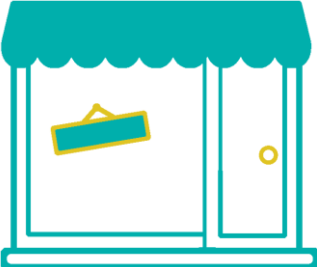


Participation in activities



% of visitors to Wildflower Country

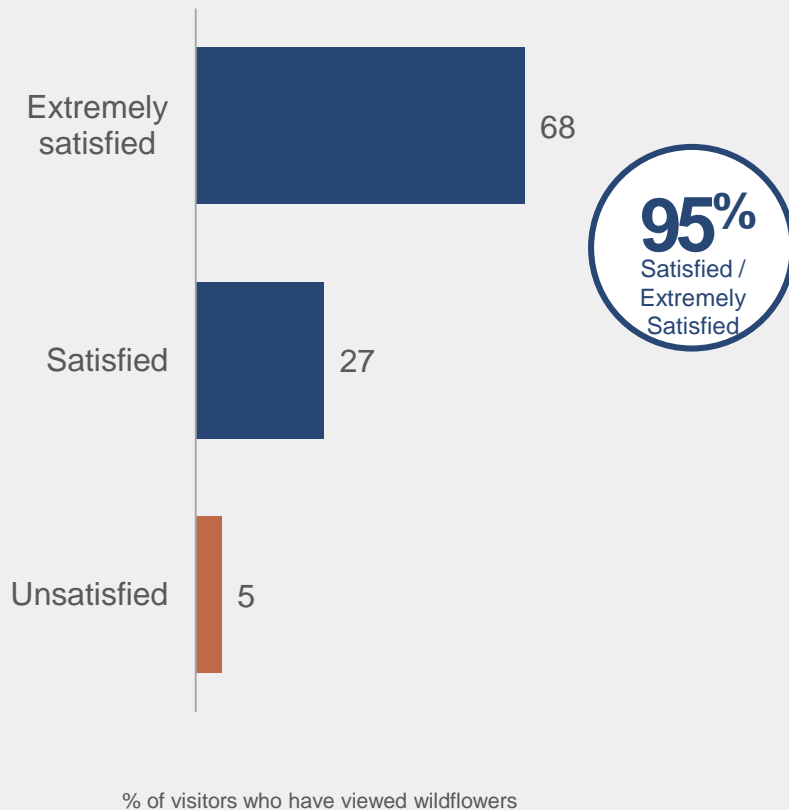
Visitor Centres when in the region or a general internet search are the most common planning sources



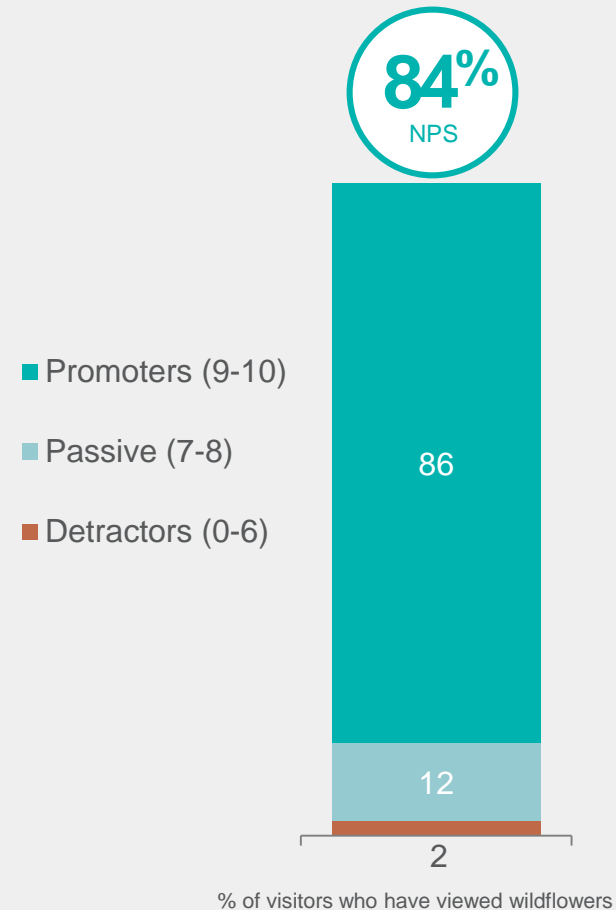
Base: Visitors n=244
 Q17. Where did you go when you were looking for your information to plan your trip to WA's Wildflower Country?

Satisfaction and likelihood to recommend Wildflower Country is extremely high

Satisfaction with WA's wildflowers



Net Promotor Score



Base: Visitors n=226

Q12. Overall, how satisfied are you with your experience of WA's wildflowers?

Q13. On a scale of 0 to 10, how likely are you to recommend WA's Wildflower Country and Season to other visitors?

However suggested improvements include greater availability of facilities and longer opening hours

The openness of the visitor's center, dining and accommodation during the season could be improved, with many mentions of the closed nature of these businesses during the peak period. Others recalled the lack of businesses in towns, such as different type of accommodation or dining locations. Other suggested improvements included a pamphlet with information regarding opening hours, flower types and other important information being appreciated and rubbish management.

“ Need a good balance between free camping and paid accommodation.

Accommodation options are limited, lots of shops closed on weekends which was surprising.

More coffee shops or cafes, as we were hungry when we got back and even the hotel had stopped selling food at 2.30pm.

Clean up the rest areas all along the roads, as the bins are overflowing with rubbish and need to be emptied more often. This needs to be done at most rest areas in Wildflower Country.

A brochure which gives more information about different types of flowers and on each walk.

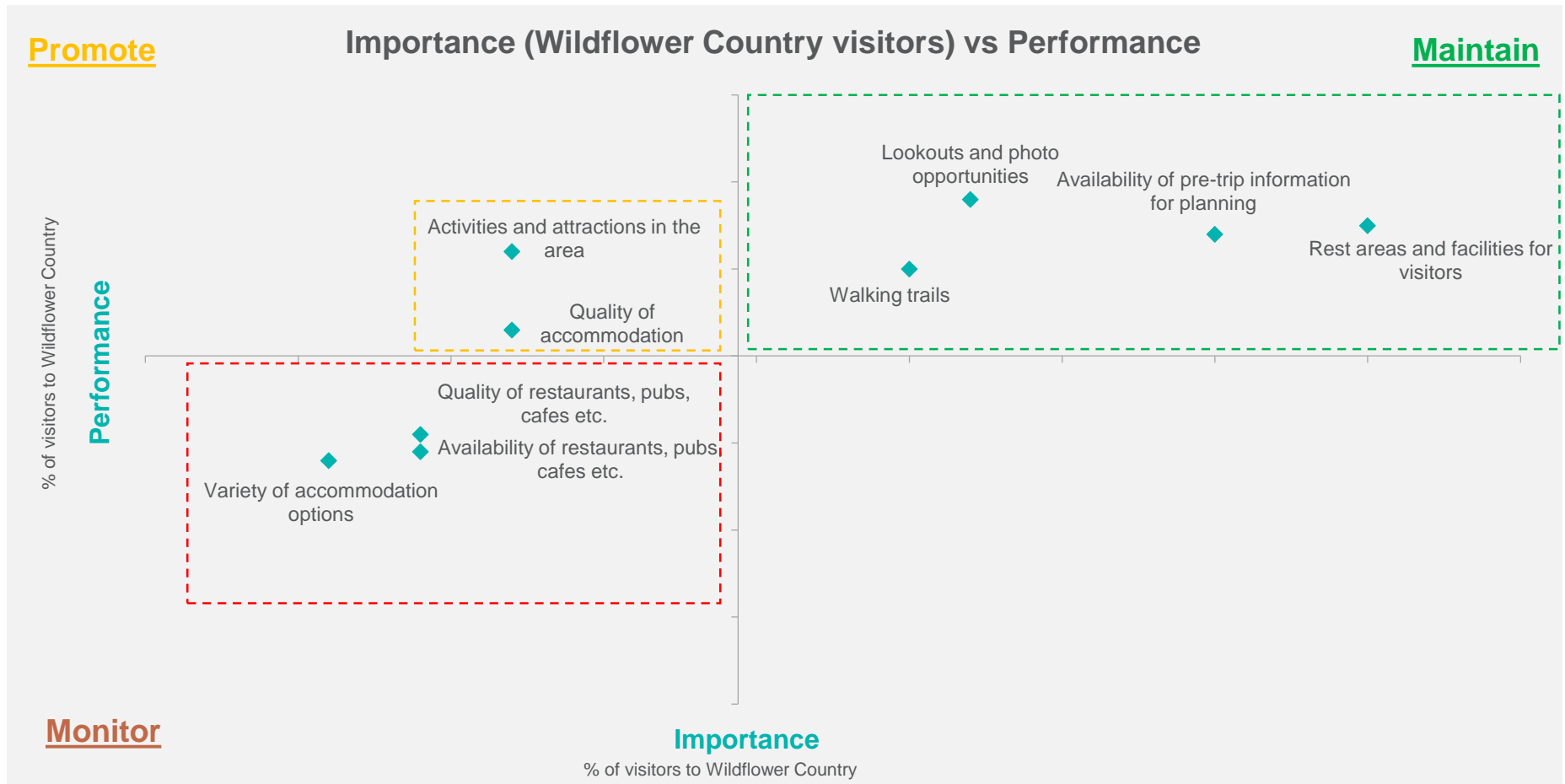
”



With low performance, accommodation and dining are key areas to monitor and address



Maintain communications and investment into areas that inform trip planning, including information, visitor facilities, walking trails and photo opportunities.



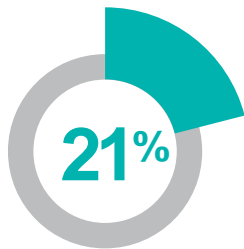
Q12b. How satisfied are you with the following specific aspects of your wildflower experience? Performance (% satisfied + extremely satisfied): n=226
 Q15. How important are each of the following when planning your trip to WA's Wildflower Country? Importance (% very + extremely important): n=224

Profiling Key Segments

Australian Market



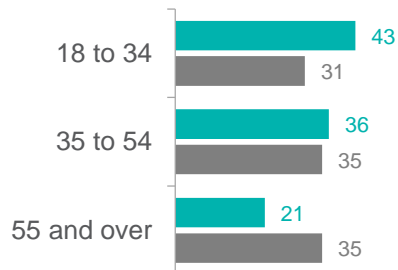
Australian market



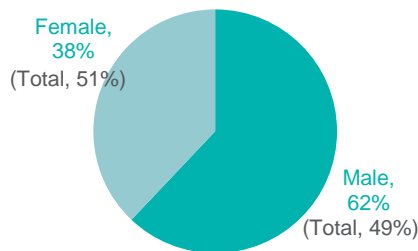
Flower Fanatics

21% of potential travellers

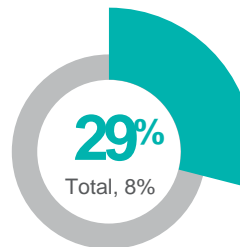
Age



Gender

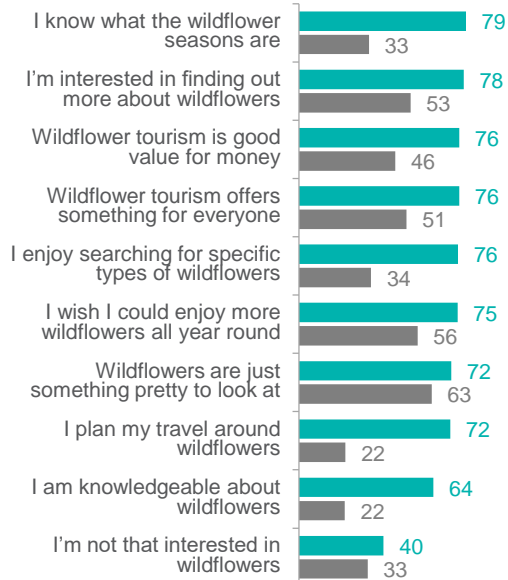


Booked a trip specifically



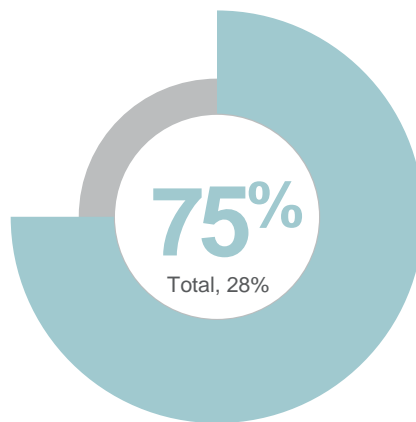
“ I’m pretty interested, I grow them and look at them in the wild usually through trails and hikes but nothing guided. Studying environmental science and know information from academic sources. ”

Wildflower perceptions - % agree



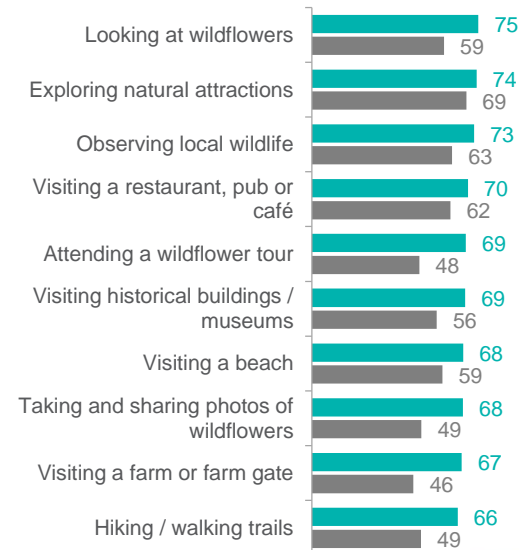
Likely to travel to / in WA for wildflowers

% definitely or very likely



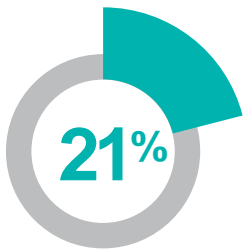
% of potential visitors to WA (Australian market)
n=333

Wildflower Activities – Top 10



Flower Fanatics Total potential travellers





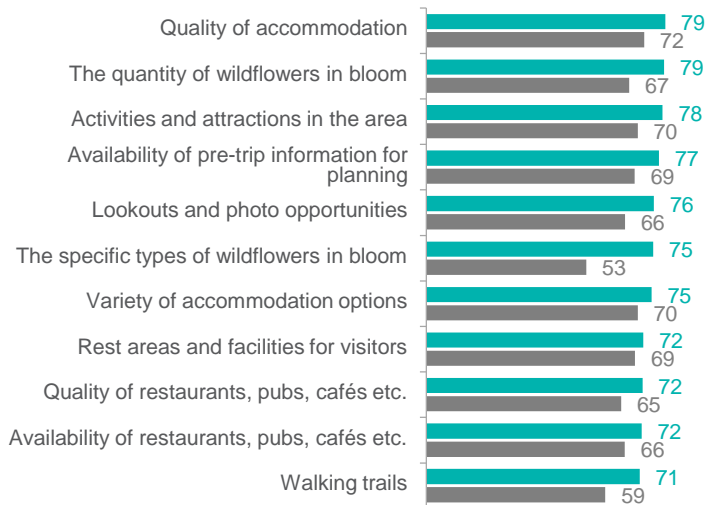
Flower Fanatics

21% of potential travellers

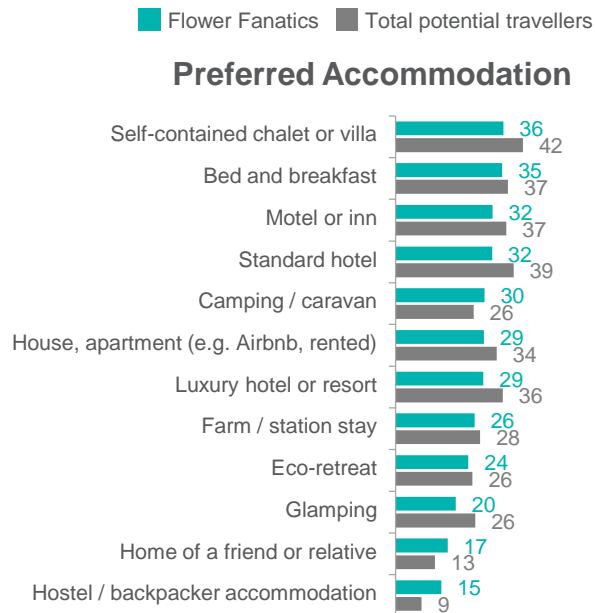


Australian market

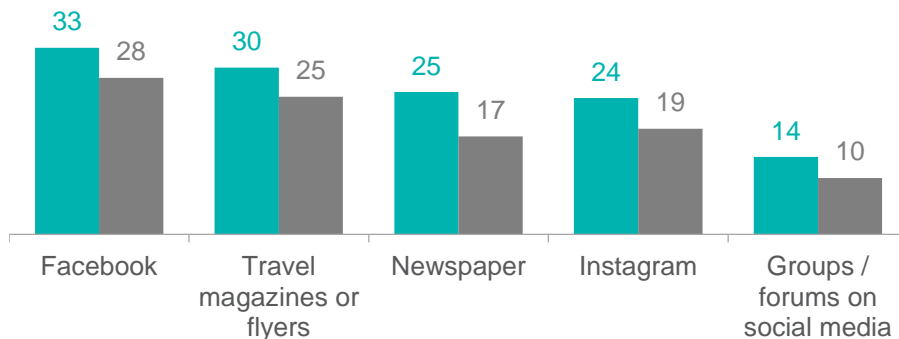
Planning Importance – Total Important



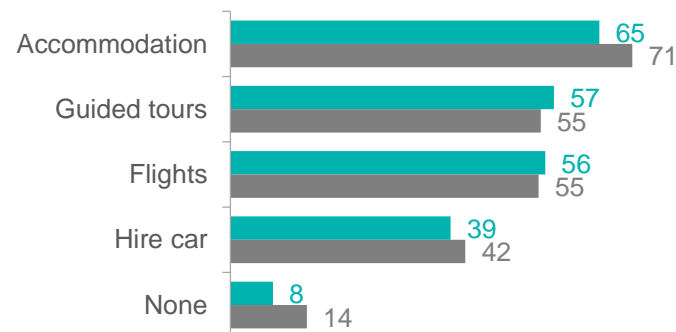
Preferred Accommodation



Top Information sources (over indexing)

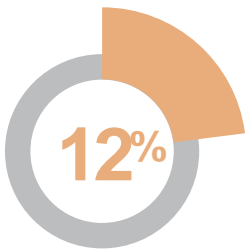


Ideal package





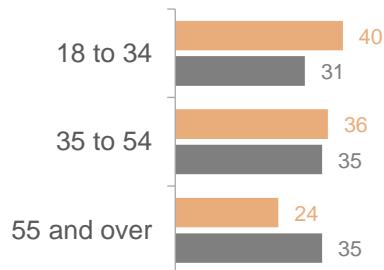
Australian market



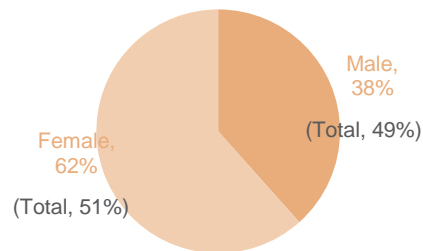
Wildflower Wanderlust

12% of potential travellers

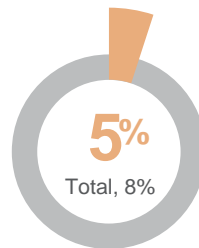
Age



Gender

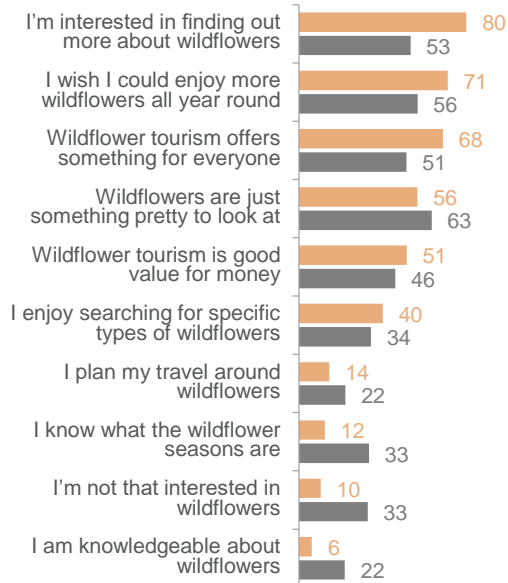


Booked a trip specifically



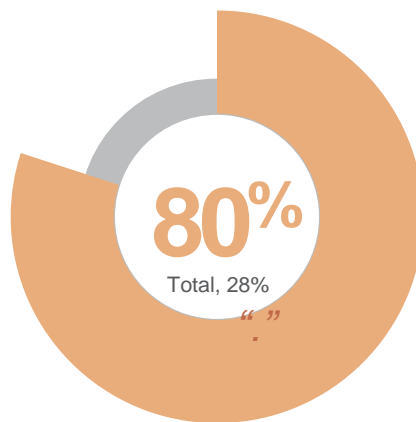
“ I do a lot of hiking but not generally wildflower based holidays. This year, knowing it was a bumper year and getting FOMO from this group, I did a trip to Coalseam and surrounds. It was awesome.”

Wildflower perceptions - % agree



Likely to travel to / in WA for wildflowers

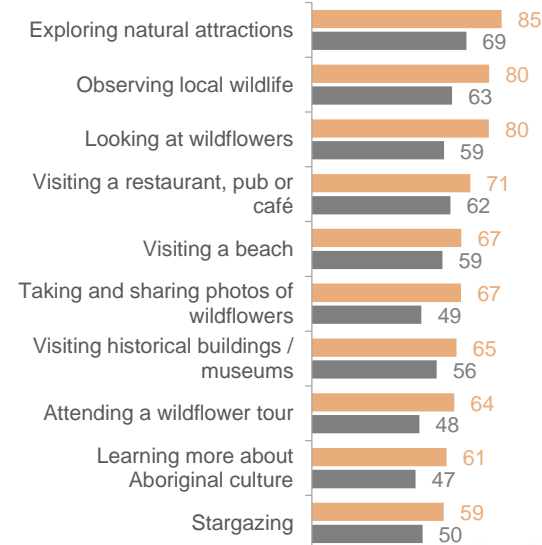
% definitely or very likely



% of potential visitors to WA (Australian market)
n=187

Wildflower Wunderlust Total potential travellers

Wildflower Activities – Top 10





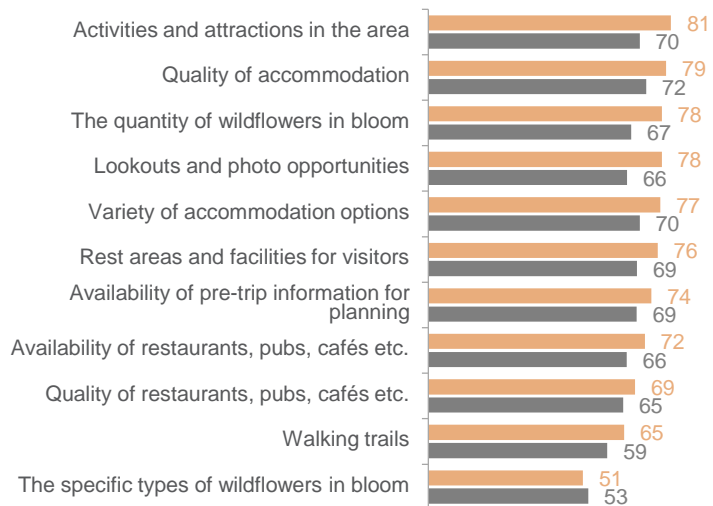
Wildflower Wanderlust

12% of potential travellers



Australian market

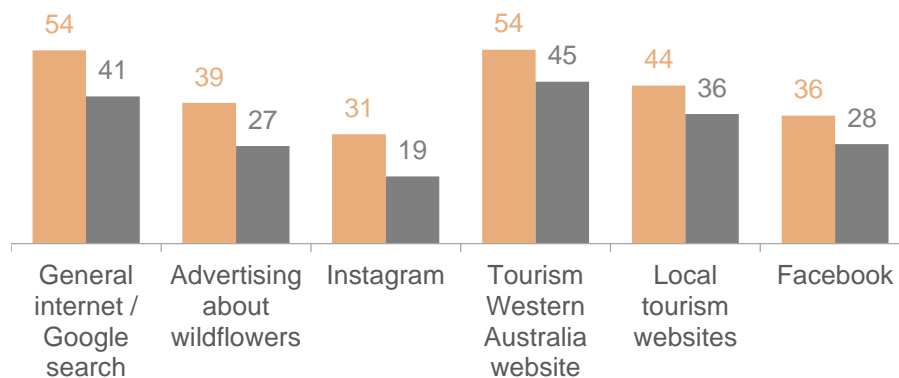
Planning Importance – Total Important



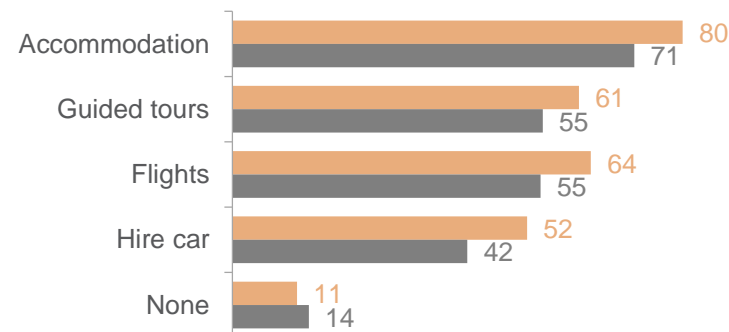
Preferred Accommodation

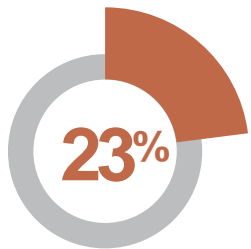


Top Information sources (over indexing)



Ideal package





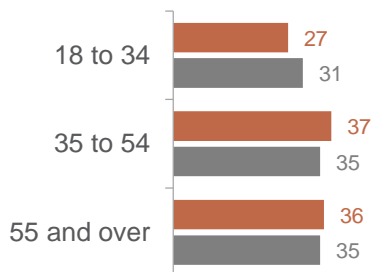
Budding Enthusiasts

23% of potential travellers

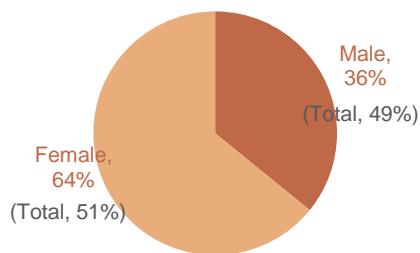


Australian market

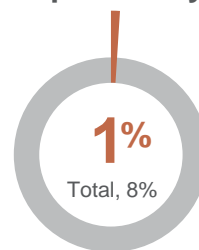
Age



Gender

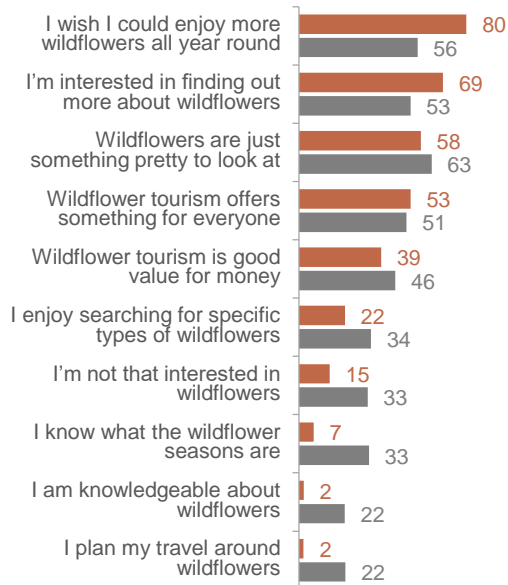


Booked a trip specifically



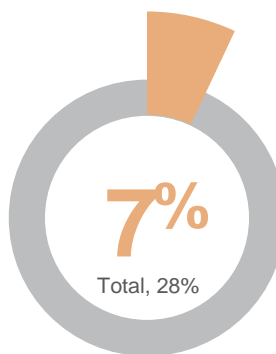
“ WA is next on my list, heard it has the best wildflowers. I did look at what kind of tours and events they had online and know there are several bus and walking tours. ”

Wildflower perceptions - % agree



Likely to travel to / in WA for wildflowers

% definitely or very likely

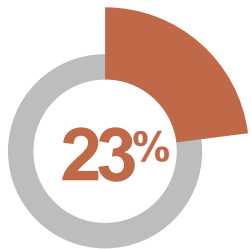


% of potential visitors to WA (Australian market)
n=303

■ Budding Enthusiasts ■ Total potential travellers

Wildflower Activities – Top 10





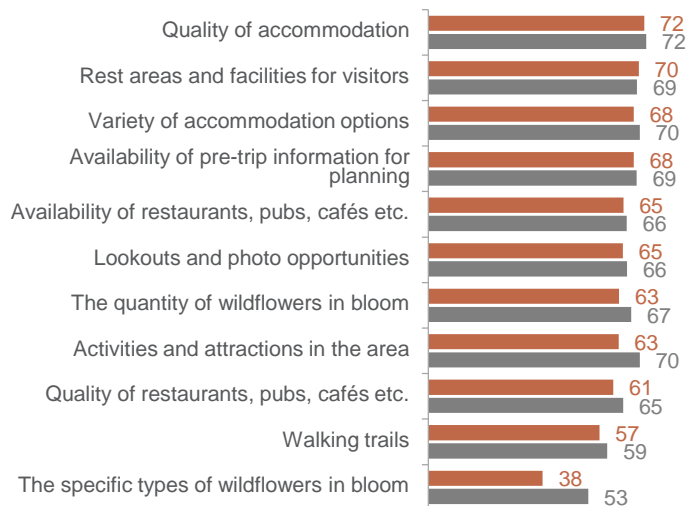
Budding Enthusiasts

23% of potential travellers

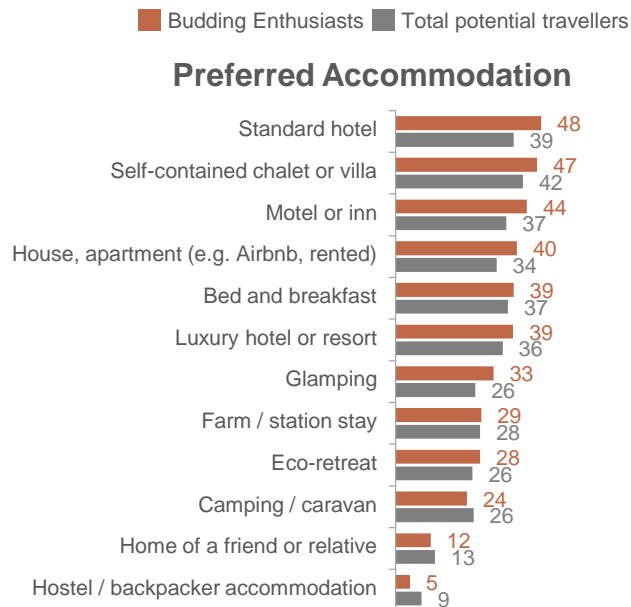


Australian market

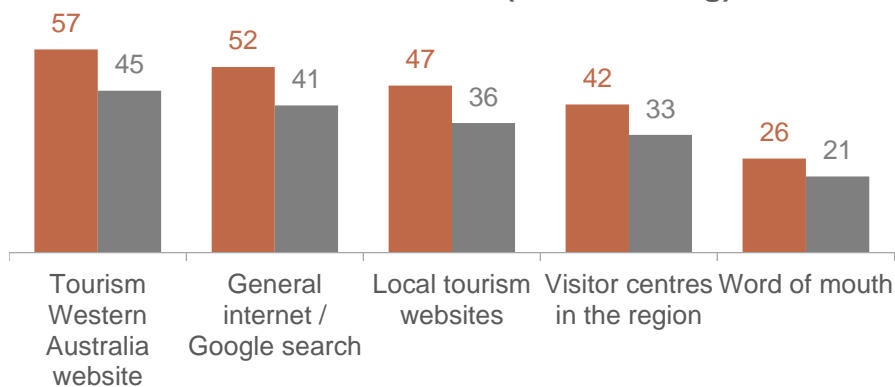
Planning Importance – Total Important



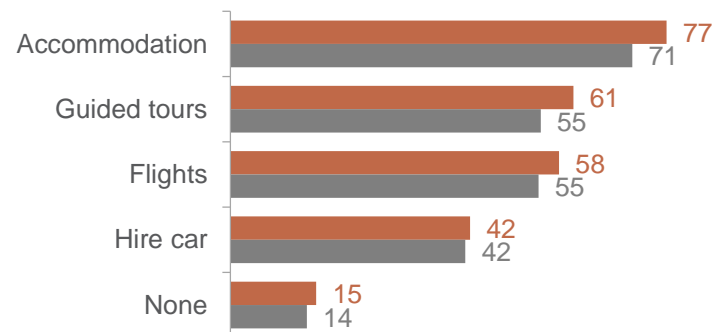
Preferred Accommodation



Information sources (over indexing)

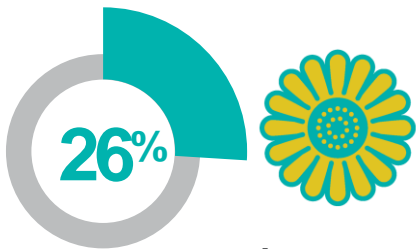


Ideal package



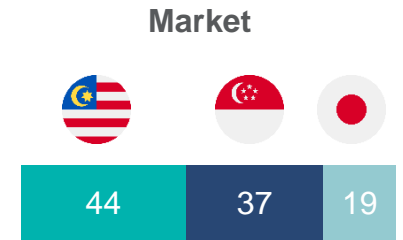
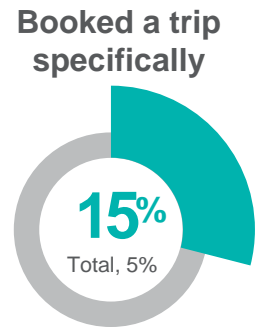
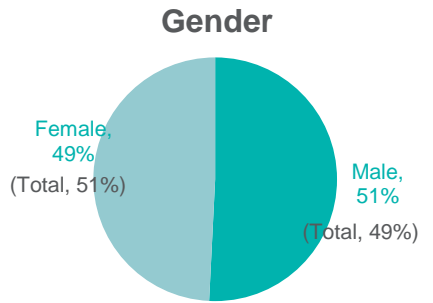
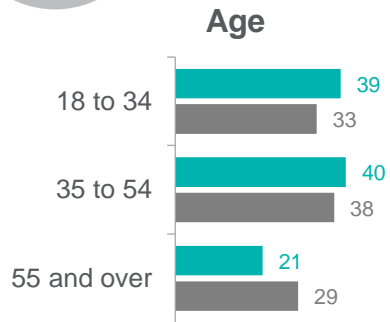
Profiling Key Segments

International Market

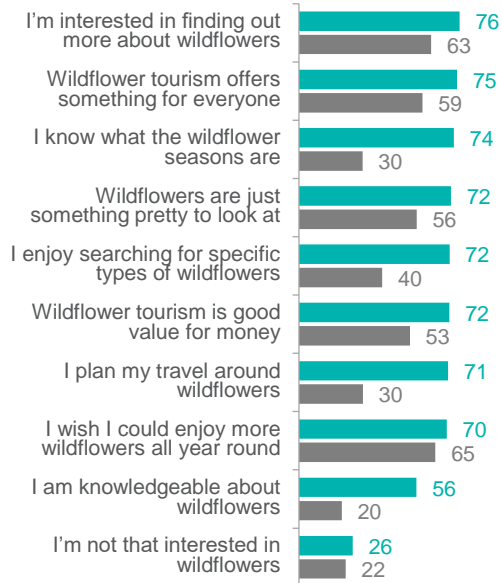


Flower Fanatics

21% of potential travellers



Wildflower perceptions - % agree



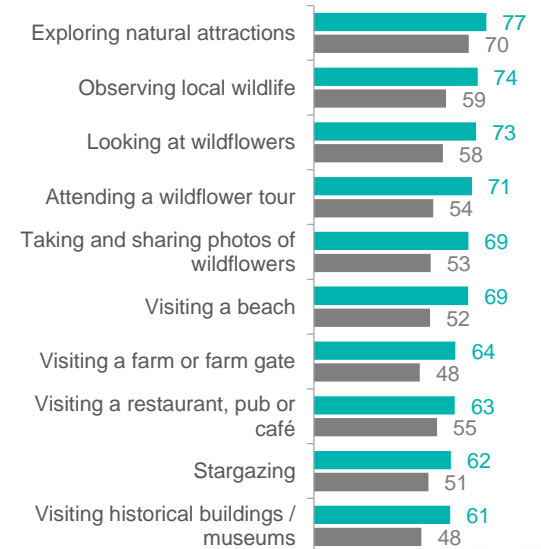
Likely to travel to / in WA for wildflowers

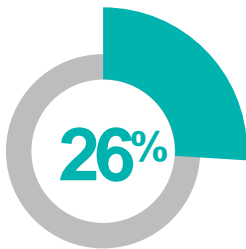
% definitely or very likely



Flower Fanatics Total potential travellers

Wildflower Activities – Top 10





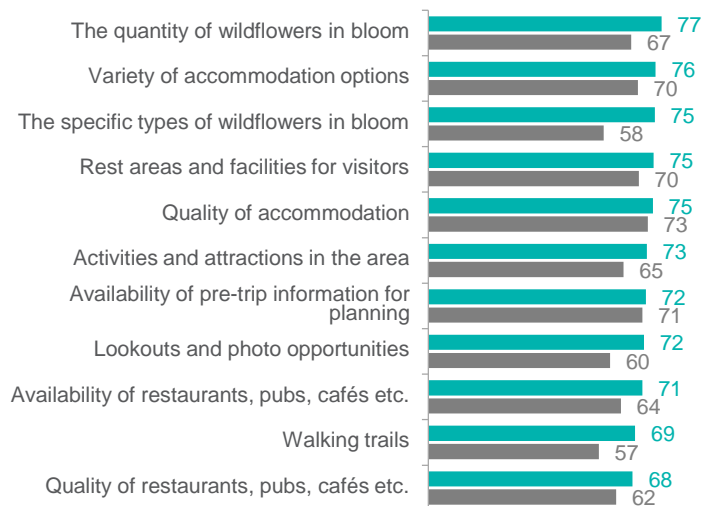
Flower Fanatics

21% of potential travellers



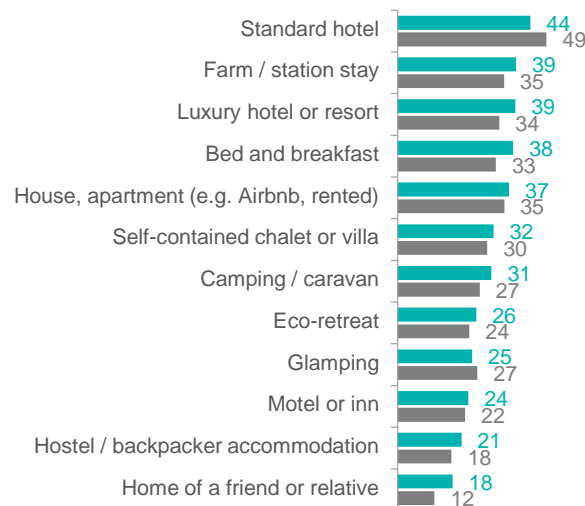
International market

Planning Importance – Total Important

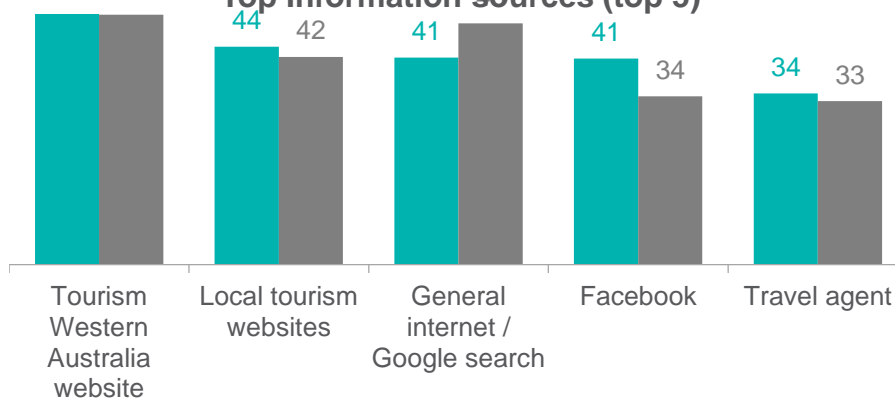


Flower Fanatics Total potential travellers

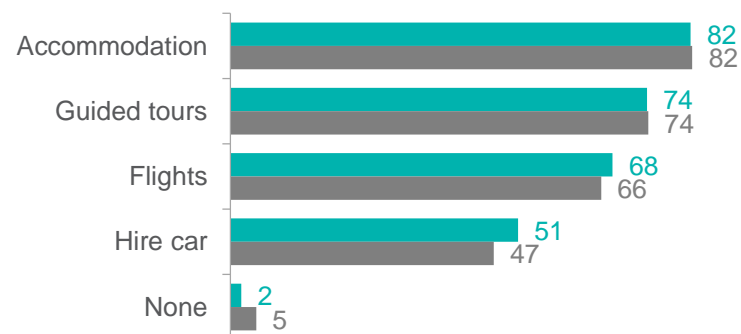
Preferred Accommodation

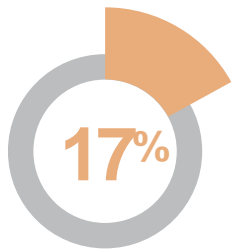


Top Information sources (top 5)



Ideal package





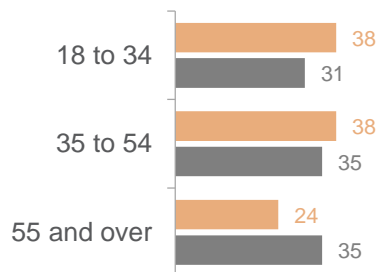
Wildflower Wanderlust

12% of potential travellers

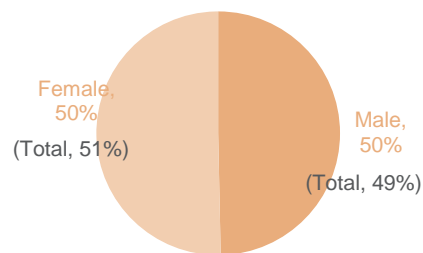


International market

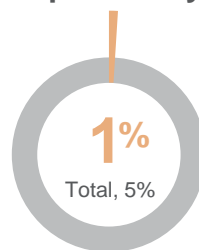
Age



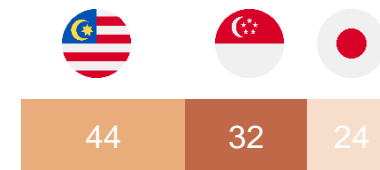
Gender



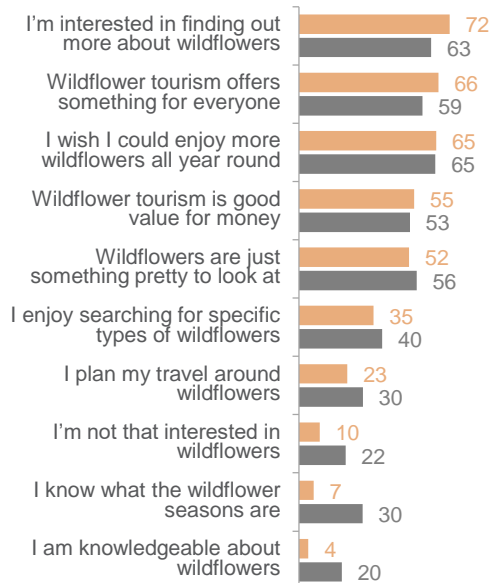
Booked a trip specifically



Market

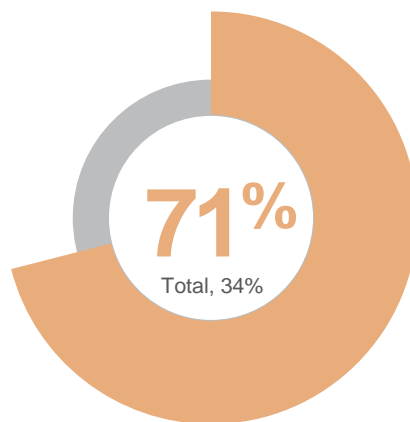


Wildflower perceptions - % agree



Likely to travel to / in WA for wildflowers

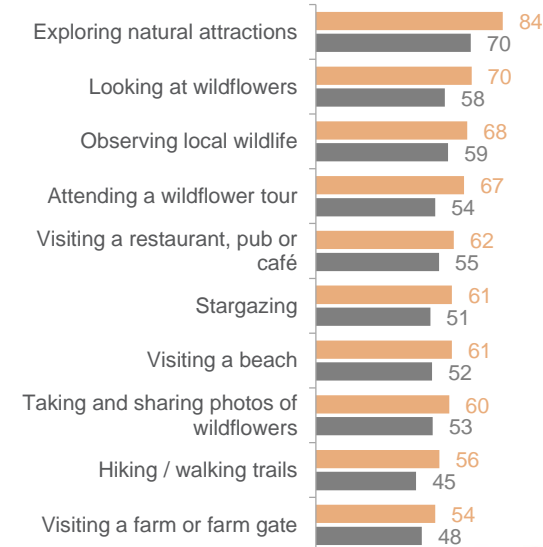
% definitely or very likely

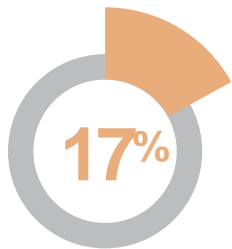


% of potential visitors to WA (International market)
n=200

Wildflower Wunderlust Total potential travellers

Wildflower Activities – Top 10





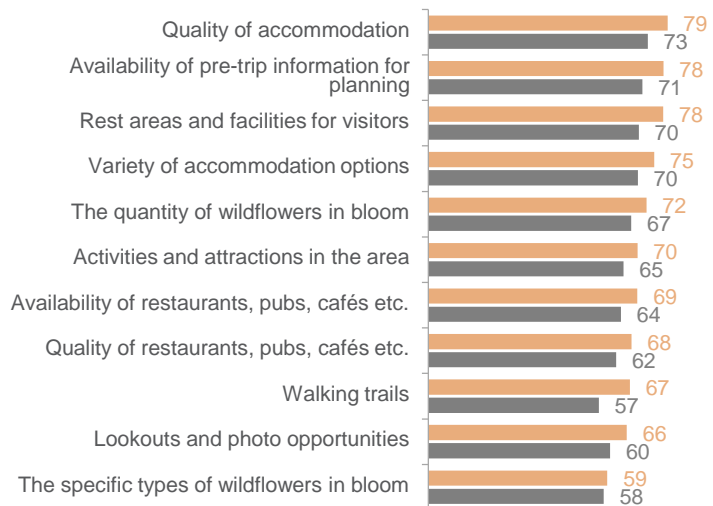
Wildflower Wanderlust

12% of potential travellers

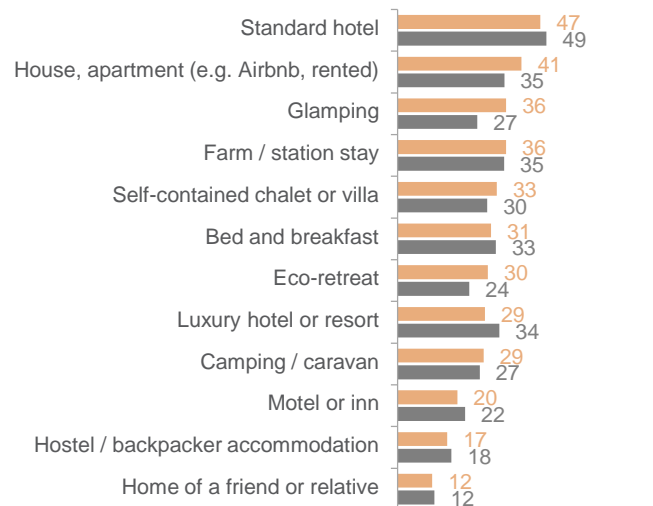


International market

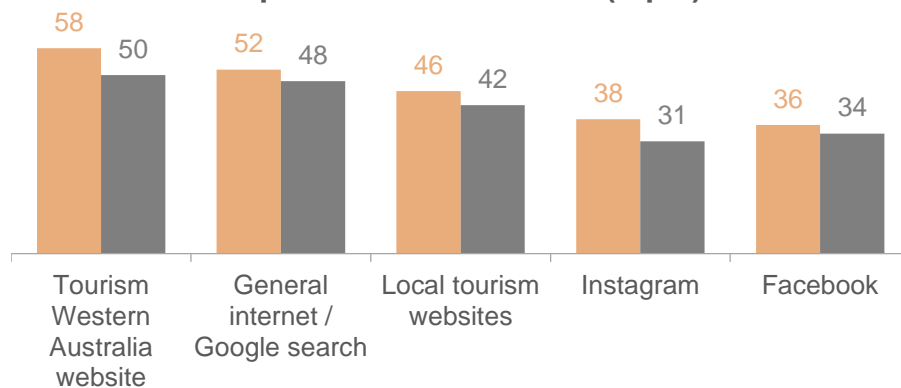
Planning Importance – Total Important



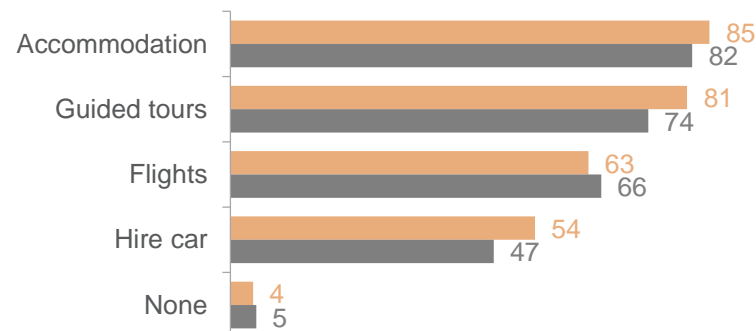
Preferred Accommodation

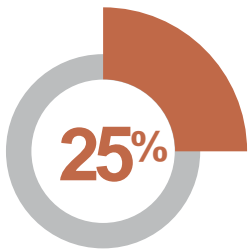


Top Information sources (top 5)



Ideal package





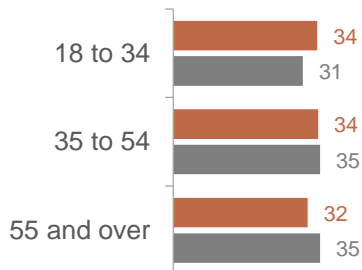
Budding Enthusiasts

23% of potential travellers

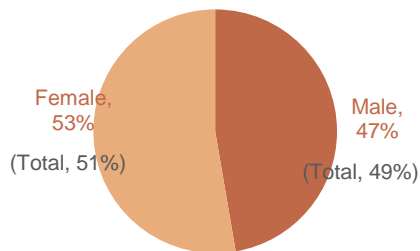


International market

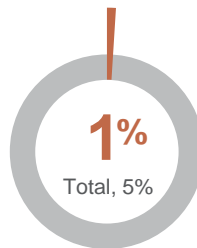
Age



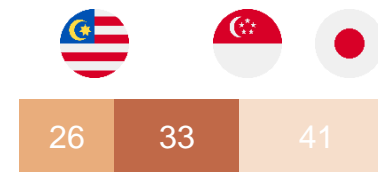
Gender



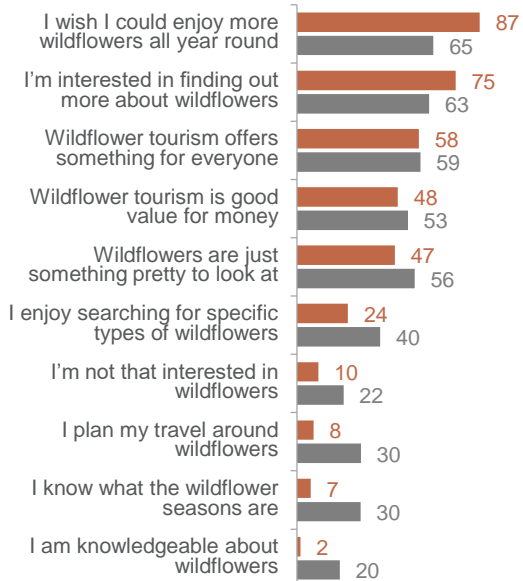
Booked a trip specifically



Market

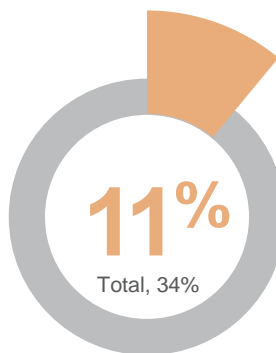


Wildflower perceptions - % agree



Likely to travel to / in WA for wildflowers

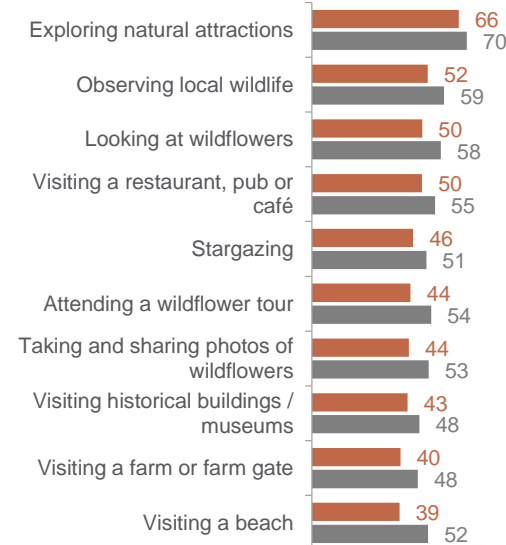
% definitely or very likely

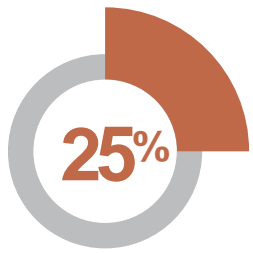


% of potential visitors to WA (International market)
n=305

■ Budding Enthusiasts ■ Total potential travellers

Wildflower Activities – Top 10





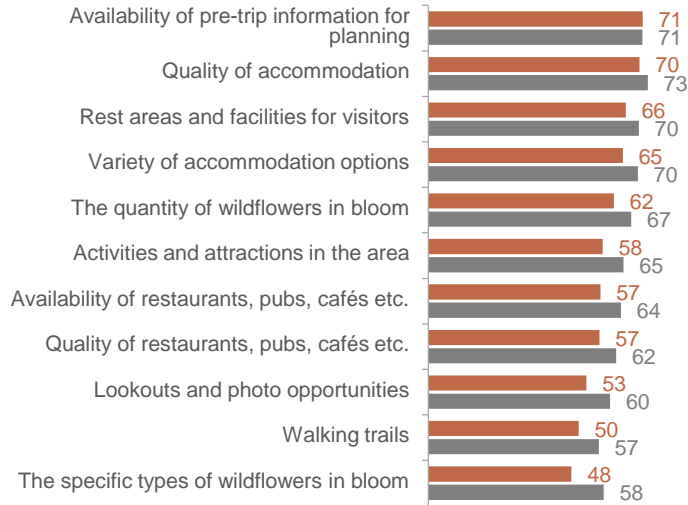
Budding Enthusiasts

23% of potential travellers



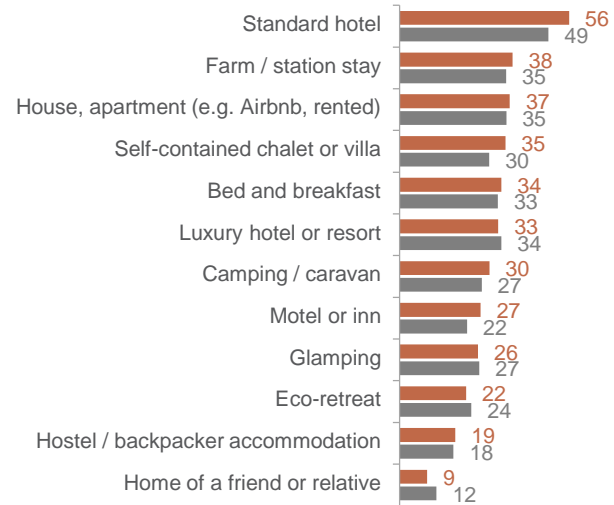
International market

Planning Importance – Total Important

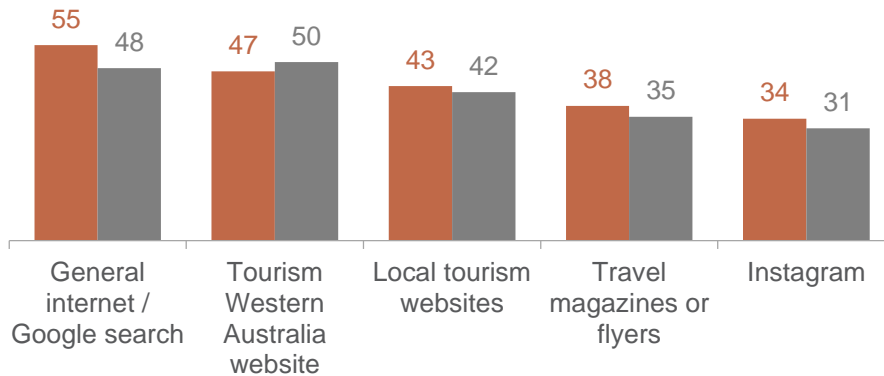


■ Budding Enthusiasts ■ Total potential travellers

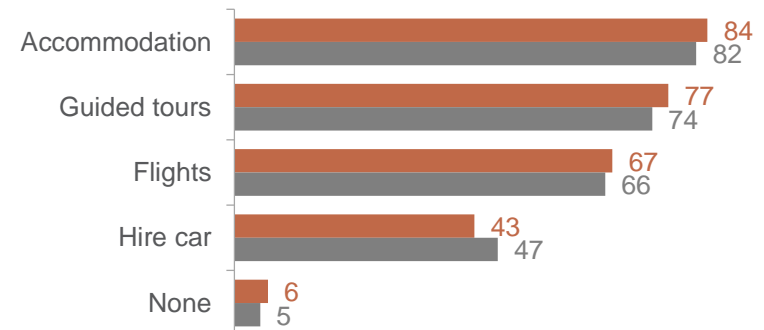
Preferred Accommodation



Information sources (top 5)



Ideal package



Metrix Consulting
metrixconsulting.com.au

