

**ROTTNEST ISLAND RESEARCH
FOR MARKETING & TOURISM
STRATEGY**

**Details of the Methodology and
of the Consumer Focus Groups
& Stakeholder IDIs**

Prepared for:

Rottneest Island Authority

Client Contact:

Andrea Merven
Peter Hill
Paolo Amaranti

TNS Consultants:

Penny Coase
Amy Steer
Tess Schenk

263100461

October 2012



Table of Contents

1. Background and Context	1
2. Summary of Key Findings from Stakeholder Workshop	7
3. Focus Group Notes	17
4. Stakeholder In-Depth Interview Results	59
Appendix A: Overnight Visitors Focus Group Discussion Guide	68
Appendix B: Day Visitors Focus Group Discussion Guide	75
Appendix C: Non-Visitor Focus Group Discussion Guide.....	81
Appendix D: Visitor/Non-Visitor Survey	87
Appendix E: Stakeholder Interview Discussion Guide.....	121
Appendix F: Boating Visitor/Non-Visitor Survey.....	126

Please note that the data contained in this report has been prepared for the specific purpose of addressing the items contained in the project contract between [TNS Australia](#) and the [Rottnest Island Authority](#). It may not be suitable for other applications. The use of this data for any other purpose should be discussed with the lead author. TNS accepts no responsibility for unauthorized use of this data by a third party.

1. Background and Context

Rottnest Island, located 11km off the coast from Fremantle, is one of the jewels in the crown of Western Australia. An A class reserve, it provides *'a scenic natural environment and sanctuary for people seeking to relax and indulge in nature-based pursuits'*.¹

Rottnest is managed by the **Rottnest Island Authority**. The RIA guides long-term planning for the Island through its vision and mission statements. The vision of the RIA is that: *'Rottnest Island is a model of ethical tourism based on financial, environmental and social sustainability'*.

The mission of the RIA, in accordance with its main roles as providing recreational and holiday facilities and in maintaining and protecting the natural environment, flora and fauna of the Island is:

'Rottnest Island visitors enjoy recreational and holiday experiences in healthy natural and cultural environments'.

Purpose of Research

The key research question that this project seeks to answer is:

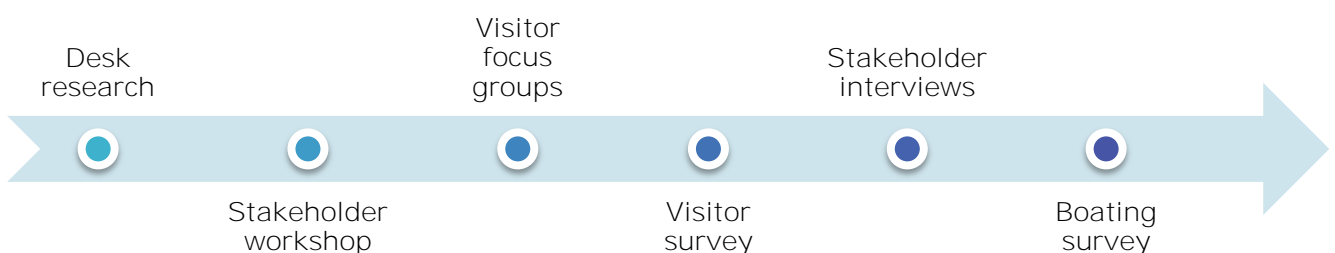
What marketing and tourism strategy will best meet the objectives of financial sustainability, economic activity and visitor satisfaction whilst sitting within the broader objectives of the Rottnest Island Management Plan?

A number of follow-on questions come out of this:

- What should be our marketing objectives?
- Who are the key visitor segments that should be the focus of this strategy?
- How should we develop products and services to best meet key segment needs and marketing objectives?
- What is the Rottnest brand, and how do we communicate that effectively?
- How can we use this information in strategy development?

Overview of methodology

This research took a multi-pronged approach to answer the aforementioned questions, with interim presentations and meetings after each subsequent stage.



More information on the methodology follows.

Desk research

The desk research was undertaken to synthesise the information available in different reports and therefore provide a summary of the current situation regarding visitation to Rottnest Island.

Information for the report was sourced from a number of sources, including the Rottnest Island Management Plan, Rottnest Island Authority's annual reports, visitor numbers, and findings from previous research projects.

The desk research report, entitled *Rottnest Island Research For Marketing & Tourism Strategy: A Marketing Research Desk Research Report* was finalized in March 2012.

Stakeholder workshop

A stakeholder workshop was held on Monday 6th Feb 2012 at the Tourism WA offices in Perth, with key stakeholders from relevant organisations invited to attend to provide input into the future strategy for Rottnest Island. Around 25 stakeholders attended the half-day workshop, with attendees split into smaller groups to discuss a number of topics, and the findings used to:

- Identify common perspectives regarding product development and growth strategies and how they can be fulfilled – i.e. routes to growth that have broad support and why;
- Likewise, identify approaches that would not have broad support and why;
- Help direct the lines of enquiry for the visitor and non-visitor research;
- Help identify areas that may need further investigation through subsequent interviews

A summary of the key findings from the stakeholder workshop can be found in Section 2 of this report.

Visitor focus groups: Qualitative research with public (visitors & non-visitors)

Following the stakeholder workshop, focus groups were conducted to gain a depth of insight and understanding, test product and positioning ideas and understand their appeal, help refine what would be tested in the subsequent quantitative stage (identifying key issues, and helping to establish questions, wording and response options).

A pool of potential participants was profiled during a monthly survey by the online research panel provider, allowing the data to be split into different groups by age, gender and location. The fieldwork team then contacted these people at random to pre-

screen them according to specific recruitment criteria, to determine who qualified to take part in the groups.

A total of 7 focus groups run with the following specifications:

- 2 groups of non-visitors – people who had not been to Rottnest in the last 2 years – one group was skewed to an older age group (some with children living at home, some without), and one skewed to a younger demographic (again with a mix of families and singles/couples)
- 2 groups of day trip visitors – people who had been on a day trip in the last 2 years, but had not been on an overnight stay in that time (with one group open to Rottnest making some changes and the other wanting a lot of changes)
- 3 groups of overnight visitors – people who had been on an overnight stay and potentially also a day trip in the last 2 years (with each group having a different degree of acceptance of Rottnest making some changes)

Each group had an average of 8 participants, with discussions lasting for around 2 hours. Participants were rewarded with \$70 for their time.

The groups were run in the evening, from 12th March to 27th March 2012.

Detailed notes from the focus groups are provided in Section 3 of this report, with discussion guides shown in Appendix A, B and C.

Visitor Survey: Quantitative research with public (visitors and non-visitors)

An online survey was devised to encapsulate the views of the general public, including those who had been to Rottnest in the past 5 years (visitors) on either an overnight stay or day trip, and those who had not been to Rottnest in the past 5 years (non-visitors).

The survey was sent to recent overnight visitors for whom the Rottnest Island Authority had email addresses on record – as well as members of an online panel (through Researchpanel), primarily to capture the views of non-visitors.

The fieldwork was conducted between Mon 21st May – Thurs 31st May 2012.

Members of Researchpanel's online panel were incentivized with credit for their time, while members of the RIA database were given the chance to win 1 of 5 \$50 Coles Myer gift cards. The average survey duration was around 27 minutes.

The required sample size for each group (visitors and non-visitors) was n=400. This sample size provides robust, statistically reliable results, with the margin of error on any result being no more than +/- 5% at the total (n=400) sample level.

A total of n=83 recent visitors from the RIA database responded to the survey, with n=735 respondents from the online panel, giving a total sample size of n=818. Sample characteristics are shown overleaf.

Visitor Survey Sample Demographics

	Visitor (n=399) %	Non-visitor (n=419) %
Age		
18-24	8	7
25-34	21	14
35-44	18	21
45-54	26	19
55-64	16	21
65 or over	11	18
Gender		
Male	36	37
Female	64	63
Household status		
Young single, no children	5	6
Young couple (living together), no children	14	8
Young family (eldest child under 13)	21	19
Teenage family (eldest child 13-17)	11	7
Adult family (eldest child aged 18+, at home)	18	18
Mature single/couple (no children at home)	29	41
Prefer not to say	2	1
Household income		
Less than \$10,000	1	2
\$10,001 - \$35,000	8	14
\$35,001 - \$60,000	12	19
\$60,001 - \$80,000	12	11
\$80,001 - \$100,000	12	11
\$100,001 - \$140,000	16	14
\$140,001 - \$180,000	13	6
\$180,001 - or above	11	4
Prefer not to say	18	19

There was some consideration about weighting the visitor and non-visitor data. However as the visitor data fairly well reflected the characteristics of visitors gained within the ongoing Visitor Surveys and there was no profile against which to weight non-visitors, it was decided to leave data unweighted.

The visitor questionnaire is shown in Appendix D.

Stakeholder interviews

The RIA provided TNS with a list of 15 relevant stakeholders to interview for this phase of the research. This included people from all kinds of businesses and organisations with a vested interest in the outcomes of the research.

A total of n=14 interviews were conducted, lasting for an hour on average. Interviews were conducted primarily at the respondent's place of work, with one undertaken via telephone. No incentives were provided.

Representatives of the following organisations were included in the research:

- Rottnest Foundation
- Rottnest Society
- Rottnest Island Voluntary Guides
- Indigenous Economic Solutions
- Tourism WA
- Royal Perth Yacht Club
- Rottnest Fast Ferries
- Rottnest Express
- Pelagic
- Rottnest Lodge
- Aristos Waterfront Restaurant
- Dome Rottnest
- Subway Rottnest
- InterContinental Perth Burswood

Findings from the stakeholder interviews can be found in Section 4 of this report, with the stakeholder interview discussion guide following in Appendix E.

Boating survey – Quantitative research with boat owners (visitors and non-visitors)

A second online survey was conducted of Western Australian boat owners, including those who had been to Rottnest in the past 12 months via boat (visitors) and those who had not been in the past 12 months (non-visitors).

The survey was broadcast as follows:

- **Emailed to a random sample (n=500) of people on the Rottnest Island Authority's wait list (people waiting to become licensees)**
- **Emailed to a random sample (n=500) of RIA's registered users**
- Link published on the Boating WA, Boating Industry Association and Freshwater Bay Yacht Club websites and newsletters
- Link published in an advert in the West Australian on Saturday 16th June 2012

The fieldwork was conducted between Sat 16th June – Weds 4th July 2012.

Respondents were given the chance to win 1 of 5 \$50 Coles Myer gift cards. The average survey duration was around 28.5 minutes.

A total of n=245 people responded to the survey, including 201 Rottneest visitors, and 44 non-visitors.

Sample characteristics are shown below.

Boating Survey Sample Demographics

	Total (n=245) %	Visitor (n=201) %	Non-visitor (n=44) %
Age			
18-24	2	3	0
25-34	9	9	9
35-44	23	23	21
45-54	33	32	34
55-64	23	23	23
65 or over	11	10	14
Gender			
Male	90	91	84
Female	10	9	16
Household status			
Young single, no children	2	2	2
Young couple (living together), no children	6	5	9
Young family (eldest child under 13)	23	25	16
Teenage family (eldest child 13-17)	9	10	7
Adult family (eldest child aged 18+, at home)	26	27	21
Mature single/couple (no children at home)	34	32	46
Household income			
Less than \$10,000	0	1	0
\$10,001 - \$35,000	2	1	5
\$35,001 - \$60,000	3	2	7
\$60,001 - \$80,000	6	4	14
\$80,001 - \$100,000	6	7	5
\$100,001 - \$140,000	15	13	23
\$140,001 - \$180,000	11	12	7
\$180,001 - or above	39	42	23
Prefer not to say	19	19	18

The boating questionnaire is shown in Appendix F.

2. Summary of Key Findings from Stakeholder Workshop

What is Rottnest Island Now?

Stakeholders recognized common strengths – pristine beauty, proximity and safe environment - and weaknesses, primarily the poor perceived value for money due to the cost and quality of the accommodation; and the quality and limited range of recreational facilities and service available on the Island. In short, Rottnest Island is a jewel on our doorstep, but a jewel that is being significantly out-sparkled by competitor activity (Bali, South West) and its own lack of activity.

When asked to consider the changes that were needed, these primarily followed the weaknesses, so improved accommodation was most widely mentioned, plus more / upgraded facilities and services – more things to do, with those activities being easily accessible, and well signposted. Many suggestions for development in accordance with the Island status as an A class reserve were given; improve access, signage and interpretation for what is already there; add walk trails, dive trails, cycle routes; increase the number of moorings and make them more accessible to a wider number of boaties; facilitate a larger permanent population by having more to do on the Island, thus helping business owners get and retain staff; provide more transport to and around the Island.

Two further common themes for change were to change (primarily reduce) the role of government in the management of the island to allow for more private investment and longer term more customer focused planning; and to reduce the involvement of interest groups (and the media) that often prevented change. Changes to the Act and to the composition of the RIA were often seen as prerequisites for these to occur. Stakeholders wanted greater involvement in the decision making of the Island. Whilst they wanted less government involvement, they also often wanted government to subsidise certain schemes that would enable subsequent growth.

What could Rottnest Island Be?

The workshop participants did not reach any clear conclusions about the direction that the marketing of Rottnest should take but common themes that emerged were:

The need to change – that just being a family, summer destination had passed its use-by date, particularly as the population in Perth grows and there is an increasing population with no childhood experience of Rottnest and love/understanding of its unchanging ways;

Building on the pristine environment and the proximity to the mainland meant that the Chinese (and other Asian) markets should be considered a priority and included in strategy (including working with inbound tour operators, signage, in-market communications etc)

The natural, healthy lifestyle offered by the Island makes a 'healthy, active' positioning a natural extension of what Rottnest offers and allows it to build on a broader societal trend, and incorporate a range of activities and events, both sporting and 'wellbeing' (spas / day retreats etc);

The use of events should be increased as a means of providing a reason to visit out of season, for encouraging day visitors and for increasing attractions/ things to do without infrastructure / a significant increase in the built environment;

The product offer on Rottnest could be greatly improved with better signage, access and interpretation rather than necessarily building new things. Similarly, an emphasis on day tripping allows for increased revenue without significant costs in building new accommodation.

Implications for the research program

Stakeholder interviews

We would suggest the following should be considered for inclusion in the stakeholder interviews. This is not intended to replace those already being considered for further interview, this list simply reflects the desire to further explore some themes that emerged in the Workshop, or conversely, were not covered to any great degree :

Representation from TWA and inbound tourism operators to help further understand the developing Chinese market and how we can maximize the appeal of Rottnest to this market and ensure its inclusion in their itineraries;

Representation from historical / cultural / Aboriginal organizations as this component of the discussion was not thoroughly covered (tended to be over-taken with environmental considerations);

Representation from an organization that can comment knowledgeably on accommodation issues, e.g. visitor services as there was no specific coverage of this at the workshop;

Representation of the boating community as there were a number of fairly technical issues which it would be helpful to explore further.

Focus Group discussions

Whilst the workshop doesn't really affect the way we structure the qual, a couple of interesting points should be considered:

Firstly, a number of stakeholders were of the opinion that many visitors were unhappy or disappointed with the experience of visiting Rottneest. Whilst the visitor research does not really back this up, it does raise the question of having at least one group with **people who only thought their visit to Rottneest was 'fair' or 'poor' or who do not have** such a high opinion of it as they did in the past (about 10% in the 2004 research).

The main thrust of the ways forward for Rottneest were active or interactive (with the Island) which would suggest capping the upper age of respondents.

We would suggest structuring the visitor groups primarily by visitor status and satisfaction with their trip rather than demographics: hence

2 x overnight stay groups – one who were very positive about their experience, one **group less so (the 'devoted' and 'vulnerables' as we called them in 2004)**

2 x day trip groups – again one more positive than the other.

In all of these groups, visit would be in the past 2 years and we would quota to achieve a mix of single visits / multiple visits (over time, not necessarily in the 2 years)

2 x non-visitor groups – I would suggest we structure these by demographics rather than attitude so we can explore (perceived) failings in terms of facilities/accommodation/cost amongst families/not. However to maximise the **usefulness of the research I suggest we exclude those who wouldn't consider going to Rottneest and include just those who are interested but haven't got around to it and those who are currently unsure what advantage it offers over other destinations**

Key findings

Purpose of the Workshop

To gather input from key stakeholders in relation to the overall objectives of the research; that is:

- to better understand the needs of our visitors to the Island (both current and **potential, hence why some don't visit**);
- to identify options for developing products and experiences to suit those needs, and
- to identify strategies that would stimulate visitation growth.

The broader Tourism & Recreation Strategy in which this research sits can be found in Initiative 2 of the Rottneest Island Management Plan:

Develop and implement a Strategy to drive and coordinate research, planning, business and product development, and marketing for a range of relevant recreational experiences, facilities, interpretation, tours and events on the Island for all visitors.

This will include nature-based, marine, heritage, cultural, Aboriginal and geological recreation and tourism opportunities suited to the environment and target markets.

The input of the key stakeholders will be used to:

- Identify common perspectives regarding the above objectives and how they can be fulfilled – i.e. routes to growth that have broad support and why;
- Likewise, identify approaches that would not have broad support and why;
- Thus help direct the lines of enquiry for the visitor and non-visitor research;
- Help identify areas that may need further investigation through subsequent interviews

Outline of workshop tasks

1. Where we are now - Break out groups identify key strengths and weaknesses
2. What change is required - Interest groups (boating, businesses, tourism peak bodies and environmental/cultural) identify need, nature & manner of change in their area
3. Where we need to be to fulfill the Strategy - Whole group identifies possible directions; break out groups then consider Best Day Out, Pristine Environment, Island for all Seasons, and Activity / Health positionings

1. Where we are now

Key Strengths

- Pristine, natural, beauty - bays and beaches
- Accessible – 30 minutes, but worlds away
- No traffic – safe, unique, family friendly

Key Weaknesses

- (Perceived) value for money – what you get for the amount you pay. Particularly in relation to quality and cost of accommodation
- Quality of facilities – including dining options
- Not enough activities (and insufficient quality)

2. What needs to change

Cultural and Environmental Perspective

Culture and environment needs to **take a greater priority** both in terms of what money is spent on and in terms of how the Island is promoted. Specifically, this would involve;

- Improving the quality of environmental management and interpretation and modernising the facilities / design / experience;
- Developing new products and repackage existing products eg having the best dive trail in the world.
- Improving access to the environment, the Coastal walk trail being a good example of this

Conditions needed to make this change – i.e. to make culture and environment a greater priority - are;

- Identify the culture and environment segment of the market
- Attract visitors for all seasons by creating themes / event for each season
- Improve land management via handing over land management and partnering with others. There was a sense RIA are limited in their ability to do this.

Tourism Peak Body Perspective

- Visitor facilities and services need to improve especially in accommodation and food & beverages, also the visitor centre (for day visitors).
- The booking system needs to change to something that is privately run, online, easy to use, and easier for non-locals to book
- Government involvement and interest groups are holding back development; **they and the media's power needs to be reduced**

How should these changes occur?

- Upgrade existing accommodation (rather than build new)
- Remove barriers to developing new accommodation (remove sovereign risk / get government support as with Southern Ocean Lodge on Kangaroo Island)
- Role of government / RIA wound back to enable customer focused development. This would require support from different government departments and good evidence that this is an appropriate model that will preserve Rottneest Island A class status.

Business Owner Perspective

Rottneest business owners saw change needed in:

- The quality of accommodation and services, and the range of facilities, feeling this made Rottneest uncompetitive with mainland destination such as Margaret River;
- The way in which government and business interact – amount of bureaucracy
- Cost of doing business on the Island, specifically need to make the island somewhere people will live rather than commute to
- The need for better transport options to and on the island
- Better facilities for the boating community, particularly access via moorings – to facilitate greater use of the island
- Allow for seasonal businesses

Change would require:

- A change to the Act, in particular the funding model and the ballot system
- Change the nature of government involvement – greater privatisation, more investment, a long **term plan...but also government support to ensure the Island's** viable future (e.g. waiving landing fees – which might need a government subsidy)
- Invest in more accommodation and more services, facilitated by changes in Act and government involvement that allows greater private investment

Boating Community Perspective

The boating community saw change as needed in;

- Better management of existing facilities, particularly the way the authorized user scheme works (in terms of who can be included), and reallocation of mooring colour codes
- More boating facilities – provision of Mediterranean moorings, provision of a wave screen to protect against Easterlies and thus open up more moorings; water supply to the Geordie jetty, mobile sewerage pump out facilities (a boat that provides this service),
- Ability for day trip charter boats to moor – cannot currently go on the north side of the Island, prohibited under commercial gain limitations
- Shark policy – aerial viewings are raising unnecessary alarm

Change would require:

- Boating representative on the RIA Board who would represent the views of a boating subcommittee in which all boating organizations would be represented
- Board members would be representative of stakeholder groups generally and should be unpaid.

3. Possible direction going forward

The Island for All Seasons

What would this look like?

- Themes by season nor even month, supported by specific events / activities
- Winter program (July) of golf
- Yachting in October
- Triathlon
- Spring / autumn festivals etc
- Very focused marketing to target groups associated with that sport / event

Strengths

- Creates a promotional strategy, provides a framework for marketing
- Can be delivered in existing infrastructure

Weaknesses

- Large scale events hampered by amount and quality of accommodation
- Lack of necessary facilities (e.g. golf buggies)

Opportunities

- Increases visitations especially off season
- Creates more to do
- Develop a new market

Threats

- Lack of funding and focus
- Overseas does it better
- The weather and off season access

The Best Day Out

What would this look like?

- Letting everyone know how much there is there – and how extraordinary it is
- 64 beaches
- Vouchers / information/ day trip itineraries when you arrive / iPod application – all the things to do made easy for you
- All-inclusive nature – everything there – good value for money
- Proximity: 'the close overseas day trip'

Target market

- Off-peak – schools, corporate, special interest groups (including cultural / heritage)
- Peak – families and internationals (cruise ship market?)

Strengths

- Proximity to Perth
- Already have lots there – just building on what we have and the current positioning
- Alternative to international destinations on our doorstep

Weaknesses

- Need better facilities
- Perception of poor value for money
- Little political will to make it a priority

Opportunities

- Reach new markets
- Build up events
- Encourage privatisation, more activities, accommodations, day flights (high end)
- Threats
- Tourist numbers are down – people going elsewhere (Bali)
- No long term vision for Island

Pristine Environment

What would this look like?

- Focus on the coast, include history / culture and provide access / interaction .
Needs to be about 'touch' not 'don't touch'
- More interpretation – environmental, historical, self-guided tours, signage
- Maps with bicycles, electronic guides
- Off season market
- Corporate sponsorship; lead people into experiences (a la Kings Park)

Target market

- International market – Chinese – pristine, extraordinary, CLOSE
- Local market via links with activity in this environment (environment alone may not be sufficient)

Strengths

- Proximity to Perth
- Broad appeal, lots of specifics can sit under this positioning
- Strong imagery to support it in communications

Weaknesses

- Arid interior?
- Need to improve current interpretation and provide translated options
- Opportunities
- Rottnest is highly visible and much loved- benefit to corporate sponsoring
- Growing Asian market – day trip
- Use the lakes?
- Build on growing interest in physical and mental health

Threats

- Act needs to change to allow corporate sponsorship?
- Public / Rottnest Society oppose change and more access to pristine environment
- Ability of RIA to manage environmental issues?

Active / Health Positioning

What would this look like?

- Relaxation as well as activity – could cover a broad range of holiday and need types, from highly active to inner wellbeing.

Physically active

- Creation of events calendar building on heritage of Rottnest swim
- Improved package of activities on Island itself e.g. snorkeling, cycling
- Create activity itineraries for different groups – families, singles etc.
- Promote island as safe environment in which to roam free
- Signage, instructions essential to many of these

Inner wellbeing - break from routine

- Healthy, spa / wellness opportunity close to Perth
- Away from the crowds in winter, green environment
- Solitude, away from work routine -soulful, rejuvenation
- Back to nature approach, uncomplicated
- Promotion of longer stay packages, and day spa / wellbeing packages. Spa day treatments an easier proposition than accommodation
- Provide more eating options – **healthy / alternative 'small bar' options**
- **'Clarity of thought' positioning good for attracting corporate functions and small conferences.** Could be tied in with the new golf course

Target market

- Potentially very broad but offers opportunity to develop from existing family peak-summer market.
- **Possible threats are connections with 'boozy' weekends and consistency of service delivery**

3. Focus Group Notes

3.1 Visitors group 1 (day trip)

<p><u>REASONS TO VISIT</u></p> <p>VISITORS: What are the strengths / benefits / drawcards of going to Rotto?</p> <ul style="list-style-type: none"> • Uniqueness • 'The vibe' (mood) • Predictable / routine (in a good way) • Specific strengths (snorkelling, no traffic etc) • Others 	<ul style="list-style-type: none"> • Events - Rotto swim 3 times • Wildlife - quokkas, peacocks • Empty roads - no cars • Relaxing - calming, serenity, quiet • Activities - sailing, swimming, snorkelling, eating, drinking, bike riding • Beautiful beaches - clear waters • Family days - lots of fun in the sun with family • Very Australian • Overseas and interstate visitors - " I took a friend who was over from Hungary that loves bird watching and nature and beautiful beaches so thought Rotto was perfect" <p>Phrases</p> <ul style="list-style-type: none"> • "A great day out " • "Giant quokkas" • "Fun in the sun for the family" • "Love the serenity" • "Lots of bays so can almost be on your own" • " Relaxing, feels like you are millions miles away" • "Want to show it off to friends and family" • "The cost is ridiculous" • "Happy kids" • "Whole point is to do nothing" <p>Highlights</p> <ul style="list-style-type: none"> • "Train was a real highlight for my son... I am sure that will wear off when he get older" • "Beaches, particularly the Cove near the lighthouse" • "The quiet and no hustle and bustle" • "The pub renovation is really nice and the beautiful view" • " Daughter (3yrs) dropped her chips and got bitten by a quokka" • "Bus allows you to get on get off whenever you like"
<p><u>REASONS TO NOT VISIT</u></p> <p>VISITORS: What are the weaknesses /costs / negatives about going to Rotto?</p> <ul style="list-style-type: none"> • Lack of presence / 	<p>Lowlights</p> <ul style="list-style-type: none"> • "Website is really really poor" • "Hard work to get there" • "The fact that after you book you get told you need to take your own bed linen" • "Cost of the ferry " • Visitor centre - About half of the people who

<p>salience (no ads / never think of it etc)</p> <ul style="list-style-type: none"> • Negative image / perceptions (e.g. schoolies) • Lack of things to do / no more or different than on mainland • Hassle • Cost • Don't holiday / pay for accommodation • Facilities are not good • Accommodation not good • Run down 	<p>used thought the visitor centre wasn't great and it was difficult to get information</p> <ul style="list-style-type: none"> • "Accommodation needs work – expensive and run down and looks dangerous" • "Dirty and annoying quokkas – quokkas pooing all over the place and kids walking in it..." <p>Things that put you off going to Rotto</p> <ul style="list-style-type: none"> • Overarching theme of expensive, poor standard of accommodation and amenities • Lack of information available "Not enough packaged deals so you lose too much time working out what is available to do." • Perceived lack of things to do - some thought there was enough to do others thought... "it was lost on them" and they were not sure what to do with themselves while on the island • "I went once – didn't really know that there was much on offer" • Hassle factor- a lot of organising and a lot of hassle once you pack up the kids, load the car with the bikes, food, getting down to the ferry...exhausted before you even get there • Loss of serenity – weekends were considered too busy that it loses its serenity. It was felt that the people needed to be spread around the island more, possibly by building a second settlement on the other side of the island "Would be good to have something to draw people out of the main settlement" • Inefficient processes - bike hire is time consuming and there is the need to line up to get a bike which eats away at the time available on the island • Expensive to hire bikes / take own bikes over "Expensive to take the bike over, but at least it works" • Website – those that had used the website thought it was frustrating and difficult to use • Lack of information available – not much information about what there is to do on the island "I tried Googling Rotto and all I got was info about the ferries but not much other information about Rotto itself" • Ballot system – put people off as you have to pre-plan 12 months in advance
---	---

<p><u>COMPETITOR OFFERS</u></p> <p>Where else are you going for holidays / day trips (distinguish which in notes) What do they offer that Rottnest doesn't? What advantages do other places have over Rotto? What advantages does Rotto have over other places?</p> <p>Thinking of the most recent holiday within Australia – and well include Bali as well. Can you tell me why you chose to go there? What kind of holiday were you looking for?</p> <p>REASON FOR TRIP</p> <p>What was the occasion that prompted you going on that holiday / those day trips?</p>	<ul style="list-style-type: none"> • Due to the nature of how almost half of this group of people obtained their tickets (i.e. as a gift, work function, won them on a radio competition) they hadn't really needed to consider another option • However, for those that did make a considered choice, other alternative day trips suggested were bushwalking in the hills, Rockingham foreshore, Point Peron and Yanchep • There was an overarching theme of cost that played a part in the decision making process. Many said that if Rotto was cheaper they would go a lot more often and for longer <p>Triggers for going on the last occasion</p> <ul style="list-style-type: none"> • Friends and family over from interstate / overseas "my family from Hungary loves bird watching, animals and flora and fauna so Rotto was great for them" • Fly over in private plane "go over too many times to count, I have my pilot's licence so I try to keep my hours up" • Day trip "Just went over for something different to do" • Hadn't been before and friends thought it was worthwhile going " If I went back it would be for the animals" • Dad bought tickets for Xmas present • Won tickets on the radio • Work function – the work paid for trip over •
<p>INFORMATION SOURCES</p> <p>For holiday / trips in general</p> <p>Appeal of Rottnest brochures</p> <p>Comments on Rottnest website</p>	<p>Website</p> <ul style="list-style-type: none"> • Search functionality - was deemed to be frustrating and not informative enough "Looked like the site was designed in the 70's" • They found it very difficult to get a price and information about the room, and those that had used the site a lot were frustrated that it didn't tell you whether the accommodation was available or not so you end up having to call to find out <p>Rottnest brochures</p> <ul style="list-style-type: none"> • Rotto brochures- self-contained includes linen, and basic (excludes) linen • Lack of smaller units – only really accommodate for a big group. Expensive if you are 2 people or have a small family as you don't need 4 bedrooms • Peak period \$200-\$360 per night for a 6 bed. They didn't think this was too much per se, people would pay that it was more what you are getting for that kind of money "I would pay that if the accommodation was nice accommodation"

<p>PROMOTION / OF ADVERTISING OF ROTTNEST</p> <p>Appeal of packages / bundles Where info should be available Advertising they have seen as well as where it should be advertised</p>	<ul style="list-style-type: none"> • Saw the ad with a guy pulling out the crayfish – saying that you couldn’t do that anymore <p>What would encourage people to go in winter / off season</p> <ul style="list-style-type: none"> • Mixed feelings. Some wouldn’t even consider going in winter “I wouldn’t go on the ferry in winter, wind and the rain can be uncomfortable and take a long time” • 2 for 1 tickets, cheaper accommodation, and cheaper ferry tickets were all ways people would be more attracted to the island over winter • It was felt that this idea would be better suited to adults / couples and market and tap into the ‘secluded getaway idea’ • It was felt by most that in order for this idea to work they would need to offer luxury 5 star accommodation that was intimate and private away from the kids and families • The pristine factor could be pushed in winter as the cold makes everything crisp and fresh • Other ideas were to promote nature walks, bonfires, cosy luxurious accommodation and focus on couples • More cafes and restaurants would also be welcomed • Promote overnight stays “Not much appeal of going for the day, I would stay overnight to getaway. Not much appeal even in summer for a day trip, but I would consider a winter weekend isolated getaway but the accommodation would have to be better.”
<p>FACILITIES / ACTIVITIES</p> <p>Experience and perceptions</p> <p>Amount to do What’s good What’s not so good Include Ferry in here</p>	<ul style="list-style-type: none"> • Visitor centre – only half had visited. Those that had visited thought it wasn’t very good. It was deemed that the information was difficult to find and was not user friendly • Ferry ride – expensive and can sometimes be a bit rough and not good if you get sea sick, particularly in the winter months • Supermarket – was considered well stocked and generally quite good • Medical facilities- no medical facilities on the island and had to wait a long time to see a nurse • Amount to do – there were mixed feelings. Some thought that there was plenty to do in a day, others thought there was not much at all to do, or were not aware of what was available to do • Not wheelchair / pram friendly “getting a double pram on and off the ferry was an absolute nightmare”

<p>ACCOMMODATION</p> <p>Experience perceptions</p> <p>Amount to do</p> <p>What's good</p> <p>What's not so good</p>	<p>Most important features to be included in the accommodation:</p> <ul style="list-style-type: none"> • Cleanliness was by far the most important aspect of the accommodation. Perceptions of the accommodation are that it is dirty and the cleanliness leaves much to be desired "I wouldn't feel comfortable let my baby crawl around on the floor and I want accommodation where I can feel comfortable making a sandwich for my child on the bench and not thinking the floor might be cleaner!" • 1 or 2 bedroom options • Cost vs. standard of living • It was unanimous that linen and towels and cleaning services should be included in the existing prices "It is holiday accommodation not a crack house...you would never see this in any developed country... they have a monopoly so they are totally fleecing the situation" • TVs – mixed feelings "It's your choice to turn it on or not" • About half like the idea of keeping the outside of buildings the same. In particular, keeping the orange outside render, but felt a strong need to upgrade the inside of the accommodation "Doesn't need anything glam and more natural and keep the outside as it is but the inside accommodation needs to be upgraded "
<p>REACTION TO NEW POSITIONINGS</p>	<p>Tranquillity – 5 star spa</p> <ul style="list-style-type: none"> • Mixed feelings. Seems to be quite controversial. Don't like 5-star, the rest of description sounds like it fits Rotto well • There would need to be a lot of development in order to achieve this. Some thought it would be an excellent idea to attract couples to the island as they wouldn't go otherwise • Some thought it wasn't a good option for those with kids "I don't think of a 5 day spa with kids, this isn't what Rotto is about for us" • The cost of 5 star was a real concern, if the shacks were already at 5* prices how expensive would this new 5 star accommodation be? There is the real need for the accommodation to be affordable <p>Important things</p> <ul style="list-style-type: none"> • Fits with Rotto, but not necessarily very catchy "Sounds like a shopping list"

Activity Island

- Was not liked by anyone. Think that the description is not an active place and doesn't represent the Island. Didn't know these activities were on the island

Experience Extraordinary

- Lovely but not necessarily extraordinary

Pristine environment

- It is beautiful but not pristine. Only really has a pristine perimeter

Boating getaway

- Mixed feelings. Could be done on a small scale however by doing this it would attract richer clientele and therefore they would want to stay in more luxurious accommodation and thus recognise the need for more 5-star accommodation on the island

Free range

- Everyone thought this positioning was not good. "Trying to put it on the same level as Margaret River and Dunsborough"
- 'Family destination' would be more fitting and could combine with the important things, would say everything

Island for all seasons

- Mixed feelings. Some think there is nothing to do in winter and wouldn't even consider. Some think it's beautiful in winter and went because they didn't want to go when it was really busy. Ferry rough and bumpy road over puts them off

WA Island Destination

- "describes Rotto quite plainly the way I see it for exploration and a day adventure"
"We like something that we can claim" – one person said they like the writing but not the title

Best day out

- "...the kids might say the best day out. A lot of organising and a lot of hassle once you pack up the kids, load the car with the bikes, food, getting down to the ferry.... exhausted before you even get there"

Most favoured

- Was a real mix, including 'important things / family', 'island of all seasons', 'island destination', 'pristine environment'

REACTION TO NEW PRODUCT IDEAS	
Other new ideas nominated by participants	<ul style="list-style-type: none"> • Wider range of food outlets – good idea • Fun park - was seen as something that could really work on the island, particularly amongst the younger people and those with children and combine a water park, water park, water slides, trampolines, putt putt, and put a café in there so the parents have something to do. Would really work if one entrance fee that once paid you can do it for as long as you like “ It will give kids something to do” • Calender of Events – comedy festival – got relentless heckling • Canoeing on lake – would be a disappointing experience as they wouldn't be able to do it as there is not enough water • Café at lighthouse – great idea • Beach trampolines - a good idea, but it needs to be cost effective • Snorkel tours - good • Cycling tour – this was seen as a good idea • Aboriginal – already do. Really educating people on what is actually already there • Heritage tours – already do • Surf lessons – good • Chairlift to the lighthouse – they were not sure what this was for. Thought it was maybe for people with wheel chairs • Fishing charter- not seen as a good idea “...it costs money to catch the ferry over to Rotto then you pay to go on a fishing charter seems a bit of a waste” It was felt this needed to be cost effective

3.2 Visitors group 2 (day trip)

<p><u>REASONS TO VISIT</u></p> <p>VISITORS: What are the strengths / benefits / drawcards of going to Rotto?</p> <ul style="list-style-type: none"> • Uniqueness • 'The vibe' (mood) • Predictable / routine (in a good way) • Specific strengths (snorkelling, no traffic etc) • Others 	<ul style="list-style-type: none"> • Natural beauty – pristine beaches, untouched, no pollution, lots of space • Distance – not too far to go • Family holiday – fun in the sun, spending time with family • Activities - frolicking in the sea, snorkelling, swimming, coffee, eating • Wildlife – quokkas, cute wildlife, seagulls • History – canons • Safety – no cars • Adventure - exploring rock pools, riding around the island • Ferry ride • No driving • Relaxing – time out <p>Phrases:</p> <p><i>"Exhilarating experience"</i></p> <p><i>"Island playground"</i></p> <p><i>"Stepping back in time"</i></p> <p><i>"Happy exhausted children"</i></p> <p><i>"Bright sandy beaches"</i></p> <p>Highlights:</p> <p><i>"Watching the quokkas ... I could watch them all day they are interesting little creatures"</i></p> <p><i>"Sunbathing with a lizard"</i></p> <p><i>"When you go to one beach and you think it's the best beach ever and then you go along to the next one and it's even better..."</i></p> <p><i>"Scenery near the church was absolutely stunning and even walking to the club you see quokkas on the way which was really nice"</i></p> <p><i>"Beaches are definitely stunning"</i></p>
<p><u>REASONS TO NOT VISIT</u></p> <p>VISITORS: What are the weaknesses/costs/negatives about going to Rotto?</p> <ul style="list-style-type: none"> • Lack of presence / salience (no ads / never think of it etc) • Negative image / perceptions (e.g. schoolies) • Lack of things to do / no more or different than on mainland • Hassle • Cost • Don't holiday / pay for accommodation • Facilities are not good • Accommodation not good • Run down 	<p>Low lights:</p> <ul style="list-style-type: none"> • Sea sickness on the ferry ride over • Cost – cost for the day is expensive • Communication breakdown between the island and the mainland which resulted in waiting for bikes • Waiting in queues for ferry, food, bikes • The ferries go back too early • Accommodation is rundown, furniture is dated, beds are uncomfortable • <i>"you wake up with rigamortas from sleeping on some of those beds"</i> • Standing in the hot sun while waiting for the ferry, there are no shady spots

<p><u>COMPETITOR OFFERS</u></p> <p>Where else are you going for holidays / day trips (distinguish which in notes) What do they offer that Rottnest doesn't? What advantages do other places have over Rotto? What advantages does Rotto have over other places?</p> <p>Thinking of the most recent holiday within Australia – and well include Bali as well. Can you tell me why you chose to go there? What kind of holiday were you looking for?</p> <p>REASON FOR TRIP</p> <p>What was the occasion that prompted you going on that holiday / those day trips?</p>	<p>For those that have only been on a day trip, what appeals about a longer trip:</p> <ul style="list-style-type: none"> • Less rushing around trying to fit everything in so you can chill out, relax and explore • More time • Change of scenery <p>What is off-putting about going to Rotto compared to other destinations:</p> <ul style="list-style-type: none"> • Availability – hard to get accommodation. Need more accommodation • Difficulty of getting accommodation like you can down south so tend to gravitate towards down south "you can't get on wotif like you can for down south" • Hard to be spontaneous – you need to book months, if not a year, in advance • Ballot system is confusing and off-putting • The quality of accommodation for what you are paying is far inferior to other destinations such as Busselton or Dunsborough <p>Triggers for going on the last occasion:</p> <ul style="list-style-type: none"> • Bought ticket from a friend because they couldn't go • Went over for friends' party • Kids pestered parents to go • Overseas visitors hadn't been before / went with an interstate visitor • Wanted something to do for the weekend
<p>INFORMATION SOURCES</p> <p>For holiday / trips in general</p> <p>Appeal of Rottnest brochures</p> <p>Comments on Rottnest website</p>	<ul style="list-style-type: none"> • Google is a wonderful search engine • Got into the history of the island • Barrack St jetty – for information on ferry times • Information on options to get there were known and didn't seek more info <ul style="list-style-type: none"> • Appeal of Rottnest brochures – the reaction to the 6 beds accommodation was that it seemed overpriced for the quality
<p>PROMOTION / ADVERTISING OF ROTTNEST</p> <p>Appeal of packages / bundles Where info should be available Advertising they have seen as well as where it should be advertised</p>	<p>"My Rotto" ad was spontaneously mentioned by several participants, perceived message takeout was that it was to promote its accessibility, however generally felt that the ad doesn't work. Felt that the ad should focus more on its natural beauty and the fact that Rotto hasn't been spoilt by modernisation, in addition to the fact its user friendly and safe because there are no cars and good exercise.</p>
<p>FACILITIES / ACTIVITIES</p> <p>Experience and perceptions</p> <p>Amount to do What's good What's not so good</p>	<p>Feelings about facilities:</p> <ul style="list-style-type: none"> • Ferry travel – generally good • Visitor centre – absolutely excellent. Thought the volunteers were top shelf, they loved their jobs, very informative and helpful and know a lot about the history • Bike hire – mixed feelings. Some thought experience was not good, with old bikes.

<p>Include Ferry in here</p>	<p>Miscommunication between island and mainland thus having a long wait for the bikes. Some also experienced old out-dated bikes</p> <ul style="list-style-type: none"> • Shop/general store – happy generally feel they have a good offer with reasonable prices • Food and drink is thought to be expensive but they generally think there is a reasonable variety • Aristos – a bacon and egg burger costs \$18 which is felt to be too expensive • Café – caters well for Celiac • Rottnest Hotel – food and drink is felt to be expensive – top shelf prices • Golf course – no one had been <p>Things Rottnest should offer:</p> <ul style="list-style-type: none"> • Possibly offer headsets so you can tour the island by yourself however some thought it's better if you are guided by a real person • Translators for foreign visitors • More shaded areas particularly where waiting for the ferry and bike shop • Doctor on the island at all times (currently just a nursing station) • More toilets
<p>ACCOMMODATION</p> <p>Experience and perceptions</p> <p>Amount to do</p> <p>What's good</p> <p>What's not so good</p>	<p>What's not so good-</p> <ul style="list-style-type: none"> • Bed quality – really uncomfortable mattresses • Old / outdated / uncomfortable furniture • Unacceptable level of cleanliness
<p>REACTION TO NEW POSITIONINGS</p>	<ul style="list-style-type: none"> • Activity Island was liked most by this group (5 votes) • Pristine environment (1 vote) • Important things (1 vote) • Tranquillity (1 vote) • Best day Out (1 vote) <p>Don't like:</p> <ul style="list-style-type: none"> • Free Range because not enough information given • Important things – good fit with Rottnest. Appeals because it infers it is away from traffic, getting away from the rat race and how things should be. No Skyscrapers, not much modernisation, simple, nice easy going pace, no traffic. Harder sell in winter. Rottnest wouldn't need to change to fit this description. Not necessarily unique to Rottnest - national park, Cervantes and could use this idea to promote themselves. Most likely to appeal to families and would widen appeal but the expense would be a limiting factor for many

	<ul style="list-style-type: none"> • Experience Extraordinary – Lots of people go there for these experiences. Has a marketing advantage that it's very accessible. Whilst places like Monkey Mia and other parts of WA could use this idea Rottnest is more accessible. Would best be targeted at active people. One person thought it may limit the appeal if people are not into snorkelling, swimming etc. • Pristine environment – unanimous that it was a perfect fit with Rottnest. Breathtaking natural beauty and untouched environment. Albany, Esperance, Great Barrier Reef, Walpole all could use this type of marketing also. Presents itself as quite unique • Free range – freedom, no limits, don't have to worry. Not much there in the description but says what it needs to say "like you can trust it". Appeals to locals as they understand what it means to be free range more so than tourists who wouldn't know Rottnest's history • Boating getaway – mixed feelings. Generally low appeal but general thought were that if there were more options and infrastructure for those to hire boats and not just for those with their own boats this would increase appeal but at the same time somewhat takes away from pristine aspect • Island of all seasons – mixed feelings. Half thought it was good and half did not, as they thought it was more geared towards summer activities. Marketing the off-peak rates might attract more visitors • WA Island destination – fits but is not favoured. Not enough information given • Best day out – felt to be a great concept. The idea is great when you don't think about the expense. If trying to attract someone for the first time then this would really appeal. 64 bays – sounds like you almost get your own bay which might be over promising the idea of being deserted. Best day out could be used to market Rottnest at Hillarys, Fremantle, the city centre. They would need to give a list of all the services and activities that you can do that day • Activity Island- Well-liked by more than half the group. The reason they liked it because it gives a snapshot of what Rottnest has to offer
--	---

	<ul style="list-style-type: none">• 5 Star Spa – received mixed feelings. Doesn't really work for a day visitor but it would be better to target longer stays, holiday goers, honeymooners, couples. Felt it might not appeal to families due to the practicality, however recognise that they would love to go. Tranquillity and vitality are really selling the concept. Bunker Bay / Eagle Bay could use this description <p>What would work best for Rottnest –</p> <ul style="list-style-type: none">• Activity Island – sums up what Rottnest is now <i>"doesn't need to be transformed"</i> <p>Greatest appeal overall:</p> <ul style="list-style-type: none">• Pristine environment <p>Too much development:</p> <ul style="list-style-type: none">• Tranquilly 5 star - would require the most capital investment but no really strong reaction
--	---

3.3 Visitors group 3

<p><u>REASONS TO VISIT</u></p> <p>VISITORS: What are the strengths / benefits / drawcards of going to Rotto?</p> <ul style="list-style-type: none"> • Uniqueness • 'The vibe' (mood) • Predictable / routine (in a good way) • Specific strengths (snorkelling, no traffic etc) • Others 	<ul style="list-style-type: none"> • Tradition – the family has been going annually since childhood/long history • Family Pilgrimage - 3 generations go on holiday • Festivals – winter, Rottfest • Relaxation – <i>"The minute you step off the jetty...it's instant relaxation – no matter what is going on on the mainland you forget about it because there is nothing you can do about it"</i> <i>"My entire goal for this trip to Rotto this time was to read a book"</i> <i>"One of my funniest memories is looking behind the boat at my wife drinking a glass of wine in the rubber boat and thinking...mmm what do we have to do today...mmm nothing, it's the best"</i> • Wildlife – pelicans, quokkas • Adventure – bike riding, exploration • Reliving childhood memories • Family holidays at the beach – fun in the sun, surf and sand • Peace and quiet – no cars • Scenery – gorgeous, pristine • Activities- swimming, snorkelling, riding, eating, drinking • Safety – no cars • History – canons, lighthouse
<p><u>REASONS TO NOT VISIT</u></p> <p>VISITORS: What are the weaknesses /costs / negatives about going to Rotto?</p> <ul style="list-style-type: none"> • Lack of presence / salience (no ads / never think of it etc) • Negative image / perceptions (egg schoolies) • Lack of things to do / no more or different than on mainland • Hassle • Cost • Don't holiday / pay for accommodation • Facilities are not good • Accommodation not good • Run down 	<ul style="list-style-type: none"> • Availability – need to plan months, if not a year, in advance • Cost – day trips are very prohibitive <i>"Have to be devoted to Rottnest to pay the money"</i> • Overarching theme of poor standard of accommodation and amenities <i>"Don't think it is any more expensive than Dunsborough or Busselton etc but for the money you expect a much better standard, i.e. you expect not to have mouldy furniture and a comfy bed."</i> • Ballot – people had mixed feelings. Those that use the ballot system like the ballot particularly for school holidays and those that haven't used it think it seems like a fair way of doing it. Some didn't know how it worked

<p><u>COMPETITOR OFFERS</u></p> <p>REASON FOR TRIP</p> <p>What was the occasion that prompted you going on that holiday / those day trips?</p>	<p>Triggers for going on the last occasion:</p> <ul style="list-style-type: none"> • Affordable – stay in the budget accommodation (7 nights for \$700 for 6 people) • Building memories - used to go as a child so wanted to pass these on to my children and therefore going more than once builds on those memories • Tradition – family has been going annually since childhood
<p>PROMOTION / OF ADVERTISING OF ROTTNEST</p> <p>Appeal of packages / bundles Where info should be available Advertising they have seen as well as where it should be advertised</p>	<ul style="list-style-type: none"> • Festivals and concerts not well known
<p>FACILITIES / ACTIVITIES</p> <p>Experience and perceptions</p> <p>Amount to do What's good What's not so good Include Ferry in here</p>	<p>Lowlights</p> <ul style="list-style-type: none"> • Quality for the price - worst food ever, have had several meals there and will never eat there again • More variety with restaurants • Governor's Bar – were good/pub closed at 8.15pm during the summer holidays • \$6.50 for a pie at the bakery - too expensive <p>Highlights</p> <ul style="list-style-type: none"> • Pub quiz at the golf club with lots of prizes (\$10 - \$20 for a place) <p>Feelings about facilities:</p> <ul style="list-style-type: none"> • Bike hire – generally good, no changes required. Process is easy, had gophers available. Lots of bikes available. Costs \$80/wk • Shop/general store – store is liked and reasonable prices • Outside Geordie Bay/Thomson Bay – no café or anywhere to get water from • Environmentally friendly toilets – are good • Bus service – great hop-on/hop-off service <p>Things Rotto should offer</p> <ul style="list-style-type: none"> • More water drinking fountains • Wider range of food outlets – this was seen as a good idea by all. Strong sense that food and drink available is expensive and not up to scratch. More variety in food offer and better service would showcase the island in a better light, particularly when showing it off to visitors • Food outlets open later at night • More shaded areas particularly where waiting for the ferry and bike shop

<p>ACCOMMODATION</p> <p>Experience and perceptions</p> <p>Amount to do</p> <p>What's good</p> <p>What's not so good</p>	<p>Places stayed:</p> <ul style="list-style-type: none"> • Caroline Bay • Thomson Bay • Main settlement • Unit in Thomson bay • Kingston Cabins <ul style="list-style-type: none"> • Reasons for booking – it accommodated a lot of people, was close to shops and amenities, cheapest accommodation available, a cancellation was made <p>What did they like about accommodation:</p> <ul style="list-style-type: none"> • Simple/basic/character/historical feel • Part of the adventure <p><i>"As a kid we stayed in the Convict cottages and we climbed in and out of the windows to go to the outside toilet and brave the quokkas...which was all great fun..."</i></p> <p><i>"Generations of children have been potty trained at Rotto"</i></p> <p>What don't they like about accommodation-</p> <ul style="list-style-type: none"> • Cleanliness – unacceptable level of cleanliness • <i>"...behind one of the doors was a t-shirt so you know it hasn't been cleaned"</i> • Television – there were mixed feelings. If you're not going to give a quality service then don't give it at all. Should have the option of whether to choose to use • Not enough accommodation during peak times - attract more people if it was really good, clean and basic • Flexibility – Would rather bring own linen and pay less <p>What improvements could be made</p> <ul style="list-style-type: none"> • Courtyard – Full set of furniture • Lounge room – Not enough seating. Only a 2-seater lounge and not enough seating, for any visitors • <i>"lack of mould would be nice"</i> • Dining – chairs are uncomfortable • Kitchen – fairly well equipped. Every year you need to remember to take pegs, non-stick pan etc. Some prefer to take things themselves. However they recognise that if you weren't aware you wouldn't think it was acceptable that some of the utensils are not provided • Bedroom – more hooks in places for towels. • Mattresses are better. Most people take their own sheets • <i>"Don't feel like you can't throw them on the floor and rub your feet on them whereas if they were a doona I wouldn't do that"</i>
--	--

	<p>What would you improve if money was no object:</p> <ul style="list-style-type: none"> • Comfy, lounge-around sofa • Robinson Crusoe type feel shack where you could canoe out • Private outdoor space – so you can read the paper in the morning in your pyjamas • Hammocks – in the private space • Better quality service and food • More barbeques • Expectation that if you are paying that money that it should be clean • Improve the look off the entrance – tidying up • More shady areas – particularly waiting for the ferry, sometimes waiting long times for the ferry or the bike shop to open
<p>REACTION TO NEW POSITIONINGS</p>	<p>There was a real mix of which idea was their favourite or which appealed the most</p> <ul style="list-style-type: none"> • Best day Out – was thought to be a good fit. They think it does appeal and is considered a great day. Not necessarily a unique offer i.e. Adventure World, Fremantle, Hillarys, Perth City, Garden Island could also be described. Probably broaden appeal more to people but locals see it as more of a place that you would go for longer than a day. The appeal would be greatest amongst overseas or interstate people "...because it is what you do when you are in WA" For locals, whilst they loved the idea of going to Rottnest for the day, the cost makes it cost prohibitive and generally they would only go if they had a visitor over from interstate or overseas • WA Island destination – is a good fit but not favoured. Some suggest that they don't necessarily like the idea that it is being promoted as special just because it's in WA. Some felt they should focus on the fact that Rottnest is special in its own right not just because it happens to be located in WA • The cost comparison between Bali and Rotto was also mentioned by more than half of participants • Resort Island – really appeals and fits the ideal because it is disconnected from the mainland. Think it would widen appeal and make locals feel guilty about going to Bali and encourage people to holiday in WA • Island of all seasons – there were mixed feelings. Half thought it was good and half did not. Those that liked the idea of going to Rottnest in winter liked cosy cottages with fires, spectacular storms, music concerts, festivals, warmer at night, less crowded. They thought this would be best targeted towards adults,

older people, those that like wine drinking and reading. Those with kids thought it was not really geared for families as there is not much to do indoors with children:

" You can only take puzzles with a 6 year old for so long before they get bored, all the activities on the island are geared towards good weather such as swimming, cycling, camping. Rotto is better for bike riding, swimming, building sandcastles, etc. Definitely a summer destination for us!"

- Leave it all behind – had mixed feelings. Some thought it would appeal but some thought it was *"preaching to the converted"*. Even though it may appeal and felt it might remind people to have some downtime it was felt that Bali delivered better on the downtime promise. In Bali you get everything done for you, cleaning done, bed made, catering, staff are fantastic, massages etc. It's **competing** amongst the week-long holiday but not the weekend away

" You wouldn't go to Bali for the weekend"

- Activity Island – is an excellent fit and they liked the idea that there are lots of options and ideas

"Would like to see more options available 4 out of 6 are just modes of transport"

"Makes you feel fit"

1 parent hates the idea and is annoyed to have to pay for additional activities

"They have put jumpy things in the water and they are a pain in the butt as a parent cos you have pay for them and why do you want to pay to jump on some blinking jumpy thing when there is sun, sand, water and the ability to be creative without these additional put on activities allows kids to entertain themselves like they are meant to do"

To add extra paid activities will decrease the appeal for families as it makes it harder for parents when they get there

- Freedom destination – was liked by all
"It's one of the only pubs that you go into and there are just as many kids as adults. It is great to see all the kids running around on the grass and the mums and dads kicking back watching their kids play while they have a beer. I think it's awesome and one day that will be me watching my kids running around..."

	<ul style="list-style-type: none"> • Pristine environment – was liked by all Beautiful and perfect fit <i>"...lots of people probably don't go to the far side to see how pristine it really is... not many people get past Thomson Bay. Promoting the beaches would increase patronage."</i> • Experience Extraordinary – was generally not well liked <i>"Who says it's world famous? Don't like the word famous...bit arrogant, which Rotto is not."</i> Felt Rotto was very similar to the southwest and therefore not that extraordinary. Known for its shipwrecks and not really promoted • 5 Star Spa – received mixed feelings. For those that thought it did not appeal, the rationale was because they think that it should remain primitive and casual <i>"I want to walk around in my bathers and my t-shirt, I don't want it to be 5-star"</i> Those that liked the idea loved the idea of being able to be pampered in a beautiful setting <i>"Yoga and massages overlooking the beach would be truly amazing"</i> It was felt that they would really broaden the appeal, particularly amongst the tourists and those staying for longer stays • Boating over – rated low in appeal <p>In summary, the most appealing were thought to be:</p> <ul style="list-style-type: none"> • Family destination (for two people) • Activity Island (for two people) • Important things (for two people) • Boating getaway (for one person) <p>Which would lead to the most growth:</p> <ul style="list-style-type: none"> • Tranquillity Island – 5 star <p>Which would represent too much growth:</p> <ul style="list-style-type: none"> • 5 star but lots of people come expecting 5 star resorts
<p>REACTION TO NEW PRODUCT IDEAS</p> <p>Other new ideas nominated</p>	<ul style="list-style-type: none"> • Snorkelling trail – appealing and well liked as an idea • Heritage tour – appealing. They have these already • Calender of Events – everyone agreed this would be a great idea. It would give you an idea of what was coming up on the island so you can plan your time better, it would give you a reason to go over to the island

<p>by participants</p>	<ul style="list-style-type: none"> • Chairlift – Fairly neutral. Agreed it would change the feel but neither in a good nor bad way • Beach trampolines - good idea, something different but has to be at a reasonable cost • Recreational marina - no comment made • Chinese food / Indian – mixed feeling some thought this would be ok, some thought it wasn't necessary • Resort island – can see the appeal but it would kill the feel of Rottnest. However a well-controlled and contained resort was considered to be a good idea, as it would bring in a lot of money and not kill the feel of Rottnest
<p>REACTION TO NEW ACCOMMODATION IDEAS</p> <p>Other new ideas nominated by participants</p>	<ul style="list-style-type: none"> • None of these new accommodation ideas are appealing enough to encourage an additional fee. Hooks for hanging things, screens and cleaning products were all expected within the cost of the accommodation that they were currently paying. Cleaning service was also expected for more than 5- 7 days • Foxtel/ipod docking - for some, docking stations were ok but not all were interested in this and not seen as necessary by most • Other rooms were seen as adequate and they didn't want nicer things in the room particularly those with children as it meant they would be worrying about kids spilling things on sofas etc <p>Things that it is imperative they don't change:</p> <ul style="list-style-type: none"> • Needs to stay unique, minimalist • Ok to build in Thomson Bay because they have already started developing – keep the development contained and don't develop where it hasn't been developed

3.4 Visitors group 4 (overnight, want changes made)

<p><u>REASONS TO VISIT</u></p> <p>VISITORS: What are the strengths / benefits / drawcards of going to Rotto?</p> <ul style="list-style-type: none"> • Uniqueness • 'The vibe' (mood) • Predictable / routine (in a good way) • Specific strengths (snorkelling, no traffic etc) • Others 	<ul style="list-style-type: none"> • Tradition – family has been going annually since childhood • Friends and family over from interstate/overseas <i>"Rotto is always on the agenda when friends or family come to visit, it is a fantastic place to either send them off if you are working because you know they will have a great day, where else can you get them to do ...everything takes 3-4 hours to drive to"</i> • Unique – <i>"Never been anywhere quite like Rotto"</i> <i>"There's only one Rotto"</i> • Vibe – special vibe that is hard to put into words (casual, relaxed) <i>"you could say it is all about the vibe and Australians would get what you were talking about straight away"</i> • History – the street in Thomson's is the oldest inhabited street in Australia, convict and Aboriginal culture, buildings • Wildlife - turkbrush turkeys, parrots, quokkas • Landscape – surprisingly sparse, untouched, natural beauty, outback, can see Perth buzzing from across the sea • Safety – no cars • Simplicity – getting back to the simple things, no technology, no television, no computer games • Activities – snorkelling, swimming, diving (at some world renowned diving spots)
<p><u>REASONS TO NOT VISIT</u></p> <p>VISITORS: What are the weaknesses /costs / negatives about going to Rotto?</p> <ul style="list-style-type: none"> • Lack of presence / salience (no ads / never think of it etc) • Negative image / perceptions (e.g. schoolies) • Lack of things to do / no more or different than on mainland • Hassle • Cost • Don't holiday / pay for accommodation • Facilities are not good • Accommodation not good • Run down 	<ul style="list-style-type: none"> • Overarching theme of poor standard of accommodation and amenities. This group recognise that there is a real need for the accommodation quality to improve and despite all the negatives they claim they would still come to Rotto regardless of the poor accommodation <i>"We love the place so are prepared to overlook"</i> • Accommodation – standard of accommodation is substandard, at best 'basic' • Beds - are uncomfortable, linen is not adequate where provided however in most cases you generally have to take your own linen, pillows etc. • Furniture - not enough to accommodate the number of people (i.e. only have a 2-seater sofa in a cabin for 6 people and therefore nowhere for them to sit) • Barbeque facilities - are <i>"dodgy, old dirty, cheap and nasty, it reeks of cheapness"</i> • Bathrooms – generally dreadful and not big enough for the number of people

	<p><i>"You can't go to the toilet at the same time as someone showering which is a problem if 8 people in the cabin"</i></p> <ul style="list-style-type: none"> • Cleanliness – there is no reliable cleaning service <i>"we have come to expect that you will get there and have to clean it yourself"</i> • Ventilation – not good • Accommodation cost – the amount wasn't deemed unreasonable per se but the quality of the accommodation was poor and didn't match the standard of accommodation • Lack of things to do (winter trip) – those with families wouldn't go in winter as it was felt there weren't enough things to do indoors with children. The accommodation was not deemed to be warm and cosy for a winter getaway • Perceived poor value – cost of the ferry was expensive <i>"waste of a day because you go and have to come back by 4pm so it's really only half a day so not really worth all the hassle. It would be so much better if you could stay longer so you could go and get dinner and then come back by 8 or 9 pm"</i>
<p><u>COMPETITOR OFFERS</u></p> <p>Thinking of the most recent holiday within Australia – and well include Bali as well. Can you tell me why you chose to go there? What kind of holiday were you looking for?</p> <p>REASON FOR TRIP What was the occasion that prompted you going on that holiday / those day trips?</p>	<ul style="list-style-type: none"> • Tradition – family has been going annually since childhood • Friends and family over from interstate/overseas • School camp • Boating over • Went camping with friends
<p>INFORMATION SOURCES For holiday / trips in general</p> <p>Appeal of Rottneest brochures</p> <p>Comments on Rottneest website</p>	<ul style="list-style-type: none"> • Website - search functionality was deemed to be frustrating. At present you can't do an overall search for a place catering for 6 people if you didn't care where it was located and wanted all available options to show. Currently have to search each individual location separately. Also can't always find the information you are looking for and end up having to call and ask • Ballot system – is deemed frustrating and confusing for most and only those that have been using it for years actually fully understand how it works. Those successfully using the ballot system thinks it's a good idea but recognises it's frustrating for others where they haven't been able to get accommodation and think that maybe it would be fairer if you got accommodation the year before you go further down the preference list and it goes to someone else that didn't get the year before

<p>FACILITIES / ACTIVITIES</p> <p>Experience and perceptions</p> <p>Amount to do</p> <p>What's good</p> <p>What's not so good</p> <p>Include Ferry in here</p>	<ul style="list-style-type: none"> • Visitor centre – was described as a good centre, however it was very crowded with long queues, and the entrance was confusing • Bike hire – expensive, not always given good bikes and have to return for better ones, no baby carriers available so difficult if you have a baby. Dishonest people hiring out the bikes. Respondent described an example of where the guy was saying that the kids hiring the bikes were doing skiddies on the bikes and therefore the tyres weren't good and therefore wanted them to pay more money • Outside Geordie Bay/Thomson Bay – no café or anywhere to get water from which is a logistical nightmare when on the other side of the island. It was felt by all the participants that having a café on this side that sold water, ice-cream etc. would be a great idea. Also having bus shelters would be beneficial as waiting 30 mins in full sun for the bus is not a pleasant experience • Ferry ride can sometimes be a bit rough and not good if you get sea sick
<p>ACCOMMODATION</p> <p>Experience and perceptions</p> <p>Amount to do</p> <p>What's good</p> <p>What's not so good</p>	<ul style="list-style-type: none"> • Accommodation – standard of accommodation is substandard, at best 'basic' • Beds - are uncomfortable, linen is not adequate where provided, however in most cases you generally have to take your own linen, pillows etc. • Furniture- not enough to accommodate the number of people (i.e. only have a 2-seater sofa in a cabin for 6 people and therefore nowhere for them to sit) • Barbeque facilities - are "dodgy, old dirty, cheap and nasty, it reeks of cheapness" • Bathrooms – generally dreadful and not big enough for the number of people "You can't go to the toilet at the same time as someone showering which is a problem if 8 people in the cabin." • Cleanliness – there is no reliable cleaning service "we have come to expect that you will get there and have to clean it yourself" • Ventilation – not good • Accommodation cost – the amount wasn't deemed unreasonable per se but the quality of the accommodation was poor and didn't match the standard of accommodation
<p>REACTION TO NEW POSITIONINGS</p>	<ul style="list-style-type: none"> • 5 Star Spa – there were mixed feelings but it was seen to be an excellent idea by most. Two people thought that it wasn't a good idea but envisioned a high-rise hotel. When it was talked about more as an eco-friendly Daintree type resort it was more readily accepted as an idea. It was discussed that this idea would probably be best suited to be in a more secluded location away from the main

settlement. It was felt that if done properly could really benefit Rottneest financially and bring in a lot of tourist dollars as well giving more locals to come to the island as many people travel overseas for this kind of experience. Yoga and massages overlooking the beach was some peoples' idea of heaven!

- Best Day Out – was thought to have potential particularly if the focus was on snorkelling and diving. **"Rotto has some world renowned diving spots and are better than the Great Barrier Reef, they are just not advertised and promoted as much. Divers travel all over the world to find the best dive spots "**

If a later boat was available so you could come back later at night at around 8 or 9 pm people would go for lunch and dinner and could go more often to catch up with friends over dinner. It means you get more time on the island so you have a chance to cycle around, go for a long lunch, etc. When the boat comes home at **4pm it's not long enough so it's not a full day it's only half a day which is seen as a waste of money**

- Island of all seasons – would be a hard sell for winter as there is nothing to do there in winter. All the activities on the island are geared towards good weather such as swimming, cycling, camping. The accommodation **available isn't cosy so it's not pleasant. Positives are that it's cheaper (you can have extended stays in winter), and it's not as busy**
- WA Island destination – time was seen as more useful than distance (30 mins means more than 19km)
- Leave it all behind – description appeals
- Simpler way of life – appeals to some, perceived as basic accommodation, carefree, no technology, camping, relaxed / not posh
- Pristine environment – Natural beauty sustainability is borderline
- Boating over – was seen as too complicated to organise
- Activity Island – definitely a market for this. Felt as though getting rid of the triathlon years ago was a big mistake and is now really popular. They do have channel swim/marathon but they are not promoted
- Freedom Family – mixed feelings about this one. Some perceived it to mean good and simple. Others thought about all the planning and organising and the need to have to plan 6 months in advance it get a group of people to the island

	<ul style="list-style-type: none"> • Experience Extraordinary – didn't know it had a diving spot so needs more promotion • Tranquillity – health and activity wellness and yoga was well received if done correctly. Great if spa and yoga overlooking the sea
<p>REACTION TO NEW PRODUCT IDEAS</p> <p>Other new ideas nominated by participants</p>	<ul style="list-style-type: none"> • Wider range of food outlets – this was seen as a good idea by all. Strong sense that food and drink available is expensive and not up to scratch. A variety of food outlets need to be made available from gourmet 5-star quality food to more affordable pub/café style food • Fun Park - was seen as something that could really work on the island particularly amongst the younger people and those with children • Calender of Events – everyone agreed this would be a great idea. It would give you an idea of what was coming up on the island so you can plan your time better, it would give you a reason to go • Canoeing on lake – good idea (apparently haven't been able to do this in the past but a couple of respondents showed strong interest in doing so) • Café at lighthouse – a good idea • Beach trampolines - a good idea, something different but would have to be at a reasonable cost • Cycling tour – this was seen as a good idea • Aboriginal / heritage tours / West end tours – they are already doing these on the island but it is felt that they are not promoted enough and do not run frequently enough so would benefit from being promoted more (i.e. the West End tour only runs once a week and bookings are essential) • Lawn bowling – a new product idea. Felt this would draw the crowds and would be low impact on the environment
<p>REACTION TO NEW ACCOMMODATION IDEAS</p> <p>Other new ideas nominated by participants</p>	<ul style="list-style-type: none"> • Good bedding, comfy sofa, rugs and soft furnishings, barbeque and tools, crockery and cutlery, new modern televisions, hooks for hanging things, kitchen, and screens were all expected within the cost of the accommodation that they were currently paying • The cleaning service (even every 3 days) was the only service where all participants were prepared to pay up to \$10 more • For some Foxtel and ipod docking stations were expected but not all were interested in this

	<p>Things to change about the accommodation</p> <ul style="list-style-type: none">• Bedrooms – decent Queen size bed, decent linen and pillows, lamp on bedside table, drawers, hooks for hanging items (such as towels)• Living area - comfortable sofas and more seating• Outdoor area - barbeques, outdoor furniture, outdoor table, flyscreens• Technology – modern televisions and wireless internet connection (i.e. so the kids can connect and play games during winter). This option was deemed fine to have available by all but not necessarily something that appealed to all participants
--	--

3.5 Visitors group 5 (overnight, don't want many changes made)

<p><u>REASONS TO VISIT</u></p> <p>VISITORS: What are the strengths / benefits / drawcards of going to Rotto?</p> <ul style="list-style-type: none"> • Uniqueness • 'The vibe' (mood) • Predictable / routine (in a good way) • Specific strengths (snorkelling, no traffic etc) • Others 	<ul style="list-style-type: none"> • Relaxing – Time out, chill out, getaway, no work • Serenity - peaceful, no cars, quiet • Casual atmosphere - laidback • Heritage - Significance of the island • Unique - flora and fauna, quokkas • Fishing • Bike riding around the island • Distance – close to the mainland • Marine life activities • Family relationship-builder <i>"really important relationship-builder for a our familyit gives us time away together as a family – we take our boat over and it's a home away from home "</i> • Good food from the bakery • Pristine beaches <p>Highlights</p> <ul style="list-style-type: none"> • <i>"Free concert – we didn't know it was on and felt like a real community vibe to it"</i> • <i>"Unaware that the coral reef and the beauty of the reef is just stunning"</i> • <i>"Relaxing"</i>
<p><u>REASONS TO NOT VISIT</u></p> <p>VISITORS: What are the weaknesses /costs / negatives about going to Rotto?</p> <ul style="list-style-type: none"> • Lack of presence / salience (no ads / never think of it etc) • Negative image / perceptions (e.g. schoolies) • Lack of things to do / no more or different than on mainland • Hassle • Cost • Don't holiday / pay for accommodation • Facilities are not good • Accommodation not good • Run down 	<p>Low lights</p> <ul style="list-style-type: none"> • Quality of the food • Price vs quality for food Cost – food, coffee (Dome is an example- a large coffee costs \$6.50– more than in the city) <i>"seems like it is double the price"</i> • Service • Surcharge – should be to pay for more bins • More cleanliness is required on the island • Another supermarket on the island would be convenient on the other side of eth island • Accessibility – would benefit if opening hours were longer

<p><u>COMPETITOR OFFERS</u></p> <p>Where else are you going for holidays / day trips (distinguish which in notes) What do they offer that Rottnest doesn't? What advantages do other places have over Rotto? What advantages does Rotto have over other places?</p> <p>Thinking of the most recent holiday within Australia – and well include Bali as well. Can you tell me why you chose to go there? What kind of holiday were you looking for?</p> <p>REASON FOR TRIP</p> <p>What was the occasion that prompted you going on that holiday / those day trips?</p>	<ul style="list-style-type: none"> Ballot system – only a couple have used it / heard about it before <i>"it's rigged, same people seem to get it every year"</i> <i>"Sounds fairer even though I have never used it"</i> <p>Triggers for going on the last occasion</p> <ul style="list-style-type: none"> Went over for friend's party Overseas visitors Don't have to drive Distance – lot closer Tradition <i>"I go to Rotto every 1st weekend in November and have done for the last 20 years. I use to go when children were small and now I go with the boys' football club. We usually go over on a mate's boat and we have a few tinnies, go fishing, swimming and relax we usually always see a whale and its calf. Then when we get on the island we go see the Osprey nests and go play some beach cricket and enjoy the other activities on the island."</i> <p>Why other destinations might be more attractive</p> <ul style="list-style-type: none"> Price- Accommodation and getting there is expensive, expensive for what you get. Would expect better quality <i>"big room with 4 bunk beds for \$300... you expect more for that kind of money ... you could get quite nice accommodation in Margaret or Dunsborough for that kind of money"</i> Bali is big competition as it is cheaper Rottnest accommodation is dated
<p>INFORMATION SOURCES</p> <p>For holiday / trips in general</p> <p>Appeal of Rottnest brochures</p> <p>Comments on Rottnest website</p>	<ul style="list-style-type: none"> Generally thought Google was great for looking up any info needed about Rotto including ferry times Website – two people had used the website. Generally thought it was ok to use and that it was black and white for what was available. However, one rang up and was told a different accommodation option was available to what was showing on the website. They felt as though this could be improved
<p>PROMOTION ADVERTISING OF ROTTNEST</p> <p>Appeal of packages / bundles Where info should be available Advertising they have seen as well as where it should be</p>	<ul style="list-style-type: none"> The bald biker guy ad with the little girl ad was mentioned. It was generally considered an effective ad. Perception of message that everyone is welcome at Rotto <i>"Don't judge a book by its cover"</i> <i>"You could be the richest person in Perth and you wouldn't know because everyone is dressed casually riding around the island on crappy bikes in crappy helmets."</i>

<p>advertised</p>	<ul style="list-style-type: none"> It was also mentioned that the fact there were no cars helped achieve the "everyone is equal" persona <i>"There is no status to it ever ... cars are seen as a status thing so the fact there are no cars helps get rid of the status symbol"</i> No one is in a hurry. Don't have to be somewhere at a certain time
<p>ACCOMMODATION</p> <p>Experience and perceptions</p> <p>Amount to do</p> <p>What's good</p> <p>What's not so good</p>	<p>Places stayed</p> <ul style="list-style-type: none"> Caroline Bay The Lodge Reasons for booking – 2 bedroom villa, availability, views, location <p>What is good</p> <ul style="list-style-type: none"> Basic – but part of the charm is that it encourages you to get out and about and not stay in the accommodation TV should be optional – Mixed feelings, some thought it would be better not to have a TV standard in the room as they felt if it was there they would watch it. However others thought it was better to be able to have the option Standard has improved slightly - recognised that some renovations and improvements have been made but was felt it still wasn't up to scratch. Mentions were made that better fridges had been included and better BBQ and better bedding but they are still not flash <p>What's not so good</p> <ul style="list-style-type: none"> Price – for the price you were expecting a lot more Bed quality – really uncomfortable mattresses, bad quality of doonas Old / outdated / uncomfortable furniture Cleanliness – unacceptable level of cleanliness Very basic accommodation <p>What improvements could be made</p> <ul style="list-style-type: none"> Cleanliness – really not good Bedding – better than what it was but still not great Bathroom – better tiles <i>"Rotto is more expensive than down south"</i> <p>5 things to change about the accommodation</p> <ul style="list-style-type: none"> Better bedrooms – mattresses, bed linen Updated bathrooms – get rid of shower curtains Better outdoor furniture Comfortable lounges to sit on Drawer space Remove sand around the rooms as it encourages a lot of snakes

	<ul style="list-style-type: none"> • Cull seagulls • Colour • Historic photos in the rooms • No television (mixed feelings) • No Wifi (mixed views) • Foxtel (mixed views) • Better TV's (mixed views) • Bike hire – the bikes need baskets as you need to carry around water • Bedrooms and bathrooms are by far the most important things to update
<p>REACTION TO NEW POSITIONINGS</p>	<p>Important things</p> <ul style="list-style-type: none"> • Good fit with Rotto. Combine with Activity Island and it would be perfect. Appeals to people who have a busy life / occupation and need time to get away and relax. But not necessarily unique to Rotto...Bungle Bungles could also use this positioning • Experience Extraordinary Felt it fits with Rotto • Doesn't necessarily appeal to everyone • Two thought it may limit appeal as not into surfing, snorkelling, swimming and water activities • Makes it mostly appeal as a summer destination • Not perceived to be unique to Rotto, thought Esperance, Busselton and other parts of WA could use this idea, though Rotto is more accessible <p>Pristine environment</p> <ul style="list-style-type: none"> • Half thought that it was not specific enough and felt that visitors would not be attracted to this description but as a local it was felt succinct <p>Free range</p> <ul style="list-style-type: none"> • Boring. Needs more details and doesn't explain it enough <p>Boating getaway</p> <ul style="list-style-type: none"> • Mixed feelings. Moderate appeal. One had their own boat and thought some of this was almost false as there are many hidden charges that aren't known and just as expensive as catching the ferry over. Felt that it would allow you to go to lots of places you wouldn't normally be able to go that would increase appeal of boating but at the same time add to the water pollution due to closed waters, increase erosion and the reduction in sea grass to build these facilities would kill marine life

Island of all seasons

- Mixed feelings. Thought it would be best combined with "Activity Island". Half thought it was good and half not good. More geared towards summer activities and in winter some places aren't open

WA Island destination

- Fits but not favoured. Not enough info. For foreigners or Eastern State visitors it **doesn't** explain enough. Generally felt that you would need to do more research before going

Best day out

- Would need to add activity island
- Any new activities that should be added – outdoor cinema
- Not too far away from being the truth, pretty accurate

Activity Island

- Well-liked by the whole group
"This is Rotto in a nutshell"
- They loved this idea because it appeals to families as it is all in the one place. Felt it can be used all year around
- Felt that no one else uses this positioning. And felt it would appeal most to families and tourists alike. Makes it sounds interesting on what it has to offer

5 Star Spa

- Mixed feelings. Recognise that it might really appeal to a certain group of people and particularly overseas visitors and people that would want to stay longer and want a more **luxurious experience without having to "slum it"**. Some thought if it was done properly it could work, but it would have to fit in with the environment and not stick out like a sore **thumb"**. If they did introduce this, it was felt that they should keep the existing accommodation that is available as well. However generally it does not appeal to regulars who love the island already. They **don't see Rotto as 5 star spa luxury**
"Rotto to me is the beach, sun, sand, no shoes, relaxed, simple"
- Felt Margaret River and Dunsborough use this positioning

	<p>What would work best for Rotto</p> <ul style="list-style-type: none"> • Unanimous - Activity Island - sums up what Rotto is now <i>"doesn't need to be transformed"</i> • Best day out – appeal most to day trippers • Important things • Experience the extraordinary • Boating Facilities <p>Greatest appeal overall</p> <ul style="list-style-type: none"> • Activity Island <i>"It is all there and it describes Rotto and gives information to those that have never been there before"</i> <p>Most growth and ability to appeal to the most people</p> <ul style="list-style-type: none"> • Activity Island • Tranquilly 5 star <p>Perceived to be 'too much development'</p> <ul style="list-style-type: none"> • Tranquilly 5 star - may put off long term visitors but may be able to co-exist if done in the right way such as Eco lodges <i>"A spa overlooking the tranquil bay would be amazing but not a massive multi-story Observation City-like hotel complex that sticks out like a sore thumb"</i>
<p>REACTION TO NEW PRODUCT IDEAS</p> <p>Other new ideas nominated by participants</p>	<ul style="list-style-type: none"> • Beach trampolines - a great idea, something different <i>"Worked really years ago and use to be free and the parents could go off and have a coffee and know their kids were safe"</i> <p>Recreational marina - Boat hire ok but only appeal to some</p> <ul style="list-style-type: none"> • Cycling tour - appealing • Snorkel trail – appealing and well-liked as an idea • Heritage tour – appealing. They have these already • Fun park – great for bored kids • Skate park – covered in graffiti • Chairlift – thought it would change the feel too much and would spoil what they like about it • Restaurants – mixed feeling some thought this was ok but not many

**REACTION TO NEW
ACCOMMODATION IDEAS**

Other new ideas nominated
by participants

- Hooks for hanging things, screens and cleaning products would all make the cost more palatable within the cost of the accommodation that they were currently paying
- Cleaning service – would pay more for this service for someone to clean out
- Foxtel / iPod docking - not seen as necessary by most
- The general feel is accommodation needs to stay basic as it is part of the Rotto charm, but recognised that comfortable lounges, better bathrooms, more kitchen utensils, better outdoor furniture, more modern bathrooms would make the price more palatable

3.6 Non-visitors group 6 (older)

<p><u>REASONS TO VISIT</u></p> <p>NON VISITORS: What appeals / is of interest about going to Rottnest?</p> <ul style="list-style-type: none"> • Uniqueness • 'The vibe' (mood) • Predictable / routine (in a good way) • Specific strengths (snorkelling, no traffic etc) • Others 	<ul style="list-style-type: none"> • Proximity – It is only 19km on the ferry to Rottnest, in our own backyard, 30 mins from Fremantle • Heritage – Aboriginal history, convict colony, museum , canons • Uniqueness - Flora and fauna unique to Rottnest, quokkas • Pristine – clean beaches, fairly quiet beaches (i.e. not hassled by people like you would be in Bali) • Activities - swimming, snorkelling, fishing, rock pools, boating • Safety - no cars, medical centre • Family friendly – laidback
<p><u>REASONS TO NOT VISIT</u></p> <p>NON-VISITORS: What doesn't appeal / why don't you go/ (if lapsed) why you no longer go</p> <ul style="list-style-type: none"> • Lack of presence / salience (no ads / never think of it etc) • Negative image / perceptions (egg schoolies) • Lack of things to do / no more or different than on mainland • Hassle • Cost • Don't holiday / pay for accommodation • Facilities are not good • Accommodation not good • Run down 	<ul style="list-style-type: none"> • Accommodation – perceived standard and range of accommodation is low. Cost is high and not readily available in peak season • Process of booking accommodation - is perceived to be difficult • Lack of flexibility - Not much flexibility if you get bored and want to go home, have to wait until the 3pm ferry to come back <i>"Limited time on the island better if you can stay, have dinner then come back on the ferry later"</i> • Financial cost – Perceived and real • Expensive for boat fare, accommodation, tours <i>"...\$1200 for a family of 6 with bikes without food is too expensive."</i> Cost is prohibitive, it is cheaper to go to Bali • Opportunity cost – Would rather go somewhere more unique and experience something they haven't experienced before <i>"There is nothing at Rottnest that you can't do somewhere else in Perth with less hassle / less expense. There is no wow factor to bring you back again and again!"</i> • Hard to budget for - No credit card facilities available on the island – hard to work out exactly how much money you will need for your trip therefore better if packages were available with everything included (would make planning much easier) • Risk – not going to risk the expense if accommodation is bad and the trip doesn't fulfil them • Security – no secure parking available for your car at the ferry terminals • Reputation – There is a perception that Rottnest is full of young hooligans – it gets a bad reputation from schoolies week • Food and beverages – both choice of outlets and standard of offer

	<ul style="list-style-type: none"> • Seasonality – perceived limited attraction in winter • Lack of appeal to overnight visitors (seen to be more geared towards the day trip market), however, also not seen as being set up optimally for day trippers either • Overarching theme of lack of choice, competition, facilities to be expected from a holiday destination • Online information - Lack of online information available
<p>COMPETITOR OFFERS</p> <p>Thinking of the most recent holiday within Australia – and well include Bali as well. Can you tell me why you chose to go there? What kind of holiday were you looking for?</p> <p>REASON FOR TRIP</p> <p>What was the occasion that prompted you going on that holiday / those day trips?</p>	<p><i>"Got to holiday in Western Australia. It is far too pretty not to"</i></p> <ul style="list-style-type: none"> • Sightseeing – seeing and experiencing new things • Value for money – hotels in Singapore are much better quality for a lot less. There are lots of different things to do on the islands in Singapore. Airfares are also really cheap • A new experience – Lankawi has a snakes and scorpions, monkeys etc. I want to see something new that I haven't seen before • Culture – want to learn / experience something different about a place • Fun / family friendly activities
<p>INFORMATION SOURCES</p> <p>For holiday / trips in general</p> <p>Appeal of Rottneest brochures</p> <p>Comments on Rottneest website</p>	<ul style="list-style-type: none"> • Availability of online information important – gives you the ability to plan beforehand. There is a want to be able to look up online opening hours, costs, suggested stopping points for food etc, so that the trip can be planned beforehand to maximise the time at destination (e.g. Whiteman Park has good information available online so you know exactly what's on when and includes costs and opening hours, map etc) • General feeling was that of surprise – there is a lot more there than they first thought, brochure makes accommodation look clean and neat but word of mouth would really strengthen this risk factor as many were not prepared to risk the expense if accommodation was not good • All costs are individual with ad-ons – making it difficult to do the maths • Some were doing the mental maths in their heads as the day pass package was \$400 then bikes are additional, tours, food, and then trying to cross reference these with the times that they were available, was felt to be complicated and confusing for some. All agreed that all inclusive packages that catered to different demographics would best suit • Some also thought it would be good if these packages could be a little flexible whereby you could chop and change some of the activities if need be

<p>PROMOTION / OF ADVERTISING OF ROTTNEST</p> <p>Appeal of packages / bundles Where info should be available Advertising they have seen as well as where it should be advertised</p>	<ul style="list-style-type: none"> • Lack of promotion locally - don't hear about a lot about Rottneest – what it has to offer in terms of activities and standard of accommodation • A general feel that more advertising and promotion can be done to change current perceptions of the standard of accommodation and activities now available on the island • No one had really heard of the refurbishment that has taken place • Tourist dominated promotion - promotion seems to be predominately at tourist information locations, as a local you wouldn't generally access • Promotions currently seen in the paper are a week on the island for \$500 which was appealing however miffed when it states in small print that you must stay for 8 weeks – the emotional reaction was one of "who has enough time to stay for 8 weeks and what is there to do on the island for 8 weeks!" • Thought the idea of having a regular feature in the paper stating "What's on in Rottneest" might make them to consider the island • No credit facilities on the island – hard to guess how much they might need. Strong consensus that it would be much better /easier if all inclusive packages including food were available. This also meant that they needn't worry about additional costs on the island and felt it would also benefit restaurants so they know who was coming and could plan accordingly. Different packages were also suggested to appeal to families, oldies, honeymooners etc • Distribution - it was suggested packages be bought from your local supermarket or petrol station for example, to make them more readily available • Marketing / promotion – remind potential visitors of the number of things to do, that it's value for money, raise its profile • Online information availability – info available on Google search and 'What's on in Perth'
<p>REACTION TO NEW POSITIONINGS</p>	<ul style="list-style-type: none"> • The tranquility concept (i.e. upmarket low rise 5-star spa hotel including yoga, spa, health and wellness retreat idea) was well received as long as it did not take away natural land
<p>REACTION TO NEW PRODUCT IDEAS</p> <p>Other new ideas nominated by participants</p>	<ul style="list-style-type: none"> • Ideas favoured – café at the lighthouse, underwater snorkelling tour, wave pool, paddle boats, wildlife park similar to Caversham Wildlife park where you can interact with the animals • A Fun Park / skate park was felt to be too commercialised by one person in the group • iphone application – map of the island with pins showing things to do, places to go, opening times, costs

	<ul style="list-style-type: none"> • Get a big feature to draw crowds/tourists • Host events (year-round), possibly golf days in winter, concerts, festivals, sporting events • Getting around Rottneest – need more accessibility, more things to do <ul style="list-style-type: none"> -More shops, restaurants, cafes, activities -Seasonal set-up (things to do all year round)
<p>REACTION TO NEW ACCOMMODATION IDEAS</p> <p>Other new ideas nominated by participants</p>	<ul style="list-style-type: none"> • More / better accommodation – greater diversity in options, newer options • Cost – needs to be more competitive

3.7 Non-visitors group 7 (younger)

<p><u>REASONS TO VISIT</u></p> <p>NON VISITORS: What appeals / is of interest about going to Rotto?</p> <ul style="list-style-type: none"> • Uniqueness • 'The vibe' (mood) • Predictable / routine (in a good way) • Specific strengths (snorkelling, no traffic etc) • Others 	<p>Rotto day trips</p> <ul style="list-style-type: none"> • Friends / Leavers • Camping • Went as a child • Unique – quokkas • Scenic - Beautiful beaches and landscapes • Mode of transport "Plane ride / boat ride...it's part of the experience of going" • Simplicity - no cars • Clean – no fumes, no cars, use of bikes "Untouched and so rare to find something that hasn't been developed and touched by man. Love to go back...." "Main thing I remember is the little building looks like everything is in miniature / tudor style which is a positive memory cos I can't see that everyday"
<p><u>REASONS TO NOT VISIT</u></p> <p>NON-VISITORS: What doesn't appeal / why don't you go/ (if lapsed) why you no longer go</p> <ul style="list-style-type: none"> • Lack of presence / salience (no ads / never think of it etc) • Negative image / perceptions (e.g. schoolies) • Lack of things to do / no more or different than on mainland • Hassle • Cost • Don't holiday / pay for accommodation • Facilities are not good • Accommodation not good • Run down 	<ul style="list-style-type: none"> • Hassle factor "I have a small child – not comfortable taking her on a boat and a lot of hassle" • Negative perceptions - media coverage – schoolies, bad things done to quokkas, environmental impact on the island • Booking ahead "you have to book such a long time on advance not like you can get on the website and book" • Perceived poor value • Cost of ferry was expensive "The ferry ticket is really expensive and becomes ridiculous for families. The only cheaper alternative you have of getting there is to do the Rotto swim over" • Accommodation cost – the amount wasn't deemed unreasonable per se but the quality of the accommodation was poor and didn't match the standard of accommodation "Price and what you get. For the price you are spending you expect accommodation to be 4*/5* and not run down" "\$2000 for a week and basically all there was to do was drink." • Perceived lack of things to do "What is there actually there to do ... Always wanted to go but don't know what there is to do so don't know what I could do over there" "I only have perceptions of beach bikes and quokkas, the pub is expensive and perception that not much to do" "It's pretty boring we stayed at the Lodge at Christmas time and it was pretty quiet"

	<p><i>"2 days was long enough and we were forced to stay there for a week... we went to play golf but it was shut so tried mini golf but it was very broken, the pitch was all patchy. Many parts of the island were broken"</i></p> <ul style="list-style-type: none"> • Perceived poor management <i>"No one pours any money into it. Only ever put money into it if there is an election coming up and then it is forgotten about. It needs to be more sustainable on its own. The island needs proper investment. At least at Hamilton Island you get what you pay for."</i> • Bakery ran out of cakes. Island is poorly managed. What they have is a start but not enough investment and development. So many overheads that it's not sustainable. Need to build a resort type 'like Hamilton Island' • Lack of presence <i>"Not many pictures out of the types of accommodation – wouldn't know what to expect inside the rooms at the 'lodge'. Not much advertising of those things that are out there"</i> • Lack of facilities <i>"No place where you can have mum and dad time. No kids club facilities like club med."</i> • Poor / rundown facilities <i>"...every time I have been, things were broken" "Ritz up one end and leave the other ... it would suit "</i> • Lack of information <i>"I have no idea what the accommodation looks like"</i> • Island poorly managed • Scuba diving for 6 hours – seen every rock in the place
<p><u>COMPETITOR OFFERS</u></p> <p>Where else are you going for holidays / day trips (distinguish which in notes) What do they offer that Rottnest doesn't? What advantages do other places have over Rotto? What advantages does Rotto have over other places?</p> <p>Thinking of the most recent holiday within Australia – and well include Bali as well. Can you tell me why you chose to go there? What kind of holiday were you looking for?</p>	<p>Busselton (x4) , Bunbury (x 2) , Margaret River, Dunsborough, Albany, Kalgoorlie / Esperance , Shark Bay / Monkey Mia / Kalbarri, Lancelin, Wedge Island, Broome (Cable Beach) , Moore River, Bridgetown, Bali</p> <p><i>"We are Southwest junkies" "We have a few friends with holiday homes, however every October we try to go somewhere different to the usual Bridgetown trip"</i></p> <p>Why did you choose the last spot that you went to –</p> <p>Cost factors</p> <ul style="list-style-type: none"> • Inexpensive holiday (Bali, cheap option) • Free accommodation and not far to travel <p>Escapism</p> <ul style="list-style-type: none"> • Camping (Walpole)

<p>REASON FOR TRIP</p> <p>What was the occasion that prompted you going on that holiday / those day trips?</p>	<p><i>"I want to get as far from civilisation as possible I work 80 hours a week so want to go somewhere with no phone service ...Unfortunately Telstra still cover there and got a phone call at 3am"</i></p> <p>Close proximity</p> <ul style="list-style-type: none"> • Mandurah / Mundaring Weir / Fremantle (day trip) <i>"somewhere different but not that far but far enough to feel like you have been somewhere"</i> • <i>"I am from Northern suburbs so even Fremantle is a good day trip for me... a certain charm about it"</i> • Moore River – feels like you are out but not too far • Donnelly River – somewhere to go – different scenery • Lunch / shopping / catching up with friends / events / birthdays / friends
<p>INFORMATION SOURCES</p> <p>For holiday / trips in general</p> <p>Appeal of Rottnest brochures</p> <p>Comments on Rottnest website</p>	<p>Website</p> <ul style="list-style-type: none"> • Only one person had used the website. Perception of site was that it seems vague <i>"Even looking on the site you still don't actually know what you are getting."</i> • The layout of the website was perceived to be ok, but admitted hadn't spent a lot of time on the site <p>Brochures</p> <ul style="list-style-type: none"> • Almost all had claimed to have not seen these brochures before. They believed that they could probably find at the local tourist bureau, but as locals wouldn't be a place they would go • Two claimed they never think of Rotto as somewhere to take friends or family from interstate or overseas • <i>"With the exception of the quokkas there is nothing that you can't do in Perth. You can ride a bike in Perth, you can go to the beach etc "</i> • <i>"Always feel there are more things to do in Margaret River, Busselton, Dunsborough"</i> • Surprises seen in the brochures - aqua park, helicopter flights were appealing but were considered very costly and therefore not something they would consider • 4 were not aware of the history and about half were interested • <i>"For \$500 a kid the expectation was that they would want to fly somewhere and... Want more km and feel like you have been somewhere really quite different"</i> • <i>"It is like a bad day at the Royal show.... You spend a lot of money and then still feel deflated when you leave"</i>

	<ul style="list-style-type: none"> • Taking out the cost factor – general consensus that there needs to be more things for young people to do
<p>PROMOTION/ ADVERTISING OF ROTTNES</p> <p>Appeal of packages / bundles Where info should be available Advertising they have seen as well as where it should be advertised</p>	<ul style="list-style-type: none"> • When looking on Wotif.com or lastminute.com or other holiday booking sites, they never see Rotto as an option <i>"Always see on Living Social good deals for down south such as Margaret River etc but never Rotto"</i>
<p>FACILITIES / ACTIVITIES</p> <p>Experience and perceptions (non visitors)</p> <p>Amount to do What's good What's not so good Include Ferry in here</p>	<p>Suggested improvements for facilities/activities</p> <ul style="list-style-type: none"> • More doing activities • Discount for families (as it an expensive trip) • Discounts if you book accommodation • Packages and better value bundles (for example in Niagara Falls the cost bundle was \$139 per night and that included entry for the whole family into a water theme park that was bigger than Adventure World, making it better value) • Lack of images of accommodation • Upload pictures on Facebook • More events on the island – a way to publicise the island • Maybe provide picnic hamper options to buy so you can pack your book get on the bus and go to a lovely cove and just relax and then get them to pick you up again
<p>ACCOMMODATION</p> <p>Experience and perceptions (non visitors)</p> <p>Amount to do What's good What's not so good</p>	<ul style="list-style-type: none"> • Ballot system – not many know about it. General feeling was that "it was all too hard" • Past experience of accommodation for the majority was not good. Those that hadn't stayed overnight had heard that the accommodation at best was mediocre and therefore was another reason not to go • The most important factors of the accommodation were that it needed to be clean, quiet and safe • One saw the accommodation as a place to sleep and a place to store stuff so want not as much of a concern and the main priority was low cost • The general consensus was that the range of accommodation types available was definitely lacking. There is a real sense that smaller 1 and 2 bedrooms are required for couples and smaller families. More luxurious accommodation is also favoured and wanted on the island <i>"Camping with children...to go on a ferry is a mission and a half with all the stuff"</i>

REACTION TO NEW POSITIONINGS

5 Star Spa

- Though there was should be like what Hawaii is to America. This was seen to be an excellent idea by almost all
"I would definitely go for a special trip over for this kind of experience way better than going somewhere in Perth at least it feels like you have actually been somewhere"
"Don't mind paying for quality ... you do mind paying for a bad experience"
- 5-star accommodation was perceived to be a good option in conjunction with what the island had available already as long as it was separated
- In the 5 star there is an expectation that the quality is high – such as having floorboards, well maintained, has Foxtel, iPod docking station, Wifi, decent restaurants

Best day Out

- Was considered a potential option

Island of all seasons

- Mixed feelings, some thought it was good. Motivating factors to visit off-peak were that it would be cheaper and there would be less people

WA Island destination

- Believe that it is by default, and is a nice idea. Time works better than distance

Leave it all behind

- The description appeals

Simpler way of life

- Appeals but is felt to not be sufficiently unique. The phrase 'simple things in life' was considered to work better

Pristine environment

- Market it to different markets. Lots of pristine "Untouched could mean severely undeveloped"

Boating over

- Mixed feelings. Thought it would be attractive for some and to people who have money. Also mentioned concerns about pollution and the environment

	<p>Activity Island</p> <ul style="list-style-type: none"> • Think it could work as an idea <p>Freedom Family</p> <ul style="list-style-type: none"> • Not appealing <p>Experience Extraordinary</p> <ul style="list-style-type: none"> • Didn't know Rottnest had a diving spot so it needs more promotion <p>What would make it special in winter</p> <ul style="list-style-type: none"> • As long as it's not raining, bike riding, cosy cafes, big comfy sofas. Tunnels underground
<p>REACTION TO NEW PRODUCT IDEAS</p> <p>Other new ideas nominated by participants</p>	<ul style="list-style-type: none"> • Events - would be considered great, particularly water-based, City to Surf, marathons. Food and wine – gourmet food festival • Canoeing on lake – good idea thought that kids would love this • Chairlift – like this idea and in conjunction with the café would be great • Café at lighthouse – a good idea as once you get to the lighthouse there is nothing to do when you get there and nowhere to get refreshments, so a café or somewhere to get a coffee or an ice cream would be great • Fun Park - was seen as something that could really work on the island particularly amongst the younger people and those with children <i>"Would work well if set like the great escape in Hillarys"</i> It was felt it would work best if set up so mums and dads can sit and have some lunch but the kids are still in view so they can keep an eye on the children • Underwater snorkel trail – was liked as an idea. Need to think about the whole infrastructure before offering this service so that it is easy • Aboriginal / heritage tours / West end tours – mixed feelings. Some liked the idea, some not really interested

4. Stakeholder Interview Results

In-Depth

Rottnest Island Tourism & Recreation Strategy Research

Appendix: Stakeholder IDIs
June 2012

TNS consultants: Penny Coase
Amy Steer
Tess Schenk

Client contacts: Andrea Merven
Paolo Amaranti
Peter Hill
John Driscoll



Rottnest Island Authority

©TNS 2012



Background & Methodology

The research for the Rottnest Island Tourism and Marketing Strategy included research amongst:

- Visitors to the Island, via focus groups and online survey
- Non-visitors via focus groups and online survey
- Boat users – visitors and non-visitors, via online survey
- Stakeholders – via a Workshop and a series of in-depth interviews.

This reports focuses on the findings of the in-depth interviews conducted with **stakeholders**.

In total, 14 interviews were undertaken with organizations and individuals nominated by RIA. Interviews were conducted primarily at the respondent's place of work, with one undertaken via telephone. Interviews generally lasted for an hour.

Representatives of the following organisations were included in the research:

Rottnest Lodge	Aristos Waterfront Restaurant	Dome Rottnest
Pelagic	Rottnest Fast Ferries	Rottnest Express
Rottnest Island Voluntary Guides	Rottnest Foundation	Rottnest Society
Tourism WA	InterContinental Perth Burswood	Royal Perth Yacht Club
Indigenous Economic Solutions	Subway Rottnest	



Rottnest Island Authority

©TNS 2012



Several **key themes** emerged from our discussions with stakeholders

Commercial Viability	The need for the Island to operate with a more commercially focussed mindset
Concerns regarding Management	Concerns about the way the Island is managed by the RIA / Board and relationship between stakeholders & the Authority
Product Development	The need for product development to encourage growth in visitor numbers.
Unity	The need for all interested parties to work together better

Other key issues raised included:

- The need to maximise the **customer experience** and the need to 'walk in the customer's shoes'
- The need for **greater promotion and marketing**
- Challenges associated with the proposed **Winter strategy**



Rottnest Island Authority

©TNS 2012



Stakeholders identified a need for the adoption of a more **commercial, business-focused mindset**

- It was recognized that the Island is in a somewhat **unique situation** of being governed by government legislation and protocols, yet competing with commercial enterprise in competitor destinations.
- This 'mismatch' is seen to manifest itself in a number of ways that inhibit commercial operations:
 - The **landing fee** is seen as too high and placing pressure on all other costs
 - **Signage** challenges – inability to promote one's business in situ as much as would like
 - A perceived excess of **red tape** making it difficult for new ideas to get off the ground (e.g. cannot implement ideas seen elsewhere in the world)
 - Perceived **inflexibility** in business dealings and an inability to respond to supply and demand
 - **High cost-base** for doing business (due to no government subsidy)
- It was perceived by some that those making commercial decisions at RIA do not have a financial or commercial background and that staff are not incentivised to build business through bringing in visitors, functions and events.



Rottnest Island Authority

©TNS 2012

Stakeholders raised concerns about the **management of the Island** by the RIA and its Board

- A range of criticism was leveled at the RIA and / or the Board, including:
 - A lack of **vision**, and a lack of clarity in their vision
 - Pursuing their **own agenda** without consulting with or incorporating the concerns of businesses (several believed the same would come of this process)
 - Being an **inefficient and expensive** operation with too many staff
 - **Retaining control** of aspects of business that would be better managed privately e.g. bike hire
 - Not being **commercially or customer focused**, with some individuals being singled out as being particularly difficult to deal with



Rottnest Island Authority

©TNS 2012

Product development was seen to be needed to encourage growth in visitor numbers

- **All** stakeholders agreed to some extent that Rottnest Island would benefit from the development of **additional facilities and activities**.
- The following suggestions for new product development were made:
 - An increased focus on **events** was supported by stakeholders, particularly if the focus was on increasing shoulder and off-season visitation
 - Additional **nighttime activities** to appeal to teenagers staying on the Island
 - Additional **temporary facilities** over peak season e.g. ice-cream vendors, fete-style stalls
 - Additional **food and beverage outlets** e.g. a fish and chip shop, increased variety of outlets, a 'flagship' high-end restaurant, coffee outlets open later in the day
 - **Bundling** offers, such as:
 - Including the use of additional facilities (e.g. bike hire, Bayseeker bus, water playground etc.) with accommodation to build value perceptions
 - Bundling festival / event prices with accommodation
 - Day packages including a variety of different experiences, such as the recent catamaran, snorkeling, lunch offer from Rottnest Express



Rottnest Island Authority

©TNS 2012



More on **product development** ideas from stakeholders

Event based strategy:

- Proven strategy - an increase in events at a State level has seen a growth in intrastate travel as it provides an extra reason to visit;
- Ensure the event is well aligned with the destination's positioning - so a strong link with nature and the outdoors will lead to more successful events;
- Concentrate on a few events and invest properly in marketing / promotion rather than being spread too thinly.

Upmarket / eco-based strategy:

- Stakeholders widely supported development of better quality accommodation and a minority felt that Rottnest could only become truly sustainable if it was either entirely, or substantially, a high-end destination (it should be noted this was not the view of most of the business community);
- Such a strategy would require significant new infrastructure, accommodation and facilities and would need to be marketed well beyond Perth - interstate and international market would be crucial in its success
- The obvious platform for a high-end re-positioning would be as eco-resort / destination
- More commonly it was felt this could co-exist with a broader market appeal, in which case the high-end offering would be limited to air or private sea travel, five star accommodation, dining (perhaps within the accommodation) and associated (largely water based) activities - eg. luxury boating to otherwise unreachable coves - creating value through experience and exclusivity.



Rottnest Island Authority

©TNS 2012



Stakeholders felt that **accommodation** needed to be a key focus of product development

- **All** stakeholders supported the introduction of a **high-end accommodation option**, as it was felt that this was a clear gap in the Island's accommodation offer.
- It was thought that Rottnest has not become less appealing, but people have many **more options to choose from** – many of which are more cost-effective.
- Whilst stakeholders recognized that efforts had been made to refurbish existing accommodation, it was felt that this would never be sufficient to meet the needs of those looking for luxurious, upmarket accommodation. Several stakeholders felt that an upmarket **eco-resort** would be the best fit for the island.
- **Booking methods** for the accommodation were frequently mentioned:
 - Several stakeholders called for the **ballot system** to be removed. It was felt to be too hard, clunky and antiquated, operating as a barrier (particularly to those who have not grown up going to Rottnest) and in sharp contrast to other customer-friendly techniques
 - The **online booking system** needs refining as it is currently not seen to be user-friendly
 - Some stakeholders mentioned removing minimum stay length requirements
 - Several stakeholders mentioned the need for Rottnest to be present on frequently used **booking sites** such as wotif.com and lastminute.com.
- It was believed that potential visitors are not aware of the extent of accommodation options available, a belief which appeared to be borne out particularly by non-visitors – and made worse by the lack of clarity, both in description and visuals, on the website



Rottnest Island Authority

©TNS 2012



Further stakeholder feedback on **accommodation**

- Feelings around upgraded accommodation were that it **might not be enough**, and it is an ongoing issue. It was felt that more could be done to leverage the heritage aspect – make more of a story about the history to offset perceptions it is not shiny/new.
- Stakeholders in the sector believe people's expectations for self-contained accommodation **depend on price**. Most people would expect daily service for the price they are pay. There is an option to offer cleaning services at an additional price so people can opt-in.
- Thoughts on the **basics people expect** from self-contained accommodation:
 - Beds made on arrival, towels provided, basic toiletries provided
 - Kitchen - basic pots and pans, dishwashing liquid, cloths provided
 - TV – flat screen and working well, or nothing - not worth it if it's clunky/old. Can be wall-mounted
- Public expectations in terms of hotel accommodation:
 - Depends on price, but generally value and good service, not being fussed over but being looked after. Delivering on a service promise. Cleanliness is non-negotiable and expected
- Public expectations in terms of hotel services/surrounds:
 - Depends on setting/location, but access to more than one dining option in hotel/close by and a liquor outlet in hotel or night spot depending on demographic. Other recreational activities are a bonus
- Accommodation suggestions if starting from scratch include:
 - Putting the toilet separate to the bathroom
 - Put the living area at the front of the accommodation to maximise the view, with big windows. Bedrooms could be towards the back of the accommodation where view isn't as important



Rottnest Island Authority

©TNS 2012



Stakeholders called for the RIA and Island businesses to **work closely together** toward shared goals

- Stakeholders felt that it was critical for the RIA to **work closely** with Island businesses and to recognize that all parties are working toward shared goals in order to maximise the benefit to the Island.
- There is a view that business stakeholders and the RIA are not always on the same page, and that RIA-owned assets and businesses own get **priority** over privately owned enterprises.
- It is felt that all business stakeholders need to be **involved as early on as possible** in the event planning process. Some stakeholders mentioned not being adequately forewarned of events, making it harder to cater for increased demand. Other stakeholders commented that the Island was well equipped to handle events and managed the logistics well.
- An example given by one business stakeholder was that when the RIA promotes Rottnest at open days for example, only selected businesses invited to contribute, while others are not given the opportunity to pitch. This stakeholder felt that this meant that people attending the stall don't see all the facets of what Rottnest has to offer.



Rottnest Island Authority

©TNS 2012



Stakeholders identified the need to **maximise the customer experience**

- Stakeholders suggested a need to maximise existing facilities through adopting a more customer-focussed mindset. Some stakeholders felt that while there was a lot to offer visitors, it was not necessarily used in the best way.
- Suggestions included:
 - Increasing the **signage** around the island to make new visitors aware of what is already there, and help people to find their way around
 - Providing a '**Rottnest Essentials**' brochure to all visitors – important to show visitors how much they can fit into a day if they want to, and to remind returning visitors of what is on offer
 - Making **check-in times** for accommodation earlier so visitors can maximise their time on the island
 - Reviewing the **booking system** to make it easier to book
 - Providing **shelter** for those waiting for the ferry and Bayseeker bus
 - Having **opening hours** of bike hire and other key facilities in line with ferry arrival times
 - Taking steps to reduce long **queues** during peak periods.
- Improving the customer experience is likely to increase positive word-of-mouth. Addressing some of the issues below is also likely to be appreciated by long-time Island visitors.



Rottnest Island Authority

©TNS 2012



Stakeholders called for **increased promotion and marketing** for Rottnest

- **All** stakeholders were in agreement that Rottnest could benefit from **increased promotion and marketing** activities. There was a strong perception that the Island is currently under promoted.
- One stakeholder felt that **Rottnest Express** does more marketing for the Island than the RIA. This was not seen as a negative, but it was felt that the marketing activities of both organisations should work together, with RIA covering aspects not covered by Rottnest Express and vice versa.
- The 'My Rotto' campaign was seen to be good, but not promoted enough. It was felt that additional promotion of **free activities** available on the Island could help to increase value perceptions (especially amongst overseas visitors).
- It was felt that the Island's **snorkeling** sites could be a focus of additional promotion – some felt that this was one of the Island's 'best kept secrets'.
- One stakeholder also commented that there was an opportunity to promote Rottnest as an 'eco-friendly' destination, which could eventually allow a premium pricing strategy.



Rottnest Island Authority

©TNS 2012



Stakeholders saw that **international and interstate visitors** could be a key market for Rottnest

- Amongst those stakeholders who were able to comment on marketing in a broader perspective, there was a belief that there could be considerable growth from international visitors to Rottnest, particularly amongst the Asian (Chinese) market.
- Rottnest offers the **dual advantage** of fitting within the broader WA positioning and marketing campaign '**Experience Extraordinary**' plus **proximity**. Therefore it is largely unique in being able to offer a unique, extraordinary landscape or nature based experiences without the need to travel extensively – which is required for many of the other 'extraordinary' offers of WA.
- Furthermore, **itineraries** for Chinese visitors in particular are still at a **developmental stage**, offering RIA the opportunity to work with inbound operators and establish Rottnest on the schedule. Again proximity is key here as many itineraries are only 4-5 days in total.
- Recommendations for maximising the appeal of Rottnest, particularly to the Chinese market were;
 - Ensure high-quality, comfort and a degree of familiarity; Perth is largely unknown and the Chinese tourist will be attracted by the familiar (signage and brochures in language)
 - Unlikely to be attracted by physical exercise; a bus tour with Chinese commentary will be more appealing than cycling round the Island; any water based activities should be high-quality sailing types activities not water based sporting exertions;
 - Chinese food is not necessary; a quality seafood barbecue (not heavy meat) with Asian flavours on a beach setting would provide a cultural cross-over with key iconic Aussie references.



Rottnest Island Authority

©TNS 2012



Stakeholders identified a number of potential issues with the **winter concept**

- Stakeholders were generally very supportive of any efforts to bring more people to the Island. It was felt that Island businesses could easily cater for additional for increased numbers of people, and that more people is good for business.
- However, stakeholders were **generally skeptical** about Rottnest's potential to draw in numbers in winter.
- **Key barriers** identified by stakeholders in relation to increasing winter visitation included:
 - The often rough **ferry ride** being off-putting to many (and the option of a small plane being just as off-putting to some)
 - People attracted to the Island in winter are likely to be older and on a lower income, and **unlikely to spend much money** whilst on the Island. Hence it is likely to be hard for businesses to sustain themselves.
- One stakeholder went so far as to say that he thought Rottnest should shut over winter as they felt it cannot compete with the South West without some 'massive changes'.
- Some positive aspects of visiting Rottnest in winter were thought to be that it is good for painting, whale watching and fishing, it is warmer than the mainland, the view every day is different, and it is quiet (and to an extent, solitary).



Rottnest Island Authority

©TNS 2012



Stakeholders identified a number of key considerations for the **winter concept**

Stakeholders suggested a number of key points that would need to be carefully considered for any future winter strategy:

- **Price points** – there was a view that prices need to be heavily discounted in winter to encourage visitation
- Those who are attracted to a high-end plane package are likely to have higher accommodation expectations than what can realistically be delivered
- It's important to **set expectations** on service – what's included/not included
- **Food and beverage purchase** – To make it easier for accommodated guests to purchase food and beverages on the island without having to venture out into the cold and wet, food hamper deliveries could be considered. They would need to be reasonably priced and in line with what is offered in other retail outlets, but would add to the 'comfort factor'. Could offer a pre-order, delivery menu that is reasonable in quality and price. Could look at themed self-contained hampers e.g. a recipe card from a well-known WA chef and all the ingredients needed to cook it. Cheese and wine hampers would be well-received and easy to manage/deliver
- Would need to look at nice 'adult' table settings as opposed to 'family plastic' and recognise that food and wine are an important part of a winter escape for many people
- Need to focus on giving people a **unique and different experience**, and assume most people will be leaving their kids at home, or not having any



Rottnest Island Authority

©TNS 2012



Stakeholders identified a number of key considerations for the **winter concept**

- **Maximising the view** – Even during winter, it was seen as important to recognize that visitors are coming for a view of the ocean. Outdoor heaters and comfier outdoor furniture outside the cottages could maximise this.
- Look at providing **outside 'itineraries'** for guests e.g. walks/picnics with option to take a thermos/blanket/coffee plunger pack. Provide rain ponchos in the room – making things easier for guests and maximising their time on the island. Look at ways to offer an experience that is different to what can be offered elsewhere
- It is critical that there is sufficient hot water at all times
- Log fires would be an excellent addition, although this might not be practical
- Offer the option of in-room spa treatments/massages – maximising the 'indulgence factor' and minimise time out in the cold
- **Transport to and from accommodation** on cold and rainy days – is there an option to use golf buggies or a courtesy bus for accommodated guests?
- **Check-in and check-out times** – particularly on cold and rainy days, it would be preferable for guest to be able to check in earlier. Late check-out could increase value perceptions
- **Shelter** – to cater for those waiting for the ferry or the Bayseeker Bus on rainy days



Rottnest Island Authority

©TNS 2012



Potential new markets

- **New markets**
 - Winter idea should only focus on locals and nationals at a pinch
 - Would not be able to attract high-end business clientele without significant upgrades
 - Should focus on Perth people who haven't lived here all their life and who haven't been (newer residents etc). Not extracting sufficient value from locals – relying on the die-hards, but not enough is being done to expand the local pool. FIFOs will always be an attractive option
 - Offer short and sharp stays, midweek specials to encourage trialling
 - Alternative view is that we must accept that Rottnest is an expensive destination and therefore need to focus on more affluent consumers who want to explore and who appreciate (and will therefore pay for) the unique nature-based experiences.
- **China**
 - China is seen very much as a source for day visitors rather than overnight, both because of the length of stay of Chinese in Perth (usually 3 – 5 days) and the quality of the accommodation on the Island which currently falls far short of that which would be required.



Rottnest Island Authority

©TNS 2012



Appendix A: Overnight Visitors Focus Group Discussion Guide

This guide is intended as an outline only. The discussion may not address all of the topics listed below, and may not cover them in the order described. There will be considerable scope within the discussion for exploring issues as they arise. Questions are not word for word descriptions of the moderator's questions.

Introduction and context

5 mins

Moderator Notes:

The purpose of this section is to clarify the purpose of the research and build rapport with the participants.

- Researcher to talk through purpose and agenda of the session:
- We have been commissioned to conduct a project to talk about Rottnest Island – **what your experiences are / why you visit / don't visit/ what you think of what's there** and your opinions on if and how it should develop in the future
- Very casual discussion – like you might have with your friends
- As with all of these things, there are no right or wrong answers. Interested in both positive and negative viewpoints. Expect people to have different views and all opinions are valid and respected. You may well disagree on some things – **that's ok.**
- Emphasise anonymity: names will not be used in reports or fed back to the client.
- Recording the groups. (and if client viewing)
- Any housekeeping bits (toilets, mobiles, food etc)
- Any other questions before we start?

1. Warm up -profile of recent visit

10 mins

Moderator Notes:

To warm up and to understand the current experience / familiarity with Rottnest.

To start off, I'd just like to go round the table and ask you to introduce yourself and give us a feel for your past visits to Rottnest. Just the when, how long etc, not at this stage what you thought of it – **we'll come to that soon.**

- When did you last go?
- Who with and for how long?
- Was that your first visit, if not roughly how many times have you been before? Day or extended trip? Time of year you tend to go – varies or same time each year?

2. Rottnest current associations (positioning)

10-15 mins

Moderator Notes:

This section will serve two purposes a) to get the respondents thinking about what Rottnest 'is' to them (offer / feel, ie tangible / intangible) without getting in to too much detail and b) to get them into the mode of thinking about 'positionings' so they are more able to assess the future positioning ideas.

I want you to use your creativity for a moment and think about how you would best sum up Rottnest as a holiday destination.

On the piece of paper I've given you, I'd like you to write down some of the words or phrases that come to mind when you think about Rottnest, particularly thinking of it as somewhere to go for a holiday, rather than a day trip, and that can be a short stay / weekend or longer week or two.

Then, I'd like you to draw what Rottnest represents to you as a holiday destination.

I'll give you a couple of examples; here is one I did earlier for Adventure World (for a day trip) and also one for Margaret River (that's for a longer stay).

There's no right or wrong way of doing this...you may concentrate on a general 'feel' or style of a holiday there, or on specific things you would do or see there.

ALLOW PARTICIPANTS TO COMPLETE AND THEN SHARE. MODERATOR TO TRY AND ENCAPSULATE THE 'POSITIONING' THAT EACH HAS PUT ON ROTTNEST

What do you think the people currently marketing / advertising Rottnest are trying to say about Rottnest? What would their words / picture look like?

(explore extent to which people see any marketing materials about Rottnest at this point:

What they have seen, where and what it was saying)

3. Rottnest potential positionings

35-40 mins

Moderator Notes:

In this section we explore some of the possible routes Rottnest could go in the future, in terms of a coherent marketing strategy and what that would mean re facilities, services, communication. This section is deliberately early in the guide so whilst participants have started to think about Rottnest, they are not yet analysing their experience to an extent which is unrealistic of everyday life – and they are therefore more able to respond to these positioning ideas as if they were seeing them in everyday life.

Before we start talking about your recent experiences of visiting Rottnest in more detail, I want to spend some time exploring how Rottnest could develop in the future.

I'm going to show you a few different ways in which Rottnest could be promoted. Each of the ideas has a phrase to sum up the idea and then a sentence giving an idea of what this would mean. These aren't ads or even clever slogans yet, they are just broad ideas. For each one, I'd like you to read it, then answer the questions. Then we will discuss them in turn.

COLLECT/NOTE REACTIONS AS PUT EACH UP

Taking each in turn:

- What appeals about this idea? Is it an appealing positioning in itself? What **doesn't appeal**?
- How about in terms of the overall feel it gives a trip to Rottnest?
- **Does it 'fit' Rottnest? In what ways does it fit / not fit? Does it fit Rottnest all year or just at certain times?**
- What does Rottnest need more of (less of) in order to be able to say this about **itself? (Activities, facilities, services, events...)**
- Is there any other day trip destination that could lay claim to this positioning (more than Rottnest?)
- Who would this appeal to? Age / local / interstate / international/ type of trip
- Would it widen Rottnest appeal – or shrink it? Why do you say that?

Overall

- Which one is most appealing – and why?
- Which one works best for Rottnest – and why
- Which one do you think would lead to the most growth for Rottnest? In other words which would have the greatest appeal?
- Do any of them represent too much development / are too far away from what Rottnest is / should be?

4. Decision to visit

15 mins

Moderator Notes:

To understand process that led to a holiday being taken at Rottneest and particularly the alternatives considered – what has Rottneest got that other places don't have

Ok...let's go back and think specifically about your last trip to Rottneest and how it was you chose to go there.

Choice

Those of you who hadn't been before... what made you think of going to Rottneest? WOM? Advertising? Always meant to go?

What was the trigger for going?

Those who have been before: What was the trigger for going this time?

What other places did you consider for this holiday / short break? (if says none, ask what other destinations have been visited / considered for other similar holidays/breaks)

Why did you choose Rottneest over these alternatives? **PROBE FULLY.** *Things to do there/ what you had heard about it / unique / proximity / price?*

And on the other hand were there things that put you off Rottneest a bit / made you think about the other options? **AGAIN PROBE FULLY**

Information for making choice...including booking accommodation

How much did you find out about Rottneest before you went? What kind of information did you need?

How did you get that information? How accessible and useful was it?

What about booking accommodation? Did you know what the choices were? How did you go about booking that? How was the process?

5. The Rottneest experience – services & facilities

15 mins

Moderator Notes:

To understand key strengths and weaknesses offered by a holiday on the Island in terms of what there is to do there

I'd like to spend some time thinking about that most recent holiday on Rottneest.

Just to start off, does anyone just want to call out some of the real highlights of their stay?

EXPLORE AND PROBE WHAT IS SAID, ESPECIALLY DRAWING ON COMMON THEMES / THINGS THAT ARE ECHOED BY A FEW (*why was that a highlight / what was special / was that something unique to Rottneest?*)

And what about any low lights? Anything that was disappointing...or just downright not good?

EXPLORE AND PROBE WHAT IS SAID, ESPECIALLY DRAWING ON COMMON THEMES / THINGS THAT ARE ECHOED BY A FEW (*including comparison to expectations*)

Let's explore a few of these things in turn: *once top of mind recollections / comments are collected, take participants through key aspects of the stay. This section somewhat shorter than for day trips to allow time to explore accommodation)*

- Visitor centre
- Bike hire/Cycling
- Swimming / water activities
- Cultural / historical activities
- Shops and other services
- Restaurants / cafes
- Facilities outside of the main settlement(s)

Was any of what you did a pleasant surprise – **something you didn't** know was there before you got there? Or something better than expected?

Was there any thing missing? Something that you would have expected or you think really needs to be there? Or something that was poor?

Thinking particularly about the types of activities and facilities that are available on Rottnest, what other ones do you think they should offer?

ANY IDEAS WE WANT TO EXPLORE SHOULD BE HERE, AGAIN WE NEED TO AGREE THIS BEFORE THE GROUPS)

On the other hand, are there things that you wouldn't want to see change? Could some of these things that you think you would like on Rottnest...could they spoil / change the feel / be too much development?

PUT UP IDEAS OF NEW PRODUCTS / SERVICES

Here are some ideas that Rottnest are considering developing.....which would you be interested in?

Do any of them represent too much development? Could some of these things spoil / change the feel / be too much development?

Why?

What are the things that you wouldn't want to see change?

Do any of them fit particularly well with some of these positionings we were looking at earlier? Which..and why?

6. Accommodation

15mins

Moderator Notes:

To explore visitors experience of the accommodation at Rottnest, particularly perception/knowledge of cost and desirability of additional features

Talking specifically about the accommodation for the moment..

(recap on type of accommodation stayed in last time) Why did you choose that particular type of accommodation / that location?

How did you book your accommodation? What is your experience of the ballot?

Do you think it is a fair system...or should it be first come first served like other places?

What advantages do each have?

How far ahead did you book?

How much do people know about the different types of accommodation available on Rottnest? How do they vary in facilities and price? (explore perceptions of cost)

The accommodation at Rottnest sometimes gets criticised in the press, but;

- What do you like about it?
- What do you dislike about it?
- Has it improved? If so, in what ways?

Let's walk through the property if you like and think about each area in turn:

- How could the courtyard / verandah be improved (should it or is it fine as it is?)
- How could the lounge area be improved (should it or is it fine as it is?)
- How could the dining area be improved (should it or is it fine as it is?)
- How could the kitchen be improved (should it or is it fine as it is?)
- How could the bedrooms be improved (should it or is it fine as it is?)
- How could the bathroom improved (should it or is it fine as it is?)

For each probe for specific aspects rather than generalisations and include quality / cleanliness / comfort / condition as well as presence or not of items

How much does it cost? Does anyone remember what they paid for their recent stay?

Show current price list and gauge reaction to actual prices

- Are these lower / higher than you thought? How do they compare with other places you stay (in WA)
- Would you be tempted to go more if there were special offers (or would you not have the time / flexibility?)

If you could change 5 things about the accommodation, and money was no problem, what would you change? WRITE UP GROUP WISH LIST ON WHITEBOARD

- Do any of these represent too much change for anyone? In what way? Do any of them remove part of the appeal of Rottnest accommodation?

Here are some ideas for improving the accommodation at Rottnest. I'd like you to sort these into groups, depending on whether you'd pay \$1 - \$5 more for, \$5-10 or \$10 Plus.

Participants to sort through list and group together those they would consider paying that amount extra per night to have that amenity

- And which would you be interest in but not pay any more - or less than the amount shown? (***participants to sort again***) ***Group to discuss***
- Again, do any of these represent too much change for anyone? Do any of them remove part of the appeal of Rottnest accommodation?
- What types of change would be good for Rottnest accommodation – and what would be too much?

7. Consideration of off / shoulder season visits

5 mins

Moderator Notes:

To explore what is needed to encourage people to visit at other times of the year

Finally, those of you who generally only visit Rottneest in the summer months...have you thought about going at other times of the year? What stops you?

Those who do visit in off season – what do you like about the Island at this time? What is different / special about this time of the year?

What could be done to increase the appeal of Rottneest from say May to September? Activities, facilities, special offers (how special), other?

THANK AND CLOSE

Appendix B: Day Visitors Focus Group Discussion Guide

This guide is intended as an outline only. The discussion may not address all of the topics listed below, and may not cover them in the order described. There will be considerable scope within the discussion for exploring issues as they arise. Questions are not word for word descriptions of the moderator's questions.

Introduction and context

5 mins

Moderator Notes:

The purpose of this section is to clarify the purpose of the research and build rapport with the participants.

- Researcher to talk through purpose and agenda of the session:
- We have been commissioned to conduct a project to talk about Rottnest Island – **what your experiences are / why you visit / don't visit/ what you think of what's there** and your opinions on if and how it should develop in the future
- Very casual discussion – like you might have with your friends
- As with all of these things, there are no right or wrong answers. Interested in both positive and negative viewpoints. Expect people to have different views and all opinions are valid and respected. You may well disagree on some things – **that's ok.**
- Emphasise anonymity: names will not be used in reports or fed back to the client.
- Recording the groups. (and if client viewing)
- Any housekeeping bits (toilets, mobiles, food etc)
- Any other questions before we start?

1. Warm up -profile of recent visit

10 mins

Moderator Notes:

To warm up and to understand the current experience / familiarity with Rottnest.

To start off, I'd just like to go round the table and ask you to introduce yourself and give us a feel for your past visits to Rottnest. Just the when, how long etc, not at this stage what you thought of it – **we'll come to that soon**

- When did you last go?
- Who with and for how long?
- Was that your first visit, if not roughly how many times have you been before? Day or extended trip? Time of year you tend to go – varies or same time each year?

2. Rottnest current associations (positioning)

10-15 mins

Moderator Notes:

This section will serve two purposes a) to get the respondents thinking about what Rottnest 'is' to them (offer / feel, ie tangible / intangible) without getting in to too much detail and b) to get them into the mode of thinking about 'positionings' so they are more able to assess the future positioning ideas.

I want you to use your creativity for a moment and think about how you would best sum up Rottnest as a day trip destination.

On the piece of paper I've given you, I'd like you to write down some of the words or phrases that come to mind when you think about Rottnest, particularly thinking of it as somewhere to go for a day trip (rather than thinking of it in relation to staying there).

Then, if you feel able, I'd like you to draw what Rottnest represents to you as a day trip destination.

I'll give you a couple of examples; here is one I did earlier for Adventure World and also one for Margaret River (that's for a longer stay).

There's no right or wrong way of doing this...you may concentrate on a general 'feel' or style of a day there, or on specific things you would do or see there.

ALLOW PARTICIPANTS TO COMPLETE AND THEN SHARE. MODERATOR TO TRY AND ENCAPSULATE THE 'POSITIONING' THAT EACH HAS PUT ON ROTTNEST

What do you think the people currently marketing / advertising Rottnest are trying to say about Rottnest? What would their words / picture look like?

(explore extent to which people see any marketing materials about Rottnest at this point:

What they have seen, where and what it was saying)

3. Rottnest Potential Positionings

35-40 mins

Moderator Notes:

In this section we explore some of the possible routes Rottnest could go in the future, in terms of a coherent marketing strategy and what that would mean re facilities, services, communication. This section is deliberately early in the guide so whilst participants have started to think about Rottnest, they are not yet analysing their experience to an extent which is unrealistic of everyday life – and they are therefore more able to respond to these positioning ideas as if they were seeing them in everyday life.

Before we start talking about your recent experiences of visiting Rottnest in more detail, I want to spend some time exploring how Rottnest could develop in the future.

I'm going to show you a few different ways in which Rottnest could be promoted. Each of the ideas has a phrase to sum up the idea and then a sentence giving an idea of what this would mean. These aren't ads or even clever slogans yet, they are just broad ideas. For each one, I'd like you to read it, then answer the questions. Then we will discuss them in turn.

COLLECT/NOTE REACTIONS AS PUT EACH UP

Taking each in turn:

- What appeals about this idea? Is it an appealing positioning in itself? What doesn't appeal?
- How about in terms of the overall feel it gives a trip to Rottnest?
- Does it 'fit' Rottnest? In what ways does it fit / not fit? Does it fit Rottnest all year or just at certain times?
- What does Rottnest need more of (less of) in order to be able to say this about itself? (Activities, facilities, services, events...)
- Is there any other day trip destination that could lay claim to this positioning (more than Rottnest?)
- Who would this appeal to? Age / local / interstate / international/ type of trip
- Would it widen Rottnest appeal – or shrink it? Why do you say that?

Overall

- Which one is most appealing – and why?
- Which one works best for Rottnest – and why
- Which one do you think would lead to the most growth for Rottnest? In other words which would have the greatest appeal?
- Do any of them represent too much development / are too far away from what Rottnest is / should be?

4. Decision to visit

15 mins

Moderator Notes:

To understand process that led to a day trip being taken at Rottnest and particularly the alternatives considered – what has Rottnest got that other places don't have

Ok...let's go back and think specifically about your last trip to Rottnest and how it was you chose to go there.

Choice

Those of you who hadn't been before... what made you think of going to Rottnest? WOM? Advertising? Always meant to go?

What was the trigger for going?

Those who have been before: What was the trigger for going this time?

What other day trips did you consider? (did you / will you do them as well or are some still to be done?)

Why did you choose Rottnest over these alternatives? **PROBE FULLY.** *Things to do there/ what you had heard about it / unique / proximity / price?*

And on the other hand were there things that put you off Rottnest a bit / made you think about the other options?

Information for making choice...

How much did you find out about Rottnest before you went? What kind of information did you need? In other words, did you want to know what there was there, whether you could hire bikes...etc etc

How did you get that information? How accessible and useful was it?

How about getting there? Did you know what the options were or did you have to find that out? How?

5. The Rottne experience – services & facilities

25 mins

Moderator Notes:

To understand key strengths and weaknesses offered by a day on the Island

All

I'd like to spend some time thinking about that most recent trip...from when you arrived at the ferry terminal until you got home again.

Just to start off, does anyone just want to call out some of the real highlights of their day / stay?

EXPLORE AND PROBE WHAT IS SAID, ESPECIALLY DRAWING ON COMMON THEMES / THINGS THAT ARE ECHOED BY A FEW (*why was that a highlight / what was special / was that something unique to Rottne?)*

And what about any low lights? Anything that was disappointing...or just downright not good?

EXPLORE AND PROBE WHAT IS SAID, ESPECIALLY DRAWING ON COMMON THEMES / THINGS THAT ARE ECHOED BY A FEW (comparison to expectations)

Let's explore a few of these things in turn: *once top of mind recollections / comments are collected, take participants chronologically through their day to ensure nothing is missed:*

- Ferry travel
- Visitor centre
- Bike hire
- Cycling
- Swimming / water activities
- Cultural / historical activities
- Shops
- Restaurants / cafes
- Golf
- Facilities outside of the main settlement(s)

Did you have enough to do?

Did you have too much to fit into a day?

Was any of what you did a pleasant surprise – **something you didn't know was** there before you got there? Or something better than expected?

Was there any thing missing? Something that you would have expected or you think really needs to be there? Or something that was poor?

Who in your group enjoyed the day the most? Why – what was special for them? And the least? Again why?

REPEAT VISITATION

Will you go back again for another trip? Why / why not?

What sort of activities would attract you back for another day trip? These might be **things that are already there that you'd like to do** (or do again) or new things?

PUT UP IDEAS OF NEW PRODUCTS / SERVICES

Here are some ideas that Rottnest are considering developing.....which would you be interested in?

Do any of them represent too much development? Could some of these things spoil / change the feel / be too much development?

Why?

What are the things that you wouldn't want to see change?

Which would you be most interested in for a day trip?

Do any of them fit particularly well with some of these positionings we were looking at earlier? Which..and why?

IF TIME: HAND OUT BROCHURES FOR PEOPLE TO LOOK THROUGH...

Looking over these, did you know about everything there was to do there ...or do you feel you missed some things? (prompt for / explore comments re information / signage)

IF QUALITY HASN'T ALREADY BEEN RAISED:

As well as the extent and nature of what was there, what did you think of the quality of the services and facilities **PROBE FOR AREAS OF DISSATISFACTION**

5. Consideration of off / shoulder season visits

5 mins

Moderator Notes:

To explore what is needed to encourage people to visit at other times of the year

Those of you who generally only visit Rottnest in the summer months...have you thought about going at other times of the year? What puts you off?

Those who do visit in off season – what do you like about the Island at this time? What is different / special about this time of the year?

What could be done to increase the appeal of Rottnest from say May to September? Activities, facilities, special offers (how special), other?

6. Consideration of extended stay

10mins

Moderator Notes:

To understand why these people have only done day trips / stopped doing extended stays. Particularly to explore negative perceptions about accommodation

Have some of you stayed at Rottnest overnight in the past? (I'll come back to you in a minute)

Those who haven't, have you ever thought about going for an extended stay there?

If so:

- What is it that appeals to you about staying?
- When do you think you would be likely to go (time of year), who with, what sort of holiday would it be?
- Where would you be going to Rottnest instead of? In other words, where would you have gone for this kind of trip otherwise / before? What do you think Rottnest would offer over that alternative?

If not interested (anymore): Why haven't you wanted to stay overnight?

Prompt for: *amount to do (in evening?) / cost (of accommodation or other) / availability / quality of accommodation*

- **If cost:** what do you think it costs to stay at Rottnest, overnight, for a week or weekend? What other sorts of places could you go for that amount?
- **If quality:** what do you know about the accommodation at Rottnest? Where do you hear this from?
- *(If based on past experience)* have you heard anyone say they have upgraded the accommodation / what it is like these days?

Probe for current perceptions and impact this may be having on decision to stay noting particular aspects of accommodation mentioned

Show current price list and gauge reaction to actual prices

- Are these lower / higher than you thought? How do they compare with other places you stay (in WA)
- What would they need to do to the accommodation to make you interested in staying overnight?
- What facilities / activities would encourage you to stay overnight?

THANK AND CLOSE

Appendix C: Non-Visitor Focus Group Discussion Guide

This guide is intended as an outline only. The discussion may not address all of the topics listed below, and may not cover them in the order described. There will be considerable scope within the discussion for exploring issues as they arise. Questions are not word for word descriptions of the moderator's questions.

Introduction and context

5 mins

Moderator Notes:

The purpose of this section is to clarify the purpose of the research and build rapport with the participants.

- Researcher to talk through purpose and agenda of the session:
- We have been commissioned to conduct a project to talk about firstly holidays and day trips in general and then later on those things in relation to Rottnest Island.
- Very casual discussion – like you might have with your friends
- As with all of these things, there are no right or wrong answers. Interested in both positive and negative viewpoints. Expect people to have different views and all opinions are valid and respected. You may well disagree on some things – **that's ok.**
- Emphasise anonymity: names will not be used in reports or fed back to the client.
- Recording the groups. (and if client viewing)
- Any housekeeping bits (toilets, mobiles, food etc)
- Any other questions before we start?

1. Profile of recent (local) holiday / trip

5-10 mins

Moderator Notes:

To warm up and to get some insight into recent holiday choices

To start off, I'd just like to go round the table and ask you to introduce yourself and tell us where you have been on holiday recently.... say the last 12 months, where you have been, how long for and who with.

(taking a selection of recent holiday destinations)

Thinking about your most recent holiday within Australia - and we'll include Bali as well. Can you tell me why you chose to go there?

What kind of **holiday** were you looking for? Perhaps on the paper in front of you just jot down where you went and the top 3 things you needed that holiday to provide...eg fun on the beach, great food, a chance to learn about a new place, for the family to be able to have a week's holiday in a certain budget...

What other places did you think of going to? And why did you decide against that place and choose where you went?

And what about **day trips**? Have you been on any day trips in the last year or so? Is that something you do quite regularly? Where did / do you go?

What was the occasion that prompted you going on that / those day trips? Eg having visitors, an event on, a special day – birthday etc. – or just to do something different with a free day?

2. Rottnest current associations (positioning)

5-10 mins

Moderator Notes:

To collect top-of mind individual perceptions of Rottnest (and be able to compare to those of visitors)

How would you best sum up **Rottnest** as a day trip destination / holiday destination *(one group of non-visitors each)*

On the piece of paper I've given you, I'd like you to write down some of the words or phrases that come to mind when you think about Rottnest, particularly thinking of it as somewhere to go for a holiday / day trip.

Then, if you feel able, I'd like you to draw what Rottnest represents to you as a (holiday / day trip) destination.

I'll give you a couple of examples; here is one I did earlier for Adventure World and also one for Margaret River (that's for a longer stay).

There's no right or wrong way of doing this...you may concentrate on a general 'feel' or style of a trip there, or on specific things you think you would do or see there.

DON'T SHARE AT THIS STAGE

2. Perceptions of Rottnest- non visitors

15 mins

Moderator Notes:

What non-visitors think about Rottnest and where those perceptions have come from

Who's been to Rottnest Island before? When was the last time you went?

Those of you who have been before in the last few years, we'll come to you in a minute but those who have never been or not for 10 years or so... what is your impression of Rottnest? What did you put down?

Where do you get the views (perceptions) you have of Rottnest from? (media, advertising, family, friends who have visited..)

Explore perceptions, probe to understand where those views come from

- What are the GOOD things you know about / think about Rottnest?
- What are the BAD things you know about / think about Rottnest?
- What do you think are the UNIQUE things about Rottnest?

(for bad things in particular explore where these perceptions come from and challenge whether they are actually true)

So..why haven't you visited Rottnest (yet / recently?)

Have you intended to but not got around to it? Why do you think that happens? What are the barriers (probe whether stays top of mind, price, difficulties in getting information / booking, those travelling with not interested)

2. Past experiences of visiting Rottnest

10 mins

Moderator Notes:

If lapsed visitor, what is their perception and experience of the Island and how does that lead to them being lapsed.

Those of you who have been to Rottnest before, how do you see Rottnest? (refer to written task).

Tell us a little bit about your past trips..

Who did you go with? How regularly did you used to go / times of year? Where did you usually stay?

What kind of holiday / trip was it?

- What did you **like** about Rottnest when you used to go? (PROBE: accommodation, facilities, activities, proximity, safety, relaxation, freedom etc)
- What are some of the things you **didn't like?** (probe fully)
- **Why haven't you gone recently?** PROBE, exploring why other places have been chosen ahead of Rottnest – not top of mind / been there, done that / experience not good enough...?? – in what way – accommodation / facilities)

4. Intention to visit / stay at Rottnest

10 mins

Moderator Notes: *What are the barriers / facilitators to staying; what will be the triggers and what could be the factors that will prevent a planned trip*

Do you plan to visit Rottnest (again) in the near future (next 12 months?) As a day trip?
As an extended trip?

IF NOT, why is a trip to Rottnest not on your agenda? PROBE: accommodation, facilities, price, activities

Holidays; Where will you go? What do those places offer that Rottnest doesn't?

Day trip: will you do day trips – and where will you go? If have interstate / international visitors where will you take them? If not Rottnest, why not?

IF PLAN TO VISIT: why do you want to go – what is it that appeals?

Holidays: when would you plan to go? Why that time of year? Can you think of any reason why you might end up not going eg have you planned to go before and it has fallen through?

Day trips: what circumstances would prompt a trip? Visitors? An event? Why would you choose Rottnest? What does it offer that other places don't?

4. Products / services

15 mins

Moderator Notes: *Explore awareness and appeal of what is available on the Island and how that could contribute to visitation*

HAND OUT BROCHURES

Here's a brochure which describes what there is to do and see at Rottnest. Can you take a moment to have a look through.

NOTE SPONTANEOUS COMMENTS AS LOOK THROUGH BROCHURE

Have you seen this or a similar brochure before?

How much information is there about what there is to do on Rottnest? Where would you go to get information if you were thinking of going?

Has anyone been on the website recently? (explore comments)

So...what do you think of what is in this brochure? Is there more to do there than you thought...or not as much...or different things?

What didn't you know about?

What is appealing to you? Why?

Does this brochure make going to Rottnest more appealing or not? Why?

How do you think it would compare to other places you could go? Like MR / Busselton?

Bali? More to do / more appealing or...?

Do you think there are other things they should say / emphasise?

DEPENDING ON CONVERSATION MAY EXPLORE NEW ACTIVITIES / FACILITIES

Here are some ideas for new activities and facilities that Rottnest are considering developing.

Would any of these make Rottnest more interesting to you.....which would you be interested in?

Do any of them represent too much development? In what way?

5. Accommodation

5 mins

Moderator Notes: *May or may not be necessary depending on earlier discussion, this is a chance to explore issues relating to accommodation in a little more detail*

How much is accommodation part of the appeal / lack of appeal of staying on Rottneest? What have you heard about the accommodation? What was your experience?

What about the choice of accommodation?

What do you understand (know) to be the good things about the accommodation on Rottneest

And what about the weaknesses? PROBE: Cost of accommodation / quality / availability

- **If cost:** what do you think it costs to stay at Rottneest, overnight, for a week or weekend? What other sorts of places could you go for that amount?
- **If quality:** what do you know about the accommodation at Rottneest? Where do you hear this from? Have you heard anyone say they have upgraded the accommodation / what it is like these days?
- **If availability:** what have you heard about booking / availability? Have you tried to book yourself? Do the issues exist all year / part of the year..?

What would they need to do to the accommodation to make you interested in staying overnight? How would the accommodation need to change to attract you (back)?

3. Rottneest potential positionings

15 mins

Moderator Notes:

This is a brief session only in this non-visitor group to get some very basic reaction to these positioning as an understanding of current perceptions / barriers / past experiences that have led to lapsed visitation is more important for this group

I want to spend a little time exploring how Rottneest could develop in the future.

First of all , what do you think Rottneest needs to do to get people like you to visit / visit again? **EXPLORE EACH OF THE FOLLOWING**

- Changes to the accommodation(what?)
- Changes to the activities and facilities (what?)
- Changes to prices (ferry)
- More advertising / promotion
- More events on the Island – particular things to go for

Finally I'm going to show you a few different ways in which Rottneest could be promoted. Each of the ideas has a phrase to sum up the idea and then a sentence giving an idea of what this would mean. These aren't ads or even clever slogans yet, they are just broad ideas. For each one, I'd like you to read it, (IF TIME then answer the questions). Then we will discuss them in turn.

Taking each in turn:

- What appeals about this idea? Is it an appealing positioning in itself? What doesn't appeal?
- Does it 'fit' Rottnest? In what ways does it fit / not fit? Does it fit Rottnest all year or just at certain times?
- What does Rottnest need more of (less of) in order to be able to say this about itself? (Activities, facilities, services, events...)
- Who would this appeal to? Age / local / interstate / international/ type of trip
- Would it widen Rottnest appeal – or shrink it? Why do you say that?

Overall

- Which one is most appealing – and why?
- Which one works best for Rottnest – and why
- Which one do you think would lead to the most growth for Rottnest? In other words which would have the greatest appeal?
- Do any of them represent too much development / are too far away from what Rottnest is / should be?

THANK AND CLOSE

Appendix D: Visitor/Non-Visitor Survey

Questionnaire

Introduction

For unique links....

Thank you for agreeing to participate in this study. This study is being conducted by an independent research company TNS Social Research. All responses are strictly confidential and individual responses will not be reported. This guarantee of confidentiality is protected by the Federal Privacy Act. Under no circumstances will any of your personal data be disclosed to any organisation other than TNS Social Research or be used for any purpose other than the research study.

All research conducted by Researchpanel is done so within the guidelines of the Australian Marketing and Social Research Society and the Federal Privacy Act.

Your opinions are greatly valued, in appreciation for your participation your Researchpanel account will be credited with \$4.

If you have any questions about the survey, please contact Daryl Lim at Research Panel on **(08) 6218 4200** or email enquiries@researchpanel.com.au.

Kind regards,

The Researchpanel Team

For generic links...

Thank you for agreeing to participate in this study – your opinions are greatly valued.

This study is being conducted by an independent research company TNS Social Research. All responses are strictly confidential and individual responses will not be reported. This guarantee of confidentiality is protected by the Federal Privacy Act. Under no circumstances will any of your personal data be disclosed to any organisation other than TNS Social Research or be used for any purpose other than the research study.

If you have any questions about the survey, please contact Tess Balson at TNS Social Research on (08) 9322 2466 or email tess.balson@tnsglobal.com.

If you have any questions about the research, please contact Andrea Merven at the Rottneest Island Authority on (08) 9432 9125 or email andrea.merven@rotnnestisland.com.

Screener Questions

In this study respondents should be soft terminates.

ASK ALL

S1. Are you a resident of Western Australia?

(Please select one)

Yes	1	
No	2	TERMINATE

ASK ALL

S2. Please type in your postcode.

ASK ALL

S3. Please select which age group you are in?

(Please select one response per line)

Under 18	1	TERMINATE
18-24	2	
25-34	3	
35-44	4	
45-54	5	
55-64	6	
65 or over	7	

ASK ALL

S4. Are you...

(Please select one)

Male	1	
Female	2	

ASK ALL

S4a. In the last 5 years, that is since May 2007, which, if any, of the following have you done? *(Please select as many as may apply)*

Been on holiday/ for a short break overseas	1	
Been on holiday/ for a short break to another Australian State or Territory	2	
Been on holiday/ for a short break outside of Perth, but it was still within Western Australia	3	
Been on holiday/ for a short break in or around Perth (including Mandurah and Rottnest)	4	
None of the above	7	SKIP TO Q5b

ASK IF S4a=1 THRU 4

S4b. Thinking about the holidays you have taken, have they been in accommodation you have needed to pay for? Or have you stayed at a place that you, your family or friends own (including caravanning)?

(Please select one response per column)

	Holiday overseas [SHOW COLUMN IF s4a = 1]	Holiday to another Aus State / Territory [SHOW COLUMN IF s4a = 2]	Holiday outside Perth [SHOW COLUMN IF s4a = 3]	Holiday in/around Perth [SHOW COLUMN IF s4a = 4]
Stayed in paid-for accommodation	1	1	1	1
Stayed at a place you / your family / your friends own (including caravanning)	2	2	2	2
Both - some trips in paid-for accommodation, some in private accommodation/caravan	3	3	3	3

CLOSE RESPONDENTS IF S4A=1 THRU 4 AND ONLY CODE 2 IS SELECTED AT S4B – WE NEED TO SCREEN OUT THOSE WHO EXCLUSIVELY DO NOT PAY FOR ACCOMMODATION. HOWEVER, IF THEY QUALIFY AS A DAY TRIP VISITOR (i.e. S5g=1 or 2), THIS CONDITION DOES NOT APPLY AND THEY SHOULD QUALIFY FOR THE SURVEY (DAY TRIP SECTION AS OPPOSED TO EXTENDED STAY)

ASK ALL

S5. When was the last time, if ever, you went for a **holiday of at least one night's duration** to the following places?

(Please select one response per row)

	In the last year	One to five years ago	More than five years ago	I have never been
a. Margaret River area	1	2	4	9
b. Busselton / Dunsborough / Yallingup	1	2	4	9
c. Mandurah	1	2	4	9
d. Rockingham	1	2	4	9
e. Rottnest Island	1	2	4	9
f. Fremantle	1	2	4	9
g. Perth City	1	2	4	9
h. Perth Hills and Swan Valley	1	2	4	9
i. North of Perth, eg Lancelin / Yanchep / Moore River	1	2	4	9
j. Coral Coast / Broome / Kimberley	1	2	4	9
k. Bali	1	2	4	9
l. Other SE Asia destination	1	2	4	9

S5b. In the last 5 years, that is since May 2007, have you been on a day trip in or around Perth? *(Please select as many as may apply)*

Yes	1	SKIP S6. IF QUALIFIED AS EXTENDED STAY, SHOW THE EXTENDED STAY SECTION. IF NOT AN EXTENDED STAY PERSON, SCREEN OUT
No	2	

ASK ALL

S6. When was the last time, if ever, you went for a **day trip** to the following places? *(Please select one response per row)*

	In the last year	One to five years ago	More than 5 years ago	I have never been
a. Margaret River	1	2	4	9
b. Busselton / Dunsborough / Yallingup	1	2	4	9
c. Mandurah	1	2	4	9
d. Rockingham	1	2	4	9
e. Rottnest Island	1	2	4	9
f. Fremantle	1	2	4	9
g. Perth City	1	2	4	9
h. Perth Hills and Swan Valley	1	2	4	9
i. North of Perth, eg Lancelin / Yanchep / Moore River	1	2	4	9

QUOTA NOTE: TARGET GROUPS FOR QUOTAING AND SURVEY ROUTING PURPOSES ARE DEFINED AS FOLLOWS:

Target Group	Definition
Extended Stay Visitors	<ul style="list-style-type: none"> Stayed at Rottnest for one or more nights in the last 2 years S5h=1 or 2
Day Visitors	<ul style="list-style-type: none"> Visited Rottnest for a day trip in the last 2 years S6g=1 or 2
Non / Potential Visitors	<ul style="list-style-type: none"> All others S5h≠1 or 2 S6g≠1 or 2

Screen Out/Quota Fail

Unique links...

We would like to thank you for taking the time to participate in our survey. Your opinions and responses are gratefully received and extremely important to us.

The survey is now closed due to overwhelming responses from people like yourself.

This survey was conducted on behalf of Rottnest Island Authority.

Once again thank you for your interest. To ensure that you receive further relevant surveys, please make sure that your details are always up to date.

Please click the '>>' button below to earn your points.

Generic links...

We would like to thank you for taking the time to participate in our survey. Your opinions and responses are gratefully received and extremely important to us.

The survey is now closed due to overwhelming responses from people like yourself.

This survey was conducted on behalf of Rottnest Island Authority.

Once again thank you for your interest.

Welcome

Congratulations!

You have qualified for the survey. This survey will take you approximately 20 minutes to complete.

Section A – Extended Stay Visitors

ASK ALL EXTENDED STAY VISITORS

The next few questions are about your trips to Rottnest.

Q1. Which of the following best describes the pattern of your stays on Rottnest Island over the past five years?

(Please select one)

Have only been once	1
Occasional – go for the odd weekend or short break, but not necessarily every year	2
Regular – go most, if not every year generally at the same time of year for about a week or more	3
Regular and more – go for a regular trip as described above, plus extra short breaks at other times if possible	4

ASK ALL EXTENDED STAY VISITORS

Q2. On how many occasions have you stayed on Rottnest Island in the last 5 years?

(Please select one)

Once	1
Twice	2
Three to five times	3
Six to ten times	4
Eleven to twenty times	5
More than twenty times	6

ASK ALL EXTENDED STAY VISITORS

Q3a. In the first column below, please tick the time of year that you most commonly stay on Rottnest Island.

(Please select one)

Q3b. In the second column, please tick any other times of year you have also stayed over the past 5 years.

(Please select as many that may apply)

	MOST OFTEN (Q3a)	OTHER TIMES (Q3b)
Summer holidays (December / January)	1	1
Other summertime (November – Easter)	2	2
Easter holidays	3	3
Autumn / winter / spring (rest of April to October)	4	4
Don't visit at any other time	na	5

ASK ALL EXTENDED STAY VISITORS

Q4. Who do you most commonly stay at Rottnest Island with?

(Please select as many that may apply)

My immediate family – including young children aged 12 years and under	1
My immediate family – including teenagers	2
Other families /friends in family groups	3
Friends (singles / couples)	4
My partner	5
On my own	6

ASK ALL EXTENDED STAY VISITORS

Q5a. In the first column below, please select which type of accommodation do you most commonly stay in when you go to Rottnest Island?

(Please select one)

Q5b. In the second column please select all other types of accommodation that you have stayed in over the past 5 years.

(Please select as many that may apply)

	MOST OFTEN Q5a	OTHER TIMES Q5b
Allison Camping ground	1	1
Bathurst	2	2
Bungalows	3	3
Caroline Thompson Cabins	4	4
Geordie/Longreach / Fays Bay	5	5
Rottnest Island Hotel	6	6
Kingston Dormitories and Hostel	7	7
Kingston Governors Circle	8	8
Rottnest Island Lodge	9	9
South Thomson	10	10
Thomson Villas / Units	11	11
Haven't stayed in any other accommodation type	na	12

ASK IF Q5a= 2, 4, 10 or 11

Q5c. Do you generally stay in self-contained accommodation or in basic accommodation?

Self-contained accommodation includes all linen, towelling, cutlery and crockery as part of the price. TVs and microwaves are also supplied.

Basic accommodation does not include linen or towels as part of the price however these items may be hired if required at an additional cost.

(Please select one)

Self-contained accommodation	1
Basic accommodation	2
It varies	3
Don't know / not sure	98

ASK ALL EXTENDED STAY VISITORS

Q5d. Have you ever entered the ballot to get accommodation on Rottnest Island?

Yes	1
No	2

ASK ALL EXTENDED STAY VISITORS

Q5e. What periods of the year does the ballot operate for? Please tick the box which best reflects your understanding of when the ballot system applies to accommodation bookings

All year round	1
The summer months (Nov-Apr)	2
All school holidays	3
Summer and Easter school holidays only	4
Summer school holidays only	5
Don't know	99

ASK ALL EXTENDED STAY VISITORS

Q6. What are the reasons you choose to go to Rottnest Island for a holiday, or short break, rather than elsewhere? What is it about Rottnest that makes you want to go there rather than elsewhere?

(Please write in as much detail as possible)

--

ASK ALL EXTENDED STAY VISITORS

Q7. On the other hand, are there things about Rottneest that mean you sometimes choose other places over Rottneest? What would you say are the things about Rottneest that (sometimes) put you off going?

(Please write in as much detail as possible)

99

I cannot think of anything

Section B – Day Trip Visitors

ASK ALL DAY TRIP VISITORS

The next few questions are about your day trips to Rottneest.

Q1. How many times have you been to Rottneest Island for a **day trip** in the last 5 years?

(Please select one)

Once	1
Twice	2
Three to five times	3
Six to ten times	4
Eleven to twenty times	5
More than twenty times	6

ASK ALL DAY TRIP VISITORS

Q3a. In the first column below, please select the time of year that you most commonly visit Rottneest Island.

(Please select one)

Q3b. In the second column, please select any other times of year you have also visited the Island over the past 5 years.

(Please select as many that may apply)

	MOST OFTEN (Q3a)	OTHER TIMES (Q3b)
Summer holidays (December / January)	1	1
Other summertime (November – Easter)	2	2
Easter holidays	3	3
Autumn / winter / spring (rest of April to October)	4	4
Don't visit at any other time	na	5

Q3c. Which days of the week do you prefer to visit Rottnest Island?
(Please select all that apply)

	PREFERED DAY (Q3c)
Saturday	1
Sunday	2
Any day of the weekend, depends on what else is happening	3
Monday	4
Tuesday	5
Wednesday	6
Thursday	7
Friday	8
Any day of the week, depends what else is happening	9

ASK ALL DAY TRIP VISITORS

Q4. Who do you most commonly visit Rottnest Island with on day-trips?
(Please select as many that may apply)

My immediate family (including young children aged 12 years and under)	1
My immediate family (including teenagers)	2
Other families /friends in family groups	3
Friends (singles / couples)	4
My partner	5

ASK ALL DAY TRIP VISITORS

Q5. Thinking about the times you have been to Rottnest on a day trip over the last 5 years, which, if any, of the following reasons for going apply to you?

(Please select as many as apply)

Q5b. If you have ticked more than one reason, which would be the most common reason for you to visit Rottnest on a day trip?

(Please select one only)

	ALL REASONS Q5a	MOST COMMON Q5b
To take visitors from outside Perth	1	1
To attend a specific event (eg channel swim, music event)	2	2
Just for a day out - no particular reason	3	3
Good place to go in the school holidays	4	4
Lovely weather	5	5
On a Corporate / Business day trip	6	6
On a group outing such as a fun day out with work colleagues or friends	7	7
To visit Rottnest on our boat	8	8
To go snorkelling / diving	9	9
To go cycling	10	10

Q5c. Are there any other situations under which you go to Rottnest? Please write in any other reasons below.

ASK ALL DAY TRIP VISITORS

Q6a. Why do you choose to go to Rottnest Island for a day trip? What is it about Rottnest that makes you want to go there?

(Please write in as much detail as possible)

ASK ALL DAY TRIP VISITORS

Q7. On the other hand, are there things about a day trip to Rottnest that mean you sometimes choose other places over Rottnest? What would you say are the things about Rottnest that (sometimes) put you off going for a day trip?

(Please write in as much detail as possible)

Section C – Non Visitors

Q2. You said earlier that you hadn't been to Rottnest Island in the last 5 years.

Have you ever been to Rottnest Island, for a day trip, holiday or short break?

	DAY TRIP	SHORT BREAK
No, never been to Rottnest	1	1
Yes, 5 – 10 years ago	2	2
Yes, more than 10 years ago	3	3

Q3. What are the reasons you haven't been to Rottnest for a holiday / short break (ever) in the last 5 years? (WORD AS APPROPRIATE TO Q2}

Please write in all the reason why you haven't been (back to) Rottnest for a holiday / short break in that time

Haven't been on a holiday / short break in the last 5 years	1

Q4. What are the reasons you haven't been to Rottnest for a day trip (ever) in the last 5 years? (WORD AS APPROPRIATE TO Q2}

Please write in all the reason why you haven't been (back to) Rottnest for a holiday / short break in that time

Haven't been on a day trip in the last 5 years	1

Q5. Here are a number of reasons other people have given for why they don't visit Rottnest Island these days. For each one, please tick whether that reason is one that is also true for you. Please tick whether it applies to you a lot, applies a little or doesn't apply to you.

PLEASE SELECT JUST ONE COLUMN FOR EACH ITEM.

[PROGRAMMER: RANDOMISE ORDER, SR FOR EACH ITEM]

(Please select one only)

	APPLIES A LOT	APPLIES A LITTLE	DOESN'T APPLY TO ME
	1	2	3
Just don't think about it / don't consider Rottneest Island when thinking of going somewhere for a day trip			
Just don't think about it / don't consider Rottneest Island when thinking of going somewhere for a holiday / short break			
Don't hear anything good about it from other people			
Don't see any advertising for it			
It's expensive			
Don't really know what there is to do there – nothing to give me a reason to go			
Not good value for money for what you get			
Not convenient or easy to get to			
Not enough to do there			
Doesn't offer the kind of activities / facilities that I enjoy			
The boat trip			
Standard of accommodation is not good enough			
The facilities there are not in good condition / are old and tired			
The things I read in the paper put me off			
Difficult to book accommodation			
Grown out of it – part of a certain stage of life I'm not in any more			
No one else I know goes to the Island			
Had a bad time the last time I went			

Section D – Destinations

ASK ALL

Q8. Please look at the statements below, and indicate for each one how important it is to you when choosing the destination for a holiday or short break by selecting an answer between 'extremely important' and 'not at all important'.

If what you want on a holiday or short break varies with different holidays, please try to think about the holidays / breaks you most enjoyed in the last 2 years.

(Please select one response per row)

RANDOMIZE ALL STATEMENTS

		Extremel y important	Very important	Moderatel y important	Slightly important	Not at all important
1	Has beautiful beaches	1	2	3	4	5
2	Offers complete relaxation	1	2	3	4	5
3	An affordable option	1	2	3	4	5
4	Easy to travel to	1	2	3	4	5
5	Is familiar and holds great memories	1	2	3	4	5
6	Offers the buzz of city life	1	2	3	4	5
7	Ideal for children	1	2	3	4	5
8	Quiet and peaceful	1	2	3	4	5
9	Chance to see new or unique sights	1	2	3	4	5
10	Experience unspoilt environment	1	2	3	4	5
11	Offers cultural / educational / historical activities	1	2	3	4	5
12	Offers physical activities / sports	1	2	3	4	5
13	Offers water based activities	1	2	3	4	5
14	Has high quality accommodation	1	2	3	4	5
15	Has good weather	1	2	3	4	5
16	A range of good restaurants	1	2	3	4	5
17	Night life and excitement	1	2	3	4	5

ASK ALL

Q9. Here are some possible places people in WA can go for a holiday or short break and some features or characteristics of holiday destinations. Please select which destination(s) you would associate with each feature.

Please base your answers not just on your personal experience but also on what you have seen or heard about each destination as well as you what you think it would be like.

For each feature, you can select as many or few destinations as you think it applies to – it may be none, one, several or all of them.

(Please select as many as may apply)

RANDOMIZE ALL STATEMENTS

		Rottne st	Mandur ah	Busselton/ Dunsborou gh/Yallingu p	Bali	Margaret River	None of these
1	Excitement	1	2	3	4	5	9
2	Relaxation	1	2	3	4	5	9
3	Safe	1	2	3	4	5	9
4	New experiences	1	2	3	4	5	9
5	Convenience	1	2	3	4	5	9
6	Reconnect with friends/ family	1	2	3	4	5	9
7	Value for money	1	2	3	4	5	9
8	Quality	1	2	3	4	5	9
9	Escape	1	2	3	4	5	9
10	Adventure	1	2	3	4	5	9
11	Memories	1	2	3	4	5	9
12	Familiarity	1	2	3	4	5	9
13	Activity	1	2	3	4	5	9
14	Easy	1	2	3	4	5	9

ASK ALL

Q10. Taking into account everything you look for in a holiday or short break destination, please rate these destinations using a 10 point scale where 10 means you think it is 'perfect' and 1 means you think it is 'terrible'.

It doesn't matter if you have been to the destination or not, we'd like your opinion of all the destinations you are aware of.

(Please select one response per row)

RANDOMISE DESTINATIONS

	Terrible									Perfect
a. Rottneest	1	2	3	4	5	6	7	8	9	10
b. Mandurah	1	2	3	4	5	6	7	8	9	10
c. Busselton/ Dunsborough/Yallingup	1	2	3	4	5	6	7	8	9	10
d. Bali	1	2	3	4	5	6	7	8	9	10
e. Margaret River	1	2	3	4	5	6	7	8	9	10

ASK ALL

Q11. Some things are extremely important to people, such as the choice of career, and others are much less important, such as the brand of paper plates to take on a picnic.

Thinking about holiday destinations, how important is it to you which destination you choose to go to for a holiday?

(Please select one)

Extremely important	1
Very important	2
Moderately important	3
Slightly important	4
Not at all important	5

ASK ALL EXTENDED STAY VISITORS

Q12. Thinking specifically about Rottneſt again, which one of the following ſtatements beſt deſcribes your feelings about Rottneſt?

(Please ſelect one)

I can think of many good reaſons to continue going to Rottneſt for holidays / ſhort breaks and no reaſon to go elſewhere inſtead	1
I can think of many good reaſons to continue going to Rottneſt for holidays / ſhort breaks but there are alſo many reaſons for me to go elſewhere inſtead	2
I can think of a few good reaſons to continue going to Rottneſt for holidays / ſhort breaks but there are many reaſons for me to go elſewhere inſtead	3

ASK ALL DAY TRIP VISITORS (THAT AREN'T ALSO EXTENDED STAY VISITORS)

Q12. Thinking ſpecifically about Rottneſt again, which one of the following ſtatements beſt deſcribes your feelings about Rottneſt?

There are many good reaſons to ſtart going to Rottneſt for holidays / ſhort breaks	1
There are many good reaſons to ſtart going to Rottneſt for holidays / ſhort breaks but there are alſo many reaſons not to	2
There are few good reaſons to ſtart going to Rottneſt for holidays / ſhort breaks.	3

ASK ALL

Q13 Using a ſcale of 0 to 10 where 0 indicates 'not at all likely' and 10 indicates 'definitely would', overall how likely are you to: [ROTATE ORDER](#)

Visit Rottneſt for a holiday / ſhort break in the next 2 years	1	2	3	4	5	6	7	8	9	10
Visit Rottneſt for a day trip in the next 2 years	1	2	3	4	5	6	7	8	9	10

Section E – New Product Ideas

ASK ALL

Q13. People have different opinions about how many experiences there should be at Rottnest Island. Which one of the following 3 statements do you agree with the most?

DAY VISITORS AND NON-VISITORS (SO ONLY DON'T SHOW IF THEY ARE EXTENDED STAY VISITORS) ADD TEXT: We know you may not know much about the accommodation, but please answer this question, and those following, based on what you do know or your perception of the accommodation on Rottnest}

(Please select one)

I think they should leave Rottnest largely unchanged, just conduct maintenance and small improvements as needed	1
I think they should provide some more and / or better facilities and improved accommodation at Rottnest	2
I think they should make a lot of changes, improvements and / or additions to the facilities and accommodation at Rottnest	3

ASK ALL

Q14. Below are some possible facilities and activities that could be offered at Rottnest.

Taking each one in turn, please indicate whether you think this should be a HIGHER or LOWER priority item or whether you don't think this should be done at all.

(Please select one response per row)

PROGRAMMER NOTE – RANDOMISE STATEMENTS WITHIN EACH SET BELOW. SHOW EACH SET ON A NEW SCREEN WITH THE SAME QUESTION WORDING.

	Higher priority	Lower priority	Do not do
a. Mini putt putt	1	2	3
b. Skate park	1	2	3
c. Wave pool	1	2	3
d. Beach trampolines	1	2	3
e. Climbing wall	1	2	3
f. Sheltered playground (with sun shades)	1	2	3
g. Tennis courts	1	2	3
h. Basketball courts	1	2	3
i. Games arcade for older kids	1	2	3
j. Indoor play area for younger kids	1	2	3
k. Water playground (Free)	1	2	3
l. Driving range	1	2	3
m. Golf course	1	2	3

SHOW ON NEW SCREEN.

	Higher priority	Lower priority	Do not do
n. Recreational Marina	1	2	3
o. Boat hire at Thomson Bay	1	2	3
p. Fishing charters	1	2	3
q. Surf lessons	1	2	3
r. Underwater snorkel trail	1	2	3
s. Canoeing on lakes	1	2	3
t. Golf lessons	1	2	3
u. Dinghy hire for fishing	1	2	3

SHOW ON NEW SCREEN.

	Higher priority	Lower priority	Do not do
v. Self-guided tours	1	2	3
w. Heritage tours	1	2	3
x. Bushwalking tours	1	2	3
y. Eco tours	1	2	3
z. Cycling tours	1	2	3
aa. Terrestrial camping tours			
bb. Walking trails	1	2	3

SHOW ON NEW SCREEN.

	Higher priority	Lower priority	Do not do
cc. Drinking water available outside of main settlement	1	2	3
dd. Wider range of food outlets	1	2	3
ee. Cafe at the Lighthouse	1	2	3
ff. Cafe at West End	1	2	3
gg. Low profile chair lift to the lighthouse	1	2	3
hh. Ability to fly to Rottneest	1	2	3
ii. More special sporting events like fun runs, marathon, golf tournaments	1	2	3
jj. More special arts/culture/music events	1	2	3
kk. Fish cleaning facilities	1	2	3

ASK EXTENDED STAY VISITORS ONLY

Q15. Here are some ways in which the available accommodation could be improved or added to.

As with the facilities and activities, taking each one in turn, please indicate whether you think this should be a HIGHER or LOWER priority item or whether you don't think this should be done at all.

(Please select one response per row)

PROGRAMMER NOTE – RANDOMISE STATEMENTS WITHIN EACH SET BELOW. SHOW EACH SET ON A NEW SCREEN WITH THE SAME QUESTION WORDING.

	Higher priority	Lower priority	Do not do
a. Toilet separate from bathroom	1	2	3
b. Bigger fridge	1	2	3
c. More storage space (drawers and hanging)	1	2	3
d. Provision of hotel amenities - mini-toiletries, welcome pack - in self-catering	1	2	3
e. Provision of more beds in each bedroom	1	2	3
f. Better outdoor furniture	1	2	3
g. More comfortable sofa / lounge seating	1	2	3
h. Provision of new barbecues	1	2	3
i. Provision of TV and DVD in self-catering	1	2	3
j. Hair dryers in bathrooms	1	2	3
k. TVs in master bedrooms	1	2	3
l. WiFi facilities	1	2	3
m. Offer late checkout options	1	2	3

ASK ALL

SHOW ON NEW SCREEN.

	Higher priority	Lower priority	Do not do
n. Upgrade existing self-catering accommodation to be more luxurious / better appointed, available for higher price than 'standard' accommodation	1	2	3
o. Build new self-catering accommodation with second bathroom and higher specification available for higher price than 'standard' accommodation	1	2	3
p. Provision of low rise 4 or 5 star hotel accommodation	1	2	3
q. Convert superior view accommodation to provide greater comfort in winter via provision of a fireplace, couches, doonas, soft furnishings etc	1	2	3
r. Provision of 'basic' cabin style accommodation at budget prices	1	2	3
s. Have the accommodation managed by private companies rather than by the public sector	1	2	3

Section F – Off Season Stays

ASK ALL

Q16. Here are some reasons other people have given for why they don't go to Rottnest Island in winter. Please select whether each applies to you a lot, applies a little or doesn't apply to you.

(Please select one response per row)

RANDOMISE ALL STATEMENTS

	Applies a Lot	Applies a Little	Doesn't Apply to me
a. Most activities are outdoors and more suitable for summer months	1	2	3
b. There are not enough indoor locations and activities if the weather is not good	1	2	3
c. Many of the facilities are not open or only open for limited times	1	2	3
d. The accommodation is not cosy / comfortable	1	2	3
e. The ferry crossing in bad weather concerns me	1	2	3
f. It is expensive compared to the deals other places offer in winter months	1	2	3
g. I don't tend to go away anywhere during winter months	1	2	3

ASK ALL

Q17. One idea is to convert some of the accommodation with good views into 'winter comfort' accommodation, by providing a fireplace, more comfortable furniture and soft furnishings, converting a bedroom into a family or dining room, providing doonas, TV / DVD, some books...and a range of other little comforts. There would be the option of flying to Rottnest if desired.

How interested would you be in staying at Rottnest in the winter months if that style of accommodation was available?

(Please select one)

More interested	1
A little more interested	2
Does not increase my interest at all	3

ASK IF Q17=1 OR 2

Q18a. What is it about this idea that makes you more interested in staying at Rottnest during the winter?

(Please write in as much detail as possible)

Q18b. Is there anything else about this idea of 'winter comfort' accommodation that you would want to know more about?

(Please write in as much detail as possible)

ASK IF Q17=3

Q18c. Why does this idea not increase your interest in staying at Rottnest in the winter?

(Please write in as much detail as possible)

ASK ALL

Q19. Here are some things other people have said about this idea. Please indicate whether you agree or disagree with each statement below.

(Please select one response per row)

RANDOMISE ALL STATEMENTS

	Agree strongly	Agree	Neither agree nor disagree	Disagree	Disagree strongly
a. Even with better furniture and facilities, the accommodation would still be too basic for a winter comfort stay	1	2	3	4	5
b. The accommodation as described would offer a good level of comfort for me	1	2	3	4	5
c. I would rather stay down South with facilities such as a second bathroom, spa, luxury kitchen	1	2	3	4	5
d. I would love the quiet of being on Rottnest in the winter	1	2	3	4	5
e. There would not be enough to do on Rottnest in the winter	1	2	3	4	5
f. This idea is no good for families with young children	1	2	3	4	5
g. This idea deals with all my concerns about staying on Rottnest in the winter	1	2	3	4	5

ASK ALL

Q20a. Another idea to encourage people to visit Rottneest Island throughout the year is to promote a calendar of different types of events on the Island.

Which, if any, of the following types of events would you be interested in going to Rottneest to attend?

(Please select one response per row)

RANDOMISE ALL STATEMENTS

	Would be interested in attending	Might be interested in attending	Would not be interested in attending
a. Fun runs	1	2	3
b. Marathons	1	2	3
c. Triathlons	1	2	3
d. Comedy festivals	1	2	3
e. Golf tournaments	1	2	3
f. Music concerts	1	2	3
g. Food & wine festivals	1	2	3
h. Arts & craft festivals	1	2	3
i. Cycling tour	1	2	3
j. Outdoor cinema program	1	2	3
k. Writing / authors festival	1	2	3
l. Yacht or other boating races	1	2	3

FOR THOSE ITEMS WITH CODE 3, ASK

Q20b Are you not interested in attending this kind of event regardless of where it is held, or would you not be interested in attending this **on Rottneest?**

(Please select one response per row)

RANDOMISE ALL STATEMENTS

	Not interested regardless of where held	Not interested in attending on Rottneest
a. Fun runs	1	2
b. Marathons	1	2
c. Triathlons	1	2
d. Comedy festivals	1	2
e. Golf tournaments	1	2
f. Music concerts	1	2
g. Food & wine festivals	1	2
h. Arts & craft festivals	1	2
i. Cycling tour	1	2
j. Outdoor cinema program	1	2
k. Writing / authors festival	1	2
l. Yacht or other boating races	1	2

Section G – Communication of Rottnest

ASK ALL

Q21. There are a number of themes that could be used to promote and communicate Rottnest Island.

We are now going to show you a series of statements about Rottnest Island. For each statement, we would like you to answer 3 short questions.

NEW SCREEN.

PROGRAMMER NOTE: SHOW EACH OF THE STATEMENTS BELOW ON A SEPARATE SCREEN, WITH Q21A, B AND C FOR EACH SHOWN ON THE SAME SCREEN

EACH RESPONDENT SHOULD SEE ONLY 5 OF THE FOLLOWING STATEMENTS IN TOTAL, SELECTED AT RANDOM.

WITHIN THE NON-VISITORS GROUP, A TOTAL OF n=200 RESPONDENTS SHOULD SEE EACH STATEMENT. ALSO WITHIN THE VISITORS GROUP (including both EXTENDED STAY and DAY TRIP visitors) A TOTAL OF n=200 RESPONDENTS SHOULD SEE EACH STATEMENT

RANDOMIZE ORDER OF STATEMENTS

a. Rottnest is a great place for a day trip because there is so much to see and do
b. Rottnest is a great place to go out of season when it is quieter and cooler
c. Rottnest is a great place for a family holiday because it offers freedom and fun
d. Rottnest is a great place to get active, with swimming, diving, snorkelling, fishing, cycling, and golf
e. Rottnest has a fascinating history including war history, Aboriginal history - plus the oldest inhabited road in Australia
f. Rottnest is just 30 minutes away making it quick and easy to get to another world
g. Rottnest is a great place to enjoy the simpler pleasures in life with those you love
h. Rottnest offers a pristine unspoilt environment within easy reach of Perth
i. Rottnest has some of Australia's best snorkelling and diving
j. Rottnest is Rottnest

Q21a. How much, if at all, does this statement **increase your interest** in visiting Rottneest?

(Please select one)

Makes me more interested	1
Makes me a little more interested	2
Does not increase my interest at all	3

Q21b. How well do you think Rottneest can provide what is stated in this statement?

(Please select one)

Can provide very well	1
Can provide quite well	2
Does not provide well - other places in WA provide it better	3

Q21c. How much does this statement suggest Rottneest offers **something different** to other destinations in WA?

(Please select one)

Offers something quite different	1
Offers something a little bit different	2
Does not offer anything different to other destinations in WA	3

Section H – Pricing Bundles

Q22. Below are a number of potential ideas for package deals for visitors to Rottneest.

How much, if at all, would these offers increase your interest in visiting Rottneest?

(Please select one response per row)

RANDOMISE ALL STATEMENTS

	Makes me more interested	Makes me a little more interested	Does not increase my interest at all
Bike hire included with accommodation	1	2	3
Ferry ticket included with accommodation	1	2	3
Bus pass included with accommodation	1	2	3
Discount voucher for food and beverage outlets with ferry ticket	1	2	3
Ferry ticket and bus pass included with accommodation	1	2	3
Upgraded room facilities for a small additional fee	1	2	3

Q23a. In your opinion, who should pay for ...

a) the upkeep of the natural environment on Rottne

b) provision and maintenance of services and facilities such as water, power, and buildings on Rottne?

(please select one answer per column)

	Maintenance of natural environment	Provision and maintenance of services & facilities
The visitors to the Island	1	1
Mainly the visitors to the Island but with some contribution from Government	2	2
Both visitors and the Government equally	3	3
Mainly the Government but with some contribution from visitors to the Island	4	4
The Government	5	5
Private Corporate sponsors	6	6

Demographics

ASK ALL

D1. Which of the following best describes your household?

(Please select one)

Young single, no children / no children at home	1
Young couple (living together), no children / no children at home	2
Young family (singles or couples with dependents, where eldest child is under 13 years)	3
Teenage family (singles or couples with dependents, where eldest child is 13-17 years)	4
Adult family (singles or couples with adult child / children, the eldest aged 18 or over, living at home)	5
Mature single / couple (singles or couples with no children living at home)	6
I'd rather not say	98

ASK ALL

D2. Which of the following best describes your total household annual income before tax?

(Please select one)

Less than \$10,000	2
\$10,001 - \$35,000	3
\$35,001 - \$60,000	4
\$60,001 - \$80,000	5
\$80,001 - \$100,000	6
\$100,001 - \$140,000	7
\$140,001 - \$180,000	8
\$180,001 - or above	9
Prefer not to say	98

ASK ALL

D3. How long have you been living in Western Australia?

(Please select one)

All my life	1
11 or more years	2
6 - 10 years	3
3 - 5 years	4
Less than 3 years	5

ASK IF GENERIC LINK (RESPONDENT MUST FILL IN BOTH BOXES OR TICK THE TICK BOX CODE 99)

D4. If you would like go in the draw to win a \$50 Coles Myer voucher, please enter your name and contact number below.

Your details will be used for the prize draw only. Your response to the survey will be kept strictly anonymous.

Name:

Phone number:

99 I do not wish to enter the draw

Completion Screens

Unique links...

We would like to thank you for taking the time to complete our survey. Your opinions and responses are gratefully received and extremely important to us.

The insight which you have given us will be used to develop future products and others like it.

Your responses will be used at an aggregate level only, and as such we would like to assure you once again that your details will be used in the strictest of confidence and will not be passed on to any other party for any purpose other than that which it was intended.

This survey was conducted on behalf of Rottneest Island Authority. To check the bona fides of TNS please phone SurveyLine on 1300 364 830.

Once again thank you for your interest. To ensure that you receive further relevant surveys, please make sure that your details are always up to date.

Please click the '>>' button below to earn your points.

Generic links...

We would like to thank you for taking the time to complete our survey. Your opinions and responses are gratefully received and extremely important to us.

Your responses will be used at an aggregate level only, and as such we would like to assure you once again that your details will be used in the strictest of confidence and will not be passed on to any other party for any purpose other than that which it was intended.

This survey was conducted on behalf of Rottneest Island Authority. To check the bona fides of TNS please phone SurveyLine on 1300 364 830.

Once again thank you for your interest.

Appendix E: Stakeholder Interview Discussion Guide

This guide is intended as an outline only. Certain sections are applicable to all interviews but where there are more specific areas of interest the general sections may only be covered fairly quickly. There will be considerable scope within the discussion for exploring issues as they arise. Questions are not word for word descriptions of the moderator's questions.

1. Introduction and context

- Researcher to talk through purpose of the session: TNS commissioned to conduct research to inform future tourism and marketing strategy for Rottnest. Gathering the perceptions of stakeholders including Island businesses and retailers and others.
- Firstly like to get some background on (as appropriate depending on respondent)
 - The business here – how long it has been here, opening hours, busy times of day / year (for Island businesses and ferries)
 - The nature of the Rottnest Society / Foundation / Voluntary Guides – how it started, how it operates, how it interacts with RIA and the Island businesses;
 - Role at RPYC and personal involvement with / experience in boating to / at Rottnest
 - (TWA) Way in which TWA interacts with Rottnest – extent of involvement, formal / informal arrangements.. also your personal experience with Rottnest (whether stayed / visited etc)
 - (Burswood) background in hotel / resort marketing – particularly **interested in your expertise on accommodation...also your experience with Rottnest** (whether stayed / visited etc)

2. Rottnest island – currently

(All)

(businesses only) How has this summer been on Rottnest? As busy as ever? Less or more?

*(businesses only)*What would you attribute any changes to?

How do you feel Rottnest is faring compared to other day trip / holiday destinations in Western Australia?

What do you think are Rottnest's main strengths? What can it offer over other day trips or holidays in WA /for WA people? Do you think enough is made of these strengths?

What about the Island's weaknesses? Does it have specific problems that make it harder for it to compete against other destinations?

Could any of these be reduced / managed in some way?

3. Product improvements and new product ideas

(All)

In what ways do you think the Island could be improved to increase visitor numbers?

Explore:

- Changes to transport – to and from the Island (routes, times, cost), also around the Island?
- Services and facilities on the Island? New businesses? Shops, cafes, etc
- Activities: New /different? Free / paying? Quality / refurbishment of what is there?
- Information and promotion of what the Island offers – both before coming to the Island and when there?
- Infrastructure / signage?
- Facilities for people coming on their own boat?
- Accommodation. Booking process, availability, choice of accommodation types, facilities in accommodation, cleanliness.

Thinking about the facilities and activities that are available, which of the existing ones do you think it is most critical to improve?

And which new products do you think would be appealing to visitors?

Are there any facilities / activities here that you feel should be closed down?

4. (TWA only) TWA specific issues

TWA; Particularly interested in talking to TWA about the Chinese market.

From your broader perspective, what are the features / activities of Rottneest that would be most appealing to the Chinese market:

- Firstly to the tour operators (i.e. how do we get on their agendas?)
- Secondly to the Chinese tourists (i.e. how do we ensure this is an attractive aspect of a proposed itinerary?)

Is Rottneest a place to get on itineraries or is it more appropriate to the proportion of the market travelling independently?

What other activities and places are being included in current itineraries...given that it is unlikely these itineraries are going to get longer, how could space be made for Rottneest?

What does Rottneest need to make it more attractive to Chinese tour operators and visitors?

- Signage / interpretation in Chinese / certain activities / facilities / food options?
- Are there aspects of Rottneest that are more or less culturally appropriate? E.g. is bike riding tied in with lower standards of living / riding to work and thus not an appropriate tourism activity? Are there any cultural issues with changing in public changing facilities? Etc

How would RIA most effectively go about forming alliances with the Chinese operators? Are there other useful partners like China Southern Airlines

TWA; Examples from elsewhere

Again would welcome your broader perspective on other destinations that might provide some illustrations /ideas for Rottneest;

- Destinations that have been successful in dealing with negative perceptions relating to price;
- **Destinations that have wanted to maintain the balance between being 'low key'(limited impact on environment / not overly commercial) with offering more and keeping current / fresh;**
- Destinations that have been dominated by one holiday type and season.

4. (Burswood only) Burswood specific issues

It would be useful to have some floor layouts for the accommodation (already have inventory information)

We are particularly interested in tapping into your expertise with regard to accommodation.

There are a number of possible options being explored with regard to accommodation on Rottneest;

- Upgrading much of the accommodation to a level more in line with consumer expectations;
- Upgrading certain front line accommodation to be very comfortable in the winter months;
- Having the new hotel facility which has been on the cards for some time (Mount Herschel)

In your experience, what are the minimum requirements for self-catering accommodation in Australia? **Given that many people don't want luxury at Rottneest but do want comfort and value for money, what should be included?**

Looking at the layout and facilities provided in the self-catering accommodation at Rottneest, what would you consider to be the main changes that need to be made?

- Do they need re-designing internally?
- Can significant improvements be made without that by more limited redesign (e.g. separate entrance to toilet)
- Can significant improvements be made by adding to the furniture and equipment provided?
- Would any of those changes negatively impact on the family – holiday freedom the current more basic accommodation provides?

Can these premises be made even more inviting for winter hibernation (high levels of comfort if not luxury) – i.e. to provide a different experience in the winter? Or does that market require a level of luxury that it is not possible to provide without significant redesign (e.g. addition of spas etc)

What else is required to support 'quality' accommodation – eg landscaping, daily cleaning, room service, dining options, other facilities?

4. (Boating) Boating specific issues

In an earlier stakeholder workshop, representatives of a number of boating organisations raised a number of issues and ideas which we would like to explore further.

What would you see as the main issues affecting the enjoyable use of Rottneest by boaties?

After spontaneous discussion, probe for:

Sufficiency of facilities

- Do we need more moorings or is the issue to manage them better? What would be the optimal scheme? Include colour allocation (too many green?)
- How moorings are allocated – how it currently works and issues with existing scheme What would be better?

New facilities, e.g.

- **Wave screen in Thomson's Bay to protect against Easterlies (as per Fremantle)**
- Marina
- Mediterranean moorings towards army jetty
- Water supply to fuel jetty at Geordie Bay
- Sewerage pump –out – at marina or a boat service?

What about facilities **on** the Island – how easy is it for boaties to get off their boat and make use of the island?

What is needed to encourage more people to spend more time on the island – either during the day or staying over in Island accommodation?

What is needed to encourage people to spend several days at Rottneest staying on their boat but using the Island each day?

5. Prices and costs

(businesses)

In the consumer research we are doing, the perception of the high cost of coming to the Island and staying on the Island comes up a lot.

We're interested in what drives this perception...from your perspective, what aspects of holidaying / day trips are more expensive here and what is the same as the mainland?

What are the things that make doing business on the Island more expensive?

And could any of those costs be reduced in some way? Are there structures or ways in which the Island currently operates that, if changed, would enable some cost reductions?

(staff living on Island, ways in which the business arrangements are structured with RIA, others?)

If the reality is that these things are more expensive because it is an Island, how do you think this can best be communicated to the public? Should it be addressed head on and the reasons given? Not mentioned? Other?

6. New markets

(All)

Are there particular markets that you feel Rottnest should be targeting more? E.g. Asian visitors, day trips, off season local market, other?

What is it about this group that makes them an attractive target?

And what is it about Rottnest that you think they would be attracted to? On what basis should we be marketing Rottnest?

What does Rottnest need to make it more attractive to this particular group?

7. Events strategy

(All)

One of the ideas that has been suggested is to develop a number of events to take place on Rottnest – such as a comedy festival, fun run / marathon, golf tournament

What would you see as the strengths and weaknesses (issues) of this idea?

What would you see as potential implications for your business that would need to be considered here? Would this be a good thing for your business?

Are there other implications that would need to be considered in making this a success? (accommodation, transport, infrastructure etc.)

8. Off season strategy

(All)

Another idea is to develop an off season market, aimed at a very different group of **people and offering a very different experience. This would involve 'refurbishing' a number of the properties with a view to a higher specification over winter – additional furniture, TVs / DVDs, doonas, rugs etc – offering transport to the Island by plane as well as ferry – and having a more upmarket winter retreat.**

What would you see as the strengths and weaknesses (issues) of this idea?

What would you see as potential implications for your business that would need to be considered here? Would this be a good thing for your business?

Are there other implications that would need to be considered in making this a success? (accommodation, transport, infrastructure etc.)

THANK AND CLOSE

Appendix F: Boating Visitor/Non-Visitor Survey

Questionnaire

Introduction

For unique links....

Thank you for agreeing to participate in this study – your opinions are greatly valued.

This study is being conducted by an independent research company TNS Social Research. All responses are strictly confidential and individual responses will not be reported. This guarantee of confidentiality is protected by the Federal Privacy Act. Under no circumstances will any of your personal data be disclosed to any organisation other than TNS Social Research or be used for any purpose other than the research study.

If you have any questions about the survey, please contact Tess Schenk at TNS Social Research on (08) 9322 2466 or email tess.schenk@tnsglobal.com.

If you have any questions about the research, please contact Andrea Merven at the Rottneest Island Authority on (08) 9432 9125 or email andrea.merven@rotnneestisland.com.

Screener Questions

In this study respondents should be soft terminates.

ASK ALL

First of all, some details about your boat and where you visit on your boat.

S1: What is the length of your boat (in metres)? WRITE IN

Note: If you own more than one boat, please think about the one you use most in/around Perth

99 I do not own a boat **CLOSE**

S2: Is it a

Power boat	1
Yacht	2

S3: Please indicate which, if any, of the following places you have visited on your own boat in the past 12 months, that is since June 2011.

Swan or Canning River	1	
Off the coast of Perth / Cockburn Sound	2	
Rottnest Island	3	
Seal / Penguin Islands	4	
Hillary's Boat Harbour / Mindarie Keys / Yanchep	5	
Further north along the WA coast	6	
Mandurah	7	
Busselton (Port Geographe)	8	
Further south along the WA coast	9	
Other	10	
None of the above	99	CLOSE

ASK IF ROTTNES NOT SELECTED

S4: You said you have not visited Rottnest on your own boat in the past 12 months. Which if any of the following reasons apply to why you have not visited Rottnest on your own boat in the past 12 months?

Do not like going on the ocean	1	CLOSE
Boat is not big enough	2	CLOSE
Not sufficiently experienced / confident	3	CLOSE
Not able to moor there	4	
Do not like mooring there	5	
Do not particularly like Rottnest	6	
Prefer going to other places	7	
No particular reason, just haven't got around to it	8	
Other (write in)	9	

ASK S5 IF MANDURAH OR BUSSELTON/GEORPAHE BAY SELECTED AT S3

S5: You said you have visited BUSSELTON / MANDURAH (SELECT AS APPROPRIATE, IF BOTH ASK AS BUSSELTON AND MANDURAH) on your own boat in the last 12 months.

What are all the reasons you visit (Busselton / Mandurah) on your boat? Please think about the general facilities / experiences AND the boating specific facilities that you like about (Busselton / Mandurah).

Busselton (Geographe Bay)	Mandurah
---------------------------	----------

QUOTA NOTE: TARGET GROUPS FOR QUOTAING AND SURVEY ROUTING PURPOSES ARE DEFINED AS FOLLOWS:

Target Group	Definition
Rottnest users	<ul style="list-style-type: none"> • Have been in past 12 months
Non users of Rottnest	<ul style="list-style-type: none"> • Not visited in past 12 months • Able to visit (i.e. not ticked codes 1-3 at S4)

NOTE ONLY THOSE WHO ARE NOT REGISTERED BOAT USERS AND HAVE TICKED ANY OF CODES 1-3 AT S4 NEED TO BE SCREENED OUT, ALL OTHERS ARE ELIGIBLE.

ASK ALL

MR

S6. Please select all of the following which apply to you. Are you a....

Member of Boating WA	1	
Member of Royal Freshwater Bay Yacht Club	2	
Member of Boating Industry Association	3	
Rottnest licensee	4	
Rottnest authorised user	5	
On waiting list to become Rottnest licensee	6	
I am none of the above	9	

ASK ALL

SR

S6a. Please select which age group you are in?

Under 18	1	CLOSE
18-24	2	
25-34	3	
35-44	4	
45-54	5	
55-64	6	
65 or over	7	

Screen Out/Quota Fail

Generic links...

We would like to thank you for taking the time to participate in our survey. Your opinions and responses are gratefully received and extremely important to us.

The survey is now closed due to overwhelming responses from people like yourself.

This survey was conducted on behalf of the Rottnest Island Authority.

Once again thank you for your interest.

Welcome

Congratulations!

You have qualified for the survey. This survey will take you approximately 20 minutes to complete.

Q1 - Q3 ONLY SHOW THOSE PLACES SELECTED AT S3

Q1: Over the past 12 months, how many times have you visited these places on your boat? Please write in for each, giving an approximate answer if unsure.

	WRITE IN
Swan or Canning River	
Off the coast of Perth / Cockburn Sound	
Rottnest Island	
Seal / Penguin Islands	
Hillary's Boat Harbour / Mindarie Keys / Yanchep	
Further north along the WA coast	
Mandurah	
Busselton (Port Geographe)	
Further south along the WA coast	
Other	

Q2: Which of the following best describes when you would usually visit these places on your boat? You may tick as many as apply.

	Weekends	Weekdays	During school holidays	Not during school holidays
Swan or Canning River	1	2	3	4
Off the coast of Perth/Cockburn Sound	1	2	3	4
Rottnest Island	1	2	3	4
Seal / Penguin Islands	1	2	3	4
Hillary's Boat Harbour / Mindarie Keys / Yanchep	1	2	3	4
Further north along the WA coast	1	2	3	4
Mandurah	1	2	3	4
Busselton (Port Geographe)	1	2	3	4
Further south along the WA coast	1	2	3	4
Other	1	2	3	4

Q3: Finally for each of these places you have visited in the past 12 months, please indicate whether this is somewhere you visit all year around in your boat, in all seasons depending on weather or if you only visit these places in the summer.

	All year	All except winter	Summer only
Swan or Canning River	1	2	3
Off the coast of Perth/Cockburn Sound	1	2	3
Rottnest Island	1	2	3
Seal / Penguin Islands	1	2	3
Hillary's Boat Harbour / Mindarie Keys / Yanchep	1	2	3
Further north along the WA coast	1	2	3
Mandurah	1	2	3
Busselton (Port Geographe)	1	2	3
Further south along the WA coast	1	2	3
Other	1	2	3

Section A – Registered Boat Users and Visitors

ASK ALL WHO HAVE VISITED TO ROTTNEST IN PAST 12 MONTHS

Q6a: Are you... PLEASE SELECT ONE ONLY

A licensee only	1
A mooring site licensee and authorised user of other sites	2
An authorised user only	3
Hiring a mooring or pen	4
Anchoring only and pay annual or daily admission fee	5
A commercial charter vessel operator	6
None of the above	9

Q6b: How many people usually accompany you on your boat when you go to Rottnest?
PLEASE SELECT ONE ONLY

No one - usually go alone	1
One person	2
Two - three people	3
Four or more people	4
Varies	5

Q7a: How many years have you been visiting Rottnest on your boat?

Only in the last year or two	1
Two to five years	2
Six to ten years	3
More than ten years	4

Q7b: What are the main reasons for your visits? Please select all that apply

Relaxing	1
To take friends / visitors	2
Just a good place to sail to	3
Fishing, lobster catching	4
Diving, snorkelling	5
Surfing, kiting	6
Skiing, jet skis	7
Sight-seeing and land-based activities	8
Events – swims, triathlons, etc.	9

IF CODE 2,3,4 AT Q7a ASK Q7c

Q7c: Would you say that over the past 12 months you have visited Rottnest as regularly as you always have, more often than you used to a few years ago or less often than you used to a few years ago?

Visit Rottnest as regularly as a few years ago	1
Visit Rottnest more often than a few years ago	2
Visit Rottnest less often than a few years ago	3

IF CODE 3 ASK Q7d

Q7d: Why are you visiting Rottnest less often than you did a few years ago?

Please write in all the reasons in the space provided

--

Q8: Which of the following describe your trips to Rottnest in the past 12 months?
Please select all that apply.

Day trip and we have not gone ashore to the Island	1
Day trip and we have gone ashore	2
Overnight trip (one or more nights), slept on boat and did not go ashore.	3
Overnight trip (one or more nights), slept on boat but did go ashore during the day	4
Overnight trip (one or more nights), slept in accommodation on the Island	5

Q9: What do you like about going to Rottnest? What is it about Rottnest that means you go there? Please think both about the Island in general and about the specific experience of boating there. Please write your answers under those two areas.

Rottnest in general	Boating (including mooring/dinghies) at Rottnest
---------------------	--

Q10: On the other hand, are there things that you do not like about going to Rottnest? What if anything can put you off going and mean you'll choose another place instead? Again please think both about Rottnest in general and the specific experience of boating there.

Rottnest in general	Boating (including mooring/dinghies) at Rottnest
---------------------	--

Q11a: How satisfied are you with following facilities at Rottneest?

For each of the following, please select an answer on a scale of 1 to 7, where 1 = very satisfied and 7 = very dissatisfied. If this facility is not one you would ever want to use, or one you know nothing about, please select 'don't know / not applicable'

RANDOMISE ORDER

	Very satisfied						Very dissatisfied	Don't know / Not applic.
Access to a hire mooring	1	2	3	4	5	6	7	9
Upkeep of private moorings	1	2	3	4	5	6	7	9
Upkeep of hire moorings	1	2	3	4	5	6	7	9
Availability of potable water	1	2	3	4	5	6	7	9
Availability of fuel	1	2	3	4	5	6	7	9
Toilet and shower facilities	1	2	3	4	5	6	7	9
Sullage pump-out facilities	1	2	3	4	5	6	7	9
Ease of getting ashore	1	2	3	4	5	6	7	9
Availability of 'short-stop' landing for shopping, passenger pick-up etc	1	2	3	4	5	6	7	9
Choice of restaurants / eating options	1	2	3	4	5	6	7	9

Q11b: How would you describe the cost of mooring at Rottnest compared to other places?

Good value for money compared to other places	1
Reasonable value for money compared to other places	2
Somewhat poor value for money compared to other places	3
Poor value for money compared to other places	4
Unable to say / have nothing with which to compare.	9

Section B – Non Boating Visitors

ASK ALL WHO HAVEN'T VISITED ROTTNEST IN PAST 12 MONTHS

Q12a. You said earlier that you hadn't visited Rottnest in the past 12 months in your own boat. Have you been to Rottnest on your own boat prior to the past 12 months?

No, never been to Rottnest	1
Yes, 1 - 5 years ago	2
Yes, more than 5 years ago	3

Q12b: And have you been to Rottnest on other occasions, not on your boat, either for a holiday or a day trip?

No	1
Yes, in the last year	2
Yes, 1 - 5 years ago	3
Yes, more than 5 years ago	4

Q13. What are the reasons you haven't been to Rottnest on your boat (in the last year?). **(WORD AS APPROPRIATE TO Q12a)}**

Please write in all the reasons why you haven't been to Rottnest ever in that time. Please think about reasons to do with Rottnest in general, and also about the specific experience of boating there. Please write your answers in under these two areas.

Rottnest in general	Boating (including mooring/dinghies) at Rottnest
---------------------	--

Q14. Here are a number of reasons other boat users have given for why they don't visit Rottneest these days. For each one, please tick whether that reason is one that is also true for you. Please tick whether it applies to you a lot, applies a little or doesn't apply to you.

PLEASE SELECT JUST ONE COLUMN FOR EACH ITEM.

[PROGRAMMER: RANDOMISE ORDER WITHIN GRID BUT NOT BETWEEN GRIDS]

	APPLIES A LOT	APPLIES A LITTLE	DOESN'T APPLY TO ME
	1	2	3
Just don't think about it / don't consider Rottneest when thinking of going somewhere on the boat			
Weather can be bad for travelling across			
Unable to get (suitable) mooring			
Too expensive to moor there			
Wind too strong in Thomson Bay			
Insufficient facilities such as water, power, ablutions for boat users			
Private moorings / pens are poorly maintained			
Not easy to get ashore from boat			
Better boating facilities elsewhere			
Hire mooring / pens are poorly maintained			

	APPLIES A LOT	APPLIES A LITTLE	DOESN'T APPLY TO ME
	1	2	3
Don't hear anything good about Rottneest from other people			
Don't see any advertising for it			
Don't really know what there is to do there - nothing to give me a reason to go			
Not enough to do there			
Restaurants / cafes are not good enough			
Doesn't offer the kind of activities / facilities that I enjoy			
The facilities there are not in good condition / are old and tired			
The things I read in the paper put me off			
No one else I know goes to the Island			
Had a bad time the last time I went			
Lack of restaurants / cafes			

Section C– Facilities

ASK ALL RESPONDENTS

Q15. Below are some services and facilities specific to boat users.

Taking each one in turn, please indicate how important you consider the good provision of that item to be at the places you visit on your boat.

(Please select one response per row)

PROGRAMMER NOTE – RANDOMISE STATEMENTS.

	Very important	Quite important	Not particularly important
Access to a hire mooring	1	2	3
Upkeep of private moorings	1	2	3
Upkeep of hire moorings	1	2	3
Availability of potable water	1	2	3
Availability of fuel	1	2	3
Toilet and shower facilities	1	2	3
Sullage pump-out facilities	1	2	3
Ease of getting ashore	1	2	3
Availability of 'short-stop' landing for shopping, passenger pick-up etc	1	2	3
Choice of restaurants and eating options nearby	1	2	3

Q16. Here are some possible new services and facilities specific to boat users that could be offered at Rottnest.

What would be your level of support for each? Please select a number from 1 to 7 where 1 means you are not in favour of the idea at all and 7 means you are very much in favour. Use 9 if you really have no opinion.

	Not in favour of					In favour of		Don't know/Not applic
	1	2	3	4	5	6	7	9
a) Additional swing moorings	1	2	3	4	5	6	7	9
b) The Rottnest Island Authority owning all the moorings	1	2	3	4	5	6	7	9
c) A comprehensive marina style development	1	2	3	4	5	6	7	9
d) Wave attenuator at Thomson Bay - a permanent but floating structure to protect against easterlies	1	2	3	4	5	6	7	9
e) Mediterranean moorings - where boats raft up onto a jetty / boardwalk	1	2	3	4	5	6	7	9
f) Star moorings - 4 boats moored to a pen in star formation instead of 2	1	2	3	4	5	6	7	9
g) Water taxi service - to take you to Island / restaurants	1	2	3	4	5	6	7	9
h) Mobile black waste pump out facility	1	2	3	4	5	6	7	9
i) A smart phone application on mooring use and availability	1	2	3	4	5	6	7	9

IF RESPONDENT GAVE Q16 STATEMENT 'c' A CODE 5-7, SHOW Q16b-Q16d all on the one screen

The next few questions relate to the potential for the introduction of a marina style development on Rottneest.

Q16b: Where would you like the marina to be located? Please write in below. You may nominate more than one location.

	1
--	---

Q16c: If you were to lease a pen in the new marina, what would be your preferred leasing arrangement?

Please rank the below options from 1-5, with 1 = your first preference, and 5 = your last preference. If you have no preference, please select the option "No specific preference"

Casual lease	
Fixed term lease	
Permanent lease for exclusive use	
Time share arrangement	
Use as required without lease	
No specific preference	9

Q16d: Do you think it is essential for power and water to be made available in all marina pens?

Yes	1
No	2

Section D – New Product Ideas

For the rest of the survey, we'd like you to think about Rottnest and what it offers more generally, not just in relation to boat users.

Q17. People have different opinions about how many experiences there should be at Rottnest. Which one of the following 3 statements do you agree with the most?

If you do not currently visit Rottnest you may not know much about the facilities and accommodation, but please answer this question, and those following, based on what you do know or your perception of Rottnest.

(Please select one)

I think they should leave Rottnest largely unchanged, just conduct maintenance and small improvements as needed	1
I think they should provide some more and / or better facilities and improved accommodation at Rottnest	2
I think they should make a lot of changes, improvements and / or additions to the facilities and accommodation at Rottnest	3

ASK ALL

Q18. Below are some possible facilities and activities that could be offered at Rottnest.

Taking each one in turn, please indicate whether you think this should be a HIGHER or LOWER priority item or whether you don't think this should be done at all.

(Please select one response per row)

PROGRAMMER NOTE – RANDOMISE STATEMENTS WITHIN EACH SET BELOW. SHOW EACH SET ON A NEW SCREEN WITH THE SAME QUESTION WORDING.

	Higher priority	Lower priority	Do not do
ll. Mini putt putt	1	2	3
mm. Skate park	1	2	3
nn. Wave pool	1	2	3
oo. Beach trampolines	1	2	3
pp. Climbing wall	1	2	3
qq. Sheltered playground (with sun shades)	1	2	3
rr. Tennis courts	1	2	3
ss. Basketball courts	1	2	3
tt. Games arcade for older kids	1	2	3
uu. Indoor play area for younger kids	1	2	3
vv. Water playground (free)	1	2	3
ww. Driving range	1	2	3
xx. Golf course	1	2	3

SHOW ON NEW SCREEN.

	Higher priority	Lower priority	Do not do
yy. Recreational Marina	1	2	3
zz. Boat hire at Thomson Bay	1	2	3
aaa. Fishing charters	1	2	3
bbb. Surf lessons	1	2	3
ccc. Underwater snorkel trail	1	2	3
ddd. Canoeing on lakes	1	2	3
eee. Golf lessons	1	2	3
fff. Dinghy hire for fishing	1	2	3

SHOW ON NEW SCREEN.

	Higher priority	Lower priority	Do not do
ggg. Self-guided tours	1	2	3
hhh. Heritage tours	1	2	3
iii. Bushwalking tours	1	2	3
jjj. Eco tours	1	2	3
kkk. Cycling tours	1	2	3
lll. Terrestrial camping tours			
mmm. Walking trails	1	2	3

SHOW ON NEW SCREEN.

	Higher priority	Lower priority	Do not do
nnn. Drinking water available outside of main settlement	1	2	3
ooo. Wider range of food outlets	1	2	3
ppp. Cafe at the Lighthouse	1	2	3
qqq. Cafe at West End	1	2	3
rrr. Low profile chair lift to the lighthouse	1	2	3
sss. Ability to fly to Rottnest	1	2	3
ttt. More special sporting events like fun runs, marathon, golf tournaments	1	2	3
uuu. More special arts/culture/music events	1	2	3
vvv. Fish cleaning facilities	1	2	3

Q19a. Another idea to encourage people to visit Rottneest Island throughout the year is to promote a calendar of different types of events on the Island.

Which, if any, of the following types of events would you be interested in going to Rottneest to attend?

(Please select one response per row)

RANDOMISE ALL STATEMENTS

	Would be interested in attending	Might be interested in attending	Would not be interested in attending
a. Fun runs	1	2	3
b. Marathons	1	2	3
c. Triathlons	1	2	3
d. Comedy festivals	1	2	3
e. Golf tournaments	1	2	3
f. Music concerts	1	2	3
g. Food & wine festivals	1	2	3
h. Arts & craft festivals	1	2	3
i. Cycling tour	1	2	3
j. Outdoor cinema program	1	2	3
k. Writing / authors festival	1	2	3
l. Yacht or other boating races	1	2	3

FOR THOSE ITEMS WITH CODE 1 OR 2, ASK

Q19b You said you would or might be interested in attending the following events. Would you go to these events on your boat (or perhaps that of a friend) or would you go by ferry?

(Please select one response per row)

RANDOMISE ALL STATEMENTS

	Go by boat	Would go by ferry
a. Fun runs	1	2
b. Marathons	1	2
c. Triathlons	1	2
d. Comedy festivals	1	2
e. Golf tournaments	1	2
f. Music concerts	1	2
g. Food & wine festivals	1	2
h. Arts & craft festivals	1	2
i. Cycling tour	1	2
j. Outdoor cinema program	1	2
k. Writing / authors festival	1	2
l. Yacht or other boating races	1	2

(NO Q 20)

Section G – Communication of Rottnest

ASK ALL

Q21. There are a number of themes that could be used to promote and communicate Rottnest Island.

We are now going to show you a series of statements about Rottnest Island. For each statement, we would like you to answer 3 short questions.

NEW SCREEN.

PROGRAMMER NOTE: SHOW EACH OF THE STATEMENTS BELOW ON A SEPARATE SCREEN, WITH Q21A, B AND C FOR EACH SHOWN ON THE SAME SCREEN

EACH RESPONDENT SHOULD SEE ONLY 5 OF THE FOLLOWING STATEMENTS IN TOTAL, SELECTED AT RANDOM.

WITHIN THE REGISTERED USERS GROUP, A TOTAL OF n=100 RESPONDENTS SHOULD SEE EACH STATEMENT. ALSO WITHIN THE NON-VISITORS GROUP) A TOTAL OF n=100 RESPONDENTS SHOULD SEE EACH STATEMENT

RANDOMIZE ORDER OF STATEMENTS

k. Rottnest is a great place for a day trip because there is so much to see and do
l. Rottnest is a great place to go out of season when it is quieter and cooler
m. Rottnest is a great place for a family holiday because it offers freedom and fun
n. Rottnest is a great place to get active, with swimming, diving, snorkelling, fishing, cycling, and golf
o. Rottnest has a fascinating history including war history, Aboriginal history - plus the oldest inhabited road in Australia
p. Rottnest is just 30 minutes away making it quick and easy to get to another world
q. Rottnest is a great place to enjoy the simpler pleasures in life with those you love
r. Rottnest offers a pristine unspoilt environment within easy reach of Perth
s. Rottnest has some of Australia's best snorkelling and diving
t. Rottnest is Rottnest

Q21a. How much, if at all, does this statement **increase your interest** in visiting Rottneest?

(Please select one)

Makes me more interested	1
Makes me a little more interested	2
Does not increase my interest at all	3

Q21b. How well do you think Rottneest can provide what is stated in this statement?

(Please select one)

Can provide very well	1
Can provide quite well	2
Does not provide well - other places in WA provide it better	3

Q21c. How much does this statement suggest Rottneest offers **something different** to other destinations in WA?

(Please select one)

Offers something quite different	1
Offers something a little bit different	2
Does not offer anything different to other destinations in WA	3

Demographics

ASK ALL

Q22. Please type in your postcode.

ASK ALL

Q23. Are you...

(Please select one)

Male	1	
Female	2	

ASK ALL

Q24. Which of the following best describes your household?

(Please select one)

Young single, no children / no children at home	1
Young couple (living together), no children / no children at home	2
Young family (singles or couples with dependents, where eldest child is under 13 years)	3
Teenage family (singles or couples with dependents, where eldest child is 13-17 years)	4
Adult family (singles or couples with adult child / children, the eldest aged 18 or over, living at home)	5
Mature single / couple (singles or couples with no children living at home)	6
I'd rather not say	98

ASK ALL

Q25. Which of the following best describes your total household annual income before tax?

(Please select one)

Less than \$10,000	2
\$10,001 - \$35,000	3
\$35,001 - \$60,000	4
\$60,001 - \$80,000	5
\$80,001 - \$100,000	6
\$100,001 - \$140,000	7
\$140,001 - \$180,000	8
\$180,001 - or above	9
Prefer not to say	98

ASK ALL

Q26. How long have you been living in Western Australia?

(Please select one)

All my life	1
11 or more years	2
6 - 10 years	3
3 - 5 years	4
Less than 3 years	5

ASK IF GENERIC LINK (RESPONDENT MUST FILL IN BOTH BOXES OR TICK THE TICK BOX CODE 99)

Q27. If you would like go in the draw to win a \$50 Coles Myer voucher, please enter your name and contact number below.

Your details will be used for the prize draw only. Your response to the survey will be kept strictly anonymous.

Name:

Phone number:

99 I do not wish to enter the draw

Completion Screens

Generic links...

We would like to thank you for taking the time to complete our survey. Your opinions and responses are gratefully received and extremely important to us.

Your responses will be used at an aggregate level only, and as such we would like to assure you once again that your details will be used in the strictest of confidence and will not be passed on to any other party for any purpose other than that which it was intended.

This survey was conducted on behalf of Rottneest Island Authority. To check the bona fides of TNS please phone SurveyLine on 1300 364 830.

Once again thank you for your interest.
