



Destination Visitor Survey

Strategic Regional Research – South Australia

Understanding consumer needs in developing the Heysen and Mawson Trails: Summary of results

Introduction

In the past, development of projects such as the Overland Track in Tasmania and the Ayers Rock Resort in the Northern Territory have resulted in significant improvements in destination awareness and image.

South Australia has substantial nature-based assets which are relatively underdeveloped and few consumers associate the State with nature-based experiences. For South Australia to improve its nature-based positioning requires tourism products and experiences to allow the destination to deliver on the potential.

Two products may have considerable potential for development:

- The Heysen Trail - a walking trail 1,200 kilometres long, it stretches from Cape Jervis to Parachilna Gorge in the Flinders Ranges. Catering for all levels of walkers, the trail has sections suitable for shorter walks. The Heysen Trail is closed for the bushfire season, usually from November to April.
- The Mawson Trail – an off-road cycling trail almost 900 kilometres long, it consists of three sections (Adelaide to Burra, Burra to Quorn, Quorn to Blinman). The Mawson Trail is open all year round, but is at its best between April and November.

The research project was required to:

- Understand the level of interest among potential visitors in walking and cycling experiences on South Australia's Heysen and Mawson Trails.
- Identify the service attributes and infrastructure expected by potential visitors.
- Identify what information needs to be directed at the target audience and therefore maximise interest in and motivation to visit these areas.

Six focus groups were conducted in Sydney and Melbourne with a cross section of visitor types including:

- 'Experienced' travellers, who had been on walking or cycling holidays in the last three years and were happy to walk/cycle over a number of days.
- 'Mainstream' travellers, who were not hobbyists but walk or cycle for fun and would consider walking or cycling as part of a holiday experience (one to two hours).

All respondents:

- had taken interstate holidays within Australia at least three times in the past five years
- were interested in visiting South Australia
- had been, or would be, interested in a holiday that involved some walking and/or cycling
- walked or cycled regularly.

Summary

Walking and cycling holiday

- 'Mainstream' respondents, while interested in walking or cycling as part of their holiday, will not be motivated to come to South Australia purely because of the potential for walking and cycling, as these experiences are readily available in their home States/Territories.
- To attract interstate visitors to South Australia for a walking/cycling experience would require offering something different or unique, which is not available at home.
- The choice of a holiday destination, for both a family and couple, is often about compromise. It is not enough to appeal only to the walking/cycling enthusiast – alternative activities must be available.

Targeting

- The most difficult audience to attract are families, due to the cost of interstate travel and the perception that 'trail' holidays are not child friendly.
- The more challenging a trail is perceived to be, the more it is likely to appeal only to a niche group.
- The most likely prospects for the trails will be the pre/post children age groups, which are more likely to have a relatively high disposable income.
- Budget travellers find it more difficult to justify spending money to travel interstate unless a trail offers something unique.
- More affluent travellers tend to seek comfort/luxury in their holiday experience.

The Trails

The respondents indicated that:

- there was no awareness of either trail
- the concept of a 1,200 kilometre trail did not have any appeal as it was considered too long to travel.

The respondents found it difficult to relate to 'The Mawson Trail'. However, when broken down into descriptive sub-sections such as 'The Riesling Trail' or 'The Flinders Adventure Trail', the respondents were clearer about the experience and were more likely to see themselves engaging in that experience.

Infrastructure

Respondents indicated that:

- Trail infrastructure was assumed and the decision to travel to South Australia was unlikely to be affected by such detail. However, bad word-of-mouth regarding infrastructure clearly would be damaging.
- There were few concerns about bike hire, as it was assumed on a cycling holiday, particularly from the 'experienced' travellers, that such facilities would automatically be available.
- There was an assumption that budget accommodation or camping would be available, as cycling/walking holidays are often perceived as 'roughing it'. Respondents did not expect that off track infrastructure would include high quality food and accommodation.

Potential visitor profile

The results from the focus groups appeared to indicate several factors/target groups that would need to be considered when developing the trails experience:

- More affluent interstate visitors, travelling without children.
- Visitors would be more interested in trails being segmented into clear experiences rather than one name for the entirety i.e. the Mawson/Heysen trails. The names of the trail segments should be descriptive e.g. Riesling Trail/Flinders Adventure Trail (The Riesling Trail had the greatest appeal for the respondents in this study).
- Visitors would require knowledge of support services available to get them from the airport to the appropriate part of the trail.
- Visitors would prefer trails to be packaged into length of stay options (for example, long weekend or week-long visits).
- Visitors responded better to a focus on the particular attractions of South Australia – food and wine, the Flinders Ranges, outstanding accommodation – all of which may justify the time and cost of getting to the destination.
- Most ‘mainstream’ travellers appeared interested in (very) soft adventure and were therefore cautious regarding physical toughness of trails. They responded to an emphasis on the comfort/indulgence aspects of the trip to provide a counterbalance to any perceived hardship.
- Visitors indicated the need for information on the logistical support available via guides, while also seeking opportunities for independence when desired (i.e. part guided).
- Family visitors to South Australia indicated the need for: a variety of activities; recognition of children’s physical limits; and a focus on child friendly hubs.

For a copy of the full Strategic Regional Research Report, please email tra@tourism.australia.com

Tourism Research Australia
Level 3 11-17 Swanson Plaza
PO Box 1110
Belconnen ACT 2617

Telephone: + 61 2 6228 6100

Facsimile: + 61 2 6228 6180

Email: tra@tourism.australia.com

Image courtesy of the South Australian Tourism Commission

Publication date: March 2009

ABN 99 657 548 712

www.tra.australia.com

© Copyright Tourism Australia 2009. Tourism Australia and Tourism Research Australia permits copies to be made of this Research data for the purpose of promoting Australian tourism, provided that Tourism Research Australia is recognised on any copies as the author and the material is reproduced in its current form. However, copies may not be made for a commercial purpose, that is, for sale without the permission of Tourism Research Australia. This information is presented in good faith and on the basis that neither Tourism Australia or Tourism Research Australia, nor their agents or employees, are liable (whether by reason of error, omission, negligence, lack of care or otherwise) to any person for any damage or loss whatsoever which has occurred or may occur in relation to that person taking or not taking (as the case may be) action in respect of any statement, information or advice given in this publication. Data derived from Tourism Research Australia surveys are subject to sample error. Users of the data are advised to consult the sample error tables contained in Tourism Research Australia publications or otherwise available from Tourism Research Australia before drawing any conclusions or inferences, or taking any action, based on the data.

Tourism Australia
Tourism Research Australia 