

WHAT MAKES WALKING ENTHUSIASTS UNORDINARY



Twisted Lakes
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——— Tourism Tasmania's Unordinary Adventures program is a Tasmanian Government initiative aimed at dispersing visitors to Tasmania's regions. The program targets visitors who travel for their passions, and focuses on four special interest areas, including walking, fly fishing, golf and mountain biking. This audience profile is a summary of Tourism Tasmania's research into walking enthusiasts.

Walking enthusiasts in Australia

The research conducted by KANTAR¹ into walking enthusiasts across Australia, who are potential walking visitors to Tasmania, revealed the following insights.

MARKET SIZE	Walking enthusiasts represent approximately 7% of travelling Australians who take passion-first holidays.
HOLIDAY HABITS	63% of walking enthusiasts take a trip intrastate, interstate or internationally every 3 months. While trips are typically short (72% of trips are 1-2 nights), they are regular and tend to be domestic (intrastate or interstate). Each trip is often taken with the same people, but to a different destination. Walkers typically travel in smaller groups, usually with a partner or close friend. There is strong consideration for Tasmania as a bushwalking destination among these enthusiasts.

PSYCHE	Walking evokes a sense of escape, energy and calm in these enthusiasts. Bushwalkers tend to be passionate conservationists.
AGE & GENDER	Bushwalking has broad appeal across age and gender, but there are slight skews towards 54 year olds and under.
LIFE STAGE	Typically family with children/dependent adults, or single/couple with no kids.
LOCATION	Across Australia, the majority of enthusiasts are based in New South Wales, followed by Victoria and Queensland.
WHAT THEY SEEK AND WHY THEY TRAVEL	Key drivers of destination choice for walkers include clearly signposted trail information, safe camp sites and well-maintained trails. The base level offering of the destination is also important (e.g. value for money, accessibility and options to suit different budgets). In terms of emotional drivers, walkers are looking to rediscover what is important to them.
SPEAKING TO ENTHUSIASTS	Word of mouth recommendations, Google, walking specific sources such as travel magazines and guides, Facebook, Instagram and review websites are trusted sources of information. Bushwalking clubs and associations, such as Bushcare and sustainability action groups, are also very popular touchpoints to inform destination choice.

Walking enthusiasts visiting Tasmania

Tourism Tasmania's Walking Situational Analysis² was developed from interviews with key industry stakeholders. This revealed the following insights about walking enthusiasts that have visited Tasmania:

HOLIDAY HABITS	Walking enthusiasts will take their hiking equipment with them, including walking boots, backpacks and overnight hiking gear.
WHAT THEY SEEK	Walkers seek experiences that are meaningful, informative and rejuvenating.
INTERESTS OFF THE TRACKS	<p>Whilst the walking experience is the primary focus for enthusiasts, complementary experiences appeal if time permits, including:</p> <ul style="list-style-type: none"> — Outdoor activities (e.g. kayaking, scenic flights, photography) — Local food and wine — Art and culture (e.g. Mona, Salamanca) — High-end accommodation — Touring <p>Busy professionals are less likely to participate in these experiences due to their time constraints.</p>
SPEAKING TO WALKING ENTHUSIASTS	<p>They are avid researchers and consumers of both print magazines and online content and are influenced by journalists and reputable experts in the walking community. Many read traditional print media including newspapers such as the Age, the Sydney Morning Herald and the Guardian, in addition to specialist walking magazines (including digital format), in-flight travel magazines, and travel and lifestyle magazines including Australian Geographic, National Geographic and Gourmet Traveller.</p> <p>Word of mouth recommendations, particularly through walking clubs, online forums and blogs, are also valued sources of information, as is social media, especially with younger walkers. Walking ambassadors and influencers are often bloggers or photographers.</p> <p>Walkers value the conservation of natural environments so that future generations can also enjoy wilderness and natural assets, therefore sustainability and ethical practice elements should be highlighted.</p>
OPPORTUNITY MARKETS	Females and families have both been identified as key opportunity markets.
ORIGIN	Walkers to Tasmania are largely domestic visitors from the Eastern Seaboard, including Victoria, New South Wales and Queensland.
GENDER	Slight skew towards females.

References

¹ Passion-first travellers were the key focus of 2020 KANTAR research, commissioned by Tourism Tasmania. The purpose of this research included gauging market size of potential future walking visitors to Tasmania, developing an audience profile and understanding key drivers of destination choice.

² The Walking Situational Analysis was compiled from data collected in a series of qualitative interviews with tourism operators in the Tasmanian walking industry in 2019, which formed a snapshot of walking visitors to Tasmania.

³ Tasmanian Visitor Survey (TVS) statistics are published quarterly on Tourism Tasmania's Corporate website. For the latest statistics, visit tourismtasmania.com.au/research/visitors

There are four distinct sub segments within walking enthusiasts visiting Tasmania.

1. LIFE LONG WALKERS

The main segment of walkers to Tasmania are generally 40 to 65+ years old and are largely supplemented by empty-nesters, soon-to-be-retirees and retirees. It includes those that want to experience multi-day walks yet may require physical assistance carrying hiking equipment. These walkers have often been members of walking clubs at some point during their lives, however also include new walkers that due to lifestyle changes such as retirement now have more time to indulge their passion. They participate in walking for social, physical and cultural enrichment and generally lead fit and active lifestyles. Group size is diverse, ranging from solo to large groups.

2. BUCKET-LISTERS

Bucket-list enthusiasts are attracted to iconic walking destinations, within Australia and internationally, based upon the high profile of a walking experience. This segment is diverse in age, however the bulk of walkers are aged from 40 years and over. They walk as couples, small groups, or solo. International walkers tend to be from the USA or UK. Both domestic and international visitors are open to participating in complementary activities, including immersion in local produce such as quality food and wine.

3. PROFESSIONALS & BUSY URBAN TYPES

Well-educated, aged 30 and above and seeking escape from busy work schedules and family commitments. They book well in advance, are open to short escapes and seek reconnection with their friends or as couples. This segment contains repeat walking visitors to Tasmania. Most of these walkers have family commitments and due to this are largely restricted in their travel at traditional family-centred calendar periods e.g. Christmas, New Year and Easter. Due to their time constrictions, they are less inclined to participate in complementary activities or extend their stay.

4. FAMILIES

Families with young children through to young adults represent a minor segment of walking enthusiasts to Tasmania. This segment is more open to travel during school holidays and traditional calendar holiday periods and are less inclined to undertake overnight walking experiences.

Bushwalking visitors to Tasmania

– What the TVS Reveals

Top-line statistics for bushwalking visitors to Tasmania, sourced from Tourism Tasmania's Tasmanian Visitor Survey (TVS) for the year ending March 2020, indicate:

- An estimated 588,000 interstate and international visitors reported participating in bushwalking during their trip in Tasmania;
- Visitors that participated in bushwalking has seen an average annual growth of 4% between 2015 and 2020;
- Visitors that participated in bushwalking stayed on average 10.1 nights in Tasmania; longer than the average visitor to Tasmania (8.1 nights).
- Bushwalking visitors spent on average \$2,607 per person on their stay (higher than the average visitor to Tasmania, \$1,920 per visitor).