

# Wild South Coast Way on the Heysen Trail

Provisional Visitor Experience Summary

November 2020



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# Overview

The Wild Coast Way (WSCW) has been developed to promote an improved and enhanced walking experience on the Fleurieu Peninsula end of the Heysen Trail. It exists to create wealth and wellbeing.

For the local government areas of Yankalilla and Victor Harbor, the WSCW promises to be an economic driver, creating employment and investment. It activates an existing infrastructure asset, driving visitation – particularly during the winter months.

For existing and new entrepreneurial businesses, the WSCW provides opportunity for prosperity as it welcomes new visitors to the area.

But the WSCW can only deliver this economic wealth because of the wellbeing benefits it provides. As a result, the return on the investment will be felt not only in financial terms, but also in the enhanced health and wellbeing experienced by all who visit this world-class destination.

This unique blend of wealth and wellbeing is the very foundation of the Wild South Coast Way.

This Provisional Visitor Experience Summary for the Wild South Coast Way on the Heysen Trail ('The Summary') has been developed to demonstrate progress to WSCW stakeholders and to reflect the contributions that have been made to the project in 2020.

The Wild South Coast Way is an experience brand and a brand blueprint has been developed to clearly articulate the values attached to the experience. The brand values are belief systems which become guiding principles for how we operate, they provide the guard-rails for decision making, and benchmarks for staff recruitment and performance.

The Summary provides key insights into the WSCW brand, target market segments and describes the narrative of the hero and supplementary experiences.

**The seven target market segments are:**

1. Adventure Light
2. Day Tripper
3. Bush Camper
4. Adventurer
5. Inclusive Tourist
6. Girls Group Getaway, and;
7. Discoverer

*'You can only walk to the truly wild places'*

Melanie Sjoberg 2020

Hero experiences showcase the highlights of the Wild South Coast Way, and although they vary in length, they offer the most significant commercial opportunities for industry as an economic driver to the region. Hero experiences act as a marketing hook which drives consumer interest and conversion.

Hero experiences also offer the best opportunities for packaging and bundling with other experiences on the Fleurieu Peninsula and tourism regions such as Adelaide and Kangaroo Island to encourage visitors to stay longer and spend more in South Australia.

The hero experiences identified for the Wild South Coast Way include:

- the five day, four-night hallmark experience from Cape Jervis to Victor Harbor
- two two-day walk experiences from Cape Jervis to Tapanappa and from Balquidder to Victor Harbor, and;
- four introductory experiences including the Tapanappa loop trail (Class 1), the Goondooloo Ridge (Class 2), Kings Head to Waitpinga and Victor Harbor to Waitpinga Cliffs.

There is significant interest by private industry to leverage the government investment across all hero and supplementary experiences identified. Tourism operators would like to offer self-guided, partially guided, or fully guided experiences of varying duration with the options to stay on-trail in the brand-new purpose built or upgraded campgrounds, or alternatively choose one of the many quality off-trail accommodation options on offer.

Several food and beverage service providers are considering providing WSCW visitors with the option to purchase food packs and beverages, including a locally brewed beer. The broad service offering will provide walkers with the opportunity to customise their itineraries based on their individual needs, including logistical components such as booking services, transport and shuttle services, portage, equipment hire, partaking in evening experiences or getting their favourite produce delivered. Opportunities were also identified for pre- and post-stay in region, Adelaide and Kangaroo Island.

The Summary will continue to be refined throughout the coming months and will be a finalised, published document for partners and stakeholders to reference as they seek opportunities to leverage off of the Government's \$6 million investment.

# Wild South Coast Way experiences

**The Wild South Coast Way on the Heysen Trail will provide the ultimate, flexible multi-day walking experiences less than two hours from Adelaide. To maximise the visitor potential, the walk will feature a series of interconnected walking experiences with customisable options spanning Cape Jervis, Deep Creek Conservation Park, Waitpinga Cliffs and Beach, Newland Head Conservation Park, Victor Harbor and Granite Island Recreation Park.**

Designated new visitor facilities at Goondooloo, Tapanappa Ridge, Cape Jervis and Rosetta Head, universal access trails, new walk-in campsites at Eagle Waterhole, Tapanappa, Balquhadder and Waitpinga and upgraded drive-in campsites at Trig, Stringybark, Cobbler Hill and Tapanappa will help unlock the full visitor potential.

Alongside the hallmark five-day four-night walking experience, the Wild South Coast Way will deliver immersive and accessible nature experiences of varying duration which will appeal to a highly diverse range of visitors, including travellers with accessibility requirements. Targeted specifically at the Walker and Outdoor Enthusiast segments, the Wild South Coast Way will unashamedly position itself to appeal to the South Australian Recreational Day Trippers, Bush Campers, Adventure Light, Adventurers, Inclusive Tourists, Girls Group Getaways, and Interstate and International Soft Adventurers and Discovers.

All Wild South Coast Way walking experiences will offer significant commercial on-trail and off-trail business opportunities for tour operators, tour guide services, transport and shuttle services, accommodation providers, portage services, equipment hire, food and beverage catering and sales (including wineries and breweries), equipment hire companies, and retailers. The walk also offers opportunities to be packaged together with Adelaide and Kangaroo Island experiences, especially for the interstate and international markets as evidenced by the industry survey.

The walking experiences will be offered as self-guided, partially guided, or fully guided experiences with the option to stay on-trail, in brand new purpose-built or upgraded campgrounds, or one of the many quality accommodation options on offer off-site. The trail will also appeal to school groups, events, special interest groups (for example, yoga, meditation, star gazing, photography, bird watching) and charity events.

Walkers will be able to pre-arrange their entire walking experience based on their individual needs including logistical components such as booking of campsites online, off-trail accommodation, transport and shuttle services, portage, equipment hire, or getting their favourite local produce and local beverages delivered. Having the ability to mix and match products (tailormade) and services based on individual needs or alternatively buy a fully inclusive package will allow visitors to have peace of mind and simply enjoy the wonders of the walk, reconnect with nature and each other. A diverse range of pre-and post-experiences will complete the South Australian holiday.

# Hero experiences

The hero experiences identified for the Wild South Coast Way include:

## Five day four-night hallmark experience

Cape Jervis to Victor Harbor

## Two-day walk experiences

Cape Jervis to Tapanappa

Balquidder to Victor Harbor

## Introductory experiences

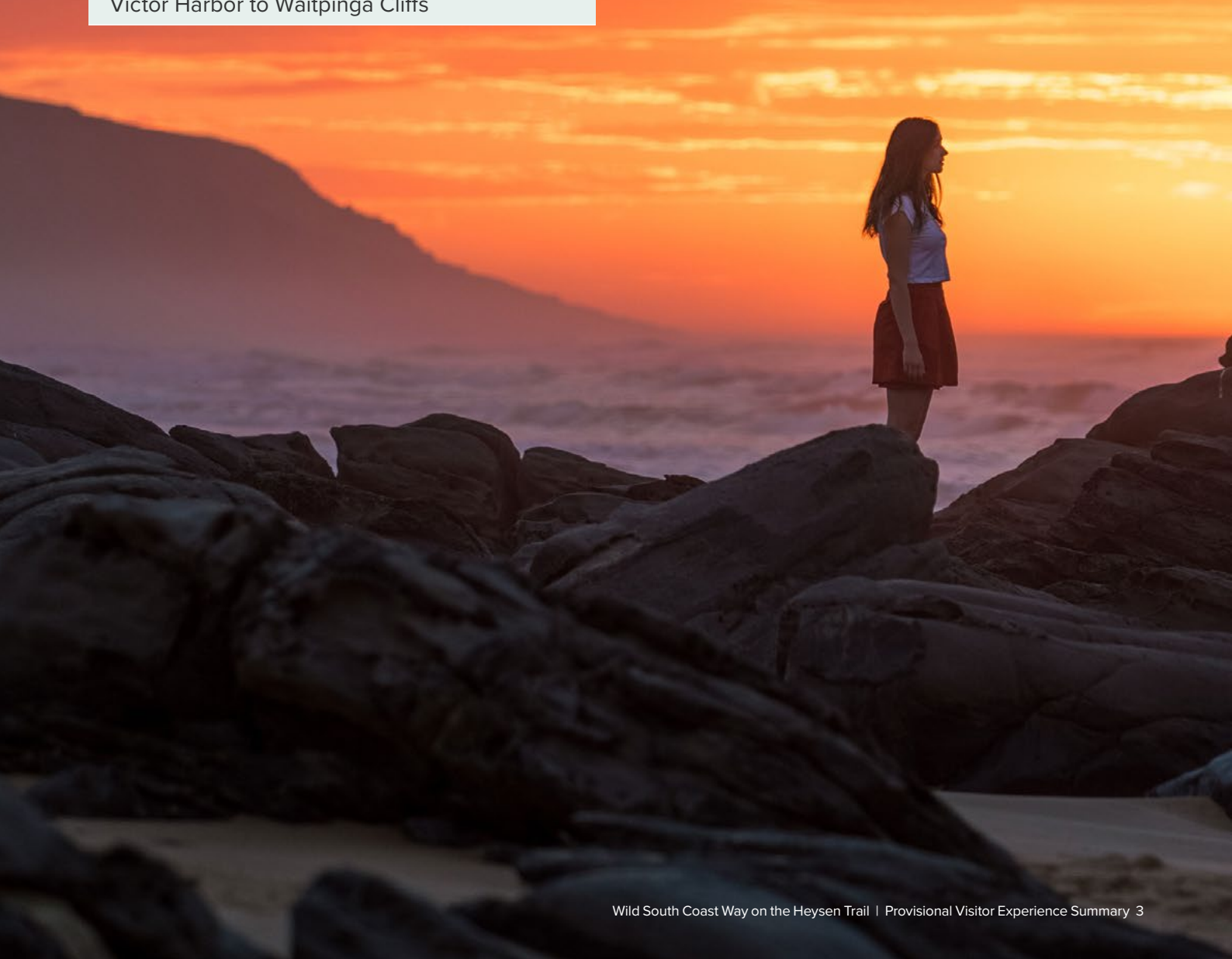
Tapanappa loop trail (Class 1)

Goondooloo Ridge (Class 2)

Kings Head to Waitpinga

Victor Harbor to Waitpinga Cliffs

A hero experience showcases the highlights of the Wild South Coast Way and while varying in lengths, will offer the most significant commercial opportunities for industry as an economic driver to the region. A hero experience will act as a marketing hook that drives consumer interest and conversion. The hero experiences will also offer the best opportunities for packaging and bundling with other experiences on the Fleurieu Peninsula and tourism regions such as Adelaide and Kangaroo Island to encourage visitors to stay longer and spend more in South Australia.



## Five-day, four-night walking experience from Cape Jervis to Victor Harbor or vice versa (74 km)

The hallmark five-day four-night walking experience from Cape Jervis to Victor Harbor (74 km one way) is a world-class coastal walk close to Adelaide which has to potential of becoming one of Australia's most iconic walks. It can be undertaken in either direction, although walking the trail from Cape Jervis to Victor Harbor will enhance the overall visitor experiences upon arrival as visitors will be able to enjoy the tourism offerings in Victor Harbor, Granite Island and surrounding areas.

The trail is classified as a Class 4 walk and suited for people with bushwalking experience and moderate fitness levels.

The walking experience offers some of the State's most spectacular and awe-inspiring coastal walking imaginable. The Wild South Coast Walk provides visitors a genuine sense of wilderness, featuring remote beaches, native bushland, rugged cliffs, First Nations' history, breathtaking vistas, deep gullies and a rich diversity of native birds, bush and wildlife, in fact more species than anywhere else on the coast.

Each day of the walk delivers a new experience and challenge, starting with views across to Kangaroo Island before the full nature experience begins encouraging the walker to 'tune in' to nature and 'tune out' of stress.

Seasonal nature activities can include whales passing by, white-bellied sea-eagles flying overhead, native plants blooming and sometimes the sounds of nothing at all but the beat of their heart and the sounds of their own footsteps.

When visitors share their Wild South Coast Way experience, they will talk about completing a challenging hike along one of the most beautiful coastlines in Australia. Going off grid, getting to know the locals,



seeing wildlife in the wild, meeting likeminded travellers, engaging all five senses, and having a sense of achievement will create long lasting memories.

Visitors to the campsites will note how well-designed they are, so much so that it felt like they were in a wilderness of their own. To ensure the safety of walkers, quality trail infrastructure, comprehensive information (collateral, websites, maps), phone signal hot spots, and signage will be made available.

Walkers will rave about spectacular cliff-top views, spotting southern right or humpback whales and white-bellied sea-eagles, learning about the local Aboriginal culture, colonial history and geology, seeing hundreds of kangaroos and simply be in awe of the sheer beauty of the landscapes.

With their friends they will share that the Wild South Coast Way is one of the greatest wilderness escapes featuring solitude and tranquillity less than two hours from a major capital Australian city and visiting a region, the Fleurieu Peninsula, that offers diverse and experiential tourism experiences including the famous wine region of McLaren Vale.

For visitors who want to undertake the walk now, there are bus shuttle services available.

## Two-day walking experiences

### Two-day, one-night walking experience from Cape Jervis to Tapanappa

- Day 1 - Cape Jervis to Eagle Waterhole or Cobbler Hill (15-16 km)
- Day 2 - Eagle Waterhole or Cobbler Hill to Tapanappa (12-13 km)

The walk features the start of the coastal trail with amazing views to Kangaroo Island, Investigator Strait, and native bushland within Deep Creek Conservation Park. It also includes the magnificent Blowhole Beach, the UFO house, Fishery Beach, First Nations' history, spectacular valleys of Deep Creek, and plentiful wildlife in the wild.



### Two-day, one-night walking experience from Balquhiddier to Victor Harbor

- Day 1 - Balquhiddier campsite to Waitpinga campsite (13 km)
- Day 2 - Waitpinga campsite to Victor Harbor Trail Head or Granite Island (16-17 km)

This section of the walk includes numerous highlights including one of the most iconic landscapes in South Australia, the Waitpinga Cliffs rising up 100 metres from the sea. Walkers will get to enjoy two magnificent beaches, namely Parsons Beach and Waitpinga Beach, spectacular views from the cliff tops towards Encounter Bay, The Bluff, Victor Harbor and Granite Island, and plentiful wildlife in the wild.

## Shorter introductory hero experiences

Shorter introductory hero experiences have been developed as they are perfectly positioned to have a broad visitor appeal and excellent potential to drive repeat visitation for longer stays and experiencing other sections of the trail.

Once the Wild South Coast Way has been experienced once, it is envisaged that visitors will return time and time again to explore other parts of this spectacular Fleurieu Peninsula coastline.

- **Tapanappa Class 1 loop trail and day visitor facility**
- **Goondooloo Ridge Class 2 return trail and day visitor facility**
- **Victor Harbor (Bluff) to Waitpinga Cliffs**
- **Kings Head to Waitpinga**

### The new Tapanappa Class 1 loop trail and day visitor facility

A short loop walk offers breathtaking views of Kangaroo Island, The Pages Islands and Tunkalilla Beach. Walkers will see kangaroos feed at dusk, spot echidnas, watch eagles flying overhead, smell fresh sea breezes and hear the waves crashing below.



This Class 1 trail will be suitable for visitors of all ages including young families with prams, the elderly and wheelchair users who have someone to assist them.

Visitors to the new Tapanappa day visitor facility will find toilets, picnic zones, elevated viewing platform, lookouts, car parking, drinking water, interpretive signage and information shelters.

### Goondooloo Ridge Class 2 return trail and day visitor facility

This trail along Goondooloo Ridge offers spectacular views of Backstairs Passage and the Pages Islands. Visitors will walk through re-vegetated and remnant native bushland to a lookout with spectacular views. Along the way large mobs of kangaroos can be seen grazing in the open fields or resting under eucalypts.

This Class 2 trail will be suitable for visitors of all

ages including families with young children and the elderly, providing visitors with prams and those with a disability an opportunity to participate in the same recreational activities as their companions.

Visitors to the new day visitor facilities at Goondooloo will most likely (pending approval of final designs) find seating areas, lookout, toilets, picnic zones, car parking, drinking water, interpretive signage and information shelters.

### Half day walk Victor Harbor (Bluff) to Waitpinga Cliffs (Lookout)

The magnificent walk starts at the Bluff (Rosetta Head) passes Petrel Cove and follows the Victor Harbor Heritage Trail onto Kings Beach and then past Kings Head. The highlight of this walk is no doubt the Waitpinga Cliffs rising up 100 metres above the sea, one of SA's most photographed coastal icons and an area frequented by the magnificent white-bellied sea-eagle. During May to October walkers may find southern right whales with calves.

### Half day walk Kings Head to Waitpinga Beach

The walk from Kings Head to Waitpinga Beach within the Newland Head Conservation Park is the spectacular highlight of the Heysen Trail. The focal point of this walk is again Waitpinga Cliffs. The trail follows along rolling hills and coastal scrub to the long Waitpinga Beach, a popular surfing and fishing spot. The walk includes panoramic views of Waitpinga Creek, Encounter Bay, the Pages in Backstairs Passage and Kangaroo Island.





## Supplementary experiences (introductory walks)

The project team identified the following full day, half-day and loop walks as primary or secondary experiences. They have good appeal and will add to the overall visitor experience in the Fleurieu Peninsula region, but in comparison to the hero experiences are not game changers and offer lesser commercial opportunities to drive visitation and visitor spend.



**Full day walk from Cobbler Hill to Tapanappa (Class 4)**

**Full day walk from Waitpinga Beach to Victor Harbor (Class 4)**

**Half day walk from Cape Jervis to Fishery Beach (Class 1)**

**Half day walk from Waitpinga Head to Waitpinga Beach**

**Half day walk from Cape Jervis to Fishery Beach**

**Newland Head Conservation Park Coastal Cliff Loop Hike**

**Deep Creek Conservation Park**

- » Blowhole Beach – Cobbler Hill Marrano Creek Hike
- » Deep Creek Circuit Hike
- » Tapanappa to Waterfall
- » Tapanappa to Deep Creek Cove
- » Tapanappa to Boat Harbor





# The Wild South Coast Way brand blueprint

## Brand purpose

As a brand developed to promote an improved and enhanced destination on the Heysen Trail, the Wild South Coast Way exists to create wealth and wellbeing.

## Wild South Coast Way An Experience Brand

### OUR VALUES

Tread lightly | Spirit of discovery | Accessible & inclusive | Pure connection

### OUR PURPOSE

Wealth & wellbeing

### HOW WE MAKE CUSTOMERS FEEL

Proud | Exhilarated | Rejuvenated  
Connected | Wonder | At peace

### FAMOUS FIVE

Rugged coastal | Walking trail  
South(ern) Australia | Near & far | Connection

### DISTINCTIVE BRAND ASSETS

Green & blue | Seven beaches



## The Wild South Coast Way is an experience brand

WSCW is an Experience Brand strongly underpinned by characteristics of a Conscious Brand:

PRIMARY

### Experience Brand

WSCW is differentiated by the experience we provide, as much as or more than by our products or services. We are exciting, energetic and imaginative.

SUPPORT

### Conscious Brand

WSCW is on a mission to make a positive social and environmental impact, and enhance people's quality of life. We are inspiring, thoughtful and transparent.



# Brand values

## Value 1: Tread lightly

*'Walk as if you are kissing the earth with your feet.'*

Thich Nhat Hahn (1926-), Vietnamese monk.

The central tenet of the WSCW brand is that we operate in harmony with the natural environment. The WSCW traverses ancient landscapes of majestic, unspoiled beauty, and its success is dependent on these environments continuing to thrive for future generations.

Our visitor experience is complementary to the landscape, and we are respectful of the place in which we operate.

## Value 2: Spirit of discovery

*'A mind stretched by a new experience can never go back to its old dimensions.'*

Oliver Wendall Holmes Jr (1841-1935), Associate Justice of the Supreme Court of the United States.

The WSCW is inspired by a spirit of discovery, curiosity, adventure and wonder. We are passionate about delivering experiences that allow people to explore our unique natural environment. But we also believe strongly in our role in education; inspiring lifelong learning and interest in the beauty and conservation of our beguiling lands.

## Value 3: Pure connection

*'Let's take our hearts for a walk in the woods and listen to the magic whispers of old trees.'*

Anonymous

Perhaps the most profound gift of the WSCW is its ability to create pure, truthful connections. Connections with the land, the sea and the sky. But also, deep human connections – between partners, families and friends, and also within ourselves. In a world cluttered with noise and superficial acquaintances, WSCW believes its ability to create pure connections is more critical than ever.

## Value 4: Accessible and inclusive

*'Accessibility is about removing barriers and providing the benefits for everyone.'*

Steve Ballmer (1956-), American businessman.

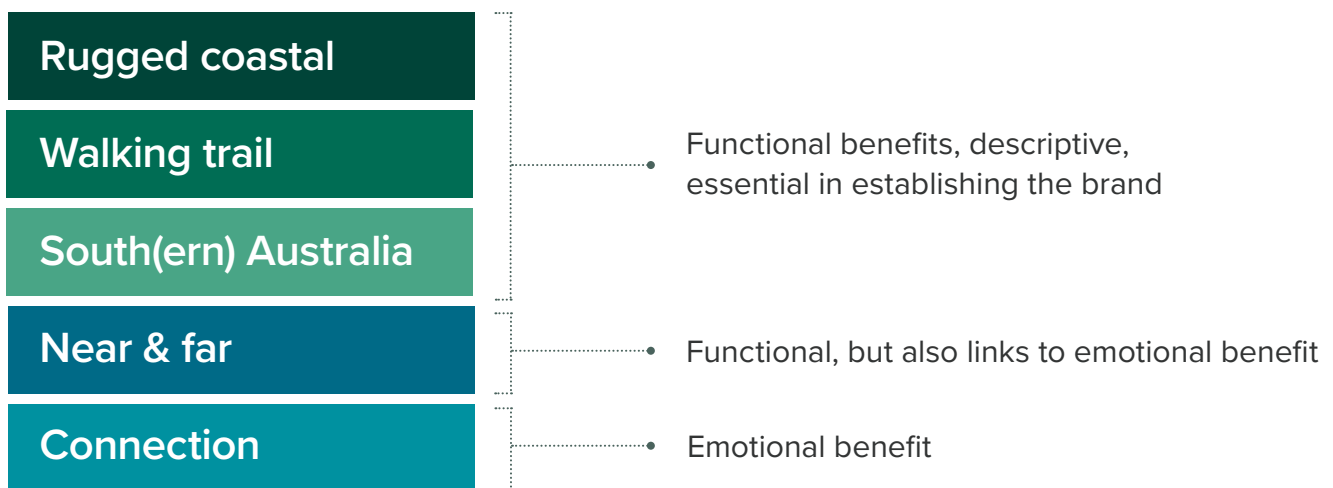
The WSCW is driven by a deep desire for accessibility and inclusion. We believe the WSCW should be accessible to as many people as possible, regardless of ability or demography. And we acknowledge our place on the ancient lands of the First Nations people and pay respect to their Elders past, present and emerging.



# The Wild South Coast Way famous five

Working memory can only store five words in conscious memory at any time.  
So what will those five words be for the WSCW?

## Famous five



# The Wild South Coast Way opportunity for the Fleurieu Peninsula visitor economy

The 2030 South Australian Visitor Economy Sector Plan aims to push the industry from currently \$8.1 billion (up 20% by Dec 2019) towards contributing \$12.8 billion by 2030. The recent increase was fuelled by growth in the intrastate and interstate expenditure. Employment in the tourism industry was at an all-time high for the year ending June 2019 with 40,500 people (up 4%) directly employed and 23,200 indirectly employed, bringing the total to 63,800 (up 5%). The gross value-add of tourism in South Australia reached \$3.3 billion in 2018-19 (up 8%).

Adelaide received 58% of tourism expenditure, while the regions split the remaining 42%. The Fleurieu Peninsula accounted for \$493 million (Dec 2019) and achieved 97% of its 2020 growth target of \$509 million. In addition to 771,000 overnight trips, on average 2.9 million domestic day trips are taken to the Fleurieu Peninsula with an extra 95,000 international day trips.

96% of visitors to the Fleurieu Peninsula are domestic and 4% are international travellers. Most visitors (94%) come to the region for leisure purposes (holiday & VFR). The industry employed approximately 3,300 people directly and 1,300 people indirectly as of December 2019.

The Fleurieu Peninsula visitor expenditure target for 2030 has been set at \$807 million, however, these targets were published in 2019 and do not take the short, medium and long-term impacts of COVID-19 into consideration. The pandemic forced a flourishing global industry to come to a complete standstill just shortly after the devastating bushfires on Kangaroo Island and in the Adelaide Hills which impacted all tourism regions in South Australia.

Over the short- and medium term the opportunity for COVID-19 tourism recovery will be the domestic market, no matter where in the world. This is evidenced by many national tourism organisations (NTOs), state tourism organisations (STOs), regional tourism organisations (RTOs) reallocating and shifting international marketing budgets to domestic tourism campaigns, including Tourism Australia and the South Australian Tourism Commission (SATC).

The most recent 'Welcome Back' campaign launched by the SATC is focused on encouraging South Australians to travel within their own state. This campaign is supported by key trade partners, including SeaLink, Tripadvisor, Expedia, RAA, Helloworld and Phil Hofmann Travel Group, some of which have only recently pivoted to cater to an intrastate travel audience. It encourages South Australian consumers to support businesses that have been hardest hit by first the bushfires and then COVID-19.

Interstate markets will take longer to recover, not only because travel restrictions may remain in place (or revert if a second wave occurs). Consumers are concerned about the economic outlook, they worry about their safety, intend to spend less and want to make a difference by supporting their local regions and businesses. The latter consumer sentiment came out strongly in post bushfire and COVID-19 research by MyTravelResearch.

The Kantar COVID-19 Barometer (Apr 2020) also highlighted that spending habits are moving closer to home and that isolation has not only prompted increased consumption of digital media but also adoption of healthier habits including exercising. Post isolation Australians are most looking forward to catching up with friends, visit bars/restaurant/pubs, meeting relatives and travelling locally (fourth on the list).

Pre-COVID-19 South Australia's top international markets were UK, Europe, North America, New Zealand, China and India. Experts predict that New Zealand will be the first international market to return to Australian shores and that markets such as UK, Europe and North America may take 18 to 24 months to resume.

Given Fleurieu Peninsula visitation is largely driven by the intrastate market (81%), the region can be leveraging this augmented sense of community and increased intrastate marketing investment and thus recover more quickly than other regions that are more reliant on interstate or international visitors.

The Fleurieu Peninsula is the most visited region outside of metropolitan Adelaide and the Heysen Trail together with the region's coastline, wineries, local produce markets, breweries, beaches, wildlife and rural landscape have made the Fleurieu Peninsula a popular nature-based tourism and food and beverage destination. The Heysen Trail and Fleurieu parks



attract more than 700,000 visitors annually and have seen a steady increase in visitation over the years.

Most domestic overnight visitors to the Fleurieu Peninsula are from Adelaide (61%), while regional SA accounts for 20%. Victoria and New South Wales are the region's biggest interstate markets and account for 9% and 4% of visitors respectively. Internationally, Europeans contribute 63% of the visits, while the USA contributes 9%, New Zealand 7%, and China 6%. Domestic visitors peak in the age groups of 55-64 and 65+ and prefer to stay 1 or 2 nights.

Nature-based tourism is a significant driver of visitation in South Australia and currently contributes \$1.7 billion to the State's economy and is expected to thrive as a result of changed consumer preferences. The COVID-19 halt of interstate and international travel appears to present an ideal opportunity for planning new nature-based tourism experiences in South Australia as industry engagement has indicated.

The Wild South Coast Way on the Heysen Trail will become the premier nature-based tourism experience on the Fleurieu Peninsula, a real drawcard that can help drive tourism recovery and fuel future visitor expenditure growth to the region. It is a multi-day trail which can compete with world-standard multi-day walks in Australia and other parts of the world.

The Wild South Coast Way will have a high appeal for domestic travellers of varying demographic, geographic and lifecycle segments. The most immediate opportunity will be to develop strategies for the growth of intrastate visitors and their visiting friends and relatives with a stretch to target interstate visitors. There is scope in the longer term to develop the offering for international visitation, once international travel to Australia resumes and once the trail has grown in brand awareness and commercialised tourism offerings.

It also presents enormous potential for repeat visitation, especially from the intrastate markets. The Walker Market Profile (bda May 2020) highlights 'been there before' as the second most important source for inspiration and fourth most important source for planning, providing the confidence

that once this magnificent part of South Australia has been experienced once, visitors will want to return to uncover more of the secrets of the trail, including through changes brought by each of the seasons. Post-COVID research also highlights that people are looking to add more short trips.

Most importantly, the Wild South Coast Way will be well positioned to increase visitation during off-peak season, increase day visitor spend, and convert day trips into multi night stays, meeting the core priorities identified in the South Australian Regional Visitor Strategy (2018).

The Wild South Coast Way will offer a wide range of hero and supplementary high value trail experiences of varying durations which will be suited to a broad range of key and secondary target markets, including the accessible tourism market to maximise the tourism potential. The industry engagement undertaken as part of the development of this plan confirmed the interest and opportunity for the private sector to capitalise on the government's investment in the walk by developing these services.

Over time the trail will drive significant commercial benefit to South Australian tourism businesses offering accommodation, tours and experiences, guides, transport, portage, and food and beverage services to day and overnight visitors and thus create new jobs in the region.

The offers will cater to visitors wanting a self-guided, partially guided, or fully guided walk experience and value-added services. Ideally, visitors will be provided with flexible options and multiple choices which can be customised (mix and match) to their own needs. The Wild South Coast Way will also drive awareness and visitation to complementary experiences in the region including, but not limited to, Deep Creek Conservation Park, Newland Head Conservation Park, McLaren Vale, Victor Harbor, Cape Jervis and Granite Island Recreation Park.

# The Wild South Coast Way attributes



## The Wild South Coast Way ideal customers and their customer journey

The key target markets are based on Greenhill Research & Planning (Sep 2017) and the Walker Market Profile (May 2020) published by the consulting firm bda. Marketing Planning outlining the market profiles of the SA and interstate Walker and Outdoor Enthusiast segments.

The inclusive tourist segment is based on research by MyTravelResearch.com (Jan 2018), University of Technology Sydney (2017) and Tourism Research Australia (Jan 2018).

Furthermore, recent research by MyTravelResearch.com (Apr 2020) and Wavemaker (Apr 2020) on intended behaviour following the impact of bushfires and COVID-19 was incorporated into the customer personas and customer stories developed for the Wild South Coast Way.

The customer stories, customer personas and customer journey maps for the seven key target markets identified can be found in Appendices 1, 2 and 3.

In addition to the key target markets the industry identified the following secondary target markets:

- Special interest 'active tourism' segment (bird watching, yoga, meditation, wellness, art)
- School groups and outdoor education market
- Lower socio-economic groups (lower affluent)

The following table gives an overview of the key target segments identified, their travel motivations and the Wild South Coast Way experiences they would likely seek.



Segment	Adventure Light	Day Tripper	Bush Camper	Adventurer	Inclusive Tourist	Girls Group Getaway	Discoverer
<b>Names and Ages</b>	Thomas (27) & Annabelle (26)	Pamela (59) & Gary (60)	Deb (45), Nigel (47), Isabelle (16), Charlie (10) & Max (8)	Trevor (63) & Denise (65)	Jess (35) and her carer Tim (29)	Karen (47) & five friends	Richard (59) & Caroline (57)
<b>Description</b>	Affluent solo, couples or groups of friends looking for a recreational day trip, soft adventure, or more extensive adventure	Affluent older couples desiring a bush camping trip, recreation day trip, or soft adventure experience	Affluent families seeking a recreational day trip experience, a bush camping trip or a soft adventure experience	Affluent solo travellers travelling with friends or as a couple seeking a multi-day walking experience	People from all walks of life with disabilities are looking for an accessible immersive nature experience	Groups of women seeking an organised time away to experience nature, bond and treat themselves	Affluent couples from outside SA looking for a recreation day trip experience or soft adventure/nature-based experience
<b>Wild South Coast Way Experience</b>	<ul style="list-style-type: none"> <li>Multi-day walks</li> <li>Two day walks</li> <li>Full day walks</li> </ul>	<ul style="list-style-type: none"> <li>Two day walks</li> <li>Full day walks</li> <li>Short and loop walks</li> <li>Car-based camping</li> </ul>	<ul style="list-style-type: none"> <li>Two day walks</li> <li>Full day walks</li> <li>Short and loop walks</li> <li>Car-based camping</li> </ul>	<ul style="list-style-type: none"> <li>Five day walks</li> <li>Multi-day walks</li> </ul>	<ul style="list-style-type: none"> <li>Goondooloo Ridge Trail</li> <li>Tapanappa Ridge Trail</li> </ul>	<ul style="list-style-type: none"> <li>Two day walks, full day walks</li> <li>Organised events/walks</li> <li>Packaged group tour (girls weekend getaways)</li> </ul>	<ul style="list-style-type: none"> <li>Two day walks</li> <li>Full day walks</li> <li>Short and loop walks</li> </ul>
<b>Relevant Travel Motivations</b>	<ul style="list-style-type: none"> <li>Being outdoors</li> <li>Having an adventure</li> <li>Fun and fitness</li> <li>Escape routines and unwind</li> <li>Digital detox</li> <li>Reconnect and relax</li> <li>Be educated</li> <li>Spend quality time with partner and friends</li> </ul>	<ul style="list-style-type: none"> <li>Nature based activities such as hiking</li> <li>Soft adventure</li> <li>Art, food &amp; wine</li> <li>Reconnect, relax and unwind</li> <li>Escape routines</li> <li>Spend quality time with friends and relatives</li> <li>Keeping fit</li> </ul>	<ul style="list-style-type: none"> <li>Outdoor adventure and fun, improve fitness</li> <li>Reconnect, relax and unwind</li> <li>See &amp; learn about wildlife &amp; nature</li> <li>Escape everyday life</li> <li>Get family away from screens</li> <li>Spend quality time with friends and relatives</li> <li>Be educated</li> </ul>	<ul style="list-style-type: none"> <li>Discovering famous walking trails</li> <li>Challenge and accomplishment</li> <li>Camping in a national park</li> <li>Be active in natural environment</li> <li>Visit wilderness of some kind</li> <li>Reconnect with nature and each other</li> <li>Digital detox</li> </ul>	<ul style="list-style-type: none"> <li>Increase activity</li> <li>Learn and discover; be emotionally and intellectually stimulated</li> <li>Escape everyday life</li> <li>Sense of achievement</li> <li>Reconnection, relax and unwind</li> </ul>	<ul style="list-style-type: none"> <li>Sense of achievement</li> <li>Spend quality time with girlfriends</li> <li>Raising money for charity (pride)</li> <li>Outdoor adventure and fun</li> <li>Reconnect, relax and unwind</li> <li>Escape routines</li> <li>Learn and discover new trails</li> </ul>	<ul style="list-style-type: none"> <li>Immersion in natural surroundings</li> <li>Spectacular scenery and unique Australian landscapes</li> <li>Native Australian wildlife in its natural habitat</li> <li>Get active and reconnect with nature</li> <li>Be educated</li> </ul>
<b>Wild South Coast Way Target Market Segment alignment to research by bda and Greenhill Research</b>	SA Outdoor Enthusiast (bda) – Day Tripper, Adventure Light, Adventurer (Greenhill)	SA Walker segment (bda) – Day Tripper, Bush Camper, Adventure Light (Greenhill)	SA Walker (bda research) – Day Tripper, Bush Camper, Adventure Light (Greenhill Research)	SA Outdoor Enthusiast (bda) – Adventurer segment walk focused (Greenhill)	Specific research to be identified	Specific research to be identified	Walker or Outdoor Enthusiast segment (bda) – Discoverer (Greenhill)



# Appendix 1 - Customer Stories

Through an iterative process of customer persona development and customer journey mapping, the following stories were created to give examples of how the Wild South Coast Way might be experienced first-hand.

## Adventure Light

### Thomas (27) & Annabelle (26)

As much as Thomas enjoyed weekends with his mates in Sydney going from one trendy bar to the next, they paled in comparison to the monumental experience of walking from Cape Jervis to Tapanappa on the new Wild South Coast Way with his girlfriend, Annabelle. And his social media postings were proof.



“Hey Belle,” Thomas called, as he scrolled through her Instagram feed, “How did you manage to capture three dolphins in that shot at Blowhole Beach? You are just lucky!” “Easy, Thomas, since you were still going on about the UFO House in Deep Creek, I just watched the water and there they were. Or maybe it was the fresh air still cleaning the cobwebs out of your head!” Or maybe it was the gourmet packed lunch they had picked up before they started, Thomas thought. Food always tastes better when you are picnicking.

“And look at this shot, with all the roos under the she-oaks in the afternoon sun, it almost looks like a movie set!” Annabelle said. “Yeah,” Thomas replied, “And by the time we reached the campsite at Eagle Waterhole we thought we had had our fill of nature, but then those magical blue wrens appeared.

They have so much personality and the way they flit around makes me wonder if they eat superfood or something.”

“Geez, Thomas, you are always going on about food. But I have to hand it to you, you did everything to make our getaway romantic, particularly the catered meal at the campsite. That picture of the Thai beef salad in the golden light of the campfire has gotten almost as many comments from our friends as the dolphins,” Annabelle mused. “But remember, the idea of portage and renting the tent and other equipment was my idea and really made the whole thing easier,” she continued.

Thomas scrolled further, looking at the spectacular hills, valley and creeks of the second day of the walk. He didn’t realise how many shots Annabelle had taken of the echidnas, tiny orchids and the towering flower spikes. As much as he enjoyed those things, he was most impressed by the roaring waterfall down the single track in Deep Creek. He loved the sense of natural power and the cycle of life and immersing himself in nature made him feel more alive.

“Earth to Thomas,” Annabelle calls out, “Do you want to include me in your dreaming?” Thomas grins and responds cheekily “Nope, Annabelle, you have to leave it to me, I’m already working on our next visit to the Wild South Coast. We’ve only just started to discover what it has to offer!”

## Day Tripper

### Pamela (59) & Gary (60)

With the winter rain pelting the window, Pam is fighting cabin fever as she flips through the newspaper. She is on a mission to find a new travel destination to visit once the weather improves.

With her husband Gary, Pam has visited most corners of South Australia, so her curiosity is piqued when she spies an article about the newest offering in the Fleurieu Peninsula: the Wild South Coast Way. Wow, she thought, does the name come from the wild terrain or the wild animals, or both? In any case, the idea that there is something new to discover makes her forget the chill outside.

Pam's mind goes into overdrive. When could they go and for how long? She wants a good balance of scenery (coastal vistas!), a good walk of 3-4 hours, and local markets to assemble a picnic lunch. She goes to her computer and finds one of SA's most photographed coastal icons: Waitpinga Cliffs rising up 100 metres above



the sea. She knows she needs to see them in real life.

She pokes around a bit more and finds that is part of a half-day walk from Victor Harbor (the Bluff) to Waitpinga Cliffs Lookout. Then Pam wonders about whales. Again, she is not disappointed, from May to October, the southern right whales with calves are often sighted. And if that is not enough, they might even see white-bellied sea-eagles since Waitpinga Cliffs is an area frequented by these magnificent birds.

"Hmmm, with all that going on, it sounds like Gary and I will need to spend the night – surely we can find a bed and breakfast close by," she mutters. And by staying the night, she plots, "We'll have the next day to fit in a morning bike trek for Gary, while I get some retail therapy in Victor Harbor!"

Pam's thoughts are interrupted by the sound of the garage door and Gary's car driving in. After a long day at the family business, he'll be tired and hungry. While she checks the slow cooker, Pam thinks through how she will spring her surprise on him over dinner...cliffs, whales and eagles, how majestic, and just a short drive away from Adelaide!

## Bush Camper

### Deb (45), Nigel (47), Isabelle (16), Charlie (10) & Max (8)

Max was excited. The Waitpinga winds tousled his hair and the stringybark branches in his fingers felt rough and smelled almost like a dessert or something – the minty strawberry aroma was making him hungry.

He couldn't believe that he was finally camping and soon his brother could no longer tease him about not being a real man because he hadn't slept alone in a tent like Charlie had the last time they went camping. When they were arranging the equipment hire, Max insisted on having his own little tent.

As Max returned to the campsite, his shoes made funny squishy sounds, which reminded him of the fun that afternoon at Callowonga Creek, when the ocean tides covered the rock crossing and his Mum let him wade through to get a closer look at the slippery, brilliant orange lichen and the green sedges, which reminded him of the time he spiked his hair with gel for a fancy dress party.

Max decided that this kind of adventure was ten times better than the theme park during their last visit to the



Gold Coast. Here on the Wild South Coast you actually get to do stuff...and get (at least a little bit) dirty!

Suddenly Max was ripped out of his thoughts by a strange rustling near a log. "No way," he thought, "Is that spiky thing an echidna?" He had learned about them in school, but never thought we would ever get to see one 'out on the loose'! He was torn: he wanted to inspect it more closely, but didn't want to scare it away and wasn't sure if they could shoot their spikes like you see porcupines do in the cartoons, so he kept his distance.

That was one more question for the Indigenous guide who would be doing a storytelling session under the stars after dinner tonight. He couldn't wait to hear what the first Australians had to say about such a strange-looking creature!

It was time to return to his family, who were cooking a BBQ dinner. Even if his Dad wasn't really good at cooking, he insisted on playing 'caveman' and roasting the meat. "Oh well," thought Max, "Even if it doesn't turn out, Mum promised we would have lunch at our favourite restaurant in Encounter Bay tomorrow before driving back to Adelaide!"

Maybe next time around they could bring along Bruno, their black Labrador. Max had so much to show him!

# Appendix 1 - Customer Stories (continued)

## Adventurer

### Trevor (63) and Brian (67)

“Shhh,” Trevor whispered to his mate Brian, “Look down there to the left, in the low bushes, is that a pair of hooded plovers?” “By golly, Trevor, you do have good eyes, it certainly is!” responded Brian, continuing with “Was it the red ring around their eyes or the red and black beak which tipped you off? Or was it the fact that you are still a spring chicken?”

The two had been friends for decades now and shared a love for birdwatching and hiking. They were on the third day of their ultimate dream of hiking all the way from Cape Jervis to Victor Harbor on the Wild South Coast Way.

The first two days had already been spectacular in the rich diversity of native birds, bush and wildlife.

Hitting the halfway mark, the two young retirees were happy to have a less strenuous trek today. They had made it to Tunkalilla Beach (one of seven beaches along the way), an incredible 4.5 km stretch of deserted beach. The soft sand wasn't easy going, so they moved closer to the water line, but were keeping an eye out for sudden big waves. As much as they would have loved to go in for a dip, they had been warned about the strong rips and large sharp-toothed fish.



“Hey Trev, check out the dolphins surfing,” exclaimed Brian. “No, you check out where you are walking, Brian, you don't want to step on any plover eggs,” Trevor interjected. Brian then joked that even if he did, he was a featherweight, not having to carry a pack.

Brian was truly relieved that Trevor had found not only portorage services but also meal catering. This made it so much easier to focus on the fun of camping, particularly when you are doing it for four nights in a row! They had noted how the campsites were so well designed that they felt like they had a wilderness to themselves.

But they wouldn't be by themselves this evening. Trevor has arranged an interpretive guide to share the history and geology of the Wild South Coast over the catered dinner of bush tucker and campfire damper.

Trevor was always organised but setting up this type of “full-service roughing it”, as he called it, was really easy online, even for a Boomer like himself. They were even able to set up coach transfers from home to the trail start and from the end in Victor Harbor back to Adelaide – fantastic that one of the greatest wilderness escapes is so close to an Australian capital city.

The original idea to do the incredible five-day, four-night hike came from Brian, who is a Heysen Trail aficionado. He talked about how they would be the first two in their Lions Club to complete the upgraded challenging wilderness escape hike along one of the most beautiful coastlines in Australia. He even joked that they might meet like-minded hikers along the way and could sign them up as new club members.



## Inclusive Tourist

### Jess (35) and her carer, Tim (29)

“Hey Tim,” called Jess, “Could you please hand me the sunscreen?”

“Sure thing, but maybe this sun umbrella would be better...”

Tim replied. There was no way that Jess was going to take the umbrella. After setting up this whole outing on her own online, which was a breeze, Jess wanted to be able to have an unobstructed view of Kangaroo Island and Tunkalilla Beach, which she had read all about.

She loved the sea breeze on her cheeks and the roar of the waves crashing on the beach below. It was all such a wonderful change of scenery from moving around in the same neighbourhood most of the time.

Tim had since given up on trying to convince Jess and just handed over the sunscreen. He knew Jess well enough to know that as much as she is dependent on the wheelchair, she is very independent in her thinking.

When he glanced over to put back the umbrella in his bag, he spotted a dark shape in the sparkling water and called out. “Jess, look! You are getting your wish, there’s a whale mum and her calf...incredible!” Both Jess and Tim were transfixed by the majestic creatures. But not for long, because just like a perfectly timed Hollywood show, a white-bellied sea-eagle soared across the horizon, gliding as if it was on pullies.

“Oh, Tim, isn’t this perfect? Isn’t nature grand? We need to come here more often!” Jess gushed. “It’s not over,



Jess, how about we go down the trail a bit and look for the tiny orchids and echidnas your friend posted on her Facebook page?” Tim said as he gave Jess’ wheelchair a firm shove to get the momentum going.

As the wheelchair set off unexpectedly quickly, Jess exclaimed, “Whoa, cowboy, settle down! This is a proper pathway, smooth as silk, no need to overdo the accelerator!” Tim realised that he was so used to the uneven pathways in Jess’ neighbourhood that he tended to overcompensate with muscle power.

As the pair wheeled along, they took it all in, the sea air, lovely sunshine and interesting signs explaining the flora and fauna along the way. Just as they were getting into it, they realised they had already completed the trail and it was only 11am.

“Well, Jess, once again you are the overachiever and we are ahead of schedule,” Tim said. “You said that just down the road is Goondooloo Ridge, where you can look out on Backstairs Passage and the Pages Islands,” he continued. “Great idea, Tim! And there’s a picnic area and food trucks, too. All this fresh air is making me hungry!”

Tim was feeling peckish, too, so lunch sounded perfect.

And once the hunger issue was resolved, he wondered if they would spot some kangaroos at Goondooloo since friends has mentioned they had seen whole mobs. Tim was feeling very much at ease since things were going so well. As a carer, it is his responsibility to look after Jess and outings could sometimes be challenging. Now knowing that the Wild South Coast Way is actually very easy for all visitors (“not that wild!”), he knew he and Jess would be coming back soon.

# Appendix 1 - Customer Stories (continued)

## Girls' Group Getaway

### Karen (47) & six friends

The ping of the final virtual arrival to Karen's Zoom room meant that she could finally start her regular get-together with her old friends, even if the pandemic had changed the meaning of a get-together! But the 'how' didn't matter for Karen and her six best mates from uni since they had big plans to discuss!



It was Karen's idea to put together an event which ticked all sorts of boxes, namely: an opportunity to share an experience with her best mates, raise money for their favourite charity, get some much-needed exercise, be challenged, provide material for her social media feed, and have an achievement to celebrate at the end.

She found the Kings Head to Waitpinga track, part of the Wild South Coast Way, which seemed perfect: lots of Instagrammable views, like the incredible Waitpinga Cliffs and panoramic views of Waitpinga Creek, Encounter Bay, the Pages in Backstairs Passage and Kangaroo Island.

The only thing she was still unsure about was whether her mates would be up to the full-on round-trip (almost 23 km) with camping overnight, or the one-way single afternoon option, which would give them an excuse to treat themselves to a luxury accommodation, some retail therapy and some bubbles in Victor Harbor.

Karen knows that they could arrange portage, catering and equipment hire to make the camping really easy, but she just wasn't sure about the commitment to walk double the distance...! Well, she thought, one way to find out, and she had made a posting to the What's App group and waited for their response.

In the meantime, Karen turned her mind away from the organisational details and focused on the fantastic images in social media posts from others of the magical southern right whales with their calves and the white-bellied sea-eagles. She couldn't wait to post her own images once they went on the walk!



## Discoverer

### Richard (59) & Caroline (57)

Susan's email intrigues Richard: she describes a new art exhibition at the Art Gallery of South Australia and suggests that Richard and his wife Caroline use it as a reason to visit her for her birthday next month. "You need to make the drive worth it, after all."



Being a technology nut, when Richard goes into research mode to find out more about the art exhibition, he stumbles on the Wild South Coast Way...The only question now is whether to do a hike, a bike tour along the coast or both!

Richard settles on the half-day walk from Kings Head to Waitpinga, not least since it is listed as the highlight of the Heysen Trail. He has seen so many photos

of the Waitpinga Cliffs and was looking forward to seeing them in their full majesty in person.

No wonder Richard was looking forward to wide-open spaces and panoramic views. Ever since that high-rise was built next door, he has had a feeling of being cooped up. He continues browsing and finds that the Kings Head Walk include spectacular views of Waitpinga Creek, Encounter Bay, the Pages in Backstairs Passage and Kangaroo Island.

Oh, Kangaroo Island! That is on his list, but he will have to save it for the next trip. This time he promised his wife Caroline she would get some retail therapy in Victor Harbor after the walk. He'll take the opportunity to play a round of golf and everyone will be happy!

# Appendix 2 – Customer Personas

## Adventure Light



### Thomas (27)

lives in a shared house in Norwood with friends and his girlfriend Annabelle.

**Personal details:** Above average single income over \$90,000 a year. Data analyst with Bachelor degree (honours).

**Broad travel segment:** Affluent younger solo and couples (25-35) living in Adelaide (Millennial).

#### **Wild South Coast Way (WSCW) Experiences:**

- Multi-day walks
- Two day walks
- Full day walks

#### **WSCW target market segment:**

SA Outdoor Enthusiast (BDA) - Day Tripper, Adventure Light and Adventurer (Greenhill).

Affluent solo, couple or group of friends travellers that will enjoy the WSCW as a recreational day trip experience, soft adventure experience, or adventure experience.

### **Bio & Personality**

Thomas loves the city just as much as being outdoors in nature. He sleeps in on weekends unless he is out hiking or trying out a new café for brunch. Work-life balance is important as is continuous learning in his professional and personal life through travel, training and higher education. Family and spending fun times with his girlfriend and mates is important. Thomas does F45 fitness training daily.

### **Travel Australia**

Takes several leisure trips each year including weekend getaways. He enjoys visiting his mates in Melbourne and Sydney. At home or away he likes exploring the local scenes, cool and trendy bars, distilleries, wineries, food and wine events, concerts, and music festivals. For the next nature-based experience he is considering Kangaroo Island since he remembers it fondly from his childhood and he is keen to give back to the local community. He chooses nature-based destinations based on the quality of the walking/hiking (or mountain biking) trails with magical scenery, although top surf can sway him, too. If he books travel experiences, they need to be unique, hands-on and educational.

Lengths of stay can vary from day trips, to weekend getaways or short breaks.

#### **Motivation for travel include:**

- Being outdoors, having an adventure
- Fun and fitness
- Escape routines and unwind
- Digital detox
- Reconnect and relax
- Be educated
- Spend quality time with girlfriend and friends

Important holiday decision factors include receiving value for money, coastal and beach experiences, uniqueness of experiences, digital detox and sustainability initiatives.

### **Travel the world experiences/Bucket list:**

- Hiking the Heysen Trail
- Bath in the Blue Lagoon – Iceland
- See the Pyramids of Giza – Egypt
- Walk the Great Wall – China
- Hike Milford Sound - New Zealand
- Road trip down Route 66 – USA
- A kiss at the Eiffel Tower – France
- Learn how to make an authentic pizza and take a gondola ride – Italy
- Party in Las Vegas



Media Preferences	Travel Inspiration & Trusted Information Sources	Travel Preferences	Travel Buying Process & Booking Preferences
<p><b>Traditional Media</b></p> <p>Outdoor enthusiasts have higher than average use of magazines and cinema even more so than Walkers, while TV and internet use are below average.</p> <p>TV documentaries for education and reality shows for entertainment.</p>	<p><b>Social media / Blog / Website / Video content</b></p> <p>Inspiring images and stories of real people having real authentic or quirky experiences.</p> <p>Online content that is engaging, humorous, action-packed, preferably videos and short-films featuring cool music.</p>	<p><b>Transport</b></p> <p>Self-drive Local transport Uber</p>	<p><b>Direct (phone, email, online)</b></p> <p>Thomas is very comfortable booking online direct with operators or via an OTA. He expects great customer service and his needs being understood and met 24/7.</p>
<p><b>Social Media</b></p> <p>Facebook, Instagram, YouTube, Snapchat. Follows friends, peers, extended family, celebrities and his idols.</p> <p>He prefers email, online chats (website), social media messaging apps, and using travel apps. Any tools that makes communication quick and convenient.</p>	<p><b>Review sites, Word of Mouth</b></p> <p>General internet searching now #1 for inspiration and planning followed by prior experience. WOM and review sites well above average.</p> <p>Instagrammable destinations.</p> <p>Consumer review sites (e.g. Tripadvisor, Trivago, Online Travel Agents)</p>	<p><b>Tours/Attractions</b></p> <p>Outdoor activities (hikes, rock-climbing, surfing, kayaking) wineries, local pubs and funky cafes.</p> <p>Attractions/tours/ experiences/ reservations booked after arrival in a destination. Equipment hire rather than organised tours unless it's an experience that he can't organise himself.</p>	<p><b>Braving the New Normal (COVID-19)</b> Although 55% of Australians remain optimistic about the future, fear and pessimism have grown as a result of COVID-19.</p> <p>Younger Australians are more likely to feel 'very optimistic' about the future</p> <p>The biggest behaviours expected to bounce back are</p> <ul style="list-style-type: none"> <li>• travel (44%)</li> <li>• being with family (37%)</li> <li>• shopping (32%), meal gatherings (28%)</li> <li>• outdoor dining (27%)</li> </ul> <p>Media choices generally should prioritise Trust (note, social media trust gap).</p>
<p><b>Digital Media (websites, online news, magazines, blogs, influencers)</b></p> <p>News and travel websites, blogs and travel guide books (Lonely Planet).</p> <p>Highly online savvy. Clicks on social media ads if image is appealing.</p>	<p><b>Search/Geotargeting</b></p> <p>Before and during trip – Google searches and Google ads.</p> <p>Apps on smartphone e.g. TripAdvisor, Urbanspoon, responds to geotargeting.</p>	<p><b>Accommodation</b></p> <p>Likely to stay off-trail in standard or 4 star or self-contained accommodation unless secure, comfortable huts available on-trail. Airbnb, preferably modern, contemporary style or glamping in nature.</p>	

## Appendix 2 - Customer Personas (continued)

### Day Tripper



**Pamela (59) and Gary (60)**  
living in Unley. Married with two  
adult children living away from home.

**Personal details:** Family income \$140k per year. Gary runs a small successful family business and Pamela works part-time in an administration role in health care.

**Broad segment:** Affluent older couple (45-65)

**Wild South Coast Way (WSCW) Experiences:**

- Two day walks
- Full day walks
- Short and loop walks
- Car based camping

**WSCW target market segment:**

SA Walker  
segment (BDA) - Day Tripper, Bush Camper,  
Adventure Light (Greenhill)

Affluent older couple will enjoy the WSCW as a bush camping trip, recreational day trip experience, or as a soft adventure experience.

### Bio & Personalities

Both Pam and Gary love good quality food and wine, nature and art. Pam loves farmers markets, beach walks with coffees, reading novels and dressmaking. Gary likes to ride his bike, plays tennis and reads biographies and history books. They enjoy spending time with family and friends and are both still fully engaged in their professional lives.

Pam and Gary always look at the bright side of life. They want to live in a meaningful way, make a contribution to society and preserve Earth's assets for many generations to come. They are comfortable financially and their children are settled and happy. Health and wellbeing are priorities and so are their lifelong friends.

### Travel

They travel whenever possible with a focus on day trips and weekend getaways in SA (Fleurieu Peninsula, Kangaroo Island, Barossa, Flinders Ranges). Both love scenic drives, fine dining, walking and historical tours, arts and cultural experiences. If not choosing a destination for its food and wine offering, they tend to opt for nature and coastal destinations. Both enjoy visiting or staying in conservation or national parks. Beautiful coastal scenery, great vistas, secluded beaches, walking trails and wildlife are attractive. Pam loves a picnic in nature as much as getting spoiled by a hatted chef. A bit of retail therapy makes a trip complete.

Lengths of stay can vary from day trips, to weekend getaways, or short breaks during school holidays. They either travel as a couple or with other couples, especially for day trips.

They are very familiar with all the regions in South Australia and thus tend to go back to their favourites. They therefore need compelling reasons to try out a new destination, for example new walking trails, a new event or market, a new experience at a cellar door or something extra special to do.

**Motivation for travel include:**

- Nature-based activities such as hiking
- Soft adventure
- Art, food and wine
- Reconnect, relax and unwind
- Escape routines
- Spend quality time with Friends & Relatives
- Keeping fit

Important holiday decision factors include receiving value for money, coastal and beach, good food and wine along with history, heritage and uniqueness of experiences.

Media Preferences	Travel Inspiration & Trusted Information Sources	Travel Preferences	Travel Buying Process & Booking Preferences
<p><b>Traditional Media (TV, radio, print)</b></p> <p>Walkers have a higher than average use of magazines and cinema, while TV and internet use are below average. Above average for ABC / SBS TV and streaming services.</p>	<p><b>Social media / Search / Content</b></p> <p>Google search and social media dominant.</p> <p>Inspiring images from friends and relatives, stories/testimonials and videos showing real travellers having a real authentic experience.</p>	<p><b>Transport</b></p> <p>Self-drive</p>	<p><b>Direct (phone, email, online)</b></p> <p>Many walkers book direct with accommodation operators (often online). Also use specialised websites.</p> <p>Require flexible booking options for campsites.</p>
<p><b>Social Media</b></p> <p>Facebook</p>	<p><b>Review sites, Word of Mouth</b></p> <p>General internet searching now #1 for inspiration and planning followed by prior experience. WOM and review sites well above average.</p>	<p><b>Tours</b></p> <p>May book guided/ packaged tour</p>	<p><b>Braving the New Normal (COVID-19)</b></p> <p>Although 55% of Australians remain optimistic about the future, fear and pessimism have grown as a result of COVID-19, especially among older Australians. The biggest behaviours expected to bounce back are:</p> <ul style="list-style-type: none"> <li>• travel (44%)</li> <li>• being with family (37%)</li> <li>• shopping (32%), meal gatherings (28%)</li> <li>• outdoor dining (27%)</li> </ul> <p>81% of consumers are spending more time looking at news and information, 47% use social media to keep up to date but only 14% believe it's a trusted source. E-commerce has increased in Australia.</p>
<p><b>Digital Media (websites, online news, magazines)</b></p> <p>southaustralia.com, other travel sites, blogs and niche interest groups/sites.</p> <p>Lifestyle, gourmet/ cooking and travel magazines.</p>	<p><b>Advertising, travel books, travel guides, documentaries</b></p> <p>Brochures, travel books, visitor guides.</p>	<p><b>Accommodation</b></p> <p>Camping/caravan/tent, staying with friends and family, standard or 4 star, self-contained. When camping are expecting well looked after camp sites and facilities, easy access in and out. Accessible camping information. Clearly marked trails for bushwalking. Enjoy social interaction.</p>	

## Appendix 2 - Customer Personas (continued)

### Bush Camper



**Deb (45) and husband Nigel (47), Isabella (16), Charlie (10) and Max (8) lives in Somerton**

**Personal details:** Above average (double) family income over \$180,000 per year

**Broad segment:** Affluent family market

**Wild South Coast Way (WSCW) Experiences:**

- Two day walks
- Full day walks
- Short and loop walks
- Car based camping

**WSCW target market segment:**

SA Walker (BDA research) - Day Tripper, Bush Camper, Adventure Light (Greenhill Research)

Affluent family to enjoy the WSCW as a recreational day trip experience, a bush camping trip or as a soft adventure experience.

### Bio & Personality

In her limited free time, Deb is active and enjoys walking the dog on the beach, having fun with her children, going to fitness and yoga classes, meeting girlfriends for a coffee or glass of wine. While she is health conscious, she enjoys giving in to the simple pleasures (red wine, cheese, Haighs chocolate). Family comes first, but Deb also values spending quality time with friends. Deb spends a lot of time with her kids and wants to know what is going in school and their lives in general. A happy, healthy and balanced family life is important, including offering her children and opportunities to learn and grow.

### Travel

Deb loves to get away with her family during school holidays to regional South Australia (summer) and Queensland (winter) as an intrinsic reward. She enjoys travelling with her family as well as with friends or her extended family. They often choose nature, coastal or river destinations in South Australia for short getaways and love visiting or staying in conservation or national parks. Beautiful coastal scenery, great vistas, secluded beaches, rock pools, swimming, walking trails and wildlife are attractive and so is a picnic in nature. Eating out during holidays is important, for instance a good quality latte and ice-cream for her children. She prefers fresh local produce and seafood. While she gives in to retail therapy, her husband Richard likes to sneak in some fishing and a round of golf or two.

Lengths of stay can vary from day trips, to weekend getaways, or short breaks during school holidays.

**Motivation for travel include:**

- Being outdoors, having an adventure and fun, improve fitness
- Reconnect, relax and unwind
- See some animals, learn about wildlife and help enjoy it responsibly
- Connect with nature without damaging it
- Escape routines/demands of everyday live
- Get family away from screens
- Spend quality time with friends and relatives
- Be educated

Important holiday decision factors include receiving value for money, coastal and beach, good food and wine along with history, heritage and uniqueness of experiences.

Media Preferences	Travel Inspiration & Trusted Information Sources	Travel Preferences	Travel Buying Process & Booking Preferences
<p><b>Traditional Media (TV, radio, print)</b></p> <p>Walkers have higher than average use of magazines and cinema, while TV &amp; internet use are below average. Above average for ABC / SBS TV.</p>	<p><b>Word of Mouth (WOM)</b></p> <p>General Internet searches are now #1 source for inspiration and planning, followed by prior experience. WOM and review sites well above average.</p>	<p><b>Transport</b></p> <p>Self-drive</p>	<p><b>Direct</b></p> <p>Many walkers book direct with accommodation operators (often online)</p> <p>Flexible booking options for campsites</p>
<p><b>Social Media</b></p> <p>Facebook, Instagram</p>	<p><b>Brochures/Books</b></p> <p>Visitor guides, travel websites, travel or guide-books, operator websites, brochures, social media.</p>	<p><b>Tours/Activities/Attractions</b></p> <p>Fun activities for children (walks, bike-riding, surfing, kayak, SUP, fishing/crabbing), visiting local producers and farmers/craft markets, cafes, pubs/restaurant and wineries.</p> <p>Booked once at destination.</p>	<p><b>Braving the New Normal (COVID-19)</b></p> <p>Although 55% of Australians remain optimistic about the future, fear and pessimism have grown as a result of COVID-19.</p> <p>The biggest behaviours expected to bounce back are</p> <ul style="list-style-type: none"> <li>• travel (44%)</li> <li>• being with family (37%)</li> <li>• shopping (32%), meal gatherings (28%)</li> <li>• outdoor dining (27%)</li> </ul> <p>Media choices generally should prioritise Trust (note, social media trust gap).</p>
<p><b>Digital Media</b></p> <p>Lifestyle, gourmet/cooking and travel magazines, online newspapers, streaming services.</p> <p>Follows travel, wellness and cooking blogs as well as influencers.</p>	<p><b>Search/Social Media/Content</b></p> <p>Google search, southaustralia.com, social media, other travel sites, blogs, niche interest groups.</p> <p>Inspiring images, stories/testimonial and videos showing real travellers having a real authentic experience.</p>	<p><b>Accommodation</b></p> <p>Friends and family, camping/caravan/tent, standard or 4 star, self-contained Airbnb, holiday parks.</p>	

## Appendix 2 - Customer Personas (continued)

### Adventurer



#### Trevor (63)

living in Stirling. Married with two adult children living away from home.

**Personal details:** Family income \$130k per year. Trevor is semi-retired from his own business and his wife Denise works part-time in education. The house is paid off, so they have financial freedom.

**Broad segment:** Affluent older solo traveller or couples (45-65)

#### Wild South Coast Way (WSCW) Experiences:

- Five day walks
- Multi-day walks

#### WSCW target market segment:

SA Outdoor Enthusiast (BDA) – Adventurer segment walk focused (Greenhill)

Affluent solo traveller travelling with friends or as a couple and will enjoy the WSCW as a multiday walking experience.

#### Bio & Personality

Respect is a very important value. Trevor has a strong sense of community and lots of friends. Trevor and Denise get on well with their neighbours and help each other out. He belongs to the local Lions Club and helps out often with fundraising. They have a son and a daughter who are both married and have good jobs. They have two grandchildren whom Denise likes to see as often as she can. Trevor loves to hike, so he doesn't commit himself to child minding. They both love to travel and their garden (growing vegetables and fruit trees). Their garden is reasonably maintenance-free because they like to go off on holidays often. They keep up to date with what is going on in the world and like to watch current affairs programs on TV, read the news, and often listen to the radio. They are worried about world affairs, politics, the environment and how young people are going to fare later in life, but they don't let it get them down as they like to enjoy life.

#### Travel

When on holidays, they make genuine travel friends along the way. As a couple they travel for longer holidays twice a year and enjoy discovering all parts of Australia. They both like to find new places to explore (they have lots of bucket list places they want to still visit). In addition Trevor, goes on hiking trips with his best mate. They are both seeking challenging, immersive experiences and will camp on-trail. Trevor does quite a bit of research online before travelling, although he is not particularly tech savvy.

#### Motivation for travel include:

- Walking along famous walking trails
- Challenge oneself and have a sense of accomplishment
- Camping in a national park
- Get active in natural environment
- Visit wilderness of some kind
- Reconnect with nature and each other
- Digital detox
- Escape and unwind

Important holiday decision factors include value for money (#1 in importance), history and heritage, good food and wine, world-class experiences, and adventure experiences.

Lengths of stay can vary depending on the type of holiday or the lengths of the walking trail. When going on multi-day walks, he loves the idea of not having to carry the overnight pack.

Media Preferences	Travel Inspiration & Trusted Information Sources	Travel Preferences	Travel Buying Process & Booking Preferences
<p><b>Traditional Media (TV, radio, print)</b></p> <p>Use of magazines and cinema even greater among outdoor enthusiasts, TV consumption lower than average, newspapers and radio similar to average. Preference for ABC &amp; SBS over other TV channels.</p>	<p><b>Search</b></p> <p>General internet searches.</p>	<p><b>Transport</b></p> <p>Self-drive</p>	<p><b>Direct (phone, email, online)</b></p> <p>Online direct booking most popular; also use specialised travel websites</p>
<p><b>Social Media</b></p> <p>Facebook (but not very active)</p>	<p><b>Review sites, Word of Mouth</b></p> <p>General internet searching now #1</p> <p>for inspiration and planning followed by prior experience. WOM and review sites well above average.</p>	<p><b>Tours/Porterage</b></p> <p>Porterage, day-packs, catering (some food and wine), fresh food/ meat/cheese.</p> <p>Star gazing, nocturnal tours or Indigenous experiences.</p>	<p><b>Braving the New Normal (COVID-19)</b></p> <p>Although 55% of Australians remain optimistic about the future, fear and pessimism have grown as a result of COVID-19, especially among older Australians. The biggest behaviours expected to bounce back are:</p> <ul style="list-style-type: none"> <li>• travel (44%)</li> <li>• being with family (37%)</li> <li>• shopping (32%)</li> <li>• meal gatherings (28%)</li> <li>• outdoor dining (27%)</li> </ul> <p>81% of consumers are spending more time looking at news and information, 47% use social media to keep up to date but only 14% believe it's a trusted source.</p>
<p><b>Digital Media (websites, online news, magazines)</b></p> <p>Travel, hiking, outdoor websites are more important at planning stage.</p>	<p><b>Advertising, travel books, travel guides, documentaries</b></p> <p>More likely than other travellers to use brochures, travel books and visitor guides.</p>	<p><b>Accommodation</b></p> <p>On-trail camping. He needs well looked after camp sites, sufficient facilities including toilets, bins, water supply. Accessible camping information. Easy access in and out. Clearly marked trails for bushwalking.</p>	

## Appendix 2 - Customer Personas (continued)

### Inclusive Tourist



#### Jess (35)

living in West Croydon with a housemate. Undertakes outings and trips with her carer, Tim (27).

**Personal details:** Average income \$80k per year. Public servant with Bachelor degree.

#### Wild South Coast Way (WSCW) Experiences:

- Class 1 & 2 trails: Goondooloo Ridge Trail and Tappanappa Ridge Trail

**Australian Market Size:** Tourism Research Australia estimates the size of the current accessible tourism sector for overnight and/or day trip travel to be around 1.3 million individuals, or 7% of the total Australian adult population. When adding in the carer multiplier that adds up to 14% of the Australian population (an estimated 3.4 million people) (TRA 2018). People with disability spent \$3.3 billion on tourism services (around 9 million day trips), accounting for 17 per cent of all tourism expenditure (UTS 2017). The potential market size in South Australia can be estimated to be 7% (122,955 people) for which a multiplier between 2.45 (overnight) to 2.62 (day trips) can be applied.

**International Market Size:** One billion people worldwide have disabilities, almost half of whom are in Asia, a key target market for tourism operators in Australia. When combined with families and carers, this rises to 2.2 billion (UTS 2017).

The 'Inclusive Tourist' for the purpose of the WSCW project has been defined as people with disabilities, ranging from sensory to physical disabilities, to cater for a broad Australian and International target audience (of all age groups) with a keen interest in immersive nature experiences along the Wild South Coast Way, more specifically the Goondooloo Ridge Trail and Tappanappa Ridge Trail.

#### Bio & Personality

Jess loves to travel, but finds it difficult to plan trips as the information about accessibility is often lacking. While she is very independent and has mastered the use of her wheelchair since an accident 10 years prior, she prefers to travel with a carer or friends/family, in case she comes across a situation where she'll need assistance. Working and living in Adelaide, on weekends Jess yearns to get back to nature and see some of the places her friends are posting on Instagram. She finds the fresh air clears her head and sets her up for a good week ahead. Rather than relying on websites for inspiration and planning, she is active on disability forums, where other users share detailed information about what accommodation and tour operators provide. When it comes time to book, she will ring or email providers to check that they are able to accommodate her needs. Being tech-savvy, she loves when operators have a chatbot or messaging function on their website or social media platform.

#### Travel

**Travel Party:** Many people with a disability travel with others, hence beside accurate and detailed information are looking for deals and offers as well as specialist planning tools to map out their journey.

**Motivation for travel:** Although travellers with a disability did slightly fewer activities, many of the experiences they participated in matched those of the broader traveller population: eating out, visits to the beach, and nature and cultural experiences. Going on a holiday (43%), VFR (30%) or camping is one of the more commonly reported social activities for people with disability across all age groups. Reconnection and unwinding are core needs for all Australian travellers, and this was just as true for travellers with a disability. Approximately 40% of travellers with a disability sought to meet those needs through either more active, or more emotionally and/or intellectually stimulating experiences.

**Barrier for travel:** 'Not knowing what to expect' and 'not knowing what is out there' are barriers to travel, highlighting the benefit of more and/or more detailed information. All case studies stressed the importance of providing information on levels of accessibility and inclusion of services and products. This information is also critical for NDIS coordinators and local area planning coordinators for funding.



Media Preferences	Travel Inspiration & Trusted Information Sources	Travel Preferences	Travel Buying Process & Booking Preferences
<p>Disability forums, peak bodies for their disability, associations (social services, developmental educators), specialist travel agents and even National Disability Insurance Scheme (NDIS) service providers and their coordinators are all used at the active planning stage.</p> <p><b>Some media and platforms that inclusive tourists may use to find information:</b></p> <p><b>Link Magazine</b>  <a href="https://linkonline.com.au/">https://linkonline.com.au/</a></p> <p><b>Good Scout</b>  <a href="http://thegoodscout.com.au/">http://thegoodscout.com.au/</a></p> <p><b>TravAbility</b>  <a href="http://www.travability.travel/">www.travability.travel/</a></p> <p><b>Accessible Accommodation</b>  <a href="http://www.accessibleaccommodation.com.au">www.accessibleaccommodation.com.au</a></p> <p><b>Cangoeverywhere</b>  <a href="http://Cangoeverywhere.com.au">Cangoeverywhere.com.au</a></p> <p><b>Wheelchair Traveler</b>  <a href="http://wheelchairtraveling.com">wheelchairtraveling.com</a></p> <p><b>Other generic platforms:</b>  Australia.com,  southaustralia.com,  <a href="https://fleurieupeninsula.com.au/accessible-tourism">https://fleurieupeninsula.com.au/accessible-tourism</a></p>	<p>Travellers with a disability find it hard to be inspired when they don't know what is possible.</p> <p>Many of the key tools they used in the travel decision-making were the same.</p> <p>Internet search was the number one tool used by travellers with and without a disability when purchasing travel services, with word-of mouth second. Direct contact with operators and word of mouth is equally important. They need information that is related to their disability and easy to find and absorb.</p> <p>They need more expert advice at the planning stage if they are to convert to visitation.</p>	<p><b>Transport</b>  Self-drive  Vehicles suited for wheelchairs</p> <p><b>Tours, Attractions, Events</b>  Accessible Facilities</p> <p><b>Accessible Accommodation</b>  Accessible rooms, facilities, sensory rooms</p> <p><b>Travel party, lengths of stay</b>  Travel with a carer and / or family member or both.</p>	<p>There is a preference for personal contact to answer specific queries (although this could increasingly be handled via chatbots).</p> <p>Specifically, the research highlighted a strong preference to connect with a business or destination personally, either by phone or email.</p> <p>Traditional travel agents with a strong service ethic could also be important in driving conversion, particularly for older travellers and those who have lower support needs. Many clients had low expectations, so this advice could expand their interest and create demand for new products.</p>

## Appendix 2 - Customer Personas (continued)

### Girls' Group Getaway



#### Karen (47)

lives in Prospect with her partner George and works full-time in financial services in a middle management role.

**Broad segment:** Affluent couples intrastate with an above average (double) income over \$180,000 per year (financially stable). SA Walker segment (BDA).

**Personal details:** tertiary educated.

**Wild South Coast Way (WSCW) Experiences:**

- Two day walks, Full day walks
- Organised events / walks
- Packaged group tour (girls' weekend getaways with accommodation)

#### Bio & Personality

Content with her relationship and social network, Karen leads a balanced life and feels proud and lucky to be Australian. She's still in touch with friends from high school and uni and she lives out her values of kindness and authenticity. Job security and stability are important to her. She loves seeing what her SA backyard has to offer and how that compares to other places in Australia and the rest of the world. She has seen a lot of technology change in her time and is adapting to that. Professionally, she loves being part of a great team and is loyal to her employer. Karen enjoys cooking and will host occasional dinner parties. Coffee and good quality food are a big part of her social life and she plans breakfast, coffees, brunches, lunches and dinners to catch up with friends and family. She uses text messages to stay in touch with her friends and What's App for group messages. She's never afraid of a bit of indulgence as a reward and likes the outdoors. Together with her girlfriends she enjoys participating in organised walks (events) and raising money for her favourite charity.

#### Travel

Karen is in the position where she can travel multiple times a year for short trips (weekend getaways with the girls) and an overseas trip with her partner every two years. Karen is particularly active on Facebook/Instagram if she is having a good time somewhere! For SA, her bucket list with the girls features a walking event combined with a few days away, good accommodation and a nice brunch on the day after the event. Travel to her is about finding something unique, but not venturing too much out of her comfort zone. She gets inspired by social media posts and travel documentaries. With her girlfriends, she would enjoy the WSCW as a one or two-day experience walking around 30 kms per day staying off-trail, as long as it is made easy and convenient for them. Ideally everything is taken care of, including the walk distances as the girls want to focus on the walking challenge while chatting and not keep themselves busy with cooking or organising transport.

### Motivation for travel include

- Completing an event, sense of achievement
- Spending quality time with her girlfriends
- Raising money for charity (sense of pride)
- Being outdoors, having an adventure and fun
- Be active and reconnect, relax and unwind
- Enjoy local produce
- Escape routines/demands of everyday live
- Enjoy nice accommodation and nights away with girlfriends
- Learn something new and maybe discover new trails

Important holiday decision factors include access to nice accommodation, coastal and beach, good food and wine, and where the event is being held.

Media Preferences	Travel Inspiration & Trusted Information Sources	Travel Preferences	Travel Buying Process & Booking Preferences
<p><b>Traditional Media (TV, radio, print)</b></p> <p>Television for her nightly news source.</p> <p>Sometimes flicks through the weekend paper.</p> <p>Walkers have higher than average use of magazines and cinema, while TV and internet use are below average.</p>	<p><b>Social media</b></p> <p>Facebook Events, Instagram, blogs</p> <p>Inspiring images, stories/ testimonial and videos showing real travellers having a real authentic experience.</p>	<p><b>Transport</b></p> <p>Uber or shuttle to and from airport</p> <p>Public transport fine where necessary if easy enough, otherwise walking around a city is great</p>	<p><b>Direct (phone, email, online)</b></p> <p>Happy to book accommodation and tours online via mobile or desktop and have the group pay her back.</p> <p><b>Indirect (online travel agent, wholesaler, inbound tour operator)</b></p> <p>Would only use travel agents for overseas travel, and that would be a joint effort with her partner.</p>
<p><b>Social Media</b></p> <p>Facebook, Instagram</p>	<p><b>Review sites, Word of Mouth, Search</b></p> <p>Will look at Trip Advisor reviews; trusts WOM; prior experience</p> <p>Google search, southaustralia.com, social media, other travel sites, blogs, niche interest groups.</p>	<p><b>Tours</b></p> <p>Walking tours and events; Winery day tours; City tours – driving or walking; Visiting local producers and farmers/craft markets, cafes, pubs/ restaurant and wineries.</p> <p>Lots of nature and a little bit of history and culture, and local food and beverages.</p>	<p><b>Braving the New Normal (COVID-19)</b></p> <p>Although 55% of Australians remain optimistic about the future, fear and pessimism have grown as a result of COVID-19.</p> <p>The biggest behaviours expected to bounce back are</p> <ul style="list-style-type: none"> <li>• travel (44%)</li> <li>• being with family (37%)</li> <li>• shopping (32%)</li> <li>• meal gatherings (28%)</li> <li>• outdoor dining (27%)</li> </ul> <p>Media choices generally should prioritise Trust (note, social media trust gap).</p>
<p><b>Digital Media (websites, online news, magazines)</b></p> <p>News.com.au; Lifestyle, gourmet/cooking and travel magazines; Follows travel, wellness and cooking blogs as well as influencers.</p>	<p><b>Advertising, travel books, travel guides, documentaries</b></p> <p>Brochures, travel books and visitor guides.</p>	<p><b>Accommodation (when with group)</b></p> <p>Standard or 4 star, self-contained including Airbnb.</p>	

## Appendix 2 - Customer Personas (continued)

### Discoverer



#### Richard 59

lives in Melbourne with his wife Caroline (their two adult daughters are living away from home).

**Broad travel segment:** Affluent older couples (45-65) living interstate (above average double income).

**Wild South Coast Way (WSCW) Experiences:**

- Two day walks
- Full day walks
- Short walks, loop walks

**WSCW target market segment:**

Walker or Outdoor Enthusiast segment (BDA) - Discoverer (Greenhill)

Affluent couples that will enjoy the WSCW as a recreational day trip experience or soft adventure / nature based experience.

#### Bio & Personality

Richard is warm, friendly and patient. He is sociable and enjoys learning from others. He's enthusiastic and genuinely interested in hearing the opinions and experiences of others. Richard is well educated, well-read and keeps up to date with various topics ranging from politics and history to culture and travel. Richard likes to keep active and enjoys hiking and bike riding and then indulging in food and wine experiences. He is tech-savvy, using various forms of technology and social media platforms to source information, communicate, plan and book travel. Family is important to him, with regular visits to his daughters, one living in Sydney and one in Adelaide.

#### Travel

Richard and his wife enjoy getting away as often as they can for short breaks and usually plan two longer holidays each year. When travelling, both short haul and long haul, he looks for new experiences such as viewing wildlife in their natural environment, new walking trails, trying new cuisines or visiting contemporary museums and art galleries. Richard is a confident driver, meaning he'll happily self-drive (hire or own car) while on holiday. Price point and convenience is important to him when choosing tour products, but he does have sufficient funds to select more personalised small group touring options. He'll happily research and book tours and experiences online, either direct or through an online travel agent. He'll use a laptop or iPad during the research and booking phase.

#### Motivation for travel include

- Escape, relax and unwind
- Gourmet food and wine
- Get active and reconnect with nature
- Digital detox
- Connect or reconnect
- Be educated
- Feel immersed in natural surrounds
- Remote and untouched landscapes
- Spectacular scenery and unique Australian landscapes
- Chance to see native Australian wildlife in its natural habitat

Important holiday decision factors include value for money (#1 in importance), touring holidays, history and heritage and good food and wine, world-class experiences and adventure experiences. Lengths of stay can vary from weekend stays, extended weekends, short breaks and weeklong holidays.

Media Preferences	Travel Inspiration & Trusted Information Sources	Travel Preferences	Travel Buying Process & Booking Preferences
<p><b>Traditional Media (TV, radio, print)</b></p> <p>Use of magazines and cinema. TV (documentaries, travel shows e.g. BBC travel documentaries) but consumption lower than average, newspapers and radio similar to average.</p>	<p><b>Search &amp; Review sites</b></p> <p>General internet search, travel websites, review sites &amp; STO websites (southaustralia.com) are more important at planning stage.</p> <p>Tripadvisor as preferred review site.</p>	<p><b>Transport</b></p> <p>Self-drive</p> <p>Fly and hire car</p>	<p><b>Direct (phone, email, online)</b></p> <p>Online direct booking most popular for accommodation and tours. Also use specialised websites.</p>
<p><b>Social Media</b></p> <p>Facebook</p>	<p><b>Word of Mouth</b></p> <p>General internet searching now #1.</p> <p>Prior experience and friends/relatives are top sources of inspiration, with review websites, travel websites next.</p>	<p><b>Tours</b></p> <p>May require drop off / pick-up in addition to accommodation. May be interested in on-trail lunches and partially or fully guided personalized tours. Interactive rather than passive tour experiences.</p>	<p><b>Braving the New Normal (COVID-19)</b></p> <p>Although 55% of Australians remain optimistic about the future, fear and pessimism have grown as a result of Australians. The biggest behaviours expected to bounce back are:</p> <ul style="list-style-type: none"> <li>• travel (44%)</li> <li>• being with family (37%)</li> <li>• shopping (32%)</li> <li>• meal gatherings (28%)</li> <li>• outdoor dining (27%)</li> </ul> <p>81% of consumers are spending more time looking at news and information, 47% use social media to keep up to date but only 14% believe it's a trusted source. E-Commerce has increased in Australia.</p>
<p><b>Digital Media (websites, online news, magazines)</b></p> <p>News apps (paid subscription)</p>	<p><b>Advertising, travel books, travel guides, documentaries</b></p> <p>More likely to use brochures/travel books including</p> <ul style="list-style-type: none"> <li>• National Geographic</li> <li>• Lonely Planet guides</li> </ul>	<p><b>Accommodation</b></p> <p>Staying with friends/relatives most common, or standard and 4 star accommodation, B&amp;Bs also have high leverage with walkers.</p>	

# Appendix 3 – Customer Journey Map

## Personas mapped

Day Trippers  
Bush Campers  
Adventurer Light  
Discoverer  
Adventurer



Activities & actions

Reading magazines, travel blogs and watching documentaries. Going to cinema once a fortnight.

Word of mouth, strong friends network. Looking at inspiring images, reading testimonials and reviews including TripAdvisor, clicking on videos, 360 views, virtual reality. Checking out social media posts, asking networks where to go next.

Google search and studying information on various websites. Confirm information, compare prices.

Mobile, tablet, laptop – switch between devices.



Touch-points

Friends and family, word of mouth, been there before, Facebook and Instagram, YouTube, cinema, magazines, billboard

Brochures, travel books and visitor guides, travel blogs.

Google search, southaustralia.com, TripAdvisor, fleurieupeninsula.com



Motivations & expectations

A world-class outdoor and nature experience right at my doorstep.

I need a holiday and to reconnect with my family and find out what is going on their lives.

Motivation for travel include: being outdoors, having an adventure and fun, improving fitness. Critical mass of experiences in the destination and easy access to this information on state and regional websites.

Value for money, coastal and beach, good food and wine along with history, heritage and uniqueness of experiences.

Wild – expect remoteness and limited numbers.

Expectation that where possible people walk one way, directional (moving forwards, no oncoming people). Acknowledge that there are areas where there are likely to be day visitors coming from different directions. State this upfront where you can expect higher visitation and sections where they might experience a more exclusive experience.

Hearing about other people's experiences. Tips and tricks from others.



Questions & barriers

I have heard about this new trail. When will the trail be finished? When can I go?

How much will it cost?

What's the best lengths of stay? Where shall we camp? How do I book?

How many other people will be doing that experiences? Do I have the right equipment, what food do I need to bring, what can I easily buy or get delivered? Do I need a filter for rainwater?

What's the best time of the year? Do I need a raincoat? Do I need warm clothes?

Will there be pack transfers available? This won't deter people doing the walk but it may encourage many to do the walk who would otherwise be unsure about carrying large packs including those with children.

## Research

## The Wild South Coast Way Experiences

## Advocacy

Checking out maps and itinerary options. Looking at most recent user-generated content on campsite. Checking availability and costs. Seeking expert advice (like-minded travellers, agents, operators). Efficient use of time, shortlisting options and travel dates. Speaking to kids and partners, passionately talking about the WSCW and the new campsites.

Go direct to operators, build my own (customised, tailored) itinerary, book experiences at different stages e.g. accommodation first. Using a portal to find all information in the one spot for convenience and then book in separate locations.

Pack the car, self-drive to Deep Creek. Arrive, check out facilities, pour a glass of wine when everything is done and kids are happily playing. Photographing the sunset, sharing via Facebook. Get up, have a hearty breakfast, pack snacks, fill up water bottles, put on sunscreen and hiking boots, close the tent, get kids ready. Taking photos of the walk, wildlife, stunning coastline and sharing on social media. Research local places to eat/drink or getting food and beverages delivered to trail. Research activities that are easily accessible on trail, people to come to them rather than going off. Options to get off the trail e.g. if 5D/4N is too much, having the options to cut it short while they are there (peace of mind).

Social media sharing. Kids in Adelaide, specific sites for kids; review on TripAdvisor only when having an outstanding experiences.

Parks.sa.gov.au, operator websites (accommodation, tour operation, guides, night-time experiences, food and beverage packs).

Tour operators, accommodation providers offering experiences on trail. Southaustralia.com, National Parks websites, Google search.

Social media (Facebook, Instagram), TripAdvisor (if the experience exceeded expectations).

Fun activities for children (walks, bike riding, surfing, kayak, SUP, fishing/crabbing), visiting local producers and farmers/craft markets, cafes, pubs/restaurants and wineries.

WSCW experiences: multiple day walks, full day walks, short and loop walks, car based camping.

Getting set up at campsite, relaxing with a glass of wine once its all done.

Reconnecting, relaxing and unwinding. We are having fun. We have seen so many kangaroos and spotted an echidna. We are blown away by the beauty of the wildflowers and saw some dolphins yesterday. We have learned so much from the interpretive signage. Close encounters with wildlife. Seeing a whale, learning about Aboriginal culture, greater immersion for longer walks (more educational factors).

Finally a digital detox and the entire family is away from the screens and talking to each other.

I could not get a good coffee. Can I sneak out for a few hours for some retail therapy?

If expectations are exceeded, I will tell my entire network instead of just close friends. Braggability: I have just done this amazing world-class experiences right on my doorstep.

Do I need to book in advance?

Do I trust this operator? Do I trust this website? How do I know the trail will be suited for our fitness levels? Where can I hire a tent/mattress?

What is providing at campsite (shelves, lock up) and what do I need to bring?

Which walk is the best? Where will I be able to park my car? Can I leave things at the campsite when I am out all day walking?

Is there one brochure or online portal that has all the information available? I need detailed information. Where can I learn to cook and dehydrate my own food?

This one stop 'shop' was amazing. I will share this with anyone who enjoys the outdoors. What a great walk and they have made planning the trip so easy for me.

Activities & actions

Touch-points

Motivations & expectations

Questions & barriers



# Where to from here?

It's expected that the reinvigorated Wild South Coast Way experience will be complete by 2023, but aspects will open in stages from early 2021.

You can stay up-to-date on the creation of the Wild South Coast Way by subscribing to our e-newsletter at [www.parks.sa.gov.au/wscw#subscribe](http://www.parks.sa.gov.au/wscw#subscribe).

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