

# Sea to Summit market research

Short summary of results



instinct<sup>and</sup>  
reason



**Prepared for:** DEWLP

**Consultants:** David Donnelly, Claire Ellis, Danica Jobson

**Reference:** J3008

18/08/2021



Omeo

Swifts Creek

HAUNTED STREAM/  
NUNNING PLAINS

JACKSONS CROSSING

SNOWY RIVER  
ICONIC 4WD

SEA TO SUMMIT

BUCHAN CAVES

LOWER SNOWY  
CAMPING PRECINCT

TIMBER WORKERS/  
HIGH COUNTRY HUTS

MALLACOOTA

GIPPSLAND  
RAIL TRAIL

BAIRNSDALE

LAKE TYERS

SNOWY RECOVERY PROJECT

CAPE CONRAN

PEACHTREE  
CREEK

POINT HICKS

LAKE ENTRANCE

THE LAKES  
NATIONAL  
PARK

CROAJINGLONG  
NATIONAL PARK

ALPINE  
HIGHWAY

BRUTHEN

NOWA  
NOWA

ORBOST

MARIO

CAPE CONRAN

PEACHTREE  
CREEK

POINT HICKS

BONANG

MONARO  
HIGHWAY

CANN RIVER

PRINCES  
HIGHWAY

CRISTAL  
WILGEMEE  
WALK





1

is there a market for a walking experience in East Gippsland?

# BACKGROUND



## SEA TO SUMMIT WALK - AN ICONIC MULTIDAY HIKING NATURE WALK EXPERIENCE

PROPOSED BY VICTORIAN GOVERNMENT BUT APPEAL IS UNKNOWN

### LONG DISTANCE WALKING



BECOMING INCREASINGLY POPULAR

MUST BE DESIGNED TO MEET THE NEEDS OF



EXPANDING & COMPETITIVE WALK MARKET

BY CREATING AN ICONIC NATURE-BASED TOURISM EXPERIENCE

that brings economic & social benefits to East Gippsland

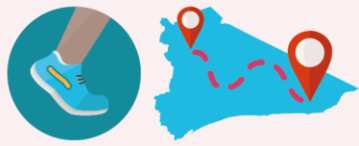


# OBJECTIVES

ASSIST

**DELWP** (THE DEPARTMENT OF ENVIRONMENT LAND, WATER & PLANNING)

IN PLANNING & POTENTIAL DEVELOPMENT OF A LONG DISTANCE WALK IN EAST GIPPSLAND



To achieve this, **DELWP** needs to first understand:



SIZE OF THE WALKER MARKET



CHARACTERISTICS OF WALKER MARKET (SEGMENTS)

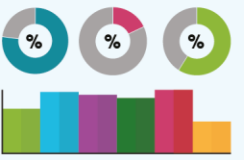


TYPES OF LONG DISTANCE WALKS THAT APPEAL TO DIFFERENT SEGMENTS



MOTIVATIONS TO TRAVEL & WALK IN EAST GIPPSLAND

# METHODOLOGY



QUANTITATIVE RESEARCH



ONLINE SURVEY



13 MINUTES



DEC 9TH TO DEC 22ND  
13 DAYS IN FIELD

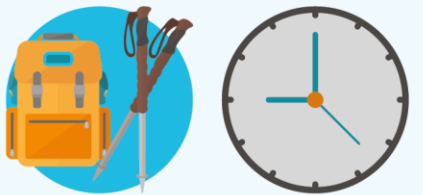
# SAMPLE n=2000



	METRO (1430)	REGIONAL (570)	TOTAL (2000)
VICTORIA	450	200	650
NSW	350	100	450
ACT	150	-	150
TASMANIA	100	50	150
SOUTH AUSTRALIA	100	50	150
QUEENSLAND	150	100	250
WESTERN AUSTRALIA	100	50	150
NORTHERN TERRITORY	30	20	50

# SCREENING CRITERIA

ALL PARTICIPANTS SAID THEY WOULD DO A



BUSHWALK OF AT LEAST 1 HOUR IN DURATION



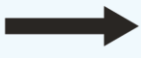
# AUSTRALIANS ARE OPEN TO A NATURE EXPERIENCE



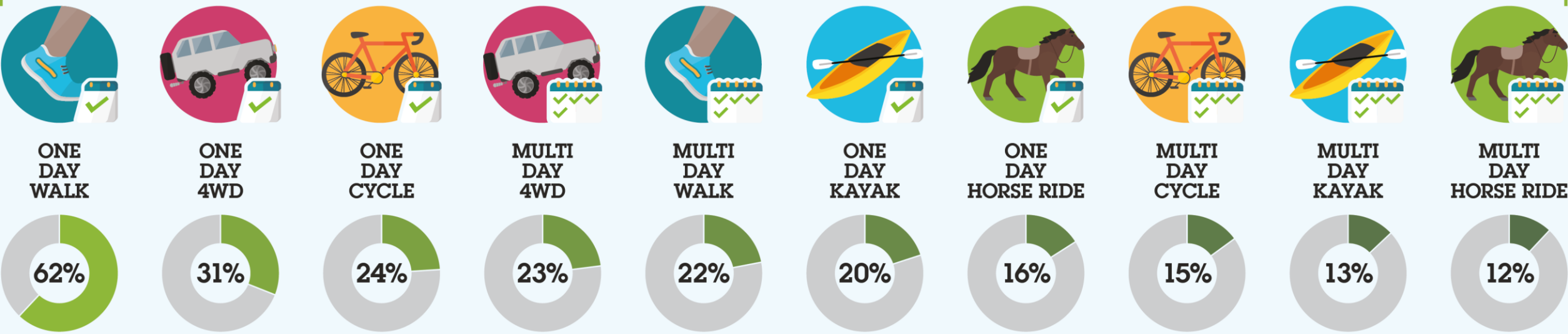
THEY WANT TO...

IN **DEC 2020**

**70%** OF **ADULT AUSTRALIANS**



**WANT TO HAVE A NATURE EXPERIENCE**  
(OF AT LEAST 1 HOUR WALKING IN NATURE)



**MOST WALKERS HAVE WALKED AT LEAST ONCE WITH A COMMERCIAL OPERATOR**

**62%** HAVE DONE A ONE DAY WALK & WANT TO **AGAIN**

**15%** HAVEN'T DONE A ONE DAY WALK BUT WANT TO

**22%** HAVE DONE A MULTI DAY WALK & WANT TO **AGAIN**

**26%** HAVEN'T DONE A MULTI DAY WALK BUT WANT TO

**MORE WANT TO DO A MULTI DAY WALK THAN ARE CURRENTLY DOING THEM**



# NOT MANY AUSTRALIANS KNOW ABOUT EAST GIPPSLAND

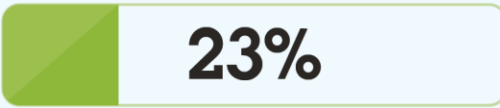


## BUT

25% EXTREMELY OR VERY LIKELY TO VISIT



IN THE NEXT 12 MONTHS TO



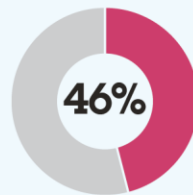
KNOW OF IT & HAVE VISITED



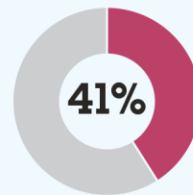
KNOW OF IT & HAVE NOT VISITED



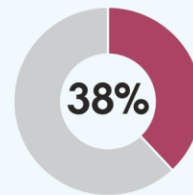
COASTAL WALK



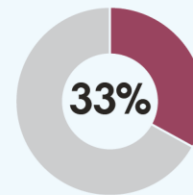
EXPLORE NATIONAL PARK



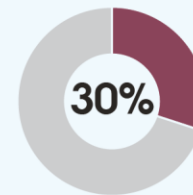
SEE WILDLIFE



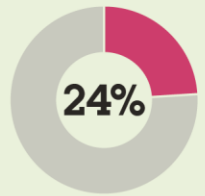
BUSHWALK



EAT GOURMET FOOD



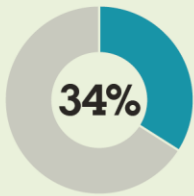
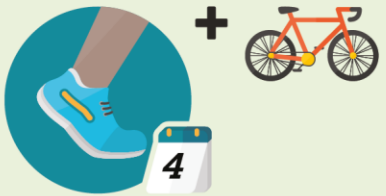
## PRELIMINARY NATURE PRODUCT IDEAS TESTED



NATURE-BASED HUB WITH DAY ACTIVITIES

\$200 PP PER DAY

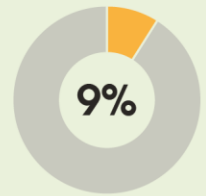
STAYING IN POD WITH OWN AMENITIES



4 DAY WALK + CYCLE DAY

\$200 PP PER DAY

STAYING IN POD WITH OWN AMENITIES



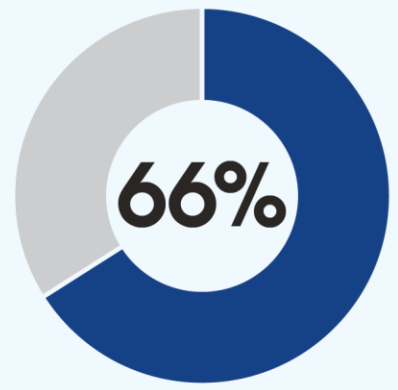
10 DAY SEA TO SUMMIT WALK

\$25 PER DAY



2 what walking product is the market interested in?

# SEA TO SUMMIT

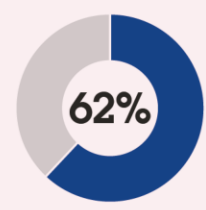


OF AUSSIES WANT TO WALK



(AT LEAST 1/2 A DAY)

## BUT EAST GIPPSLAND IS A MYSTERY



OF AUSSIES WHO WALK



ONLY HAVE A VAGUE IDEA & HAVE NEVER VISITED

WHY?

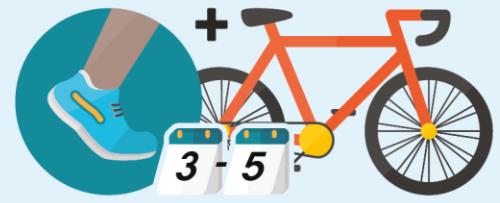
1. TIME



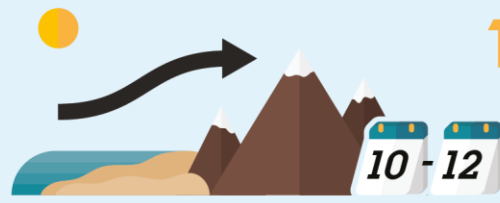
- 5 HOURS FROM MELBOURNE
- 7 HOURS FROM SYDNEY

2. NO REASON TO GO

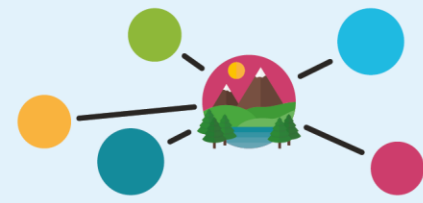
## IF EAST GIPPSLAND HAD...



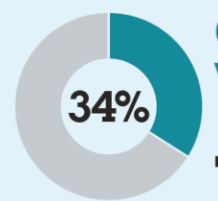
3-5 DAY WALK / CYCLE



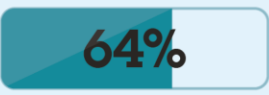
10-12 DAY SEA TO SUMMIT



NATURE BASE

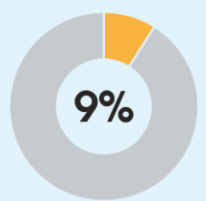


OF WALKERS WOULD WANT TO DO IT



THE #1 TARGET

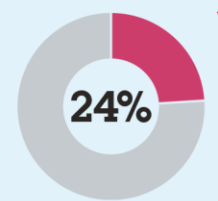
OF BUSY NATURE SEEKERS



WOULD DO IT - MANY LOVE CHALLENGE



FEW WILL ACTUALLY DO IT?



WANT 1/2 TO 1 DAY EXPERIENCES BASED IN 1 PLACE

(33% WOULD DO NONE OF THEM)





# THE 3-5 DAY WALK-CYCLE-4WD



**WALK 15km/day / CYCLE 60km/day**



**NEAR SUMMIT OF MT ELLERY TO THE COAST**



**BASIC FITNESS NEEDED**



**LOCAL FOOD HAMPERS NIGHTLY**



**COFFEE & LOCAL SNACKS**



**ABORIGINAL CULTURAL EXPERIENCES**



**NATURAL HUTS, COOKING, HEATED, LOCAL WINES & BEVERAGES**



**INTERPRETATION BY LOCALS**

**ECONOMIC IMPACT: \$299m & 254 JOBS!**

# COMPLIMENTARY BUSINESSES

KEY...



**INDIGENOUS CULTURAL EDUCATION**



**OTHER INTERPRETATION TOOLS**



**FOOD, BEVERAGE, COFFEE, SNACKS**



**PACK TRANSFER SERVICES**



**HELICOPTER/4WD SERVICES**



**BUILDING/MAINTAINING 60km TRACK & HUTS**

**+ WILL STAY 8 - 14 DAYS! AND..**



**GO TO SURFING SCHOOL**



**TAKE HELICOPTER RIDES OVER REGION**



**DO SHORTER WALKS**



**TAKE WILDLIFE/WILDERNESS TOURS**



**HAVE AN OFFSHORE FISHING EXPERIENCE**



**GO WATER RAFTING ON SNOWY RIVER**

AND A LOT MORE!

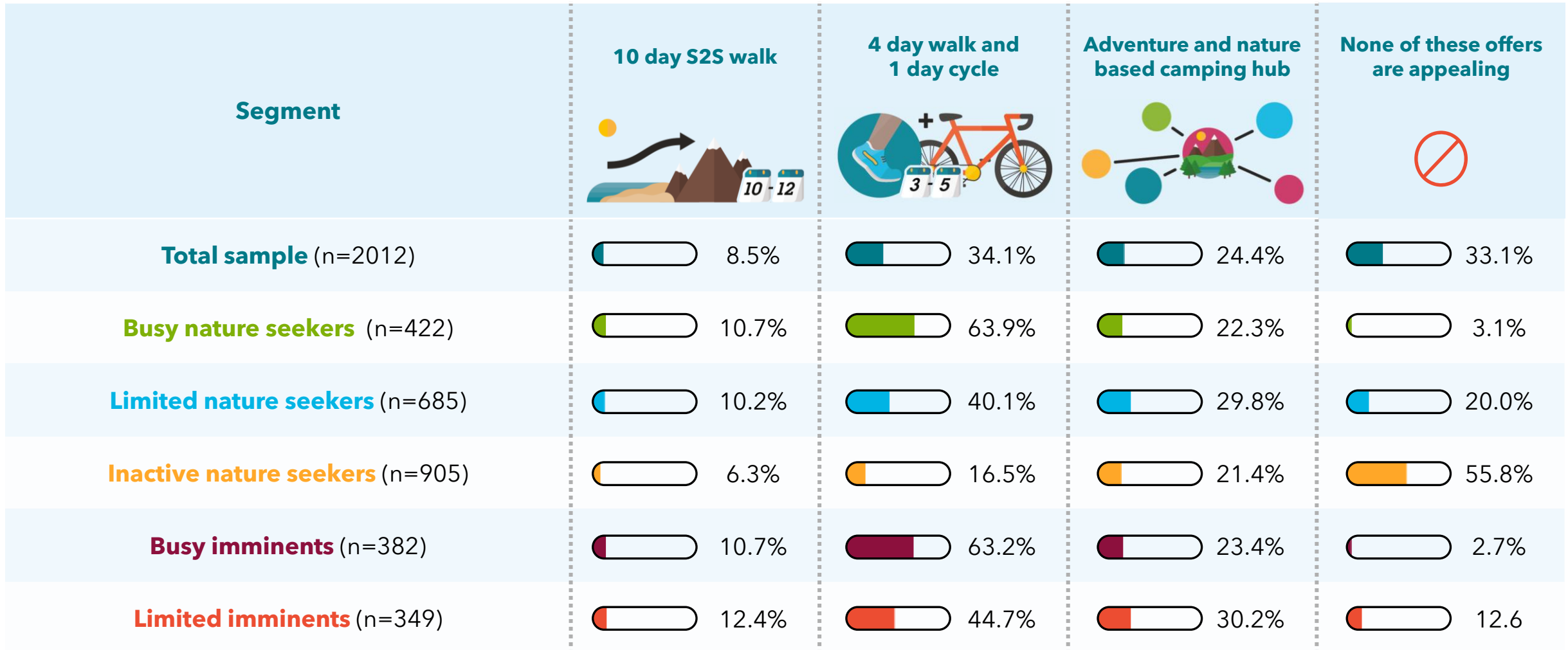


# 3 the ideal 4 day walk 1 day cycle

# interest in the three core nature experiences that emerged from the discovery stage

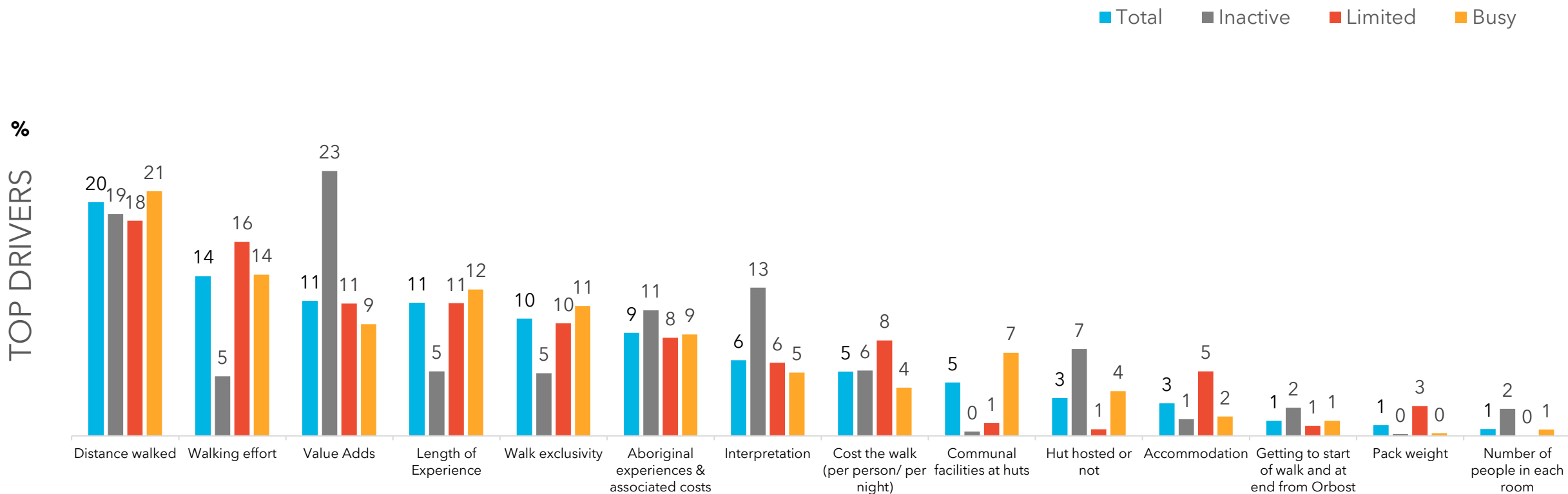


% take up





# key drivers for a multi day nature experience



Among considerers of a multi-day nature experience, including a walk and cycle or 4WD trip, the most important factors were practical, such as the distance walked per day, how strenuous that walk will be, and then the length of the overall experience. In addition to this, value-adds to make the walk an experience were particularly important, especially so for the Inactive segment. Again, the cost of the trip and accommodation stayed in did not influence the decision to walk as much.

Q. If this experience were available in East Gippsland, would you take it in the next 12 months?

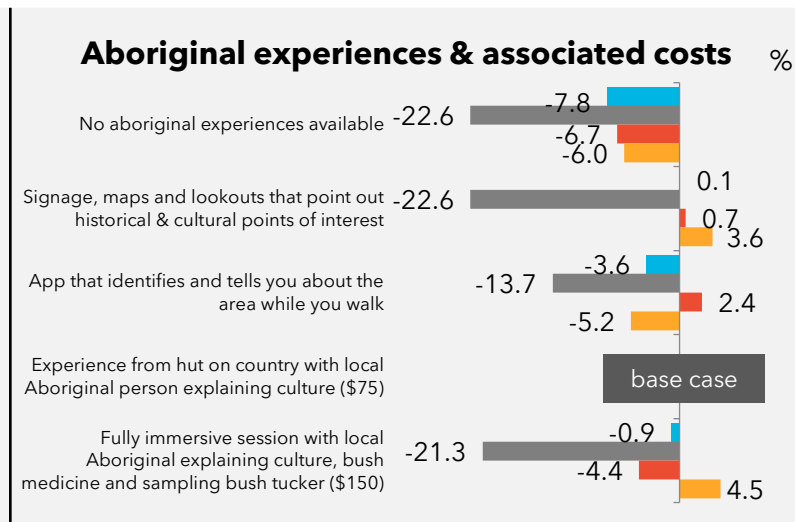
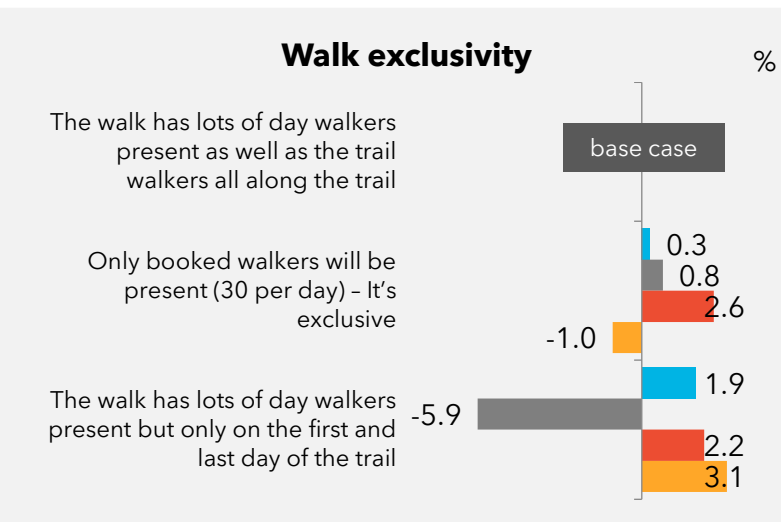
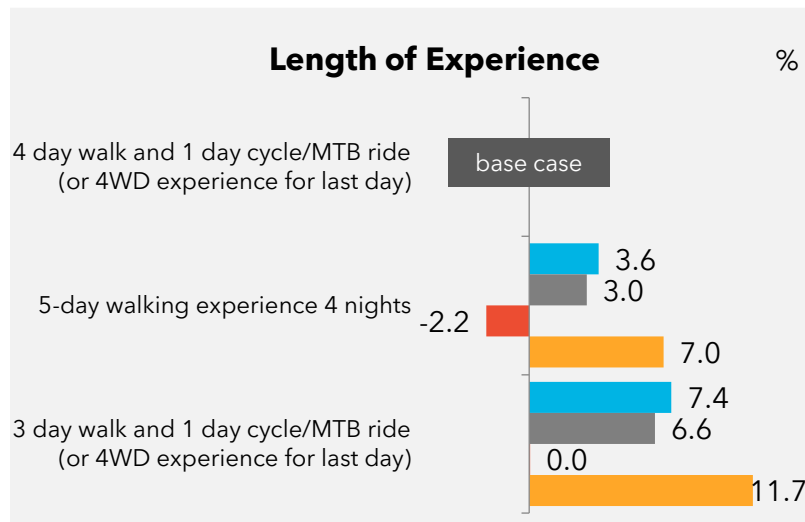
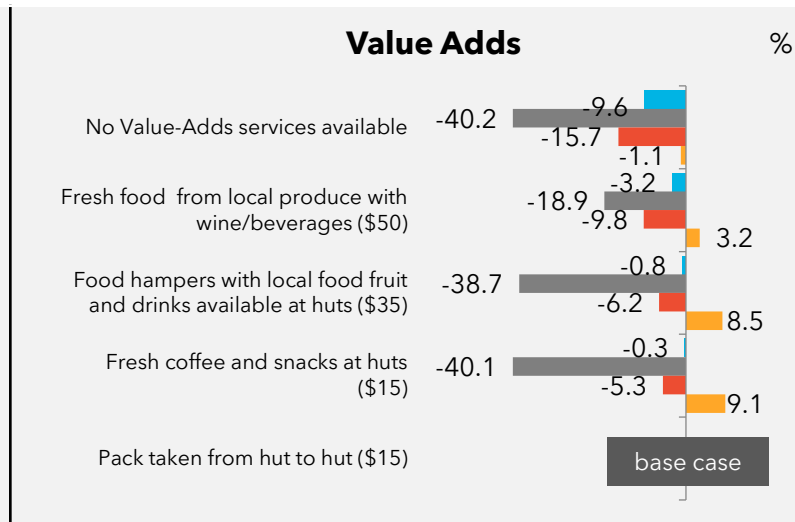
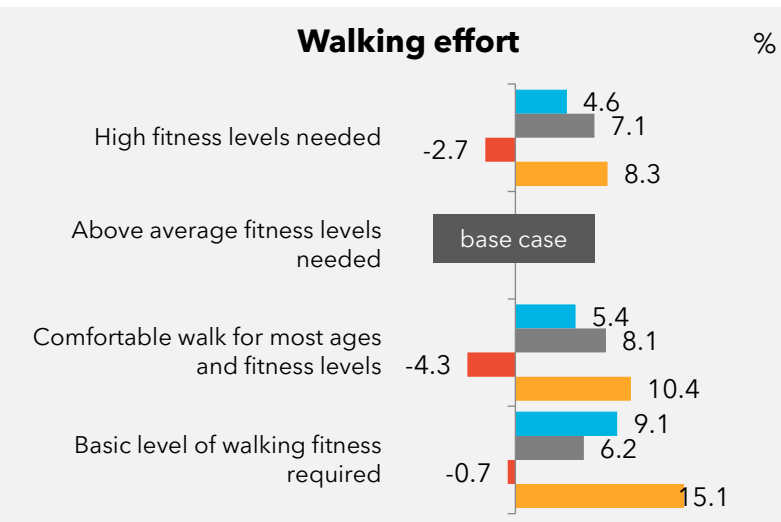
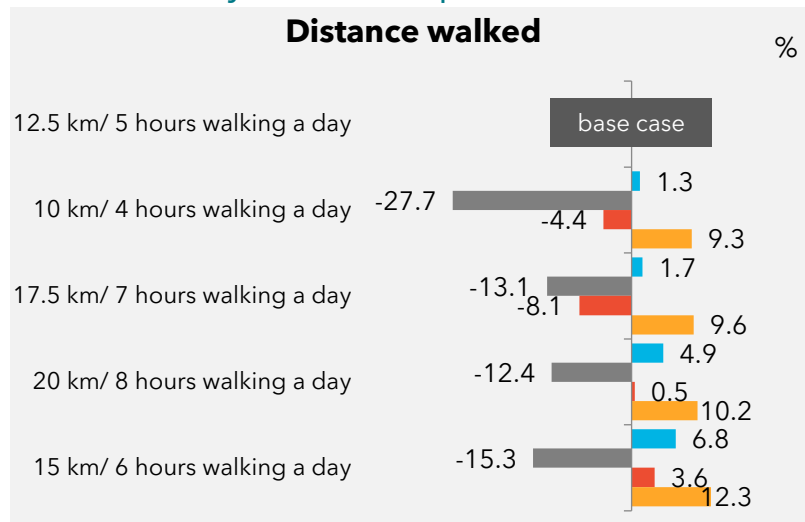
Base: Total (n=605)



# how can appeal of the walk be enhanced? (1)

## multi-day nature experience...

■ Total ■ Busy ■ Limited ■ Inactive



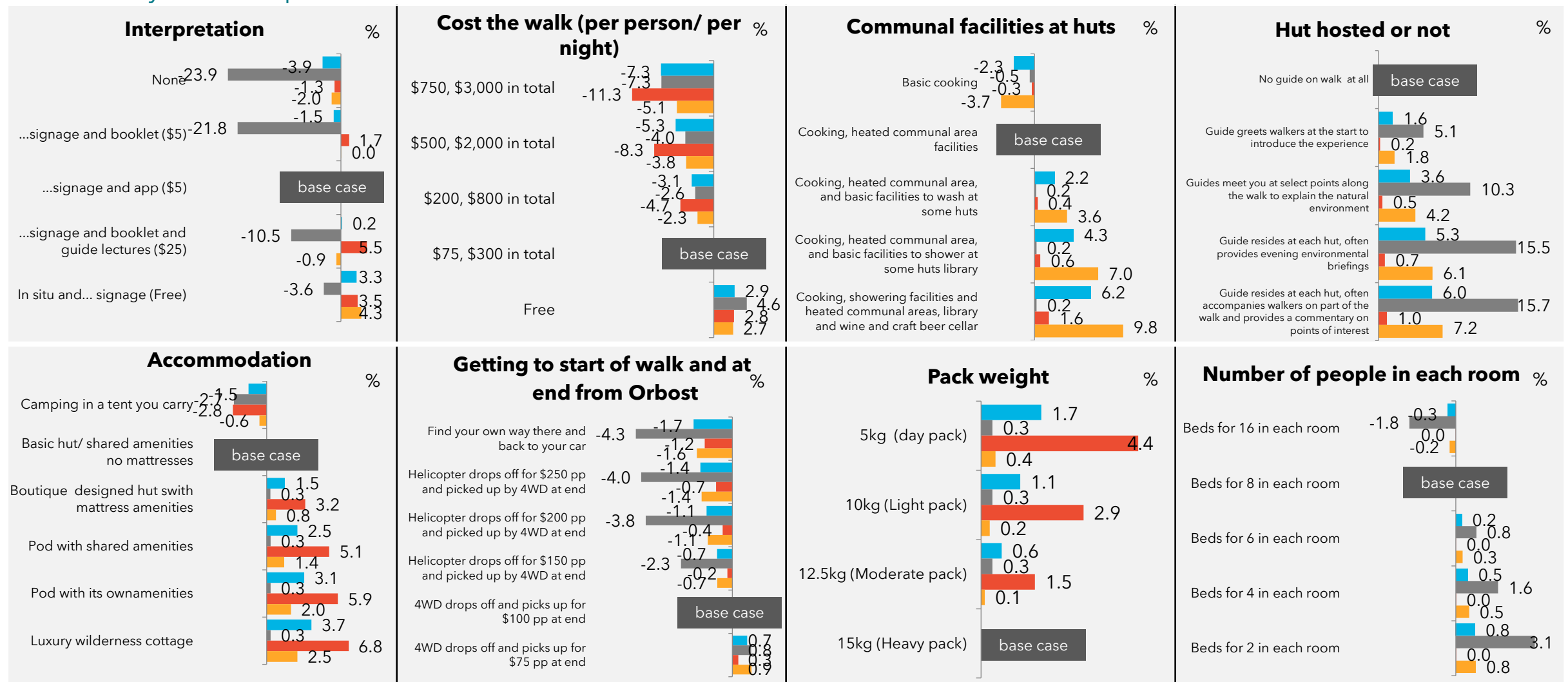
NB: The base case represents the base level scenario. This is needed for the analysis to determine likely engagement if we modify one of the settings within each factor/attribute. This slide shows the setting within each factor that has the most influence. Base: Total n=605 (Busy n=361, Limited n=190, Inactive n=54)



# how can appeal of the walk be enhanced? (2)

## multi-day nature experience...

■ Total ■ Busy ■ Limited ■ Inactive



NB: The base case represents the base level scenario. This is needed for the analysis to determine likely engagement if we modify one of the settings within each factor/attribute. This slide shows the setting within each factor that has the most influence.

Base: Total n=605 (Busy n=361, Limited n=190, Inactive n=54)

## Sydney, Australia

Suite 302, 410 Elizabeth Street  
Surry Hills NSW 2010  
e: [enquiries@instinctandreason.com](mailto:enquiries@instinctandreason.com)  
p: +61 (0)2 9283 2233

## Canberra, Australia

103/11 Trevillian Quay  
Kingston Act 2604  
e: [enquiries@instinctandreason.com](mailto:enquiries@instinctandreason.com)  
p: +61 2 6231 0350

## Darwin, Australia

Level 16, Charles Darwin Centre  
19 Smith Street Mall  
Darwin NT 0800  
e: [enquiries@instinctandreason.com](mailto:enquiries@instinctandreason.com)  
p: +61 (0)8 8963 5633

## London, UK

No. 7 Ridgmount Street, suite 1,  
London, WC1 E7AE,  
United Kingdom  
e: [international@instinctandreason.com](mailto:international@instinctandreason.com)  
p: +44 (0)2 03 355 4454

## Kelowna, Canada

Home office location  
e: [international@instinctandreason.com](mailto:international@instinctandreason.com)  
p: +61 (0)2 9283 2233