

DESTINATION DRIVERS

TOURISM RESEARCH FINAL REPORT

September 2021

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Table of contents

Executive Summary	3
Background	7
Aims and Objectives	8
An overview of the research process	9
Methodology and Sample	10
Results: Structure, How to read reported data and The Travel Segments	12
Section 1: About the travel market and Echuca's share	16
Section 2: What travellers look for in a leisure destination	22
Section 3: How most recent travel destination met traveller requirements	26
Section 4: Travellers to Echuca in detail	29
Section 5: Perceptions of Echuca	35
Section 6: Reasons for Visiting and Activities Undertaken in Echuca	42
Section 7: Perceptions of Echuca Port Area	50
Section 8: Likelihood to Recommend Echuca & the Port Area vs Other destinations	54
Section 9: Non-visitors considerations for visiting Echuca	58
Section 10: Sources of Information in planning breaks and holidays	61
Appendix 1: Other results	65
Appendix 2: Survey	76

Executive summary

This report presents findings from research into the visitor market for Echuca and the Echuca Port area. The research was undertaken by newfocus on behalf of the Administration of Campaspe Shire Council to better understand the role the Port Precinct has in tourism in the Echuca area. Outcomes of research were to help inform planning re tourism.

A total of 1,552 participants were surveyed via an online methodology. The sample consisted of adult residents of Melbourne, regional Victoria and adjacent NSW regional areas who had undertaken a leisure holiday or getaway trip of at least one nights stay in the past 3 years. The surveys were conducted between 5th to 18th August 2021 and required an average of 10 minutes.

Key outcomes are summarised below with full details provided within the body of the report.

Echuca as a holiday destination

There is high awareness of Echuca (93%) and a high proportion (74%) who have ever visited Echuca for a holiday / getaway.

In the past 3 years, 6% cited having Echuca as a main destination - and 1% as the most recent destination visited.

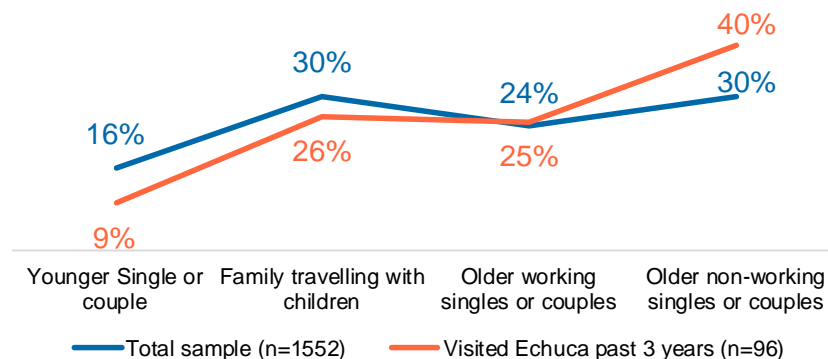
Echuca accounts for approx. of the Victorian domestic holiday traveller market.

2%

Who visits Echuca

Whilst visitors to Echuca represent a broad cross section they are skewed to older non working with results *suggesting scope exists to expand penetration into young adult and family segments.*

Profile of Echuca Vistors past 3 years across Segment



Perceptions of and reasons for visiting Echuca (unprompted)

Echuca is very much seen as a river town with river activities that is quaint and relaxing.

Whilst not the dominant top of mind perception, the Echuca Port area, and in particular paddlesteamers, has its place as a defining characteristic and attraction of Echuca.

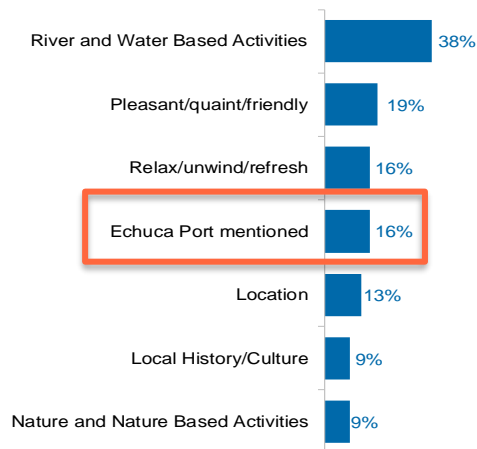
Top of mind perceptions of Echuca as a leisure or holiday destination

Unprompted, the dominant perception of Echuca relates to the **River and water based activities**.

Secondary perceptions of Echuca as a **pleasant, quaint and friendly place** enabling visitors to **relax, unwind and refresh**.

The **Echuca Port area** forms an important part of Echuca's image mix – especially the paddlesteamers (accounting for 12% of unprompted responses).

Mentions of Echuca Port area were more often made by older traveller segments.

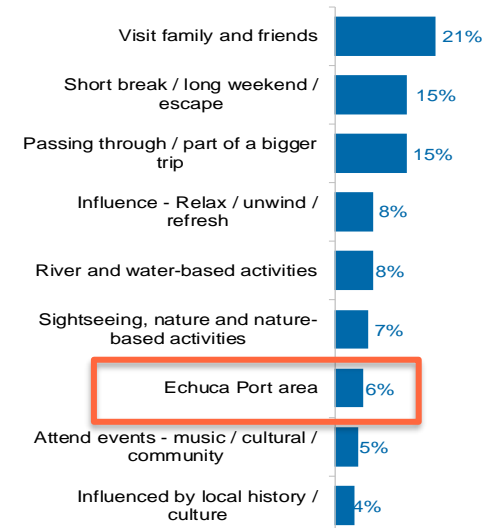


Main reasons for visiting Echuca

There are varied reasons people visit Echuca: to **visit family and friends**; for a **short break / long weekend / to escape**; and to **relax / unwind / refresh**

Mentions related to the **Echuca Port area** were next (6%) – with paddlesteamers the most cited aspect (4%)

Few differences exist between segments – suggesting similar motivating factors to visit Echuca regardless of the type of traveller.



What people do when visiting Echuca and the Port

Findings suggest that despite not being the dominant reason for visiting Echuca, the Port area is the space where the majority of travellers in all segments visit and engage in – but there are differences between segments with the Port area being most visited by and engaged with by Older traveller segments..

Lower levels of involvement by Younger and Families segments in the Port area, suggests scope may exist to review and potentially enhance either the promotion and/or the mix of activities available to these segments.

What people do when visiting Echuca

The most common type of activities undertaken by visitors during their most recent trip to Echuca were those available within the Port Area. Followed by: dining/restaurants; shopping including local markets; river and related activities and nature based activities.

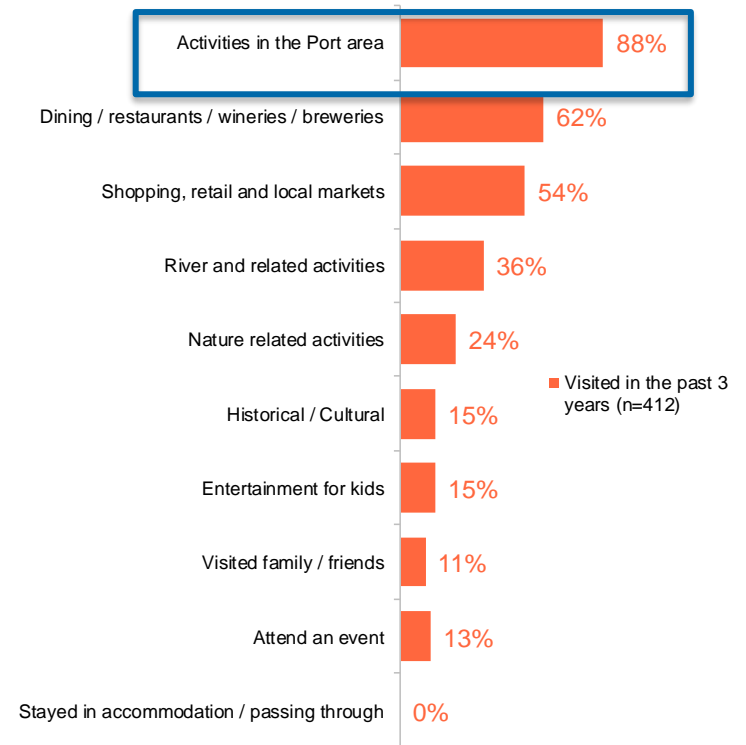
Activities in the Port Area:

Of the specific activities within the Port Area, the Wharf was most often cited (53%); followed by a walk in the old gravel area of Echuca (43%); cruise on a paddlesteamer (39%); visit Information centre and just look at paddlesteamers (33% each) and the Echuca Discovery Centre (30%).

By Segment:

- Older segments: were significantly more likely to visit and engage in more activities within the Port area
- Families: whilst high visitation to Port area, appeared to engage in less activities than older cohorts when there (perhaps financial constraints)
- Younger aged segment were least likely to visit the Port area and when there, engaged in fewer activities

Activity Categories undertaken in Echuca



Note: Whilst report reference is to *old gravel area* of Echuca the survey question was referenced as *old pebble street* of Echuca

Perceptions of Echuca meeting traveller requirements

Findings suggest that Echuca holds positive views across the market on aspects related to natural environments – water and water based activities; nature and bushland; camping and history.

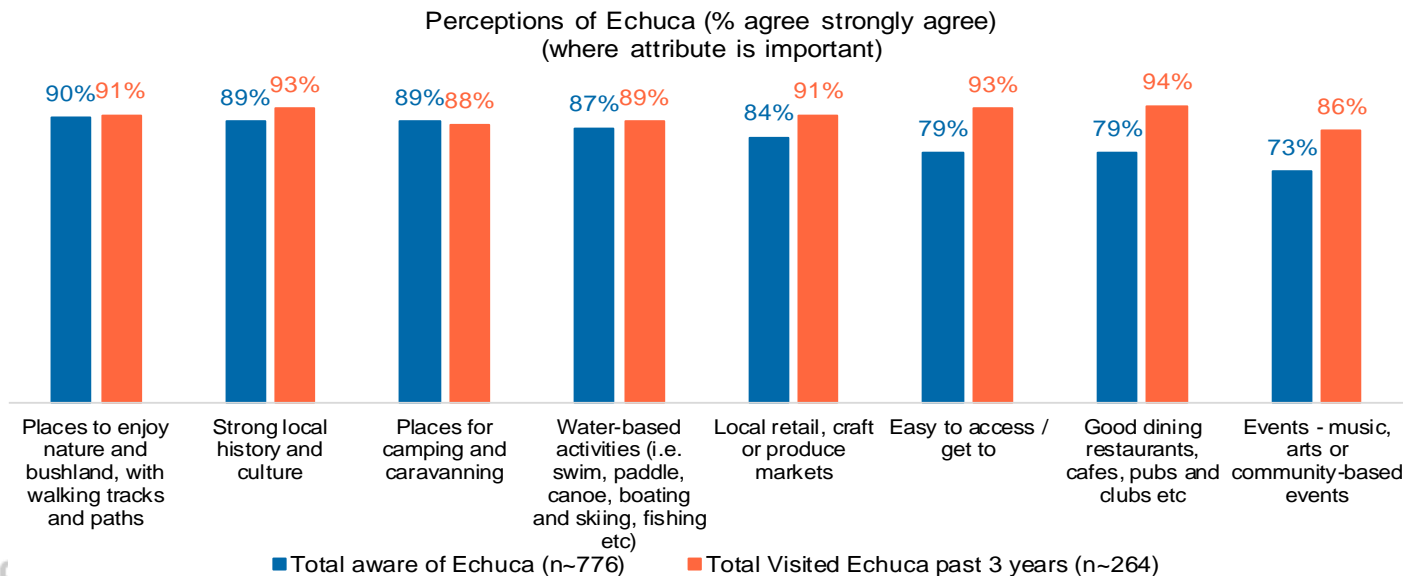
Perceptions of other travel experiences such as retail, dining, events etc. are less so and may pose a negating factor in attracting new visitors – especially Younger aged travellers.

Consideration was given to perceptions of Echuca – by those who are aware of Echuca (potential market) and those who have visited Echuca in past 3 years (current market).

There are consistent views about Echuca as a *Place to enjoy nature; strong local history, good places for camping and caravanning and water based activities*. These can be considered as almost **universal truths of Echuca**.

There are **gaps in perceptions** between these two primary audiences in relation to other factors that could attract visitors such as *local Retail; dining and events* – where the potential market have considerably less positive views of Echuca than current market – suggesting these gaps are more perceptual in nature

Review of these by segment found that perceptions were most positive by Older aged and by Family and lower by Younger aged travel segment. The differences were especially evident amongst potential Younger aged.



Background



The Shire of Campaspe (Council) is a large rural municipality located approximately 180 kilometres north of the Melbourne CBD, in one of the richest and most diverse agriculture and food processing areas in Victoria.

Its climate, history, cultural heritage, natural assets and location in relation to major urban centres are considered to provide the municipality with extensive tourism opportunities.



At the Council meeting on 21 April 2021 and in relation to Port of Echuca Management model report deliberations, it was resolved that Council:

- *develop a scope / request for tender to commission targeted market research to gain a better understanding of the Precinct's tourism market; including consideration of visitor expectations and visitation drivers along with the identification of current and potential market segments and demand*

Following release of a Request for Quotation for research issued by the Council, **newfocus** was commissioned.

This report presents the findings from said research.



Aims and Objectives

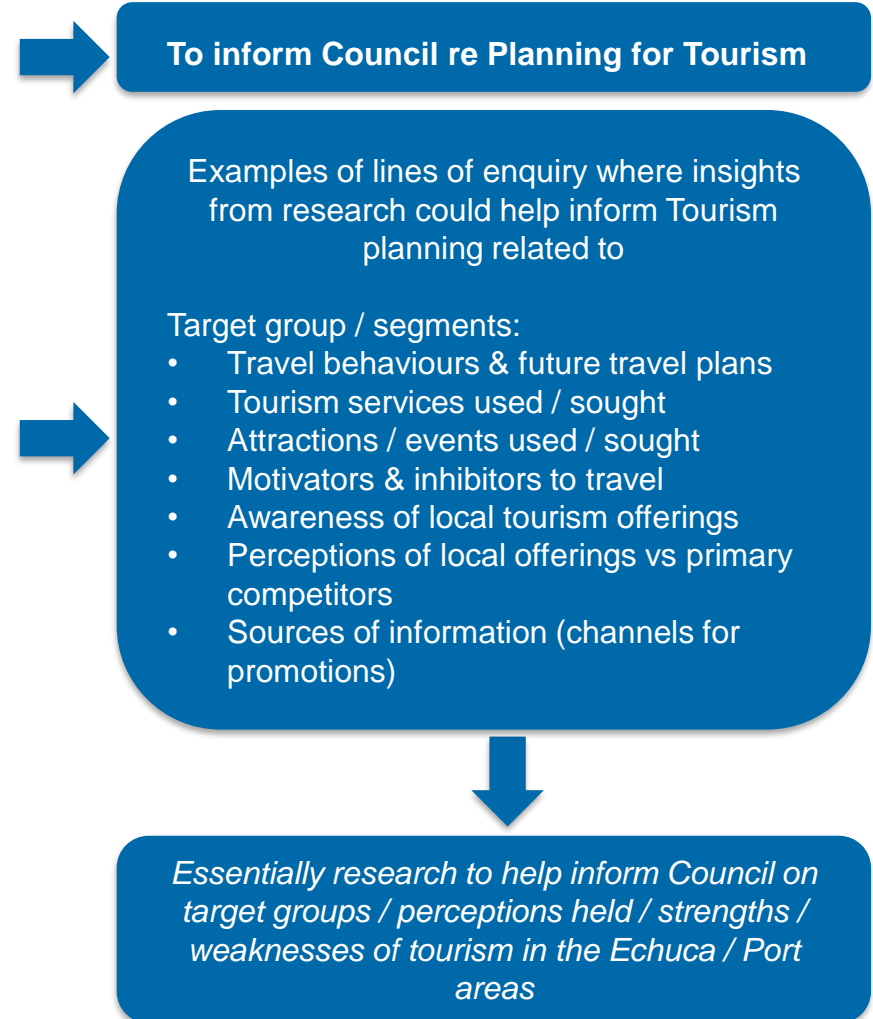
The agreed aims and objectives of this research, were as follows:

Aim

Understand the role the Port Precinct has in tourism in the Echuca area / surrounds

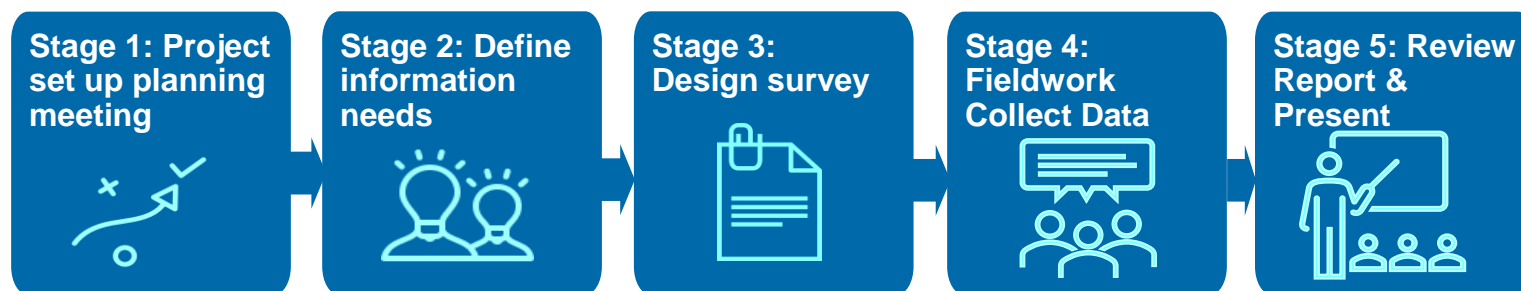
Objectives

- Who comes and why do people come to the area – what attracts them?
- What people do when they come to the area / and the Port?
- Perceptions travellers have of the Echuca area with a focus on the Port precinct



An overview of the research process

This research project was structured by 5 key stages – as outlined below:



Completed

Current

Stage 1: Project planning meeting held 25 June 2021 to ratify approach and timings

Stage 2: Part A: Secondary desktop research

newfocus reviewed selected secondary tourism data sources held by Council / obtained through 3rd party re tourism segments / market in the area.

Outcomes were compiled as a top line report.

Part B: Workshop with Project Steering Committee

Review of secondary desktop findings and ratified: sample size and compositions; key lines of enquiry for survey; timings and terms etc.

Stage 3: Survey for use via online methodology was designed by newfocus in collaboration with the Administration.

Approvals provided by the Administration.

Stage 4: Online survey samples n=1,552

(refer next page for details)

Stage 4: Fieldwork conduct survey

– methodology, sample size and sample profile

Stage 4: Fieldwork conduct survey



Methodology

newfocus undertook an online survey via an online panel partner

The survey ran from 5th August – 18th August 2021 and required an average of 10 minutes to complete and consisted 3 x open ended questions

Sample had condition that respondents:

- be residents of Victoria or reside within 350Km from Echuca on NSW side.
- have travelled for leisure with at least one night's stay anywhere in past 3 years

Sample

The sample of n=1,552 was achieved (vs planned 1,500); as follows

	Planned	Achieved	% of sample
Greater Melbourne	950	1,001	64%
Rest of Victoria	500	500	32%
NSW Rural (350km radius from Echuca)	50	51	3%
	1,500	1,552	

Sampling accuracy

Sampling accuracy at 95% confidence interval for a sample on n=1,552 from a large population (i.e. over 3m) is estimated at $\pm 2.49\%$.



Sample Profile: The sample of n=1,550 was comprised of a good mix of metro and regional residents; wide range of age groups, good mix by gender and travel segments. The sample structured as follows :

	Total	1552	100%
Q1a Where do you live?	Melbourne	1001	64%
	regional Victoria	500	32%
	regional NSW	51	3%
	Total	500	100%
Q1b In which part of regional Victoria do you live?	Daylesford & Macedon Ranges	22	4%
	Yarra Valley & Dandenong Ranges	11	2%
	Mornington Peninsula	13	3%
	Phillip Island	6	1%
	Geelong and the Bellarine	91	18%
	Great Ocean Road	27	5%
	Goldfields	102	20%
	Grampians	37	7%
	High Country	42	8%
	Gippsland	79	16%
	Murray Region	70	14%
Q1c In which part of regional NSW do you live?	Total	51	100%
	Murray	12	24%
	Riverina	14	27%
	Southern Inland	13	25%
	Central West	10	20%
	Orana	1	2%
	Far West	1	2%

	Total	1552	100%
QAge What is your age?	18-29 years	153	10%
	30-39 years	259	17%
	40-49 years	291	19%
	50-59 years	255	16%
	60-69 years	308	20%
	70-79 years	254	16%
	80 years and older	32	2%
QGender What is your gender?	Total	1552	100%
	Male	740	48%
	Female	808	52%
	Other (non-binary)	4	0%
QSeg Which of the following best describes the type of getaway or holiday traveller you are. If not perfect, please select the best fit	Total	1552	100%
	Younger Single or couple	254	16%
	Family travelling with children	463	30%
	Older working singles or couples	372	24%
	Older non-working singles or couples	463	30%
QChild What are the ages of the children your travel with? Please select all that apply?	Total	461	100%
	0-4 years	120	26%
	5-10 years	214	46%
	11-15 years	175	38%
	16-18 years	97	21%
	19-24 years	39	8%
25 years and older	11	2%	

RESULTS

Structure,
How to read reported data
and
The Travel Segments



Structure

The results section is structured under key lines of enquiry, as follows:

1. About the travel market and Echuca's share
2. What travellers look for in a leisure destination
3. How most recent travel destination met traveller requirements
4. Travellers to Echuca in detail
5. Perceptions of Echuca
6. Reasons for visiting and activities undertaken in Echuca
7. Perceptions of Echuca Port Area
8. Likelihood to recommend Echuca & the Port area vs other destinations
9. Non-visitors considerations and reasons for not visiting Echuca
10. Sources of information in planning breaks and holidays

How to read reported data

Tables and charts are reported in percentage results. Due to rounding some scores may range from 99% to 101%.

n = value

The n= value in the tables and charts represents the total number of respondents included in the study and the number of respondents that answered a specific question (excluding 'don't know' responses except where noted).

The values represent weighted sample n's and %

n ~ value

In some cases n~ is used. This represents the average number of respondents across two or more questions.

Statistical significance analysis

↑ and ↓ labels on charts indicate statistically significant differences between waves at the 95% confidence level, with ↑ denoting a higher result and ↓ denoting a lower result.

In tables, green figures represent a higher result and red figures represent a lower result; both at the 95% confidence level.

The travel segments

The following travel segments and sub-groups have been used for analysis throughout this report (full profile next page)

Four travel life stage segments considered most relevant to Echuca were included in the survey by:

QSeg Which of the following best describes the type of getaway or holiday traveller you are. If not perfect, please select the best fit

- Younger Single or couple
- Family travelling with children
- Older working singles or couples
- Older non-working singles or couples

Traveller Life Segment	1552
Younger Single or couple	16%
Family travelling with children	30%
Older working singles or couples	24%
Older non-working singles or couples	30%

- **Younger single or couple:** skewed under 40 years; skewed Female; skewed reside in Melbourne
- **Family group:** skewed 30-49 years; skewed Female; range of children to age 18 years; skewed reside in Melbourne
- **Older Working singles or couples:** skewed 50-69 years; even male and female; Melbourne and regional residents
- **Older non-working singles or couples:** skewed 60-79 years; skewed Male; approaching parity Melbourne vs regional residents

Camping and caravanning sub-group was based on those important/very important in selecting a holiday destination:

Q7. How important are each of the following to YOU when selecting a place to go to for a leisure getaway or holiday..

- Places for camping and caravanning
 - Very important
 - Important
 - Neither important nor unimportant
 - Unimportant
 - Not at all important

Places for camping and caravanning	1530
Camping/Caravanning (Important / very important)	30%
Non camping/caravanning (neither, unimportant, not at all important)	70%

- Camping / caravanning important: has a wide age group skewed under 50 years; male and female; skew Young single/Family; Melbourne and regional residents
- Camping / caravanning not important group: also has a wide age group skewed 60-79 years; male and female; skewed older working and non-working singles and couples; Skew Melbourne.

The travel segments...continued

		Total
		Total (n=1552)
Gender	Male	48%
	Female	52%
Age	18-29	10%
	30-39	17%
	40-49	19%
	50-59	16%
	60-69	20%
	70+	18%
	Location respondent lives	Melbourne
	regional Victoria	32%
	regional NSW	3%
Segment	Younger Single or couple	16%
	Family travelling with children	30%
	Older working singles or couples	24%
	Older non-working singles or couples	30%

Segment			
Younger Single or couple (n=254)	Family travelling with children (n=463)	Older working singles or couples (n=372)	Older non-working singles or couples (n=463)
34%	42%	49%	60%
65%	58%	50%	40%
44%	9%	-	-
44%	32%	-	-
11%	39%	18%	3%
-	16%	35%	10%
-	4%	33%	37%
-	1%	13%	50%
77%	70%	65%	51%
20%	28%	31%	44%
2%	2%	4%	4%
100%	-	-	-
-	100%	-	-
-	-	100%	-
-	-	-	100%

Campers vs Non campers	
Campers / caravanners (n=465)	Non campers / caravanners (n=1065)
47%	48%
52%	52%
14%	8%
27%	12%
25%	16%
16%	17%
11%	24%
8%	23%
61%	66%
36%	30%
3%	4%
20%	15%
48%	22%
16%	27%
16%	36%

		Total
		Total (n=461)
Ages of children travel with	0-4 years	26%
	5-10 years	46%
	11-15 years	38%
	16-18 years	21%
	19-24 years	8%
	25 years and older	2%

Segment			
Younger Single or couple (n=0)	Family travelling with children (n=461)	Older working singles or couples (n=0)	Older non-working singles or couples (n=0)
-	26%	-	-
-	46%	-	-
-	38%	-	-
-	21%	-	-
-	8%	-	-
-	2%	-	-

Campers vs Non campers	
Campers / caravanners (n=221)	Non campers / caravanners (n=232)
24%	28%
50%	42%
39%	38%
21%	21%
5%	12%
2%	3%

About the travel market and Echuca's share

Section 1



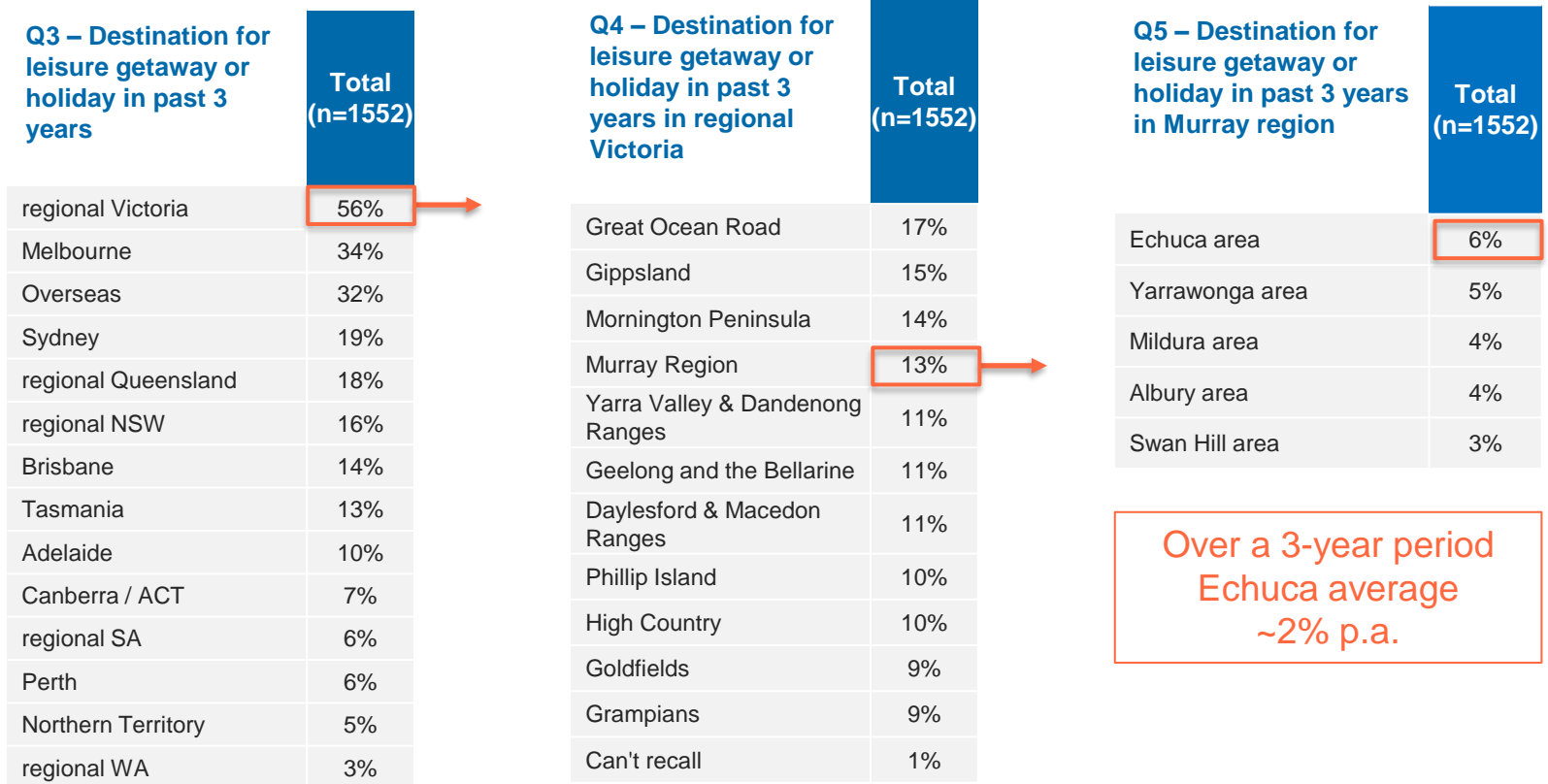
Echuca has approx. 2% share of Victoria's domestic travel market

- is the leading destination for visitors to Murray Region

1.1 Travel destinations – Travelled to in past 3 years; Most recent; and Planned travel to - Total Sample

regional Victoria was the most common destination for leisure breaks over the past 3 years (56%) with Murray Region being fourth most popular in regional Victoria (13%) and Echuca being most popular of the Murray regions (6%).

In terms of most recent destination, Echuca had 1% overall with 2% stating they had Echuca as a planned destination for their next break/holiday (refer Appendix).



Q3 - Where have you gone for a leisure getaway or holiday of at least one night's stay in the past 3 years?

Q4 - Using the map as a guide, where in regional Victoria have you gone to for a leisure getaway or holiday in the past 3 years?

Q5 - Roughly speaking, which areas of the Murray Region have you gone to for a getaway or holiday in the past 3 years?

Echuca is a more popular destination by Older non-working travellers - and also by those travellers who are more oriented to camping/caravanning

1.2 Travel destinations – Travelled to in past 3 years; Most recent; and Planned travel to - By Segment

By Segment

As a travel destination, over the past 3 years Echuca had a higher incidence of visits by Older non-working segment (9%). This was more than twice the incidence of least likely to visit Echuca being Younger singles/couples (4%).

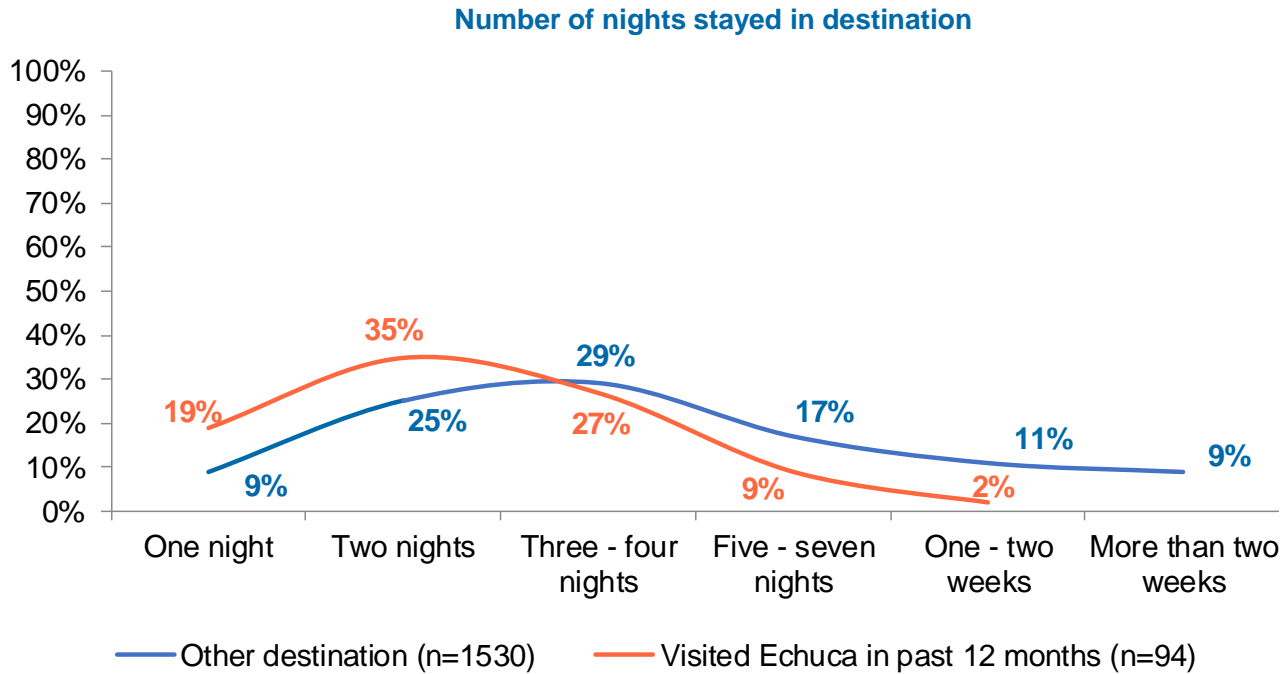
Those who placed importance on camping were more likely to have visited Echuca in the past 3 years (8%), visited most recently (2%) and planned to visit Echuca (3%) vs those not-interested in camping/caravanning.

		Total (n=1552)	Segment				Campers vs Non campers	
			Younger Single or couple (n=254)	Family travelling with children (n=463)	Older working singles or couples (n=372)	Older non-working singles or couples (n=463)	Campers / caravanners (n=465)	Non campers / caravanners (n=1065)
In past 3 years visited	Melbourne	34%	44%	44%	24%	25%	42%	30%
	Any regional Victoria	56%	50%	51%	55%	64%	56%	55%
	Any Murray	13%	7%	9%	14%	19%	15%	12%
	Echuca	6%	4%	5%	6%	9%	8%	5%
Most recent visited	Melbourne	15%	19%	24%	9%	8%	20%	12%
	Any regional Victoria	42%	39%	41%	44%	44%	44%	41%
	Any Murray	4%	4%	2%	3%	7%	5%	4%
	Echuca	1%	2%	1%	1%	2%	2%	1%
Planned to travel to	Melbourne	6%	9%	12%	3%	3%	12%	4%
	Any regional Victoria	34%	32%	46%	26%	30%	45%	29%
	Any Murray	6%	2%	7%	6%	8%	8%	5%
	Echuca	2%	1%	3%	1%	2%	3%	1%

Stays at Echuca are predominantly 2-3 nights

- marginally less than other destinations

1.3 Length of stay - Visitors to Echuca in past 12 months vs Most Recent other destinations



Visitors to Echuca over the past 12 months have stayed 2-3 nights –somewhat fewer nights than visitors to other most recently visited destinations.

There was no substantive differences in length of stay by segment nor by Campers vs Non campers by those who have ever visited Echuca.

Suggesting Echuca is primarily seen as a 2 to 3 night destination by all traveller types.

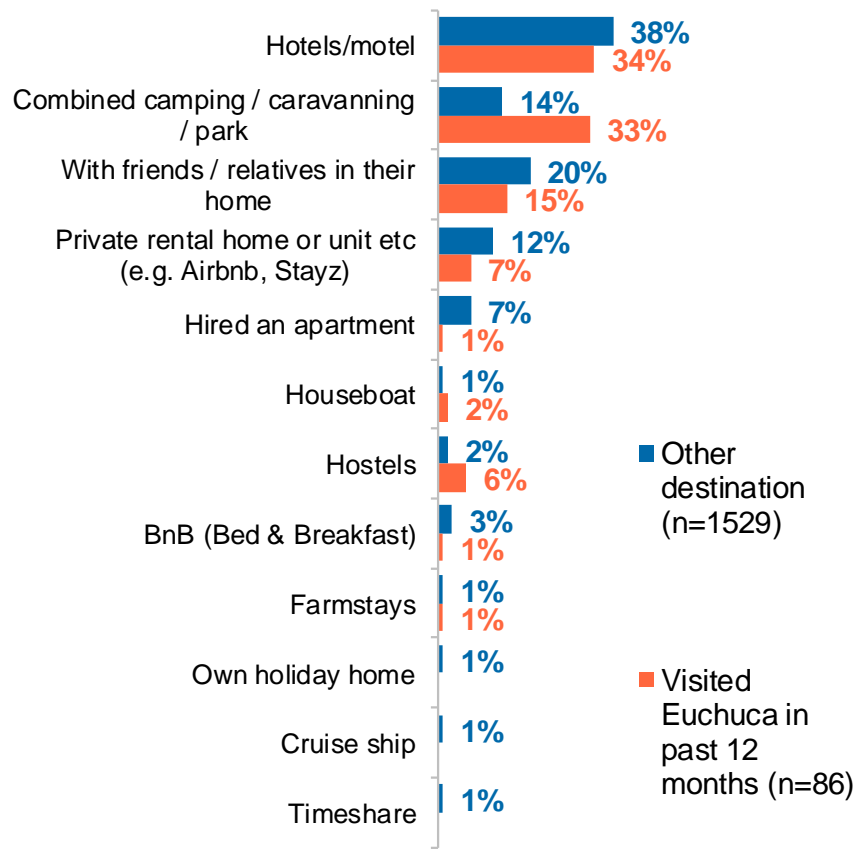
Q6a - How many nights did you stay in [Q6 destination] during your most recent leisure break there
Q12 - When was the last time you went to Echuca as part of a leisure getaway or holiday?
Q26 - How many nights did you stay in Echuca during your most recent leisure break there?
0% represents n=1

Camping and Caravanning a key part of Echuca accommodation mix

- just as popular as Hotels/Motels
- but is there a gap in other private accommodation types

1.4 Accommodation- Echuca in past 12 months vs Other destinations... Total sample

Type of accommodation stayed in destination



Visitors to Echuca in past 12 months were equally likely to have stayed in Hotel/motel to have been camping/caravanning.

Camping and caravanning is considerably more likely in Echuca than other destinations. In Echuca, camping/caravanning skewed towards doing so in a holiday/caravan park.

There is a gap in other private accommodation types i.e. Private rental and Hired apartment - 19% combined for other destinations vs 8% for Echuca

Camping and caravanning

- A cabin at a holiday park / caravan park
- A caravan at a holiday park / caravan park
- Camping (not in a holiday park/caravan park)
- Camping at a holiday park / caravan park
- Glamping tents / safari tents

	Other destination (n=1529)	Echuca past 12 months (n=86)
A cabin at a holiday park / caravan park	5%	12%
A caravan at a holiday park / caravan park	4%	7%
Camping (not in a holiday park/caravan park)	2%	10%
Camping at a holiday park / caravan park	2%	3%
Glamping tents / safari tents	1%	-



Q6b - What type of accommodation did you stay at during your most recent trip to [Q6 destination]? If more than one, please select the MAIN accommodation.
 Q12 - When was the last time you went to Echuca as part of a leisure getaway or holiday?
 Q27 - What type of accommodation did you stay at during your most recent leisure trip to Echuca? If more than one, please select the MAIN accommodation.
 Q27 not asked of those who said that they never stayed overnight at Q26

Younger single & Family segments camp/caravan more in Echuca

- but camping/caravanning is not for everyone and not on all occasions
- Older aged segments prefer the comfort of hotels/motels

1.5 Accommodation- Echuca in past 12 months vs Other destinations...By Segment

Camping and caravanning is a key accommodation type in Echuca in all groups – especially amongst Younger singles or couples and Families (41% each) and even amongst approximately 25% of Older aged cohorts.

Non-camping remains considerably more popular than camping; even amongst those who place importance on camping and caravanning.

Q6b - Type of accommodation (other destination)

	Segment				Campers vs Non campers	
	Younger Single or couple (n=249)	Family travelling with children (n=459)	Older working singles or couples (n=367)	Older non-working singles or couples (n=454)	Campers / caravanners (n=454)	Non campers / caravanners (n=1054)
Hotels/motel	41%	36%	44%↑	35%	31%↓	42%↑
Combined Camping /Caravanning	9%↓	20%↑	10%↓	14%	30%↑	7%↓
With friends / relatives in their home	23%	11%↓	21%	26%↑	15%↓	22%↑
Private rental home or unit etc (e.g. Airbnb, Stayz)	12%	15%↑	11%	9%↓	8%↓	13%↑
Hired an apartment	5%	7%	6%	7%	5%	7%

Q27 – Type accommodation (Echuca)

	Segment				Campers vs Non campers	
	Younger Single or couple (n=90)	Family travelling with children (n=273)	Older working singles or couples (n=233)	Older non-working singles or couples (n=308)	Campers / caravanners (n=286)	Non campers / caravanners (n=606)
Hotels/motel	31%↓	31%↓	49%	61%↑	26%↓	56%↑
Combined Camping /Caravanning	41%↑	41%↑	27%	24%↓	48%	24%
With friends / relatives in their home	8%	8%	10%↑	3%↓	8%	6%
Private rental home or unit etc (e.g. Airbnb, Stayz)	7%	7%	5%	3%↓	4%	5%
Hired an apartment	4%	2%	2%	4%	3%	3%

Note: sample of visitors over past 12 months too small to analyse by subgroups – this data represents most recent visit regardless of time

Refer Appendix for full details

Statistically significantly higher/lower within the segment ↑↓

What travellers look for in a leisure destination

Section 2



Overall, the three most important aspects of a holiday destination are ease of access, good food and the opportunity to engage with nature

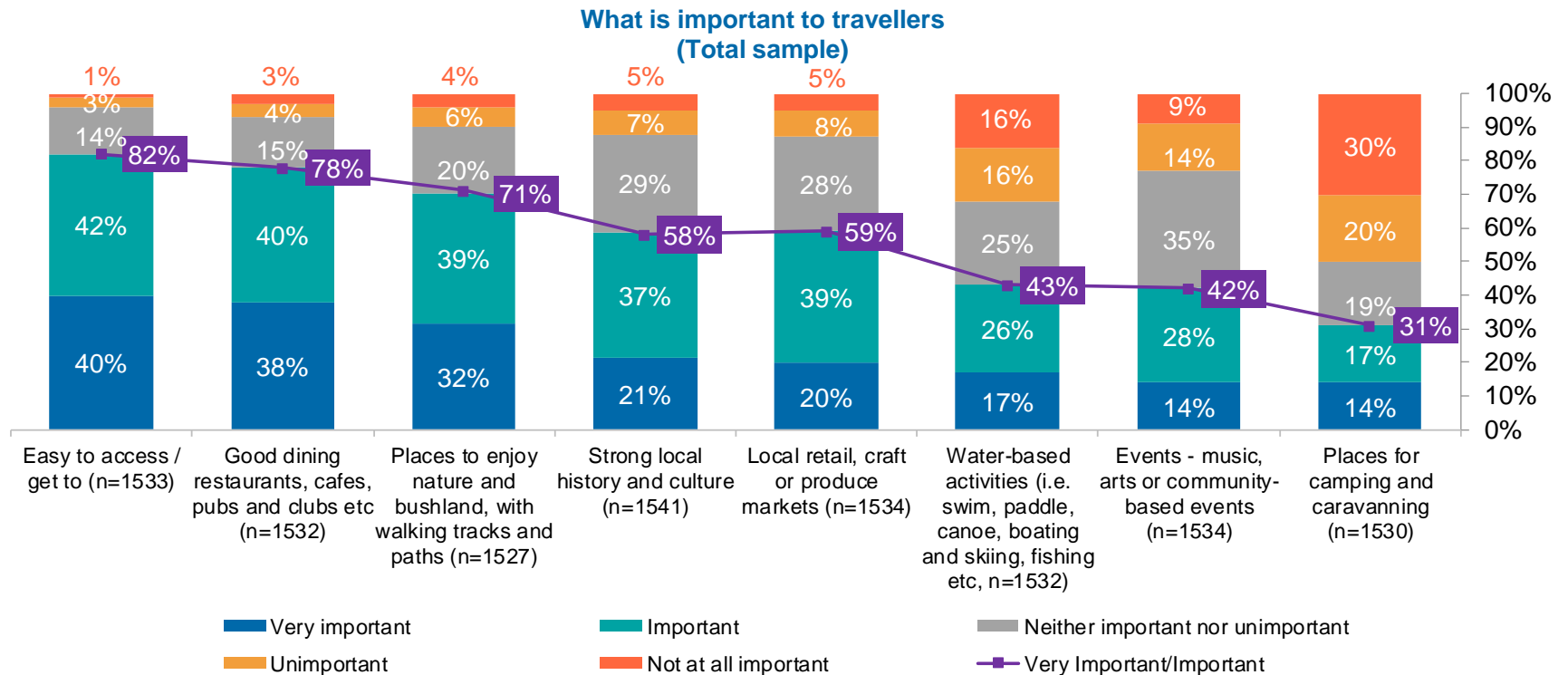
2.1 What is important in destination to Travellers – Total sample

The most important aspects travellers consider in selecting a place to go for a leisure getaway or holiday include: easy to access (82% very important / important), followed by good dining restaurants, cafes, pubs and clubs (78%) and places to enjoy nature and bushland, with walking tracks and paths (71%).

Strong local History and culture and Retail, craft or produce markets had mid level importance.

Of lesser importance were water based activities (43%), Events (42%) and least importance overall was places for camping and caravanning (31%).

These were not uniform across all segments.



Families seek a very diverse set of experiences in their holidays

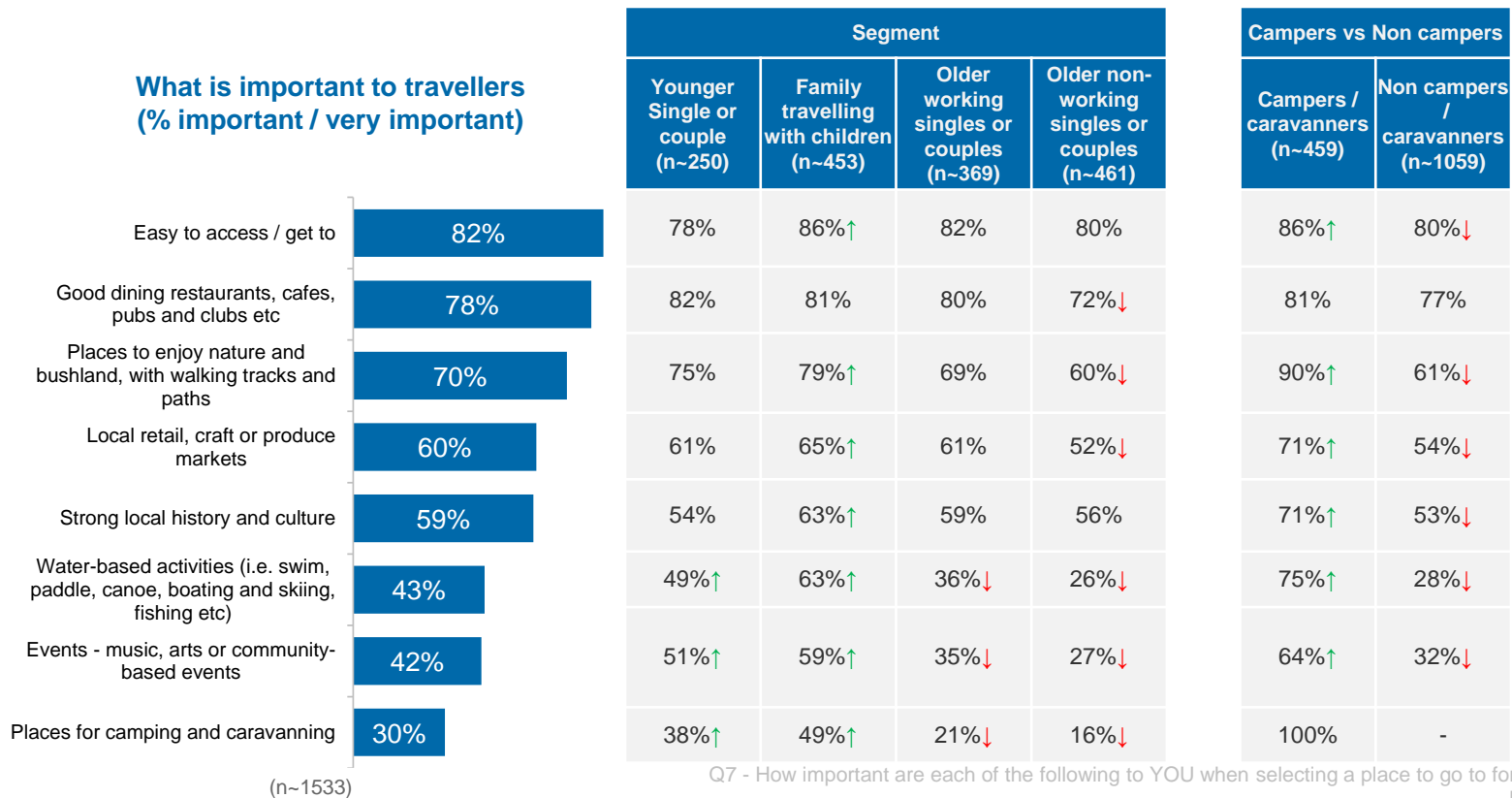
- Younger adults may be more food and entertainment seekers
- Older travellers may seek more passive experiences

2.2 What is important to Travellers – By segment

Easy to access is the most important aspect in all segments with the exception of younger aged (where it was 2nd). Key differences by segment:

- Families - placed higher importance on most aspects suggesting they seek a variety of aspects in their holiday destinations
- Younger aged - placed higher importance on Food/entertainment experiences (dining restaurants cafes, pubs clubs etc) and whilst less interest shown in local history and culture than other segments were second highest on rating events as important.
- Older segments placed lesser importance on aspects with Older non-working placing least.

These suggest Families seek a diversity of experiences in their holiday destinations; Younger travellers may be driven more by food and entertainment (including potentially events) and Older aged groups more driven by ease of access and dining with some interest in nature and potentially some in history and culture – perhaps nostalgia.



Those placing importance on camping and caravanning placed higher importance on all aspects.

This suggests campers - regardless of age - seek diversity of experiences, whereas non campers may be seeking more passive experiences (not specifically captured in this survey).

Access, good dining and nature remain most important:

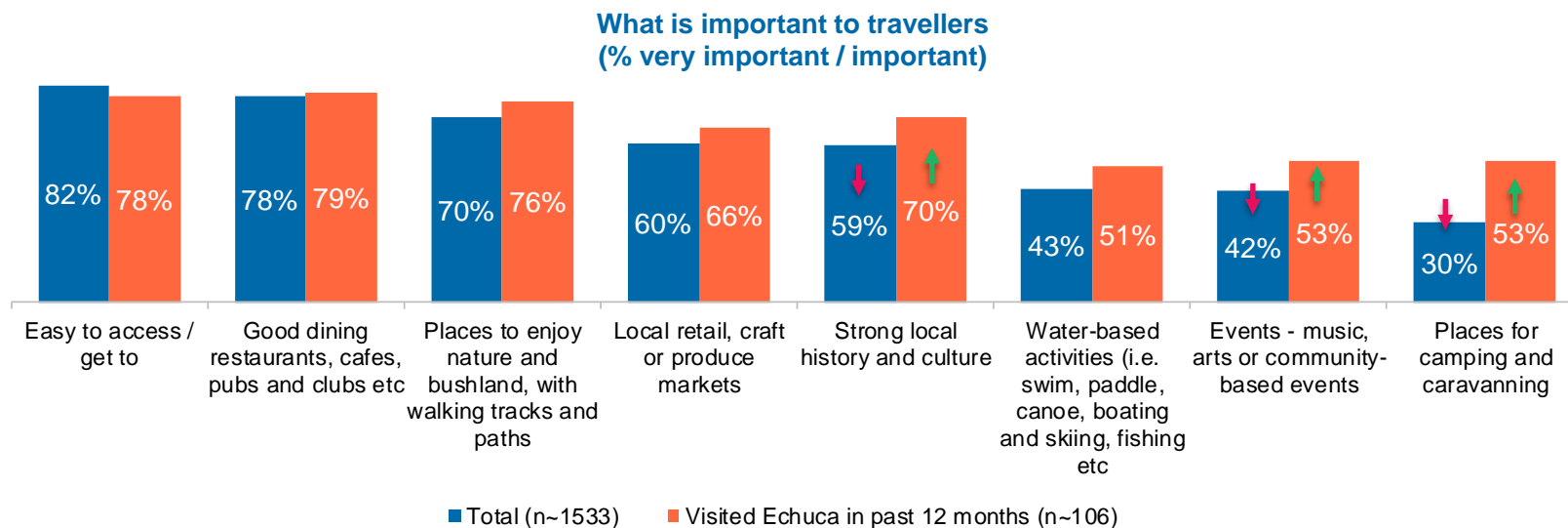
- but visitors to Echuca also place higher importance on places for camping, events and local history than do other travellers

2.3 What is important to Travellers who visited Echuca in past 12 months

Whilst Easy to access, Good dining and Places to enjoy nature remain most important, visitors to Echuca placed more importance than other travellers on:

- Places for camping and caravanning (53% vs 30% total sample)
- Events (53% vs 42%)
- Strong local history (70% vs 59%)
- Water-based activities (51% vs 43%)

These findings suggest travellers to Echuca seek a broad mix of experiences, that include the comforts of dining and retail along with experiences involving nature



Q7 - How important are each of the following to YOU when selecting a place to go to for a leisure getaway or holiday?
Q12 - When was the last time you went to Echuca as part of a leisure getaway or holiday? (Only asked of those who have ever visited Echuca)

Don't know response excluded

How most recent travel destination met traveller requirements

Section 3



Travellers appear content their holiday destination met their needs

- very low levels of travel needs not being met by destination

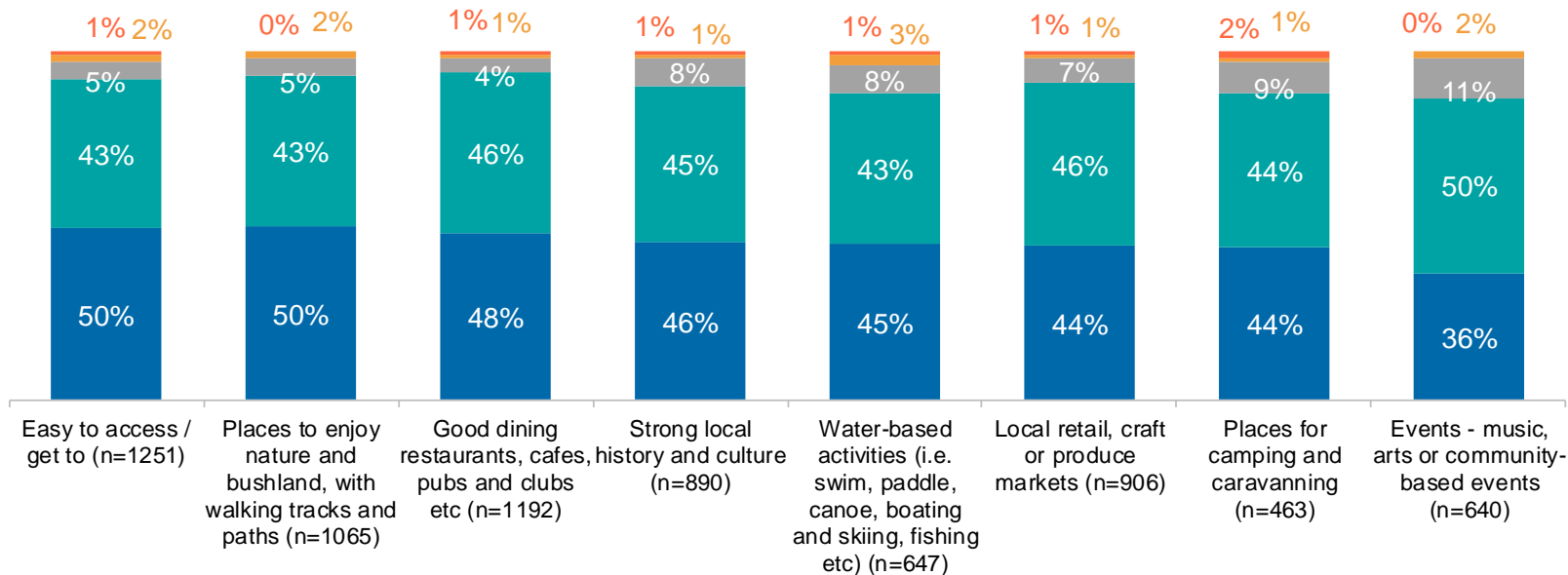
3.1 How most recent destination met traveller requirements – Total sample - Where attribute Important

Travellers (as a collective) agree their most recent travel destination met their requirements – with low disagreement existing for any aspect.

With most aspects at or above 90% agree/strongly agree, highest were the three most important aspects - Good dining, Easy to access and Places to enjoy nature.

These findings suggest that travellers are mostly content with their travel destinations, and it is not as if holiday places are failing to provide what travellers seek. The implication of this is that traveller growth will likely need to be made by proactive intervention to gain consumer preference rather than a result of existing gaps in the market.

How most recent destination met needs by what is important to travellers (% very important / important)



■ Strongly agree ■ Agree ■ Neutral ■ Disagree ■ Strongly disagree

Whilst all segments are content that their destinations met their requirements there may be some opportunities to explore

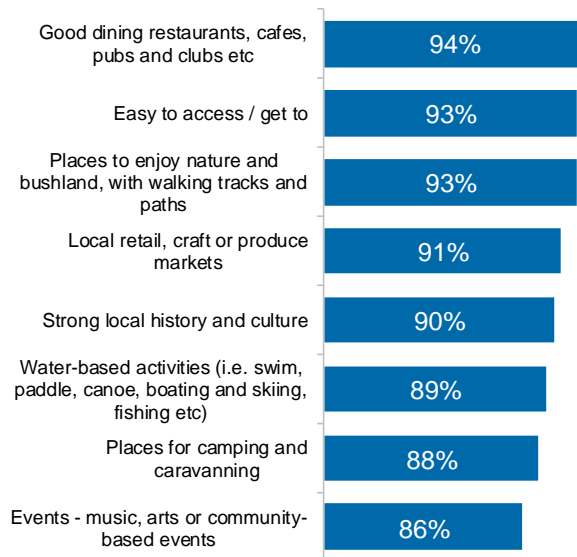
- Younger aged and those not into camping who appear less content

3.2 How most recent destination met traveller requirements – By Segment - Where attribute Important

- Family and Older traveller segments most content, whereas Younger travellers (whilst still content) were least so on all aspects (statistically significant on 5 aspects).
- Campers / caravanners were somewhat more content on most aspects, though only one being statistically significant (Water based activities).

This suggests that travel needs of Younger adult travellers and those not into camping may have scope for market development. For Echuca, water-based activities for non campers may provide some opportunities to explore.

How most recent destination met needs (% strongly agree / agree) by what is important to travellers (% very important / important) (total sample)



(n~882)

	Segment				Campers vs Non campers	
	Younger Single or couple (n~150)	Family travelling with children (n~305)	Older working singles or couples (n~204)	Older non-working singles or couples (n~223)	Campers / caravanners (n~364)	Non campers / caravanners (n~578)
Good dining restaurants, cafes, pubs and clubs etc	90%↓	94%	95%	95%	93%	94%
Easy to access / get to	90%↓	94%	94%	93%	95%	92%
Places to enjoy nature and bushland, with walking tracks and paths	88%↓	93%	93%	94%	94%	92%
Local retail, craft or produce markets	86%↓	93%	88%	93%	93%	89%
Strong local history and culture	83%↓	92%	92%	91%	90%	90%
Water-based activities (i.e. swim, paddle, canoe, boating and skiing, fishing etc)	84%	91%	89%	87%	92%↑	84%↓
Places for camping and caravanning	86%	89%	87%	89%	88%	-
Events - music, arts or community-based events	85%	89%	88%	80%↓	89%	84%

Q7 - How important are each of the following to YOU when selecting a place to go to for a leisure getaway or holiday?
 Q8 & Q15 – How strongly do you agree or disagree that [Q6] / Echuca has what YOU look for in a getaway or holiday destination in regard to...
 Don't know response excluded

Travellers to Echuca in detail

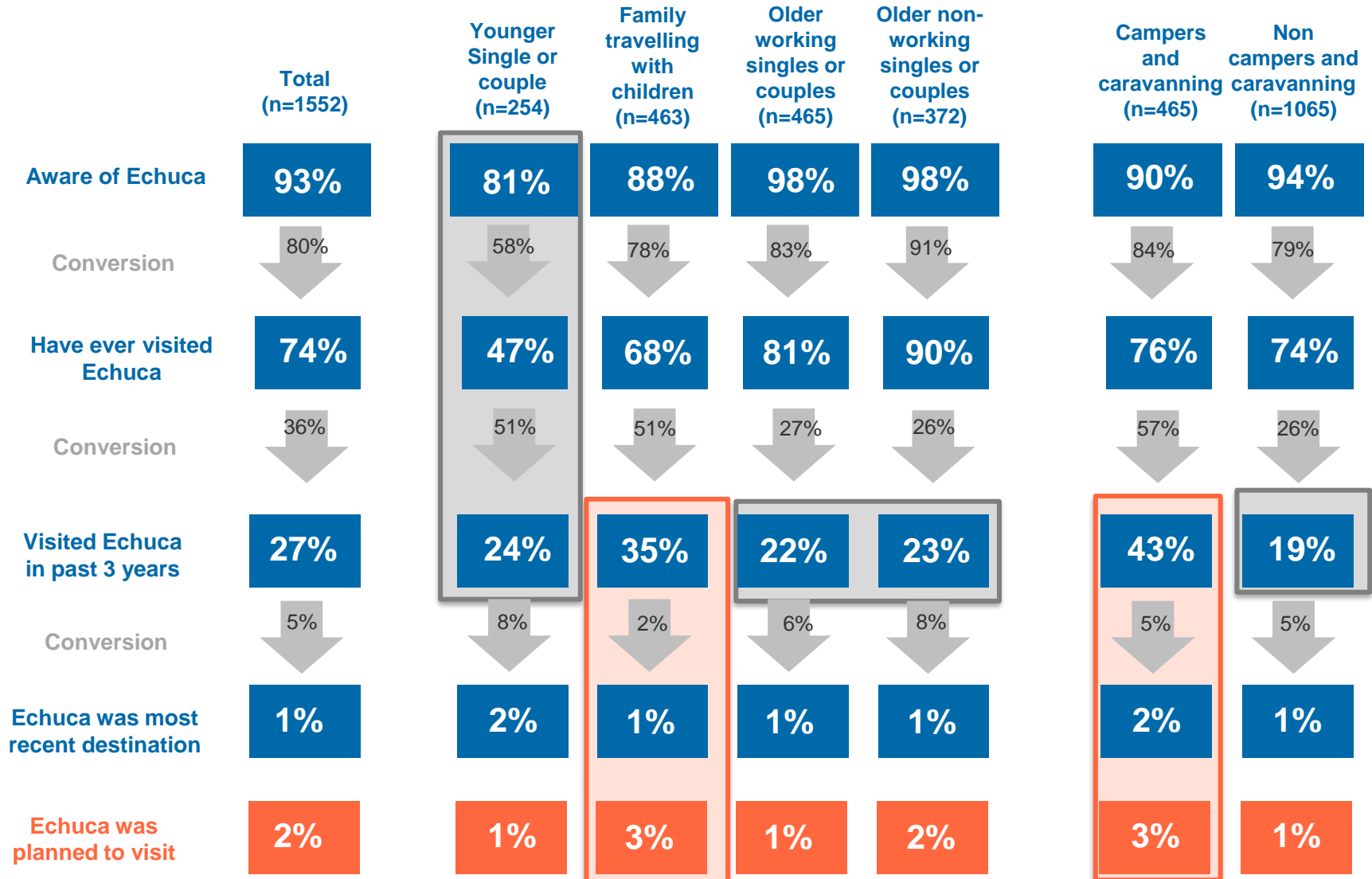
Section 4



Echuca performs best in Family segment (and those into camping/caravanning)

- greater awareness and reason to visit is needed amongst Younger travellers
- more reason to come back amongst older traveller segments (especially non campers)

4.1 Awareness and Visitation of Echuca – At a Glance



Visitors to Echuca are almost 50:50 Melbourne : regional

- regional visitors very diverse – skewed slightly towards Goldfields

4.2 Where Visitors to Echuca in past 3 years come from – where they reside

Visitors to Echuca over the past 3 years (for leisure travel) came from a broad cross section of areas with almost a 50:50 split between Melbourne and regional Victoria/nearby NSW.

Whilst visitors come from across the state, those most likely to visit Echuca are skewed slightly towards residents of Goldfields.

		Total sample (n=1552)	Q5 – Total travelled to Echuca in past 3 years (n=98)	Q12 – Visited Echuca for any travel related visit in past 3 years (n=412)
Q1a Area lived	Melbourne	64%	50%	54%
	regional Victoria	32%	46%	42%
	regional NSW	3%	4%	4%
Q1b Region lived in regional VIC	Goldfields	7%	7%	10%
	Geelong and the Bellarine	6%	7%	6%
	Gippsland	5%	7%	4%
	Murray Region	5%	5%	5%
	High Country	3%	1%	5%
	Grampians	2%	3%	3%
	Great Ocean Road	2%	7%	2%
	Daylesford & Macedon Ranges	1%	4%	3%
	Mornington Peninsula	1%	-	1%
	Yarra Valley & Dandenong Ranges	1%	1%	1%
	Phillip Island	0%	3%	1%

Whilst Echuca has a diverse visitor profile it is skewed Older - and under-represented in Younger adult and Family traveller segments

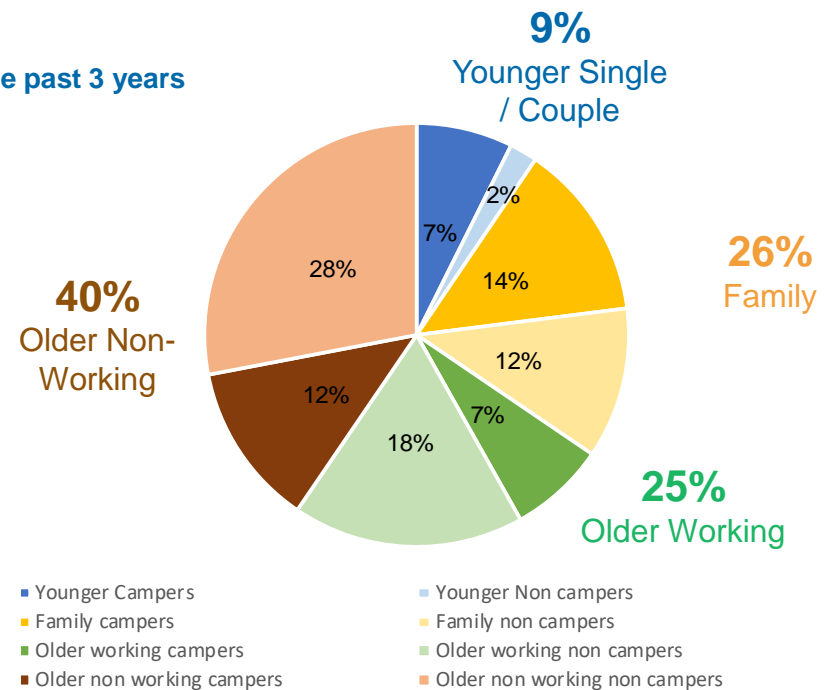
4.3 Profile of Travellers to Echuca for a getaway of holiday in past 3 years

Visitors to Echuca appear over-represented by Older non- working and under respected in Younger and Family traveller segments

Those travellers who considered camping/caravanning important comprised 40% overall of all visitors to Echuca – and whilst present in all segments campers/caravanning made up the larger contingent of Younger and Family segments.

Visited Echuca in the past 3 years

	Total sample (n=1552)	Visited Echuca past 3 years (n=96)
Younger Single or couple	16%	9%
Family travelling with children	30%	26%
Older working singles or couples	24%	25%
Older non-working singles or couples	30%	40%



(n=96)

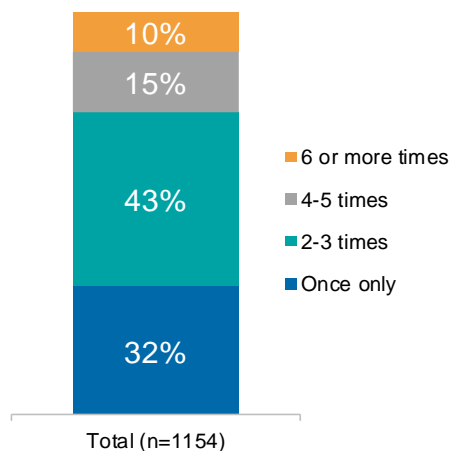
2:3 Visitors to Echuca have been repeat visitors

- But ~ 1:3 have not been back for 10 years

4.4 Recency and repeated visits and reason for last visit to Echuca – Total

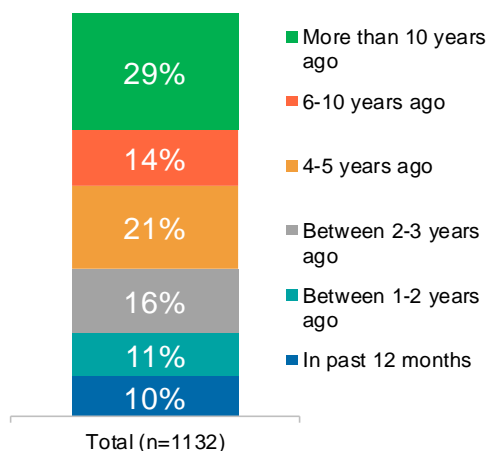
How often Echuca was visited

2 out of every 3 visitors to Echuca have visited more than once with 25% four or more times.



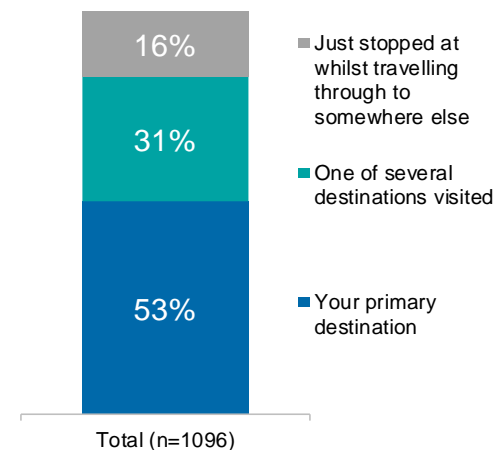
Last time Echuca was visited

37% of those who ever visited Echuca, did so in past 3 years with 10% in past 12 months.
- However, approx. 29% had not returned in more than 10 years.



Echuca destination type

53% of all visitors to Echuca have been there as a main destination and a further 31% as one of several.



Families and Campers/caravanners more likely to be repeat visitors

- Over 1:3 Older travellers have not been back in past 10 years

4.5 Recency, repeated visits and reason for last visit to Echuca – by segment

By segment..

Those more interested in camping were more likely repeat visitors.

Q11 How often Echuca was visited	Segment				Campers vs Non campers	
	Younger Single or couple (n=120)	Family travelling with children (n=316)	Older working singles or couples (n=302)	Older non-working singles or couples (n=416)	Campers / caravanners (n=352)	Non campers / caravanners (n=788)
Once only	38%	28%	38%↑	29%	24%↓	36%↑
2-3 times	42%	46%	38%↓	45%	45%	42%
4-5 times	12%	18%	13%	16%	20%↑	13%↓
6 or more times	8%	8%	12%	10%	11%	9%

Families and Campers/caravanners were most likely to have visited in the past 3 years.

Over 1:3 of Older travellers have not returned in past 10 years.

Q12 Last time Echuca was visited	Segment				Campers vs Non campers	
	Younger Single or couple (n=119)	Family travelling with children (n=310)	Older working singles or couples (n=297)	Older non-working singles or couples (n=406)	Campers / caravanners (n=346)	Non campers / caravanners (n=772)
In past 12 months	14%	14%↑	8%	6%↓	16%↑	6%↓
Between 1-2 years ago	22%↑	18%↑	6%↓	6%↓	21%↑	7%↓
Between 2-3 years ago	15%	20%↑	14%	14%	20%↑	13%↓
4-5 years ago	22%	22%	19%	21%	21%	21%
6-10 years ago	10%	8%↓	15%	19%↑	8%↓	17%↑
More than 10 years ago	17%↓	18%↓	38%↑	33%↑	14%↓	35%↑

Families somewhat more likely to visit Echuca as a main destination.

Q13 Echuca destination type	Segment				Campers vs Non campers	
	Younger Single or couple (n=109)	Family travelling with children (n=304)	Older working singles or couples (n=288)	Older non-working singles or couples (n=395)	Campers / caravanners (n=344)	Non campers / caravanners (n=738)
Your primary destination	52%	59%↑	55%	49%↓	50%	55%
One of several destinations visited	27%	32%	28%	32%	35%	29%
Just stopped at whilst travelling through to somewhere else	21%	9%↓	17%	18%	15%	16%

Q11 – How often have you visited Echuca as part of a leisure getaway or holiday?

Q12 – When was the last time you went to Echuca as part of a leisure getaway or holiday?

Q13 - When you last visited Echuca as part of a leisure getaway or holiday, was Echuca...

Only asked of those who have visited Echuca

QSeg, Q7_8

Perceptions of Echuca

Section 5



Echuca – known best for the river and pleasant & relaxing

- Echuca Port Area (due to paddlesteamers) has presence as a perceptual asset

5.1 Unprompted Perceptions of Echuca The Emerging Themes – Total sample

Findings suggest Echuca is very much seen as a river town with river activities that is quaint and relaxing. Whilst not the dominant top of mind theme, the Echuca Port (and in particular paddlesteamers) has its place as a defining characteristic of Echuca.

The **dominant** emerging themes related to:

- River and water-based activities, highest in all segments

Followed by **secondary themes**:

- Pleasant, quaint and friendly
- Relax, unwind and refresh

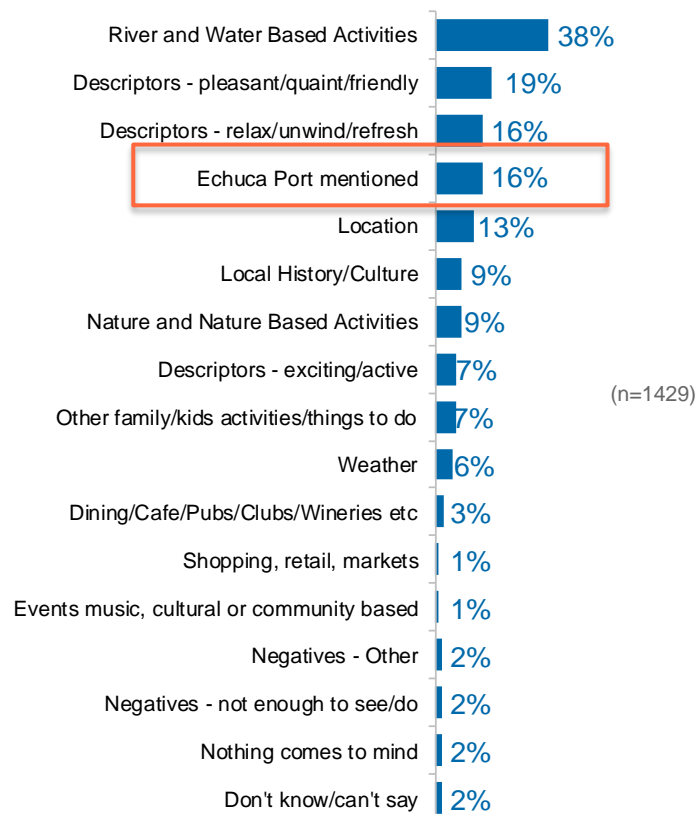
For Echuca Port area the paddlesteamers were the dominant mention (12%).

Other common themes were:

- Location
- Local history/culture
- Nature/nature activities

Negative perceptions of any kind were few

Top of mind thoughts of Echuca as a leisure or holiday destination (themes)



Refer Appendix for full details

Q14 - What words come first to mind when you think of Echuca as a leisure getaway or holiday destination?
Asked of those aware of Echuca

River / water activities is dominant image of Echuca in all segments

- Echuca Port Area has presence in all, though salience strongest in Older segments

5.2 Unprompted Perceptions of Echuca The Emerging Themes – Total sample and by segment. ...continued

There were considerable similarities in top of mind perceptions of Echuca by all segments and sub-groups, with river and Water based most cited in each, there were some variances:

Younger travellers and Families mention Nature and nature-based activities more often than Older segments
Suggesting its more than just the River for these

Families tended to perceive Echuca as Pleasant / quaint / friendly more often than other segments
Suggesting Echuca is seen as safe family friendly place to be

Older non-working segment most likely to mention Echuca Port
Suggesting the Port area is a more salient perception amongst Older travellers

Top of mind thoughts of Echuca as a leisure or holiday destination (themes)	Segment				Campers vs Non campers	
	Younger Single or couple (n=205)	Family travelling with children (n=402)	Older working singles or couples (n=365)	Older non-working singles or couples (n=457)	Campers / caravanners (n=416)	Non campers / caravanners (n=997)
River and Water Based Activities	30%↓	31%↓	45%↑	43%↑	29%↓	42%↑
Descriptors - pleasant/quaint/friendly	14%	27%↑	15%↓	18%	28%↑	15%↓
Descriptors - relax/unwind/refresh	18%	17%	16%	16%	14%	18%
Echuca Port mentioned	11%	12%↓	17%	19%↑	14%	17%
Location	21%↑	14%	12%	11%↓	11%↓	15%↑
Local History/Culture	3%↓	6%↓	10%	14%	6%↓	10%↑
Nature and Nature Based Activities	13%↑	13%↑	6%↓	6%↓	13%↑	7%↓

Refer Appendix for full details

Q14 - What words come first to mind when you think of Echuca as a leisure getaway or holiday destination?
 Statistically significantly higher/lower within the segment ↑↓
 Asked of those aware of Echuca
 0% represents n=2 or fewer

Across the market, Echuca is best seen for nature, camping and history.

- whilst access is an issue, gaps appear to exist related to Dining

5.3 Prompted Perceptions of Echuca's ability to meet traveller requirements – Total sample - Aware of Echuca and attribute considered Important

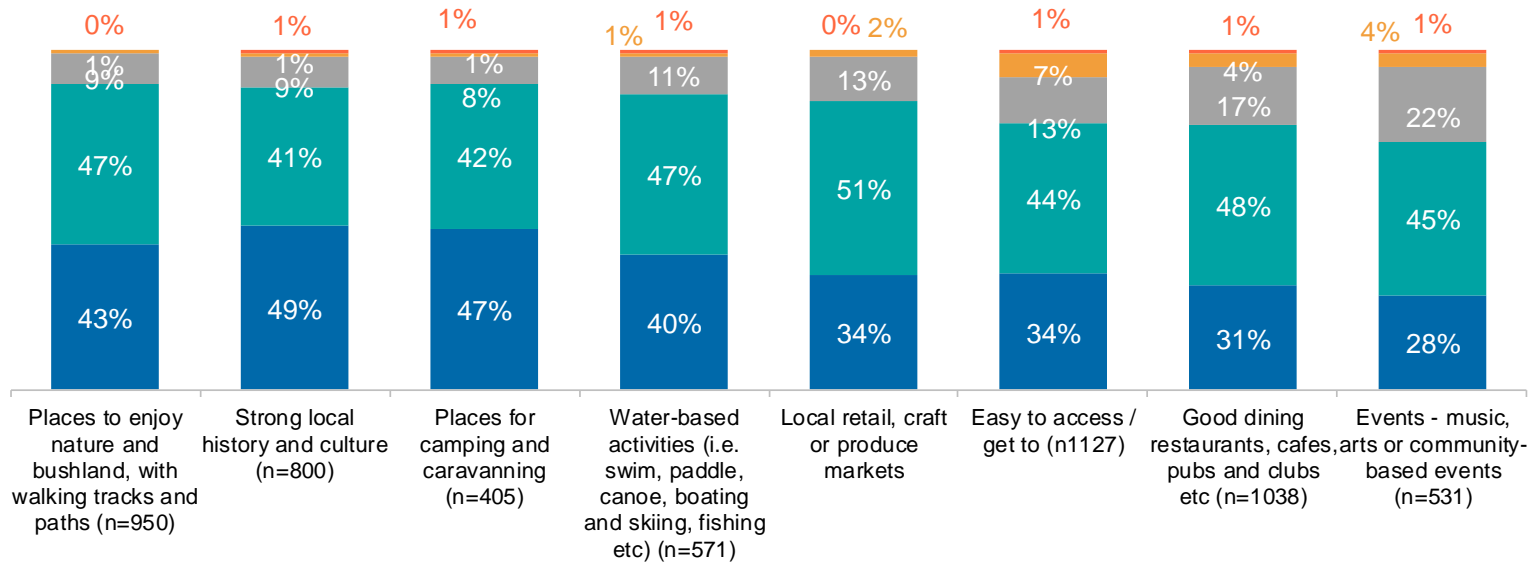
Amongst those aware, Echuca was seen as best able to meet their travel needs for **Places to enjoy nature and Strong local history** (each 90% agreement). Followed closely by **Camping and caravanning** (89%).

2nd tier aspects related to Water-based activities (87%) and Local retail craft and produce markets (85%).

Of lower perceived ability for Echuca to meet requirements related to *Dining, restaurants and café, nightclubs* (79%); Easy to access (78%) and Events (72%).

Given the high importance placed on Dining yet moderate levels perceptions for Echuca suggest this is an aspect that may need perceptual strengthening.

How most recent trip to Echuca met needs (% strongly agree / agree) by what is important to travellers (% very important / important)



■ Strongly agree ■ Agree ■ Neutral ■ Disagree ■ Strongly disagree

Q7 - How important are each of the following to YOU when selecting a place to go to for a leisure getaway or holiday?

Q15 – How strongly do you agree or disagree that Echuca has what YOU look for in a getaway or holiday destination in regard to...

Q15 asked of those aware of Echuca

Don't know response excluded

0% represents n=3

Echuca is perceived slightly differently by different segments

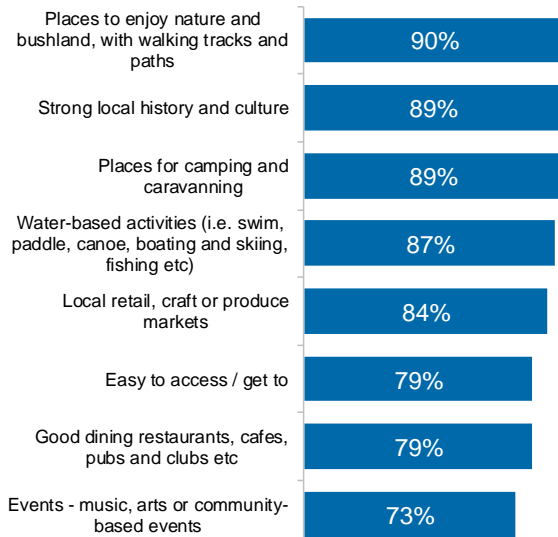
- Most positive perceptions by Family and Older non-working segments
- Least positive by Younger adult segment

5.4 Prompted Perceptions of Echuca’s ability to meet traveller requirements – By Segment - Where aware of Echuca attribute Important

By segment: Echuca is seen differently by different segments. Most positive perceptions are held by Families, followed by Older non-working segments and least so by Younger single or couple travellers. Key differences in perceptions (statistically significant) were:

- Family segment most positive re *Natural aspects bushland, walking trails and Events*
- Older non-working segment were most positive re *Local history and culture, Local retail and Dining*
- Younger single and couples had lowest agreement of Echuca meeting their *Retail and Dining needs* and lowest rating for *Easy to access*

How most recent trip to Echuca met needs by what is important to travellers (% very important / important)



(n~776)

	Segment				Campers vs Non campers	
	Younger Single or couple (n~113)	Family travelling with children (n~261)	Older working singles or couples (n~191)	Older non-working singles or couples (n~211)	Campers / caravanners (n~318)	Non campers / caravanners (n~513)
Places to enjoy nature and bushland, with walking tracks and paths	88%	93%↑	88%	90%	91%	90%
Strong local history and culture	85%	89%	88%	93%↑	90%	89%
Places for camping and caravanning	88%	90%	90%	88%	89%	-
Water-based activities (i.e. swim, paddle, canoe, boating and skiing, fishing etc)	83%	87%	86%	87%	89%↑	83%↓
Local retail, craft or produce markets	74%↓	88%	82%	89%↑	89%↑	82%↓
Easy to access / get to	66%↓	81%	79%	82%	88%↑	75%↓
Good dining restaurants, cafes, pubs and clubs etc	60%↓	83%↑	77%	86%↑	86%↑	76%↓
Events - music, arts or community-based events	70%	81%↑	67%	66%	85%↑	62%↓

Q7 - How important are each of the following to YOU when selecting a place to go to for a leisure getaway or holiday?

Q15 – How strongly do you agree or disagree that Echuca has what YOU look for in a getaway or holiday destination in regard to...

Q15 asked of those aware of Echuca - Don't know response excluded

Echuca is meeting traveller requirements as well as other destinations

- growth will likely need strategic and tactical intervention to create a clear point of difference

5.5 Prompted Perceptions of Echuca’s ability to meet traveller requirements – By Recent Visitors to Echuca vs Other destinations - Where attribute Important

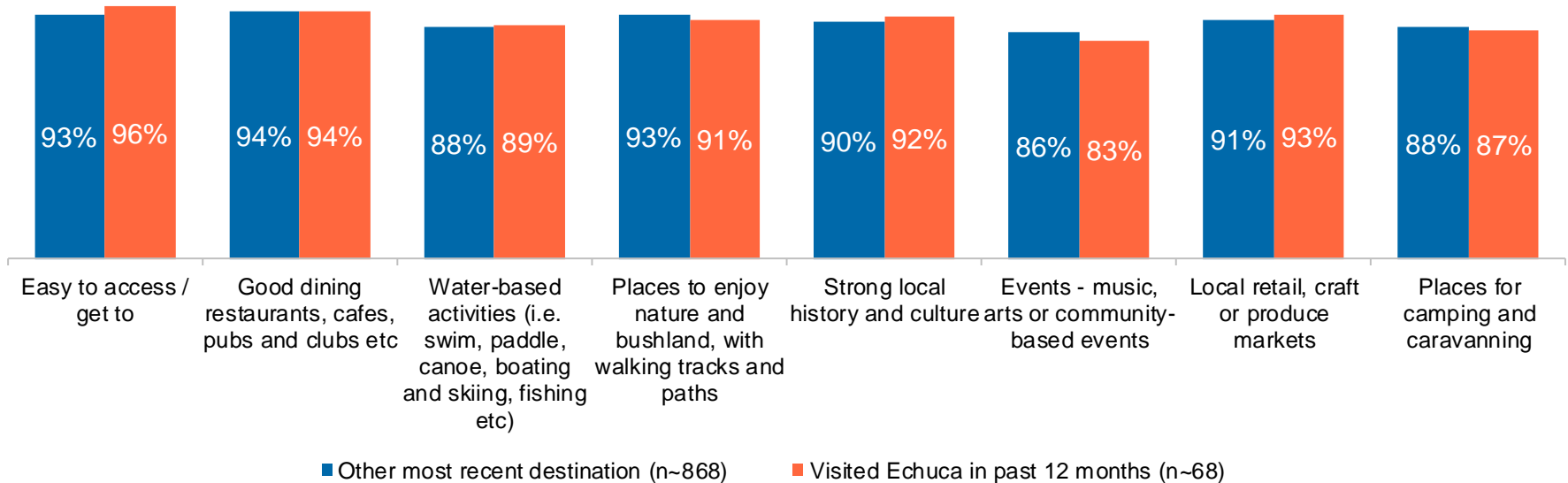
Recent visitors to Echuca (past 12 months) rated Echuca well in meeting their requirements.

These were similar to the perceptions by travellers to other most recent destination – with very little distinguishing Echuca vs other destinations at a collective.

This suggests that travellers are having their needs met by the travel destinations visited.

From a marketing perspective, this suggests growth will need to be by strategic and tactical interventions to establish clear reason to visit beyond what other locations can deliver (i.e. point of difference), such as ease of access to River, etc.

Agree with attribute – visited Echuca in past 12 months vs other most recent destination (where attribute important)



Perceptions of Echuca by recent visitors generally positive

- Most so by Family and Older aged segments than Younger singles or couple

5.5 Prompted Perceptions of Echuca's ability to meet traveller requirements – By Segment

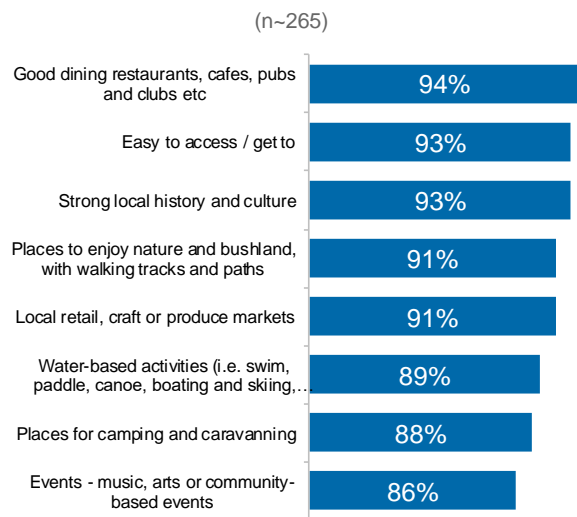
By segment

Overall, generally positive perceptions are held of Echuca by those who have visited in past 3 years, with most positive being Family, followed by Older age segments, and least positive by Younger single or couple.

Key differences:

- Families – High (90% plus) agreement on all aspects - significantly higher on local retail and events
- Older working and Non-working were similar with only the former significantly less content with Echuca's local retail
- Younger travellers – Lowest on almost all aspects, statistically significant for good dining.

How most recent visit to Echuca in past 3 years met needs (%strongly agree agree) by what is important to travellers (% very important / important)



	Segment			
	Younger Single or couple (n~39)	Family travelling with children (n~120)	Older working singles or couples (n~51)	Older non-working singles or couples (n~54)
Good dining restaurants, cafes, pubs and clubs etc	87%↓	94%	94%	97%
Easy to access / get to	86%	93%	96%	93%
Strong local history and culture	86%	95%	91%	95%
Places to enjoy nature and bushland, with walking tracks and paths	85%	91%	94%	94%
Local retail, craft or produce markets	90%	96%↑	84%↓	91%
Water-based activities (i.e. swim, paddle, canoe, boating and skiing...)	93%	91%	86%	85%
Places for camping and caravanning	89%	90%	80%	87%
Events - music, arts or community-based events	80%	92%↑	79%	76%

Campers vs Non campers	
Campers / caravanners (n~158)	Non campers / caravanners (n~117)
95%	93%
95%	91%
91%	94%
92%	92%
94%	88%
93%↑	81%↓
88%	-
90%↑	78%↓

Statistically significantly higher/lower within the segment ↑ ↓

Reasons for Visiting and Activities Undertaken in Echuca

Section 6



Reasons to visit Echuca – Visit Family & Friends and a Short Break

- The Port area (mainly paddlesteamers) whilst not the dominant driver is in the mix

6.1 Unprompted Reasons for Visiting Echuca last visit - The Emerging Themes – Total sample

Unprompted reasons for most recent visit to Echuca (regardless of when that may have been) were grouped under emerging themes.

With main reasons being **Visit family and friends** and **Short Break / long weekend / escape**

These were followed by Relax / unwind / refresh, River-based activities and general Sightseeing.

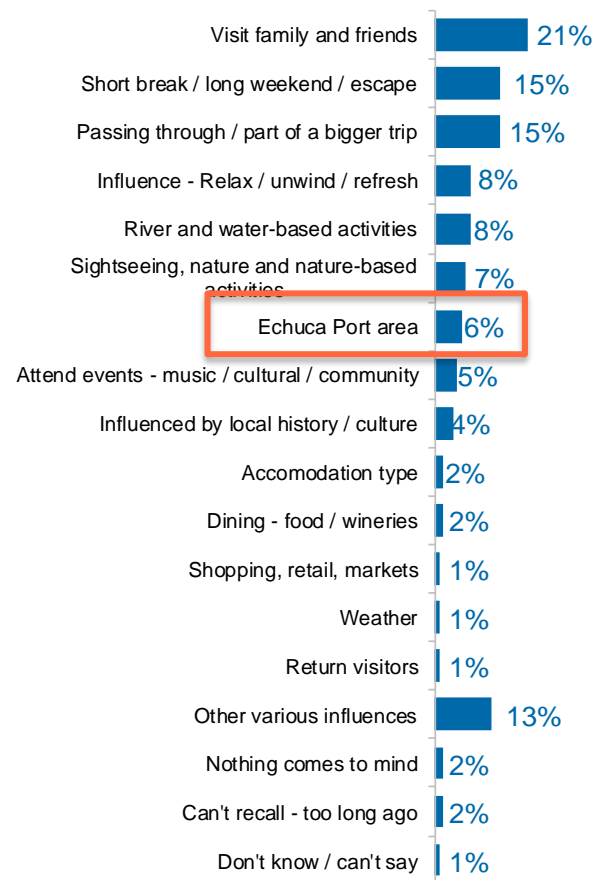
Mention of **Port area** was placed mid tier of reasons (6%) – with most often cited specific aspect related to the Port Area being paddlesteamers (accounting for 4%).

Core motivators for visiting Echuca are centred on the personal reasons for taking a holiday and whilst not the main motivator the Port area (and in particular paddlesteamers) is an attraction for some 1:20 visitors.

The Port area/paddlesteamers were mentioned more often than other aspects of Echuca such as events, local history, dining and shopping as reasons for visiting Echuca.

And note: with approx. 1:8 visitors to Echuca having been on route to other destinations suggest opportunities could be explored to increase their stay or spend.

Main reasons for visiting Echuca (themes)



(n=1126)

Refer Appendix for all items under each Theme

Reasons to visit Echuca – reasonably consistent across segments

6.2 Unprompted Reasons for Visiting Echuca last visit - The Emerging Themes –By segment

Unprompted reasons for visiting Echuca displayed little variance between segments, suggesting a similar mix of factors exist as reasons for visiting Echuca.

What minor variances arose were: Older non-working segment more likely than others to have been passing through as part of a bigger trip; and Younger segment most mentioned aspects related to general sightseeing, nature and nature-based activities.

Whilst not statistically significant, mention of the Port area was somewhat higher by Older non-working segment (7%).

Main reasons for visiting Echuca (themes)	Segment				Campers vs Non campers	
	Younger Single or couple (n=115)	Family travelling with children (n=299)	Older working singles or couples (n=300)	Older non-working singles or couples (n=412)	Campers / caravanners (n=335)	Non campers / caravanners (n=779)
Visit family and friends	22%	18%	22%	21%	17%↓	23%
Short break / long weekend / escape	21%	15%	15%	14%	13%	16%
Passing through / part of a bigger trip	13%	9%↓	15%	18%↑	16%	14%
Influence - Relax / unwind / refresh	4%	10%	10%	7%	6%	9%
River and water-based activities	7%	5%	10%	8%	8%	7%
Sightseeing, nature and nature-based activities	14%↑	5%	6%	7%	7%	6%
Echuca Port area	4%	6%	4%	7%	6%	6%
Attend events - music / cultural / community	2%	3%	6%	7%	4%	6%
Influenced by local history / culture	1%	2%	4%	6%↑	2%	4%
Accommodation type	3%	3%↑	2%	1%	4%↑	1%↓
Dining - food / wineries	3%	2%	2%	1%	2%	2%
Shopping, retail, markets	1%	2%	1%	1%	3%↑	1%↓

Statistically significantly higher/lower within the segment ↑↓

Q16 – What were the main reasons for visiting Echuca the last time you went there as part of a getaway or holiday?
 Asked of those who have visited Echuca in the past
 0% represents n=2 or fewer

Echuca Port area is the precinct most visited in Echuca

- Each of the activities in Echuca Port area are undertaken by at least 1:3 visitors

6.3 Activities undertaken last visiting Echuca – and Echuca Port area - Total sample

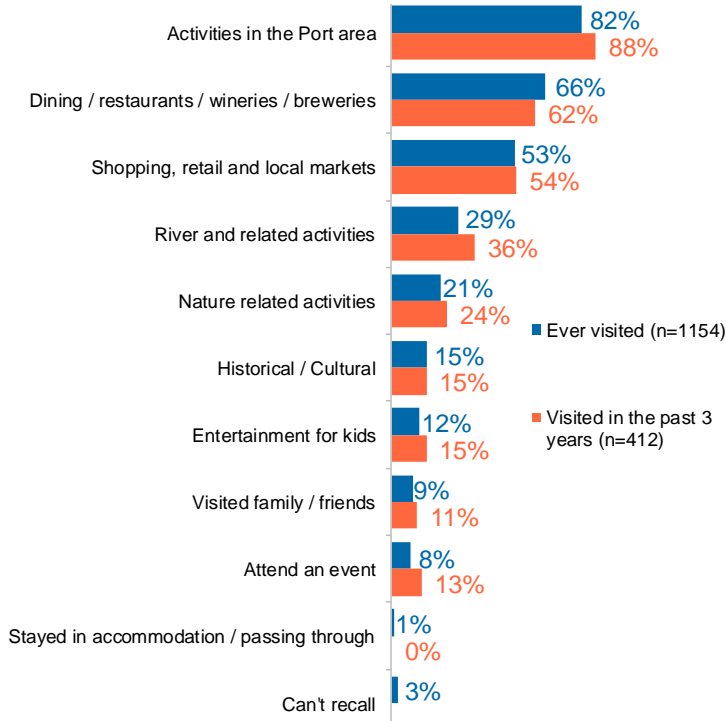
Whilst the Echuca Port area may not have been the dominant reason for visiting Echuca it is the area most attended and available activities most undertaken when visiting

Type of Activities undertaken in Echuca

Activities within the Echuca Port area are the most common undertaken when visiting Echuca.

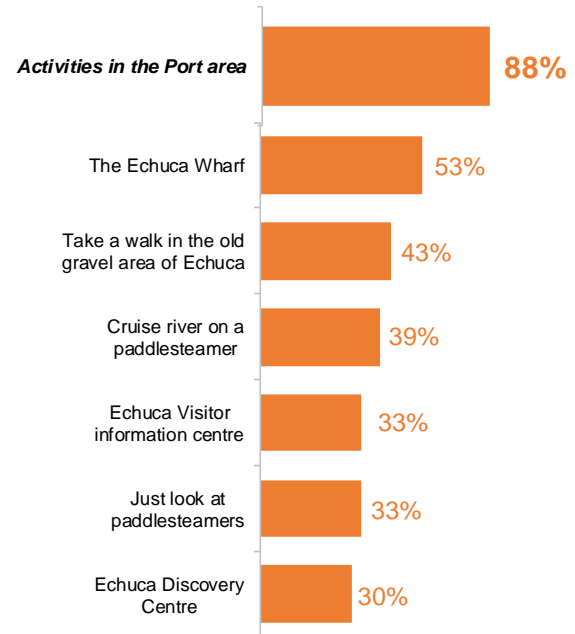
More so than either Dining/restaurants, Shopping, or other River and related activities

Activities have been reasonably stable over time.



Specific activities in Echuca Port area By those who visited in past 3 years

Each activity within The Port Area has been undertaken by a reasonable proportion of visitors. With range from 1:2 who specified the Echuca Wharf to some 1:3 who visited the Visitor Information Centre and Echuca Discovery Centre



Q17 – What did you do when you last visited Echuca as part of a leisure getaway or holiday?
Asked of those who have visited Echuca in the past
0% represents n=2

Whilst report reference is to *old gravel area* of Echuca the survey question was referenced as *old pebble street* of Echuca

Echuca Port area is the precinct most visited by all segments

- but somewhat less by Younger travellers

6.4 Prompted activities undertaken last visiting Echuca – Grouped activities– by segment

Echuca Port area most common activity by each segment .

Some variances in activities by segment:

Younger: were least likely to visit The Port area or to Shop and somewhat less likely to Dine. Second most likely to for River activities.

Families: most likely to engage in River activities, entertainment for kids and though less frequent – to attend events.

Older Working: More likely to dine and shop and with some still participating in water and nature activities.

Older non-working: Most likely to dine; least likely to participate in River or Nature activities but somewhat more into History/Culture.

Activities last undertaken in Echuca of those who have visited in the past 3 years(themes)	Segment				Campers vs Non campers	
	Younger Single or couple (n=61)	Family travelling with children (n=161)	Older working singles or couples (n=83)	Older non-working singles or couples (n=107)	Campers / caravanners (n=199)	Non campers / caravanners (n=205)
Activities in the Port area	79%↓	89%	92%	91%	88%	89%
Dining / restaurants / wineries / breweries	48%↓	42%↓	78%↑	87%↑	47%↓	78%↑
Shopping, retail and local markets	46%	43%↓	63%	69%↑	49%↓	60%↑
River and related activities	41%	51%↑	28%	16%↓	50%↑	22%↓
Nature related activities	26%	24%	27%	22%	22%	26%
Historical / Cultural	13%	14%	16%	18%	18%	13%
Entertainment for kids	10%	26%↑	7%	6%↓	17%	12%
Visited family / friends	11%	9%	13%	10%	8%↓	14%↑
Attend an event	11%	20%↑	8%	7%↓	21%↑	6%↓
Stayed in accommodation / passing through	-	-	2%	-	1%	0%
Can't recall	-	-	-	-	-	-

Older visitors to Port Area do more at the Port

- perhaps Port lacks appeal by Younger aged and there are limits to what Families can afford

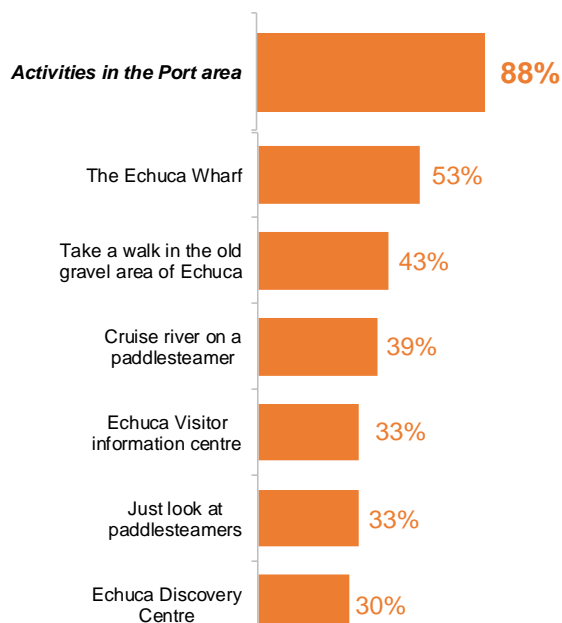
6.5 Prompted activities in Port Area during last visit to Echuca in past 3 years – Detailed activities– Total sample

By Segment: There is a progressive increase by life-stage segment in percentage of visitors who (during their most recent visit to Echuca) participated in the activities available in the Echuca Port Area:

- Younger single are less likely to visit Port at all and less likely to participate in activities in Port area
- Family segments who despite high visitation are less likely to participate in specific activities in Port Area
- Older segments more likely to have visited and undertaken activities at the Port

This suggests Older visitors to Echuca Port do more at the Port and whilst Younger are less likely to visit at all, Families with high visitation may be more selective in mix of activities undertaken. Is there a cost factor which may discourage Families from doing more at the Port?

Activities last undertaken in Echuca Port area of those who have visited in the past 3 years (themes)



(n=412)

	Segment				Campers vs Non campers	
	Younger Single or couple (n=61)	Family travelling with children (n=161)	Older working singles or couples (n=83)	Older non-working singles or couples (n=107)	Campers / caravanners (n=199)	Non campers / caravanners (n=205)
Activities in the Port area	79%↓	89%	92%	91%	88%	89%
The Echuca Wharf	43%	38%↓	65%↑	73%↑	46%↓	62%↑
Take a walk in the old gravel area of Echuca	34%	32%↓	57%↑	54%↑	37%↓	50%↑
Cruise river on a paddlesteamer	23%↓	34%	41%	53%↑	31%↓	46%↑
Echuca Visitor information centre	26%	35%	30%	37%	36%	31%
Just look at paddlesteamers	36%	28%	37%	35%	35%	32%
Echuca Discovery Centre	33%	31%	28%	28%	28%	33%

Q17 – What did you do when you last visited Echuca as part of a leisure getaway or holiday?

Asked of those who have visited Echuca in the past

Whilst report reference is to old gravel area of Echuca the survey question was referenced as old pebble street of Echuca

Different segments participate in different activities in Echuca

– there may be opportunities to increase use of some activities by different traveller types

6.6 Prompted activities undertaken during last visit to Echuca – Detailed Other activities– Total and By Segment

The following is a summary of Other activities undertaken by visitors when last visiting Echuca (irrespective of recency)

Dining/restaurant/wineries/breweries (66% overall)

- Restaurants and café was most common activity (63%) by each segment and more so by Older aged segments.
- Wineries were 2nd (16%) and more common in Older working and Non-working segments.

Shopping, retail and local markets (53% overall)

- Going shopping for essentials and visiting local retailers were equal most common retail activity (36% each) and reasonably consistent across segments and sub-groups.
- This was followed by Attending local handicraft or produce markets (17%) – also consistent by segment.

River and related activities (29% overall)

- The two most common river activities were Swimming (15%) and Fishing (12%).
- Both more often done by Family and Younger adult segments (and least by Older Non working).

Nature related activities (21% overall)

- The most common nature activity was bush walking / trails (17%) followed by national parks (9%).
- Each activity was undertaken more often by Younger aged, followed by Family segments.

History / Culture (15%) overall

- The recorded activity related to visiting an art/gallery or museum was most often done by Older non-working segment (17%).

Entertainment for kids (12% overall)

- Most common entertainment for kids involved outdoor places (11%) – double that of indoor places (6%).

Attend event (8% overall)

- The most common event was *Go to Southern Ski race* (3% of visitors). This was followed by Winter Blues Festival, Elmore Agricultural field day and Riverboats Music festival (mention by 2% each).
- Attendance at festivals though low in each were somewhat higher by Younger and Family segments.

These findings suggest that different travel segments to Echuca have different needs and interests. There may be opportunities to explore options to increase participation in some activities by some segments, i.e.:

- *Increase perceptions of Echuca as a place for foodies, wine and distilleries etc. amongst Younger travellers*
- *Facilitate river-based activities by travellers who are not camping and caravanning*
- *Easy walking trails for Older aged travellers*
- *What events of the area might be more engaging amongst Younger travellers*
- *Given that Older travellers are a big segment – are there some events that could be developed to attract more of the 60 years plus segment*

Refer Appendix for details

Covid-19 may have impacted activities in Echuca and Port area

– but some return to pre-covid levels arising

6.7 Prompted activities undertaken in Echuca and in Port Area By Recency of Visit – Total sample and by segment

Assessment of activities undertaken in Echuca and within the Port Area over time (i.e. recency of last visit) indicates that Covid-19 has had an impact.

- Dining and Shopping when visiting Echuca and most activities available in the Port area appears to have reduced during visits 1-2 years ago. And whilst some have picked up again in past 12 months, Cruise on Paddlesteamer has yet to rebound.
- In contrast, River based activities increased at the same time (1-2 years ago) and since declined to prior levels.

Suggesting Covid-19 impacted how visitors engaged with different experiences available in the Echuca area.

Activities last undertaken in Echuca and port area by most recent visit to Echuca	Total	Most recent visit Echuca					
	Total (n=1154)	In past 12 months (n=108)	Between 1-2 years ago (n=125)	Between 2-3 years ago (n=179)	4-5 years ago (n=235)	6-10 years ago (n=159)	More than 10 years ago (n=326)
Activities in the Port area	82%	84%	90%↑	90%↑	89%↑	82%	72%↓
Dining / restaurants / wineries / breweries	66%	60%	54%	69%	71%	82%↑	63%
Shopping, retail and local markets	53%	55%	42%	62%↑	60%↑	58%	47%↓
River and related activities	29%	31%	42%↑	34%	27%	25%	24%↓
Nature related activities	21%	30%↑	19%	25%	22%	27%	16%↓
Historical / Cultural	15%	13%	15%	17%	17%	19%	11%↓
Entertainment for kids	12%	14%	16%	14%	13%	10%	12%
Visited family / friends	9%	16%↑	10%	8%	11%	9%	7%
Attend an event	8%	12%	14%↑	13%↑	8%	6%	3%↓
Stayed in accommodation / passing through	1%	-	2%	-	-	-	1%
Theme - Activities in the Port area	82%	84%	90%↑	90%↑	89%↑	82%	72%↓
The Echuca Wharf	53%	55%	46%	57%	61%↑	64%↑	44%↓
Cruise river on a Paddlesteamer	40%	30%↓	30%↓	50%↑	46%	47%	36%↓
Take a walk in the old gravel area of Echuca	39%	46%	36%	46%	47%↑	46%	27%↓
Just look at Paddlesteamers	31%	35%	36%	29%	31%	30%	29%
Echuca Visitor information centre	29%	34%	30%	35%	31%	35%	22%↓
Echuca Discovery Centre	22%	27%	34%↑	29%↑	25%	21%	10%↓

Statistically significantly higher/lower within the segment ↑↓



Q17 – What did you do when you last visited Echuca as part of a leisure getaway or holiday?

Asked of those who have visited Echuca in the past

Q12 – When was the last time you went to Echuca as part of a leisure getaway or holiday? (Only asked of those who have ever visited Echuca)

0% represents n=2 or fewer

Perceptions of Echuca Port Area

Section 7



Perceptions of Port Area centred on its History and Paddlesteamers - and with old world charm that closely aligns with perceptions of Echuca itself and the river

7.1 Unprompted Perceptions of Echuca Port Area - The Emerging Themes – Total sample

Unprompted perceptions of the Echuca Port area by those who have ever visited the Port were positive

Overall, the most common emerging perceptions of the Port area related to:

- Local history and culture which included:
 - History/historic/early Victoria/early Australia (25%)
 - Authentic /well done/restored (4%)
- Port area being exciting, active, interesting; which included
 - Interesting/fascinating/amazing (12%)
 - Good/great place (10%)
- followed by a variety of aspects of the Port area itself; which included:
 - paddlesteamers (12%)
 - Old town/old style/rustic (5%)

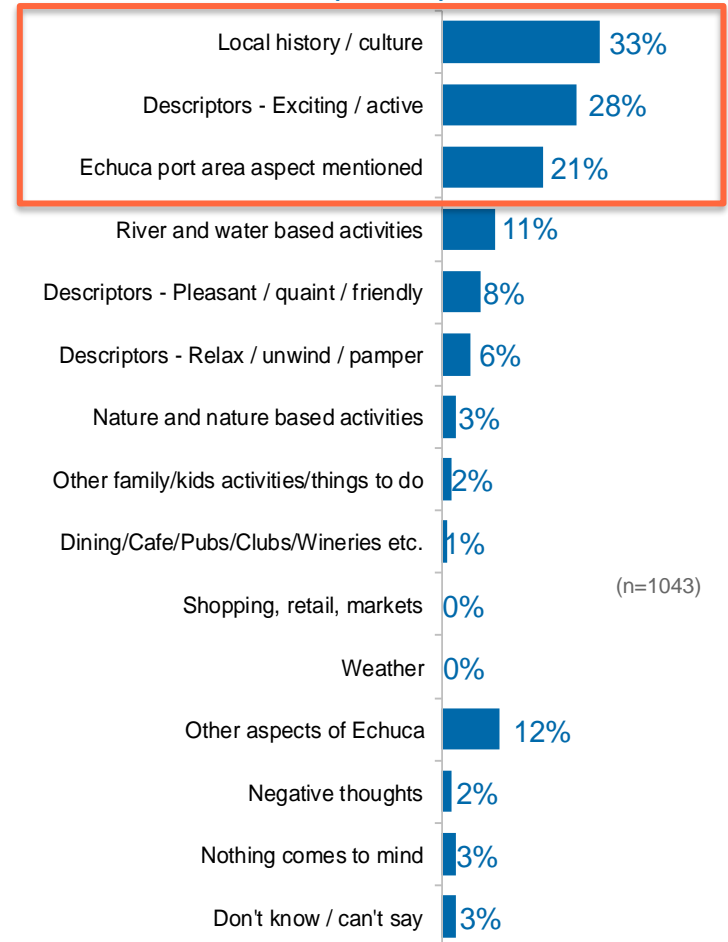
These were then followed by a variety of other perceptions which related more to perceptions previously reported of Echuca itself, i.e.:

- *River and water-based activities; being pleasant/quaint/friendly; and Relax, unwind, pamper etc*

These findings suggest that the Port Area image is one of a place of historic significance, with paddlesteamers and old-world charm. It also shows that the image of The Port Area is closely entwined with that of Echuca itself (and vice-versa)

Refer Appendix for full details of aspects under each theme

Top of mind Perceptions of Echuca Port area (themes)



Q19 – What words first come to mind when you think of the Echuca Port area?
 Asked of those who have visited The Echuca port area
 0% represents n=4

Historic image of Echuca Port resonates more with Older segments

- history by itself may lack appeal or need to be more contemporary for Younger travellers

7.2 Unprompted Perceptions of Echuca Port Area - The Emerging Themes –By segment...continued

By Segment, some variances did exist in perceptions of Echuca Port Area:

Younger: Least likely to mention Local History culture or descriptors of exciting and active (suggesting lack of general appeal).

Families: Were also less likely (than older groups) to mention Local history/culture but Most often mentioned it as Exciting / active interesting (suggesting it may be a pleasant surprise).

Older Working and Non-working segments most often stated Local History and Culture as descriptors of the Echuca Port area.

These suggest the historic significance of Echuca Port is more salient an issue to Older aged cohorts. Perhaps it needs to be made more contemporary.

Top of mind Perceptions of Echuca Port area (themes)	Segment				Campers vs Non campers	
	Younger Single or couple (n=97)	Family travelling with children (n=292)	Older working singles or couples (n=272)	Older non-working singles or couples (n=382)	Campers / caravanners (n=325)	Non campers / caravanners (n=706)
Local history / culture	14%↓	22%↓	38%↑	42%↑	23%↓	37%↑
Descriptors - Exciting / active	22%	32%	24%	30%	37%↑	24%↓
Echuca port area mentioned	19%	14%↓	22%	24%↑	15%↓	23%↑
River and water based activities	10%	11%	10%	11%	11%	10%
Descriptors - Pleasant / quaint / friendly	10%	10%	6%	7%	10%	7%
Descriptors - Relax / unwind / pamper	7%	7%	8%	4%↓	6%	6%
Nature and nature based activities	1%	5%↑	3%	2%	3%	3%
Other family/kids activities/things to do	2%	3%	1%	2%	2%	2%
Dining/Cafe/Pubs/Clubs/Wineries etc.	1%	1%	1%	1%	1%	1%
Shopping, retail, markets	1%	1%	-	-	-	1%
Weather	-	0%	0%	1%	1%	0%
Other aspects of Echuca	14%	15%↑	14%	7%↓	14%	11%



Statistically significantly higher/lower within the segment ↑↓

Q19 – What words first come to mind when you think of the Echuca Port area?
Asked of those who have visited The Echuca port area

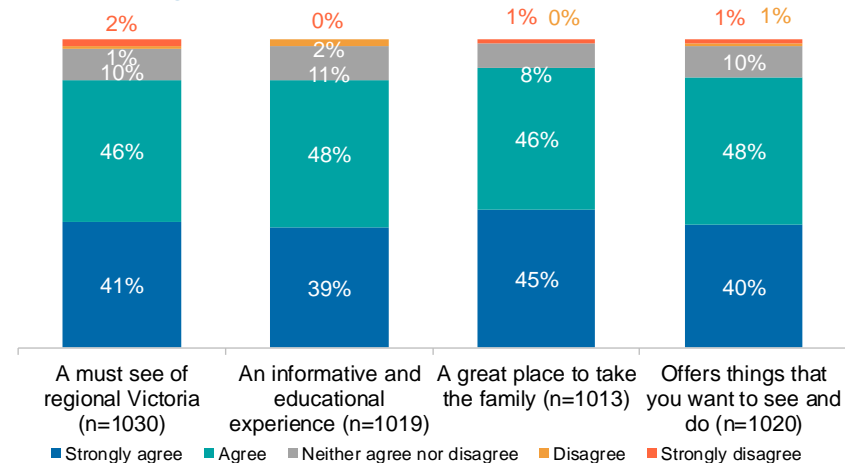
Attitudes towards Port area positive by Families and Older travellers - but considerably less so by Younger aged travellers

7.3 Prompted Attitudes of Echuca Port Area – if aware of Echuca Port Area - Total sample and by segment

Across the total sample and despite unprompted perceptions of the Port area being mainly historic based, attitudes were generally positive with:

- 91% - agreeing it was a great place to take the family
- 88% - offers things that you want to see and do
- 87% - a must see of regional Victoria
- 87% - informative & educational experience

Agreement that the Echuca Port area is...



By Segment:

Attitudes towards the Port area were similarly positive by Family and Older working and non-working segments with considerably fewer positive views held by Younger aged segment.

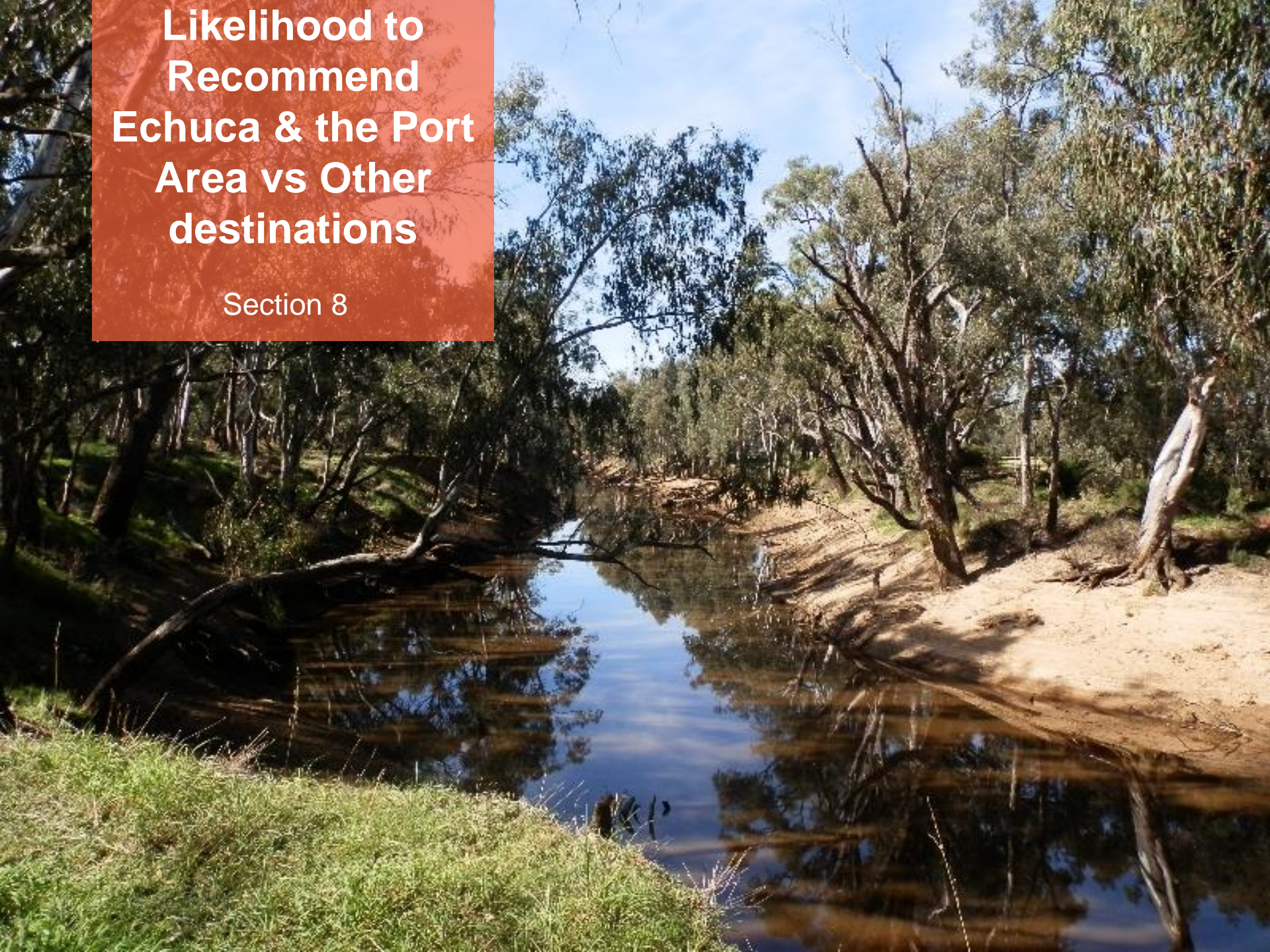
Agreement that the Echuca Port area is... (% strongly agree / agree)

	Segment				Campers vs Non campers	
	Younger Single or couple (n~92)	Family travelling with children (n~288)	Older working singles or couples (n~267)	Older non-working singles or couples (n~374)	Campers / caravanners (n~319)	Non campers / caravanners (n~688)
A must see of regional Victoria	74%↓	88%	87%	88%	91%↑	85%↓
An informative and educational experience	71%↓	85%	88%	90%↑	91%↑	85%↓
A great place to take the family	83%↓	91%	93%	92%	92%	90%
Offers things that you want to see and do	77%↓	90%	88%	89%	92%↑	86%↓

Statistically significantly higher/lower within the segment ↑↓

Likelihood to Recommend Echuca & the Port Area vs Other destinations

Section 8



Perhaps one can't recommend Echuca without the Port

- Family segment most likely to recommend both Echuca and the Port area
- Explore options to build word of mouth sharing of experiences – especially amongst Families

8.1 Likelihood to recommend Echuca and The Port to friends and family – Total sample and by segment

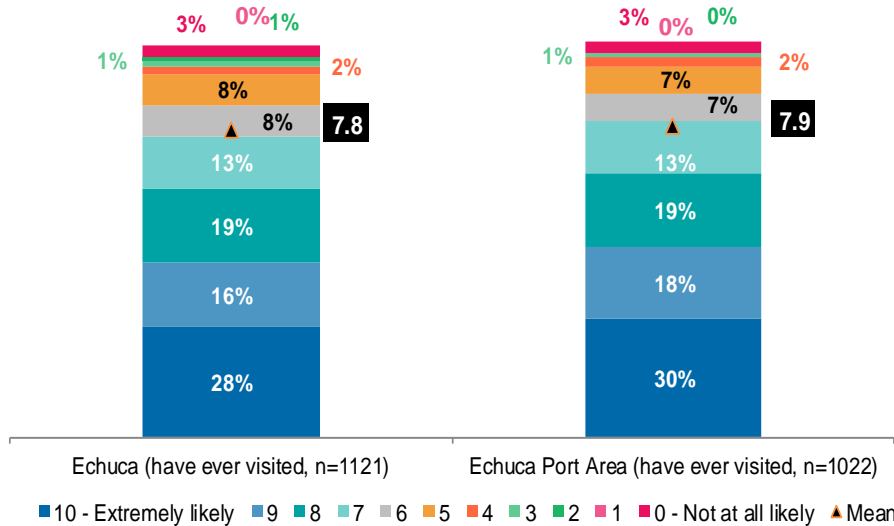
By those who have ever visited, the likelihood to recommend Echuca and The Port area to friends and family were both strong with 63% and 66% respectively displaying a High Likelihood (score 8-10) and few unlikely to (score 0-4).

Families significantly more likely to recommend Echuca and the Port Area to others.

What opportunities exists to leverage word of mouth by Families?

Perhaps older persons are just less likely to admit they would recommend any destination to others (rather than results being specific to Echuca).

Likelihood to recommend (total sample who have ever visited)



Likelihood to recommend (% rating 8-10)

	Segment				Campers vs Non campers	
	Younger Single or couple (n~105)	Family travelling with children (n~300)	Older working singles or couples (n~281)	Older non-working singles or couples (n~387)	Campers / caravanners (n~336)	Non campers / caravanners (n~723)
Echuca (have ever visited)	57%	69%↑	60%	63%	74%↑	58%↓
Echuca Port Area (ever visited)	61%	73%↑	63%	66%	77%↑	62%↓

Statistically significantly higher/lower within the segment ↑↓

Echuca and Port area stand up well against other travel destinations - ranked equal 4th on likelihood to recommend

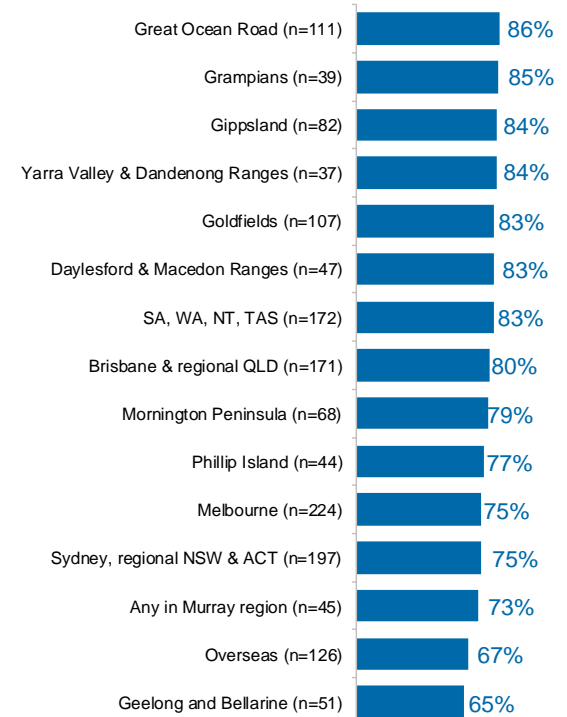
8.2 Likelihood to recommend Echuca and Port vs Other destinations to friends and family – By recent visitors

Likelihood to recommend **Echuca and Echuca Port area 83% each** (score 8,9,1) was marginally higher than likelihood to recommend Other destinations visited most recently 78%.

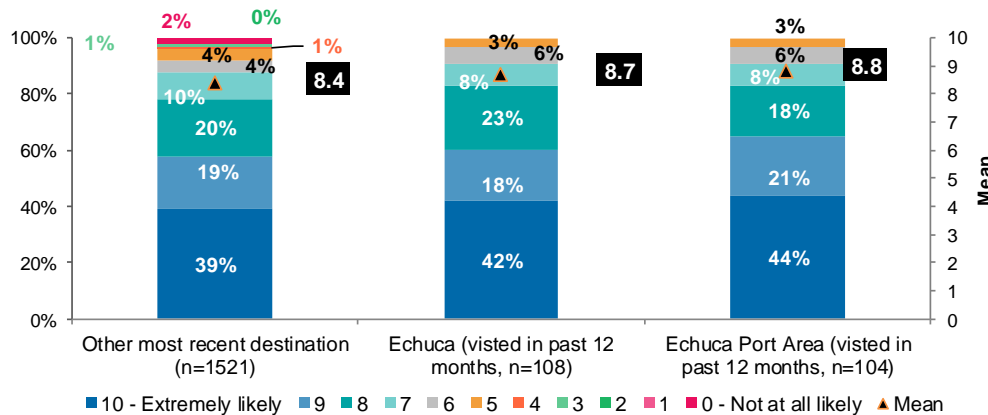
Likelihood to recommend vs specific Victorian locations travelled to most recently shows that **Echuca at 83%** would be **ranked equal 4th** (with Goldfields, Daylesford).

This was higher than the average for all Murray Regions visited most recently (average 73%).

Likelihood to recommend family and friends to visit... (% rating 8-10)



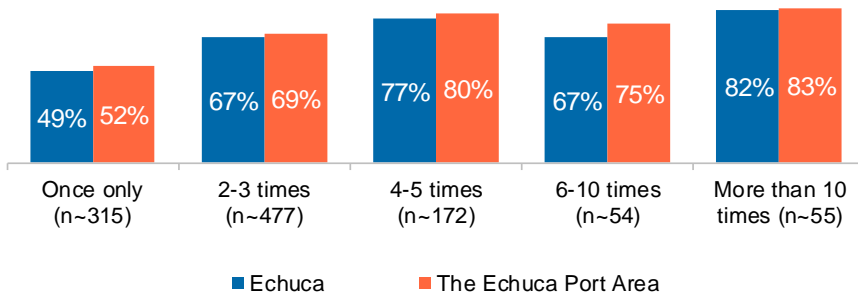
Likelihood to recommend (most recent other destination vs Echuca in last 12 months)



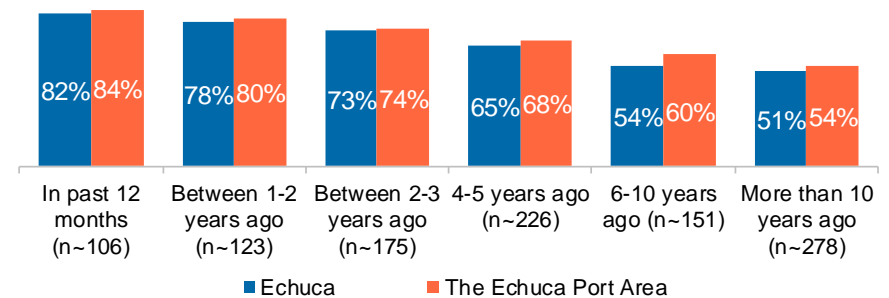
Visitors in the past 12 mths were most likely to recommend Echuca & the Port area

8.3 Likelihood to recommend Echuca and The Port By Frequency and Recency of visiting Echuca

Likelihood to recommend Echuca and The Port by frequency visited Echuca (% rating 8-10)



Likelihood to recommend Echuca by recency of visiting Echuca (% rating 8-10)



Repeat visitors are more likely to recommend Echuca and The Port than those who have visited less often.

Likelihood to recommend Echuca and the Port was highest amongst those who have visited in the past 12 months (82% and 84% respectively).

This suggests that the experience of previous visitors (i.e. – 4 years or more) may not have yielded as a positive an experience as they may have today and opportunities may exist to re-engage with these, i.e. Time to come back to Echuca

Non-Visitors Considerations and Reasons for Not visiting Echuca

Section 9



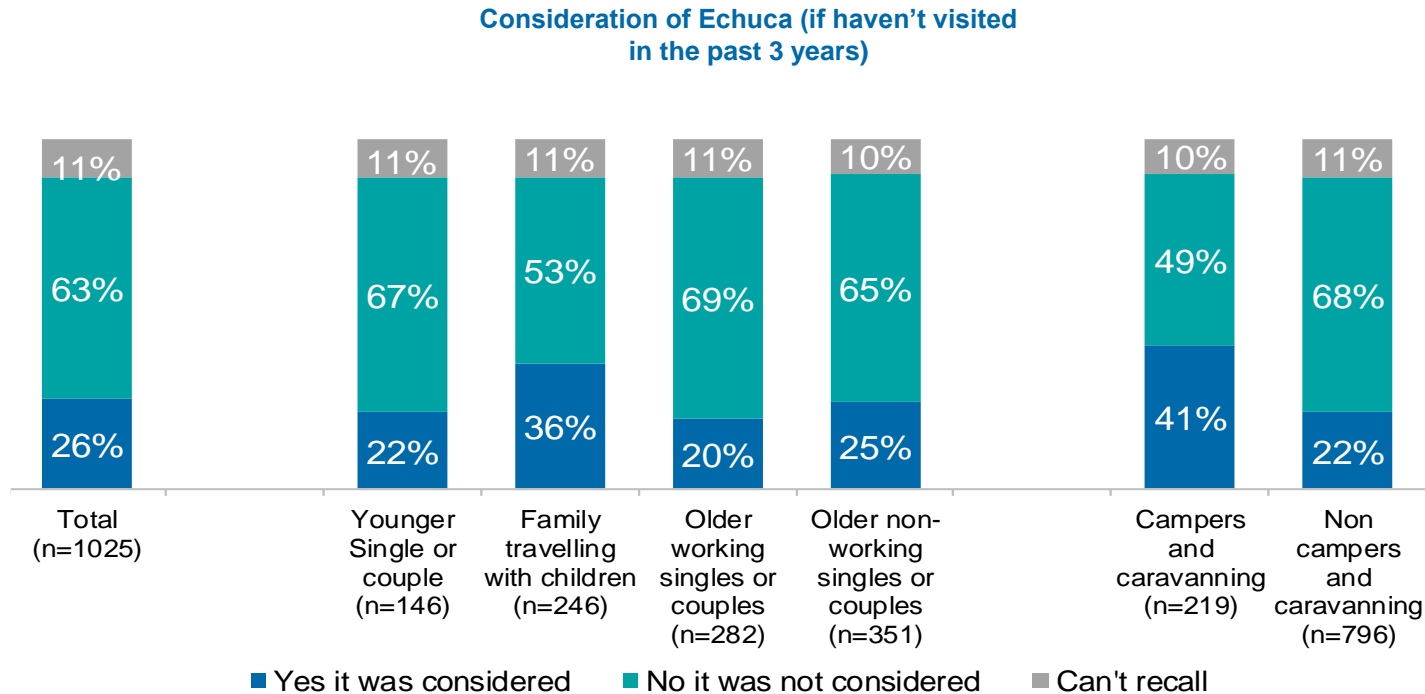
Approx 1:4 non visitors had considered Echuca

- Families most likely to have considered (but not done so)
- Younger segment least likely to consider

9.1 Considerations given to visiting Echuca (if not visited in past 3 years) – Total sample and By segment

Of those who had not visited Echuca in past 3 years as part of a leisure getaway, 26% had considered Echuca.

By Segment: Highest to consider Echuca was the Family segment (36%) and Camper and caravanners (41%). Other segments were similar to each other.



Three main reasons for not visiting Echuca align with segment

- Visited previously (Older), Too far (Family) and Not enough to do (Younger)
- Consider strategies to counter each

9.1 Reasons for not visiting Echuca (if not visited in past 3 years) – Total sample and By segment

Reasons for not visiting Echuca

The three dominant reasons for not visiting Echuca were:

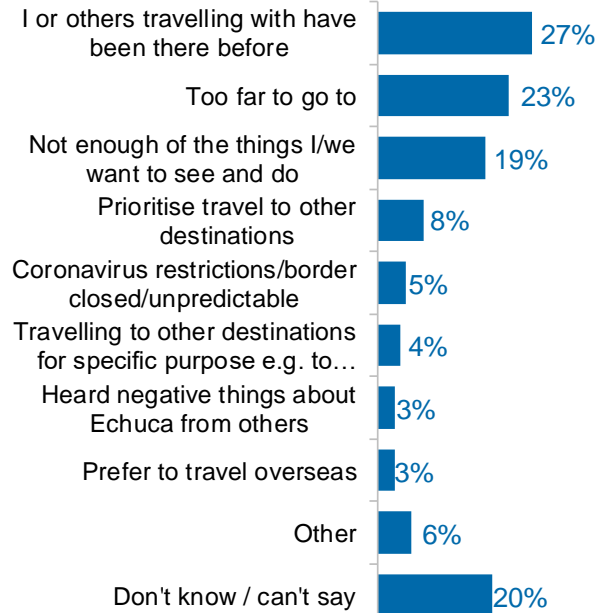
- I or others have been there before (mainly Older segment)
- Too far to go (mainly Younger and Family segments)
- Not enough of the things we seek to do (mainly Younger)

Suggests strategies needed to counter each

- Entice back - Time to come back campaign (a lot has changed)
- Reduce obstacles to distance – i.e. Just a few hours drive
- Address perceptual gaps and barriers that exist for Younger group

Reasons for Not visiting Echuca

(n=1025)



	Segment				Campers vs Non campers	
	Younger Single or couple (n=97)	Family travelling with children (n=292)	Older working singles or couples (n=272)	Older non-working singles or couples (n=382)	Campers / caravanners (n=325)	Non campers / caravanners (n=706)
I or others travelling with have been there before	14%↓	24%	29%	32%↑	27%	27%
Too far to go to	33%↑	30%↑	22%	16%↓	27%	22%
Not enough of the things I/we want to see and do	31%↑	17%	20%	13%↓	16%	20%
Prioritise travel to other destinations	3%	4%	12%↑	11%	6%	9%
Coronavirus restrictions/border closed/unpredictable	2%	6%	3%	7%↑	5%	5%
Travelling to other destinations for specific purpose e.g. to...	2%	2%	4%	5%	1%	4%
Heard negative things about Echuca from others	5%	9%↑	1%		6%↑	2%↓
Prefer to travel overseas	1%	1%	4%	3%	0%	3%
Other	5%	2%	5%	11%↑	7%	6%
Don't know / can't say	18%	22%	17%	21%	17%	20%

Statistically significantly higher/lower within the segment ↑ ↓

Q21 – Thinking back to your leisure getaway or holidays over the past 3 years, was Echuca ever considered as a destination to go to?
 Q22 - Why [did you consider but not visit Echuca or did you not consider visiting Echuca] in the past 3 years? Please select all that apply.

Sources of Information in planning breaks and holidays

Section 10



Travellers use various sources to plan trips – most are digital based

- whilst demographic differences exist in sources used, the internet is main source in all cohorts

10.1 Sources of information used – Total sample and by demographic

Overall, the two sources of information used most and considered most helpful in planning trips were:

- **Internet searches** (57% and 34% respectively)
- **Recommendations** from family and friends (42% and 16%)

Also used widely as general source were: accommodation websites, specialist travel websites such as Trip Advisor, travel shows on TV, social media, travel sections in newspapers and travel guides from state travel authorities.

By demographic (refer following pages)

Differences more often found for sources used rather than most helpful:

- **By gender:** Females more likely to use a greater range of sources of information and especially so on those involving digital technology (internet searches, accommodation websites, social media) – as well as recommendations from others.

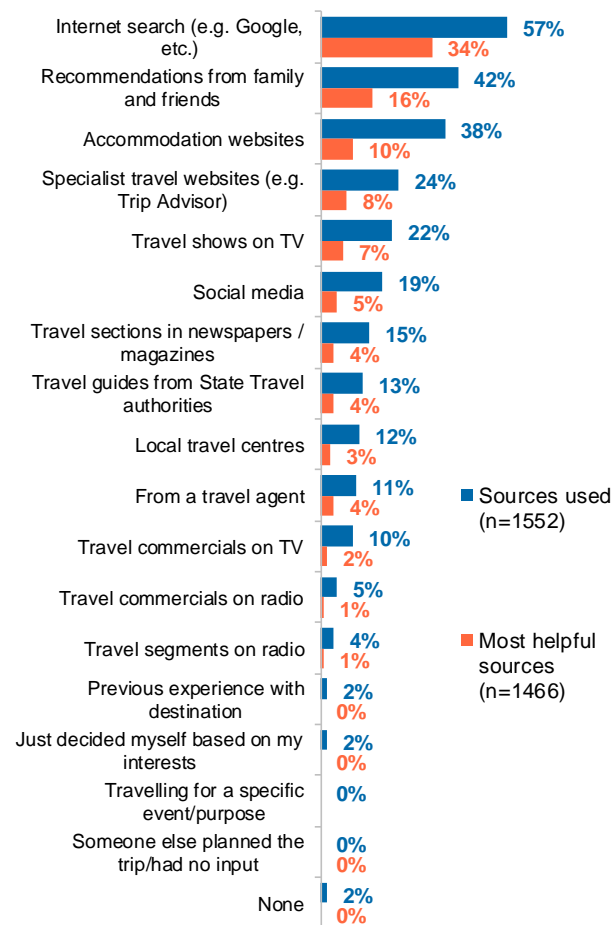
This suggests females are more often the holiday planner – or at least the acquirer of information)

- **By age:** the main differences were:
 - social media used more by younger ages and declines with age
 - Travel shows on TV used most by mid-life stages 40 to 69 years

In terms of **Most helpful sources** the key demographic differences were:

- 70 y.o plus rely most on Internet plus recommendations from others
- 18-29 y.o. rely as much on social media as they do internet searches

Sources of information used vs most helpful sources of information



Q28 – Thinking about all your leisure breaks or holidays over the past 3 years, what sources of information have you used when considering where to go to or when planning your trip? Please select all that apply

Q29 – Overall, which of the sources of information (you have used) have you found MOST helpful when considering where to go to or when planning your trip? Please select one option
0% represents n=7 or fewer

Sources of information used when planning trip	Total	Gender		Age					
	Total (n=1552)	Male (n=740)	Female (n=808)	18-29 (n=153)	30-39 (n=259)	40-49 (n=291)	50-59 (n=255)	60-69 (n=308)	70+ (n=286)
Internet search (e.g. Google, etc.)	57%	54%	59%↑	54%	56%	58%	59%	59%	53%
Recommendations from family and friends	42%	36%↓	47%↑	44%	41%	46%	40%	39%	40%
Accommodation websites	38%	35%↓	41%↑	37%	36%	38%	43%	40%	35%
Specialist travel websites (e.g. Trip Advisor)	24%	23%	26%	24%	20%	24%	26%	28%	23%
Travel shows on TV	22%	23%	21%	13%↓	18%	27%↑	26%↑	24%	17%↓
Social media	19%	13%↓	24%↑	44%↑	29%↑	27%↑	13%↓	7%↓	4%↓
Travel sections in newspapers / magazines	15%	17%↑	12%↓	8%↓	10%↓	13%	14%	19%↑	20%↑
Travel guides from State Travel authorities	13%	17%↑	10%↓	8%↓	12%	15%	11%	15%	16%
Local travel centres	12%	13%	11%	9%	10%	11%	15%	14%	12%
From a travel agent	11%	13%↑	10%↓	5%↓	8%	11%	11%	12%	16%↑
Travel commercials on TV	10%	12%↑	8%↓	12%	10%	13%	10%	8%	8%
Travel commercials on radio	5%	5%	5%	7%	8%↑	8%↑	3%	1%	2%↓
Travel segments on radio	4%	4%	3%	3%	6%↑	6%	4%	2%	2%
Previous experience with destination	2%	3%	2%	-	-	-	2%	5%↑	5%↑
Just decided myself based on my interests	2%	2%	1%	-	-	0%	1%	3%	5%↑
Someone else planned the trip/had no input	0%	1%	0%	-	-	-	1%	-	2%
Travelling for a specific event/purpose	0%	0%	-	-	-	-	0%	-	0%
None	2%	3%	1%	1%	1%	-	3%	3%	3%↑

Statistically significantly higher/lower within the segment ↑↓

Q28 – Thinking about all your leisure breaks or holidays over the past 3 years, what sources of information have you used when considering where to go to or when planning your trip? Please select all that apply
0% represents n=7 or fewer

Most helpful source of information used when planning trip	Total	Gender		Age					
	Total (n=1466)	Male (n=689)	Female (n=773)	18-29 (n=152)	30-39 (n=256)	40-49 (n=290)	50-59 (n=236)	60-69 (n=277)	70+ (n=255)
Internet search (e.g. Google, etc.)	34%	33%	35%	26%↓	31%	33%	38%	39%	32%
Recommendations from family and friends	16%	14%	17%	17%	15%	13%	15%	14%	21%↑
Accommodation websites	10%	10%	11%	7%	10%	10%	14%↑	10%	9%
Specialist travel websites (e.g. Trip Advisor)	8%	7%	9%	9%	9%	9%	9%	8%	7%
Travel shows on TV	7%	8%	6%	1%	8%	11%↑	7%	6%	6%
Social media	5%	4%↓	6%↑	21%↑	6%	5%	3%↓	2%↓	1%
From a travel agent	4%	6%↑	3%↓	1%	4%	3%	3%	6%	7%↑
Travel guides from State Travel authorities	4%	5%↑	3%↓	3%	4%	3%	1%	6%↑	5%
Travel sections in newspapers / magazines	4%	5%↑	3%↓	4%	2%	3%	3%	5%	5%
Local travel centres	3%	4%	3%	5%	2%	2%	5%	3%	5%
Travel commercials on TV	2%	3%↑	1%↓	3%	3%	3%	1%	0%	0%
Travel segments on radio	1%	1%	1%	1%	3%↑	2%	1%	0%	0%
Travel commercials on radio	1%	1%	1%	2%	4%↑	1%	-	-	-
Someone else planned the trip/had no input	0%	0%	0%	-	-	-	0%	-	0%
Previous experience with destination	0%	-	0%	-	0%	-	-	-	-
Just decided myself based on my interests	0%	-	0%	-	-	-	-	-	0%
None	0%	0%	-	-	-	-	-	-	0%

Statistically significantly higher/lower within the segment 

APPENDIX 1

Other Results



Q6 – Destination for most recently visited for a leisure getaway or holiday

**Total
(n=1552)**

Melbourne	15%
Overseas	8%
Great Ocean Road	7%
regional Queensland	7%
Sydney	6%
Gippsland	5%
regional NSW	5%
Mornington Peninsula	4%
Brisbane	4%
Tasmania	4%
High Country	3%
Goldfields	3%
Geelong and the Bellarine	3%
Daylesford & Macedon Ranges	3%
Phillip Island	3%
Adelaide	3%
Grampians	3%
Yarra Valley & Dandenong Ranges	2%
regional SA	2%
Canberra / ACT	2%
Murray Region - Echuca area	1%
NT	1%
Murray Region - Mildura region	1%
Perth	1%
Murray Region - Yarrawonga area	1%
Murray Region - Swan Hill area	1%
regional WA	1%
Murray Region - Albury area	0%

Q24 – Planned destination for next getaway or holiday

**Total
(n=1552)**

Overseas	10%
regional Queensland	8%
Melbourne	6%
Great Ocean Road	5%
Don't Know / Can't say	5%
Daylesford & Macedon Ranges	4%
Mornington Peninsula	4%
Tasmania	4%
Brisbane	4%
regional NSW	4%
Phillip Island	3%
Gippsland	3%
Grampians	3%
Sydney	3%
NT	3%
High Country	2%
Adelaide	2%
Murray Region - Echuca area	2%
Yarra Valley & Dandenong Ranges	2%
Perth	2%
Murray Region - Yarrawonga area	2%
regional WA	2%
Goldfields	1%
Murray Region - Mildura region	1%
regional SA	1%
Geelong and the Bellarine	1%
Canberra / ACT	1%
Murray Region - Albury area	1%
Murray Region - Swan Hill area	1%
Not planning to go anywhere in the next year	14%

Q6 - Where did you MOST recently go to for a leisure getaway or holiday? If more than one location in the same trip, which was the MAIN destination?

Q24 - Prior to participating in this research, where were you [prox1] next for a leisure getaway or holiday? If more than one location, please select the main destination.
0% represents n=7

By segment:

As the sample of visitors to Echuca over the past 12 months is too small to break down by segment, consideration was given to length of stay during most recent visit to Echuca – regardless of when that may have occurred.

Q26 - How many nights stayed in Echuca during the most recent leisure break there	Total	Segment				Campers vs Non campers	
	Total last visited Echuca (n=981)	Younger Single or couple (n=97)	Family travelling with children (n=288)	Older working singles or couples (n=253)	Older non-working singles or couples (n=343)	Campers / caravanners (n=299)	Non campers / caravanner (n=669)
One night	18%	14%	17%	17%	20%	16%	19%
Two nights	32%	36%	31%	34%	31%	33%	33%
Three - four nights	27%	31%	28%	28%	24%	28%	27%
Five - seven nights	11%	8%	14%	10%	10%	14%↑	10%↓
One - two weeks	3%	2%	4%	2%	3%	4%	2%
More than two weeks	1%	1%	1%	1%	0%	1%	1%

1.4 Accommodation- Echuca in past 12 months vs Other destinations...continued

Q6b - Type of accommodation (other destination)	Segment				Campers vs Non campers		Q27 - Type of accommodation (Echuca)	Segment				Campers vs Non campers	
	Younger Single or couple (n=249)	Family travelling with children (n=459)	Older working singles or couples (n=367)	Older non-working singles or couples (n=454)	Campers / caravanners (n=454)	Non campers / caravanners (n=1054)		Younger Single or couple (n=90)	Family travelling with children (n=273)	Older working singles or couples (n=233)	Older non-working singles or couples (n=308)	Campers / caravanners (n=286)	Non campers / caravanners (n=606)
Hotels/motel	41%	36%	44%↑	35%	31%↓	42%↑	31%↓	31%↓	49%	61%↑	26%↓	56%↑	
With friends / relatives in their home	23%	11%↓	21%	26%↑	15%↓	22%↑	8%	8%	10%↑	3%↓	8%	6%	
Private rental home or unit etc (e.g. Airbnb, Stayz)	12%	15%↑	11%	9%↓	8%↓	13%↑	7%	7%	5%	3%↓	4%	5%	
Hired an apartment	5%	7%	6%	7%	5%	7%	4%	2%	2%	4%	3%	3%	
A cabin at a holiday park / caravan park	4%	6%	5%	6%	6%	5%	13%	14%	13%	11%	13%	13%	
A caravan at a holiday park / caravan park	1%	5%	3%	4%	10%↑	1%↓	9%	8%	6%	7%	12%↑	5%↓	
BnB (Bed & Breakfast)	3%	3%	4%	2%	4%	3%	2%	2%	3%	2%	3%	2%	
Camping (not in a holiday park/caravan park)	2%	3%	2%	2%	7%	0%	7%	5%	4%	2%↓	6%↑	3%↓	
Camping at a holiday park / caravan park	3%	4%↑	1%	1%	6%↑	1%↓	10%	11%↑	4%	3%↓	14%↑	3%↓	
Hostels	3%	3%	1%	1%	3%↑	1%↓	1%	4%	-	1%	4%	0%	
Cruise ship	0%	0%	1%	3%↑	1%	1%	-	-	-	-	-	-	
Farmstays	1%	2%↑	1%	0%	2%↑	1%↓	2%	2%	-	0%	1%	1%	
Glamping tents / safari tents	0%	2%↑	0%	1%	2%	0%	2%	3%	0%	-	3%	0%	
Own holiday home	-	-	0%	2%	0%	1%	-	-	-	0%	-	0%	
Houseboat	1%	0%	1%	0%	0%	1%	3%	3%	3%	2%	3%	2%	
Timeshare	-	-	1%	1%	0%	1%	-	-	-	-	-	-	
TOTAL Camping /Caravanning	9%↓	20%↑	10%↓	14%	30%↑	7%↓	41%↑	41%↑	27%	24%↓	48%	24%	

Statistically significantly higher/lower within the segment ↑↓

Q6b - What type of accommodation did you stay at during your most recent trip to [Q6 destination]? If more than one, please select the MAIN accommodation.

Q27 - What type of accommodation did you stay at during your most recent leisure trip to Echuca? If more than one, please select the MAIN accommodation.

0% represents n=2 or fewer

Theme - River and Water Based Activities	546	38%
River/River Murray	460	32%
Boats/Boating/skiing	56	4%
Houseboat cruise	37	3%
Water activities general	32	2%
Fishing	14	1%
River cruise	8	1%
Swimming	4	0%
Canoe/kayak/paddle board	2	0%
Ferry	1	0%

Theme - Location	191	13%
regional/Country Town	126	9%
Easy to access	27	2%
Border	23	2%
Want to visit	6	0%
Holiday destination	5	0%
Good variety of accommodation	4	0%
Mining	2	0%
Good place to pass through	1	0%

Theme -Descriptors - pleasant/quaint/friendly	272	19%
Nice	97	7%
Excellent / great	72	5%
Lovely/pretty	47	3%
Pleasant / enjoyable	33	2%
Friendly / nice people	25	2%
Quaint	10	1%
A place to revisit	1	0%
Breathtaking	1	0%

Theme - Local History/Culture	131	9%
History	117	8%
Indigenous culture	7	0%
Museum/gallery	5	0%
Sightseeing	2	0%
Culture	2	0%
Learning	1	0%

Theme - Descriptors - relax/unwind/refresh	235	16%
Relax	175	12%
Peaceful	48	3%
Quiet	26	2%

Theme - Nature and Nature Based Activities	129	9%
Scenic	49	3%
Nature	47	3%
Camping	21	1%
Outdoors	11	1%
Bushwalks	4	0%
Parks	3	0%
Country air / fresh air	3	0%
Fauna	2	0%

Theme - Echuca Port mentioned	225	16%
Paddlesteamers	172	12%
Echuca Port/port/wharf	36	3%
Old town	27	2%
Discovery Centre / Information centre	2	0%

Top of mind thoughts of Echuca as a leisure or holiday destination (themes)	Segment				Campers vs Non campers	
	Younger Single or couple (n=205)	Family travelling with children (n=402)	Older working singles or couples (n=365)	Older non-working singles or couples (n=457)	Campers / caravanners (n=416)	Non campers / caravanners (n=997)
River and Water Based Activities	30%↓	31%↓	45%↑	43%↑	29%↓	42%↑
Descriptors - pleasant/quaint/friendly	14%	27%↑	15%↓	18%	28%↑	15%↓
Descriptors - relax/unwind/refresh	18%	17%	16%	16%	14%	18%
Echuca Port mentioned	11%	12%↓	17%	19%↑	14%	17%
Location	21%↑	14%	12%	11%↓	11%↓	15%↑
Local History/Culture	3%↓	6%↓	10%	14%	6%↓	10%↑
Nature and Nature Based Activities	13%↑	13%↑	6%↓	6%↓	13%↑	7%↓
Descriptors - exciting/active	6%	8%	9%	7%	10%	7%
Other family/kids activities/things to do	4%	6%	6%	10%↑	6%	7%
Weather	4%	3%↓	10%↑	6%	4%	7%
Dining/Cafe/Pubs/Clubs/Wineries etc	2%	3%	3%	4%	3%	3%
Shopping, retail, markets	0%	1%	1%	2%	1%	1%
Events music, cultural or community based	1%	0%	1%	1%	1%	1%
Negatives - Other	2%	1%	4%	3%	2%	3%
Negatives - not enough to see/do	4%↑	1%	2%	2%	1%	2%
Nothing comes to mind	2%	1%	2%	2%	2%	2%
Don't know/can't say	3%	2%	1%	2%	2%	2%

Statistically significantly higher/lower within the segment ↑↓

Q14 - What words come first to mind when you think of Echuca as a leisure getaway or holiday destination?

Asked of those aware of Echuca

0% represents n=2 or fewer

– (n=1126)

Theme - Visit family and friends	234	21%
Visiting family and friends	78	7%
Travel with Family	67	6%
With friends / mates	25	2%
Wedding	19	2%
Part of a tour	18	2%
Birthday	9	1%
With overseas guests	7	1%
Meet up with others to travel together	5	0%
With partner	5	0%
Funeral	2	0%

Theme - Short break / long weekend / escape	170	15%
Short break / Escape	59	5%
Holiday / school holiday	48	4%
Get away from city life / Melbourne	22	2%
Day trip	13	1%
Easter / Christmas / New Year	9	1%
Leisure	9	1%
Long weekend; Easter; Christmas, New Year	6	1%
Getaway	3	0%
Short break / romantic	1	0%

Theme - Passing through / part of a bigger trip	164	15%
Passing /driving through unspecified	87	8%
Part of road trip / exploring regional Victoria	29	3%
Driving through to NSW / Sydney / Queensland	23	2%
On way to other river town Mildura / Leitchville / Yarrawonga / Riverina	11	1%
Overnight stop - / Break Trip up unspecified	9	1%
Driving through to Adelaide	4	0%
Crossing the border	1	0%

Theme - River and water-based activities	87	11%
Visit River / River Murray	35	3%
Boats / Boating / skiing	32	3%
Fishing	9	1%
River Cruise	7	1%
For water activities general	5	0%
River Murray Canoe Trail	2	0%

Theme - Influence - Relax / unwind / refresh	92	8%
Relax / unwind	89	8%
Quiet / peaceful	2	0%
Beautiful	1	0%

Theme - Sightseeing, nature and nature-based activities	75	7%
To enjoy / explore nature / Scenery / Sightseeing	58	5%
Great family holiday, so much scenery and nature	7	1%
Outdoors activities - unspecified	6	1%
Cactus country	3	0%
Parks / national parks / bushwalks	2	0%
Photography	1	0%

Theme – Echuca Port area	92	6%
Paddlesteamer	49	4%
Visit the port	13	1%
Echuca	8	1%

6.1 Unprompted Reasons for Visiting Echuca last visit - The Emerging Themes – Total sample and by segment...continued
 – (n=1126)

Theme -Attend events - music / cultural / community	60	5%
Golf	26	2%
For a course/event	25	2%
Blues Festival /music festival	4	0%
Attend horseback/horse racing event	3	0%
Autism camp	1	0%
Rodeo	1	0%

Dining - food / wineries	21	2%
Dining	15	1%
Wineries	9	1%
Pubs	2	0%

Shopping, retail, markets	14	1%
Shops	10	1%
Local Market	3	0%
Antiques and collectables	1	0%

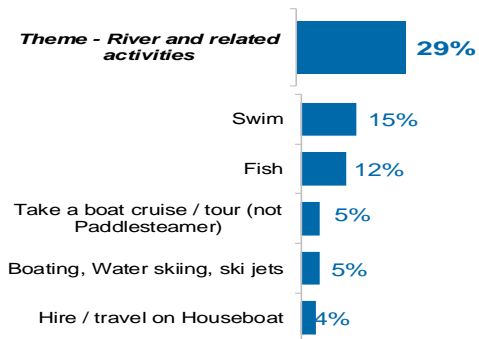
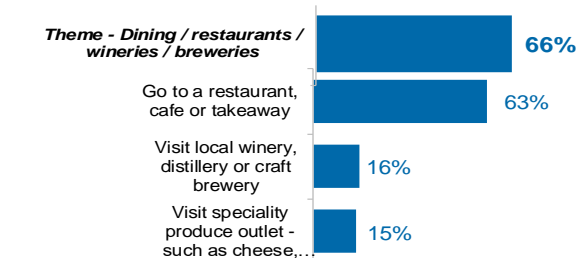
Weather	13	1%
For nice weather / sunny weather	13	1%

Theme - Influenced by local history / culture	43	4%
Explore History/ historical town	40	4%
Cultural experience	1	0%
Steam train trip	2	0%

Accommodation type	22	2%
Camping/caravanning	19	2%
Pet friendly accommodation available	1	0%
Luxury hotel	1	0%
Good hotel options	1	0%

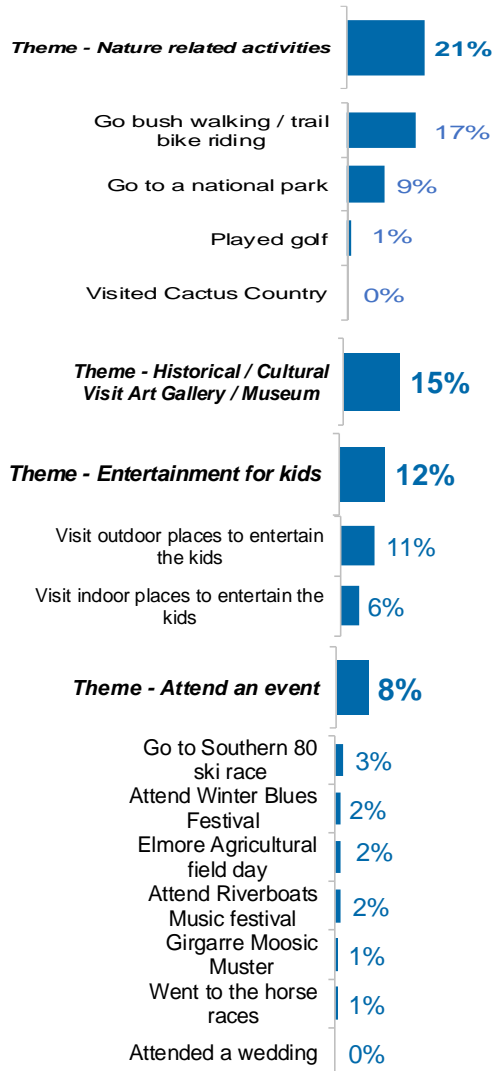
Theme – Other various influences	151	13%
Fun / Great / Love going there	49	4%
Just somewhere different to go/ show the kids	35	3%
Close to home / easy quick to get to	24	2%
Interesting / enjoy activities / see the town	9	1%
Because I haven't been before	9	1%
For work	7	1%
Affordable	6	1%
Heard from others it was a good place	4	0%
Pokies	3	0%
Won a holiday / special deal	3	0%
Friendly place	2	0%
Amazing	1	0%
To check out real estate / to move there	1	0%

Activities last undertaken during last visit to Echuca



	Segment				Campers vs Non campers	
	Younger Single or couple (n=120)	Family travelling with children (n=316)	Older working singles or couples (n=302)	Older non-working singles or couples (n=416)	Campers / caravanners (n=352)	Non campers / caravanners (n=788)
Theme - Dining / restaurants / wineries / breweries	53%↓	51%↓	74%↑	77%↑	53%↓	73%↑
Go to a restaurant, cafe or takeaway	48%↓	47%↓	71%↑	74%↑	48%↓	70%↑
Visit local winery, distillery or craft brewery	10%↓	11%↓	22%↑	17%	14%	17%
Visit speciality produce outlet - such as cheese...	11%	14%	13%	17%	13%	15%
Theme - Shopping, retail and local markets	45%↓	49%	57%	56%	50%	55%
Go shopping for essentials in local stores	28%	35%	39%	36%	35%	37%
Visit other local retailers in the area	30%	30%↓	39%	39%	31%↓	38%↑
Attend local handicraft or produce market(s)	13%	18%	17%	19%	17%	18%
Go to health spa, massage, beauty outlet etc	5%	7%↑	2%	0%	5%↑	2%↓
Theme - River and related activities	38%↑	45%↑	25%	15%↓	43%↑	22%↓
Swim	26%↑	25%↑	13%	6%↓	25%↑	11%↓
Fish	17%	22%↑	8%	5%↓	22%↑	7%↓
Take a boat cruise / tour (not Paddlesteamer)	7%	6%	4%	5%	7%	5%
Boating, Water skiing, ski jets	7%	9%↑	4%	2%↓	9%↑	3%↓
Hire / travel on Houseboat	6%	5%	4%	2%↓	6%↑	3%↓

Activities last undertaken during last visit to Echuca



	Segment				Campers vs Non campers	
	Younger Single or couple (n=120)	Family travelling with children (n=316)	Older working singles or couples (n=302)	Older non-working singles or couples (n=416)	Campers / caravanners (n=352)	Non campers / caravanners (n=788)
Theme - Nature related activities	28%	24%	22%	17%↓	25%	20%
Go bush walking / trail bike riding	23%↑	20%	16%	13%↓	21%	15%↓
Go to a national park	17%↑	12%	8%	6%↓	11%	9%
Played golf	-	1%	2%	2%	1%	2%
Visited Cactus Country	1%	-	-	-	0%	-
Theme - Historical / Cultural	13%	14%	14%	17%	16%	14%
Theme - Entertainment for kids	11%	23%↑	8%↓	8%↓	17%	10%↓
Visit outdoor places to entertain the kids	10%	19%↑	7%↓	8%↓	14%	10%↓
Visit indoor places to entertain the kids	5%	12%↑	4%	2%↓	9%	4%↓
Theme - Attend an event	8%	15%↑	6%	4%↓	15%	5%↓
Go to Southern 80 ski race	5%	5%↑	2%	1%	6%	1%↓
Attend Winter Blues Festival	3%	5%↑	2%	0%	5%	1%↓
Elmore Agricultural field day	4%	3%	1%	1%	4%	1%↓
Attend Riverboats Music festival	3%	3%	1%	1%	3%	1%↓
Girgarre Moosic Muster	1%	4%	-	0%	4%	0%
Went to the horse races	-	-	1%	1%	-	1%
Attended a wedding	-	-	-	0%	-	0%

Q17 – What did you do when you last visited Echuca as part of a leisure getaway or holiday?
 Asked of those who have visited Echuca in the past
 0% represents n=2 or fewer

(n=1043)

Theme - Local history / culture	340	33%
History/historic/early Victoria/early Australia	265	25%
Authentic heritage/well done/restored	46	4%
History educational	18	2%
Unique historically/legendary	14	1%
History river and railway	11	1%
Nostalgic/take back in time	9	1%
Open air museum	4	0%
River Run TV/Movie	3	0%

Theme - Descriptors - Exciting / active	293	28%
Interesting/fascinating/amazing	125	12%
Good/great place	107	10%
Fun/exciting	44	4%
Tourist town	32	3%

Theme - Echuca port area mentioned	214	21%
Paddlesteamers	130	12%
Old town/old style/rustic	50	5%
Echuca Port/port/mentioned	14	1%
Echuca Wharf mentioned	7	1%
Information centre	7	1%
Discovery/Discovery Centre/learning	5	0%
3rd largest port in Australia	4	0%

Theme - Other aspects of Echuca	123	12%
Pretty/Lovely/Beautiful	101	10%
Well presented	17	2%
Easy to access	4	0%
Border	2	0%

Theme - River and water based activities	110	11%
River/River Murray	45	4%
Boats/Boating/Skiing	28	3%
River cruises/tours	21	2%
Water	13	1%
Fishing	6	1%
Open beach/swimming	6	1%
Marina	1	0%

Theme - Descriptors - Pleasant / quaint / friendly	81	8%
Nice	32	3%
Pleasant	17	2%
Friendly	12	1%
Different	11	1%
Quaint	10	1%
Inviting	2	0%
Quirky	1	0%

Theme - Descriptors - Relax / unwind / pamper	64	6%
Relaxing	40	4%
Peaceful	22	2%
Quiet	8	1%

APPENDIX 2



Survey



Version 2
5657_Campaspe_DestDrivers
Last modified:19/08/2021 4:56:42 PM

QIntro Welcome to our online survey. newfocus - an independent market research company is looking to understand how Australians think about and decide on travel destinations within Australia. This survey will take approximately 10 minutes of your time and is conducted in compliance with the Australian Privacy Principles. Please click on the "Next" button to start the survey.

Q1a. Where do you live?

Melbourne	1	
Regional Victoria	2	
Regional NSW	3	
Other	4	End

Q1a

Q1b. In which part of Regional Victoria do you live?

Answer If Attribute "Regional Victoria" from Q1a is SELECTED

Daylesford & Macedon Ranges	1	
Yarra Valley & Dandenong Ranges	2	
Mornington Peninsula	3	
Phillip Island	4	
Geelong and the Bellarine	5	
Great Ocean Road	6	
Goldfields	7	
Grampians	8	
High Country	9	
Gippsland	10	
Murray Region	11	

Q1b

Q1c. In which part of Regional NSW do you live?

Answer If Attribute "Regional NSW" from Q1a is SELECTED

Murray	1	
Riverina	2	
Southern Inland	3	
Central West	4	
Orana	5	
Far West	6	
Other	7	End

Q1c

Q2a. In the past three years have you travelled anywhere for a leisure getaway or holiday (non-work) with at least one-night's stay?

Yes	1		
No	2	End	Q2a
Can't recall	3	End	
<i>Do not answer If true</i>			

**QSEC Section 2: Travel Behaviours
T2.**

Q3. Where have you gone for a leisure getaway or holiday of at least one night's stay in the past 3 years? Please select all that apply.

Melbourne	1	Q3_1
Regional Victoria	2	Q3_2
Sydney	3	Q3_3
Regional NSW	4	Q3_4
Canberra / ACT	5	Q3_5
Brisbane	6	Q3_6
Regional Queensland	7	Q3_7
Tasmania	8	Q3_8
Adelaide	9	Q3_9
Regional SA	10	Q3_10
Perth	11	Q3_11
Regional WA	12	Q3_12
Northern Territory	13	Q3_13
Overseas	14	Q3_14
Have not travelled	15	Q3_15
Can't recall	999	Q3_16
<i>Answer If [Q3_15] = 15 OR [Q3_16] = 999</i>		

**QTER Thank you for your time. Unfortunately you do not qualify for this particular research
M1. study.**

End

Q4. Using the map as a guide, where in Regional Victoria have you gone to for a leisure getaway or holiday in the past 3 years? Please select all that apply.

Answer If Attribute "Regional Victoria" from Q3 is SELECTED

Daylesford & Macedon Ranges	1	Q4_1
Yarra Valley & Dandenong Ranges	2	Q4_2
Mornington Peninsula	3	Q4_3
Phillip Island	4	Q4_4
Geelong and the Bellarine	5	Q4_5
Great Ocean Road	6	Q4_6
Goldfields	7	Q4_7
Grampians	8	Q4_8
High Country	9	Q4_9
Gippsland	10	Q4_10
Murray Region	11	Q4_11
Cant recall	999	Q4_12

Q5. Roughly speaking, which areas of the Murray Region have you gone to for a getaway or holiday in the past 3 years? Please select all that apply.

Answer If Attribute "Murray Region" from Q4 is SELECTED

Albury area	1
Yarrawonga area	2
Echuca area	3
Swan Hill area	4
Mildura area	5

Q5_1
Q5_2
Q5_3
Q5_4
Q5_5

Q6. Where did you MOST recently go to for a leisure getaway or holiday? If more than one location in the same trip, which was the MAIN destination?

Answer If ([Q3_COUNT] >= 2) OR ([Q4_1] = 1 OR [Q4_2] = 2 OR [Q4_3] = 3 OR [Q4_4] = 4 OR [Q4_5] = 5 OR [Q4_6] = 6 OR [Q4_7] = 7 OR [Q4_8] = 8 OR [Q4_9] = 9 OR [Q4_10] = 10) OR ([Q5_1] = 1 OR [Q5_2] = 2 OR [Q5_3] = 3 OR [Q5_4] = 4 OR [Q5_5] = 5)

DP note: autofilled non numeric text to be replaced with corresponding code in dataset

Melbourne	1
<i>Answer If Attribute "Melbourne" from Q3 is SELECTED</i>	
Daylesford & Macedon Ranges	2
<i>Answer If Attribute "Daylesford & Macedon Ranges" from Q4 is SELECTED</i>	
Yarra Valley & Dandenong Ranges	3
<i>Answer If Attribute "Yarra Valley & Dandenong Ranges" from Q4 is SELECTED</i>	
Mornington Peninsula	4
<i>Answer If Attribute "Mornington Peninsula" from Q4 is SELECTED</i>	
Phillip Island	5
<i>Answer If Attribute "Phillip Island" from Q4 is SELECTED</i>	
Geelong and the Bellarine	6
<i>Answer If Attribute "Geelong and the Bellarine" from Q4 is SELECTED</i>	
Great Ocean Road	7
<i>Answer If Attribute "Great Ocean Road" from Q4 is SELECTED</i>	
Goldfields	8
<i>Answer If Attribute "Goldfields" from Q4 is SELECTED</i>	
Grampians	9
<i>Answer If Attribute "Grampians" from Q4 is SELECTED</i>	
High Country	10
<i>Answer If Attribute "High Country" from Q4 is SELECTED</i>	
Gippsland	11
<i>Answer If Attribute "Gippsland" from Q4 is SELECTED</i>	
Murray Region - Albury area	12
<i>Answer If Attribute "Albury area" from Q5 is SELECTED</i>	
Murray Region - Yarrawonga area	13
<i>Answer If Attribute "Yarrawonga area" from Q5 is SELECTED</i>	
Murray Region - Echuca area	14
<i>Answer If Attribute "Echuca area" from Q5 is SELECTED</i>	
Murray Region - Swan Hill area	15
<i>Answer If Attribute "Swan Hill area" from Q5 is SELECTED</i>	
Murray Region - Mildura region	16
<i>Answer If Attribute "Mildura area" from Q5 is SELECTED</i>	
Sydney	17
<i>Answer If Attribute "Sydney" from Q3 is SELECTED</i>	
Regional NSW	18
<i>Answer If Attribute "Regional NSW" from Q3 is SELECTED</i>	
Canberra / ACT	19
<i>Answer If Attribute "Canberra / ACT" from Q3 is SELECTED</i>	
Brisbane	20
<i>Answer If Attribute "Brisbane" from Q3 is SELECTED</i>	
Regional Queensland	21
<i>Answer If Attribute "Regional Queensland" from Q3 is SELECTED</i>	

Q6

Tasmania	22
<i>Answer If Attribute "Tasmania" from Q3 is SELECTED</i>	
Adelaide	23
<i>Answer If Attribute "Adelaide" from Q3 is SELECTED</i>	
Regional SA	24
<i>Answer If Attribute "Regional SA" from Q3 is SELECTED</i>	
Perth	25
<i>Answer If Attribute "Perth" from Q3 is SELECTED</i>	
Regional WA	26
<i>Answer If Attribute "Regional WA" from Q3 is SELECTED</i>	
NT	27
<i>Answer If Attribute "Northern Territory" from Q3 is SELECTED</i>	
Overseas	28
<i>Answer If Attribute "Overseas" from Q3 is SELECTED</i>	

Q6a. How many nights did you stay in [Q6] during your most recent leisure break there?

Do not answer If Attribute "Murray Region - Echuca area" from Q6 is SELECTED

One night	1
Two nights	2
Three - four nights	3
Five - seven nights	4
One - two weeks	5
More than two weeks	6

Q6a

Q6b. What type of accommodation did you stay at during your most recent trip to [Q6]? If more than one, please select the MAIN accommodation.

Do not answer If Attribute "Murray Region - Echuca area" from Q6 is SELECTED

With friends / relatives in their home	1
Hired an apartment	2
Hotels/motel	3
Hostels	4
BnB (Bed & Breakfast)	5
Private rental home or unit etc (e.g. Airbnb, Stayz)	6
A cabin at a holiday park / caravan park	7
Camping at a holiday park / caravan park	8
A caravan at a holiday park / caravan park	9
Camping (not in a holiday park/caravan park)	10
Glamping tents / safari tents	11
Farmstays	12
Houseboat	13

Q6b

Do not answer If true

QSEC Section 3: What travellers look for in a destination T3.

Q7. How important are each of the following to YOU when selecting a place to go to for a leisure getaway or holiday?

	Not at all important	Unimportant	Neither important nor	Important	Very important	Don't know / can't say
--	----------------------	-------------	-----------------------	-----------	----------------	------------------------

				unimportant			
Easy to access / get to	1	2	3	4	5	999	Q7_1
Good dining restaurants, cafes, pubs and clubs etc	1	2	3	4	5	999	Q7_2
Water-based activities (i.e. swim, paddle, canoe, boating and skiing, fishing etc)	1	2	3	4	5	999	Q7_3
Places to enjoy nature and bushland, with walking tracks and paths	1	2	3	4	5	999	Q7_4
Strong local history and culture	1	2	3	4	5	999	Q7_5
Events - music, arts or community-based events	1	2	3	4	5	999	Q7_6
Local retail, craft or produce markets	1	2	3	4	5	999	Q7_7
Places for camping and caravanning	1	2	3	4	5	999	Q7_8

Do not answer if true

QSEC T4. How important are each of the following to YOU when selecting a place to go to for a leisure getaway or holiday?

Q8. How strongly do you agree or disagree that [Q6] has what YOU look for in a getaway or holiday destination in regard to...

Do not answer if Attribute "Murray Region - Echuca area" from Q6 is SELECTED

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know / can't say	
Easy to access / get to	1	2	3	4	5	999	Q8_1
Good dining restaurants, cafes, pubs and clubs etc	1	2	3	4	5	999	Q8_2
Water-based activities (i.e. swim, paddle, canoe, boating and skiing, fishing etc)	1	2	3	4	5	999	Q8_3
Places to enjoy nature and bushland, with walking tracks and paths	1	2	3	4	5	999	Q8_4
Strong local history and culture	1	2	3	4	5	999	Q8_5
Events - music, arts or community-based events	1	2	3	4	5	999	Q8_6
Local retail, craft or produce markets	1	2	3	4	5	999	Q8_7
Places for camping and caravanning	1	2	3	4	5	999	Q8_8

Do not answer if true

QSEC 5. Section 5: Awareness and prior visits to Echuca

Q9. Have you heard of the Victorian town on the Murray called Echuca?

Do not answer if Attribute "Echuca area" from Q5 is SELECTED

Yes	1		
No	2		Q9
Not sure	3		

Q10. Have you ever visited Echuca?

Answer if Attribute "Yes" from Q9 is SELECTED

Yes	1		
No	2		Q10

Q11. How often have you visited Echuca as part of a leisure getaway or holiday?

Answer If [Q5_3] = 3 OR ([Q9] = 1 AND [Q10] = 1)

Once only	1
2-3 times	2
4-5 times	3
6-10 times	4
More than 10 times	5

Q11

Q12. When was the last time you went to Echuca as part of a leisure getaway or holiday?

Answer If [Q5_3] = 3 OR ([Q9] = 1 AND [Q10] = 1)

In past 12 months	1
Between 1-2 years ago	2
Between 2-3 years ago	3
4-5 years ago	4
6-10 years ago	5
More than 10 years ago	6
Can't recall	999

Q12

Q13. When you last visited Echuca as part of a leisure getaway or holiday, was Echuca...

Answer If [Q5_3] = 3 OR ([Q9] = 1 AND [Q10] = 1)

Your primary destination	1
One of several destinations visited	2
Just stopped at whilst travelling through to somewhere else	3
Can't recall	999

Q13

Q26. How many nights did you stay in Echuca during your most recent leisure break there?

Answer If ([Q5_3] = 3 OR [Q10] = 1) AND ([Q13] = 1 OR [Q13] = 2 OR [Q13] = 999)

One night	1
Two nights	2
Three - four nights	3
Five - seven nights	4
One - two weeks	5
More than two weeks	6
Never stayed overnight	7

Q26

Q27. What type of accommodation did you stay at during your most recent leisure trip to Echuca? If more than one, please select the MAIN accommodation.

*Answer If Attribute "One night" from Q26 is SELECTED OR
 Answer If Attribute "Two nights" from Q26 is SELECTED OR
 Answer If Attribute "Three - four nights" from Q26 is SELECTED OR
 Answer If Attribute "Five - seven nights" from Q26 is SELECTED OR
 Answer If Attribute "One - two weeks" from Q26 is SELECTED OR
 Answer If Attribute "More than two weeks" from Q26 is SELECTED*

With friends / relatives in their home	1
Hired an apartment	2

Hotels/motel	3
Hostels	4
BnB (Bed & Breakfast)	5
Private rental home or unit etc (e.g. Airbnb, Stayz)	6
A cabin at a holiday park / caravan park	7
Camping at a holiday park / caravan park	8
A caravan at a holiday park / caravan park	9
Camping (not in a holiday park/caravan park)	10
Glamping tents / safari tents	11
Farmstays	12
Houseboat	13

Q27

Do not answer if true

QSEC Section 6: Perceptions of Echuca T6.

Q14. What words come first to mind when you think of Echuca as a leisure getaway or holiday destination?

*Answer If Attribute "Echuca area" from Q5 is SELECTED OR
Answer If Attribute "Yes" from Q9 is SELECTED*

Q14

Q15. How strongly do you agree or disagree that Echuca has what YOU look for in a getaway or holiday destination in regard to...?

*Answer If Attribute "Echuca area" from Q5 is SELECTED OR
Answer If Attribute "Yes" from Q9 is SELECTED*

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know / can't say
Easy to access / get to	1	2	3	4	5	999
Good dining restaurants, cafes, pubs and clubs etc	1	2	3	4	5	999
Water-based activities (i.e. swim, paddle, canoe, boating and skiing, fishing etc)	1	2	3	4	5	999
Places to enjoy nature and bushland, with walking tracks and paths	1	2	3	4	5	999
Strong local history and culture	1	2	3	4	5	999
Events - music, arts or community-based events	1	2	3	4	5	999
Local retail, craft or produce markets	1	2	3	4	5	999
Places for camping and caravanning	1	2	3	4	5	999

Q15_1
Q15_2
Q15_3
Q15_4
Q15_5
Q15_6
Q15_7
Q15_8

Do not answer if true

QSEC Section 7: Activities undertaken in Echuca T7.

Q16. What were the main reasons for visiting Echuca the last time you went there as part of a getaway or holiday?

*Answer If Attribute "Echuca area" from Q5 is SELECTED OR
Answer If Attribute "Yes" from Q10 is SELECTED*

**Q17. What did you do when you last visited Echuca as part of a leisure getaway or holiday?
Please select all that apply.**

*Answer If Attribute "Echuca area" from Q5 is SELECTED OR
Answer If Attribute "Yes" from Q10 is SELECTED*

The Echuca Wharf	1	Q17_1
Echuca Discovery Centre	2	Q17_2
Echuca Visitor information centre	3	Q17_3
Just look at Paddlesteamers	4	Q17_4
Cruise river on a Paddlesteamer	5	Q17_5
Take a walk in the old pebble street of Echuca	6	Q17_6
Canoe, kayak, paddleboard	7	Q17_7
Swim	8	Q17_8
Fish	9	Q17_9
Hire / travel on Houseboat	10	Q17_10
Boating, Water skiing, ski jets	11	Q17_11
Take a boat cruise / tour (not Paddlesteamer)	12	Q17_12
Attend Winter Blues Festival	13	Q17_13
Go to Southern 80 ski race	14	Q17_14
Attend Riverboats Music festival	15	Q17_15
Girgarre Moosic Muster	16	Q17_16
Elmore Agricultural field day	17	Q17_17
Visit art gallery or museum	18	Q17_18
Go to a restaurant, café or takeaway	19	Q17_19
Go shopping for essentials in local stores	20	Q17_20
Visit other local retailers in the area	21	Q17_21
Attend local handicraft or produce market(s)	22	Q17_22
Visit outdoor places to entertain the kids	23	Q17_23
Visit indoor places to entertain the kids	24	Q17_24
Visit local winery, distillery or craft brewery	25	Q17_25
Visit speciality produce outlet - such as cheese, chocolate, small goods etc	26	Q17_26
Go to health spa, massage, beauty outlet etc	27	Q17_27
Go to a national park	28	Q17_28
Go bush walking / trail bike riding	29	Q17_29
Visit family / friends	30	Q17_30
		Q17_O

*If [Q17_1] = 1 OR [Q17_2] = 2 OR [Q17_3] = 3 OR [Q17_4] = 4 OR [Q17_5] = 5 OR [Q17_6] = 6 go to Q19
Do not answer If true*

**QSEC Section 8: Prior Visit and Perceptions of the Echuca Port Area
T8.**

Q18. Have you at any time visited or done any of the following when previously visiting Echuca? Please select all that apply.

*Answer If Attribute "Echuca area" from Q5 is SELECTED OR
Answer If Attribute "Yes" from Q10 is SELECTED*

The Echuca Wharf	1	Q18_1
Echuca Discovery Centre	2	Q18_2
Visitor information centre	3	Q18_3
Just to look at Paddlesteamers	4	Q18_4
Take a Paddle steamer cruise	5	Q18_5
Take a walk in the old pebble street of Echuca	6	Q18_6

Q19. What words come first to mind when you think of the Echuca Port area?

*Answer If Attribute "The Echuca Wharf" from Q17 is SELECTED OR
 Answer If Attribute "Echuca Discovery Centre" from Q17 is SELECTED OR
 Answer If Attribute "Echuca Visitor information centre" from Q17 is SELECTED OR
 Answer If Attribute "Just look at Paddlesteamers" from Q17 is SELECTED OR
 Answer If Attribute "Cruise river on a Paddlesteamer" from Q17 is SELECTED OR
 Answer If Attribute "Take a walk in the old pebble street of Echuca" from Q17 is SELECTED OR
 Answer If Attribute "The Echuca Wharf" from Q18 is SELECTED OR
 Answer If Attribute "Echuca Discovery Centre" from Q18 is SELECTED OR
 Answer If Attribute "Visitor information centre" from Q18 is SELECTED OR
 Answer If Attribute "Just to look at Paddlesteamers" from Q18 is SELECTED OR
 Answer If Attribute "Take a Paddle steamer cruise" from Q18 is SELECTED OR
 Answer If Attribute "Take a walk in the old pebble street of Echuca" from Q18 is SELECTED*

Q19

Q20. Using the scale shown, how strongly do you agree or disagree that the Echuca Port area is...

*Answer If Attribute "The Echuca Wharf" from Q17 is SELECTED OR
 Answer If Attribute "Echuca Discovery Centre" from Q17 is SELECTED OR
 Answer If Attribute "Echuca Visitor information centre" from Q17 is SELECTED OR
 Answer If Attribute "Just look at Paddlesteamers" from Q17 is SELECTED OR
 Answer If Attribute "Cruise river on a Paddlesteamer" from Q17 is SELECTED OR
 Answer If Attribute "Take a walk in the old pebble street of Echuca" from Q17 is SELECTED OR
 Answer If Attribute "The Echuca Wharf" from Q18 is SELECTED OR
 Answer If Attribute "Echuca Discovery Centre" from Q18 is SELECTED OR
 Answer If Attribute "Visitor information centre" from Q18 is SELECTED OR
 Answer If Attribute "Just to look at Paddlesteamers" from Q18 is SELECTED OR
 Answer If Attribute "Take a Paddle steamer cruise" from Q18 is SELECTED OR
 Answer If Attribute "Take a walk in the old pebble street of Echuca" from Q18 is SELECTED*

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Don't know / can't say
A must see of Regional Victoria	1	2	3	4	5	999
An informative and educational experience	1	2	3	4	5	999
A great place to take the family	1	2	3	4	5	999
Offers things that you want to see and do	1	2	3	4	5	999

Do not answer If true

Q20_1
 Q20_2
 Q20_3
 Q20_4

QSEC Section 9: Reasons for not visiting Echuca in past 3 year and Perceptions of Echuca if T9. aware.

Q21. Thinking back to your leisure getaway or holidays over the past 3 years, was Echuca ever considered as a destination to go to?

Answer If ([Q9] = 1 AND [Q10] = 2) OR ([Q12] = 4 OR [Q12] = 5 OR [Q12] = 6 OR [Q12] = 999)

Yes it was considered	1
No it was not considered	2
Can't recall	999

Q21

Q22. Why [prox1] in the past 3 years? Please select all that apply.

*Answer If Attribute "Yes it was considered" from Q21 is SELECTED OR
 Answer If Attribute "No it was not considered" from Q21 is SELECTED OR
 Answer If Attribute "Can't recall" from Q21 is SELECTED*

prox1 if considered at Q21 = 'did you consider but not visit Echuca' prox1 if did not consider/dont know at Q21 = 'did you not consider visiting Echuca'

I or others travelling with have been there before	1	Q22_1
Heard negative things about Echuca from others	2	Q22_2
Too far to go to	3	Q22_3
Not enough of the things I/we want to see and do	4	Q22_4
Don't know / can't say	999	Q22_5
		Q22_O

Do not answer If true

**QSEC Section 10: Future travel intentions
T10.**

Q23. Prior to participating in this research, and assuming COVID would allow, were you planning on taking a leisure getaway or holiday in the next 12 months?

Yes - was definitely planning on going	1	
Was considering going	2	
Was not considering any travel	3	Q23
Prefer not to say	888	

Q24. Prior to participating in this research, where were you [prox1] next for a leisure getaway or holiday? If more than one location, please select the main destination.

*Answer If Attribute "Yes - was definitely planning on going" from Q23 is SELECTED OR
 Answer If Attribute "Was considering going" from Q23 is SELECTED*

Melbourne	1	
Daylesford & Macedon Ranges	2	
Yarra Valley & Dandenong Ranges	3	
Mornington Peninsula	4	
Phillip Island	5	
Geelong and the Bellarine	6	
Great Ocean Road	7	
Goldfields	8	
Grampians	9	
High Country	10	
Gippsland	11	
Murray Region - Albury area	12	
Murray Region - Yarrawonga area	13	
Murray Region - Echuca area	14	
Murray Region - Swan Hill area	15	Q24
Murray Region - Mildura region	16	
Sydney	17	
Regional NSW	18	
Canberra / ACT	19	
Brisbane	20	

Regional Queensland	21
Tasmania	22
Adelaide	23
Regional SA	24
Perth	25
Regional WA	26
NT	27
Overseas	28
Don't Know / Cant say	999

Q25. What is the likelihood that you would recommend each of the following to friends or other family members to visit?

- Answer If Attribute "Melbourne" from Q3 is SELECTED OR*
- Answer If Attribute "Sydney" from Q3 is SELECTED OR*
- Answer If Attribute "Regional NSW" from Q3 is SELECTED OR*
- Answer If Attribute "Canberra / ACT" from Q3 is SELECTED OR*
- Answer If Attribute "Brisbane" from Q3 is SELECTED OR*
- Answer If Attribute "Regional Queensland" from Q3 is SELECTED OR*
- Answer If Attribute "Tasmania" from Q3 is SELECTED OR*
- Answer If Attribute "Adelaide" from Q3 is SELECTED OR*
- Answer If Attribute "Regional SA" from Q3 is SELECTED OR*
- Answer If Attribute "Perth" from Q3 is SELECTED OR*
- Answer If Attribute "Regional WA" from Q3 is SELECTED OR*
- Answer If Attribute "Northern Territory" from Q3 is SELECTED OR*
- Answer If Attribute "Overseas" from Q3 is SELECTED OR*
- Answer If Attribute "Daylesford & Macedon Ranges" from Q6 is SELECTED OR*
- Answer If Attribute "Yarra Valley & Dandenong Ranges" from Q6 is SELECTED OR*
- Answer If Attribute "Mornington Peninsula" from Q6 is SELECTED OR*
- Answer If Attribute "Phillip Island" from Q6 is SELECTED OR*
- Answer If Attribute "Geelong and the Bellarine" from Q6 is SELECTED OR*
- Answer If Attribute "Great Ocean Road" from Q6 is SELECTED OR*
- Answer If Attribute "Goldfields" from Q6 is SELECTED OR*
- Answer If Attribute "Grampians" from Q6 is SELECTED OR*
- Answer If Attribute "High Country" from Q6 is SELECTED OR*
- Answer If Attribute "Gippsland" from Q6 is SELECTED OR*
- Answer If Attribute "Murray Region - Albury area" from Q6 is SELECTED OR*
- Answer If Attribute "Murray Region - Yarrawonga area" from Q6 is SELECTED OR*
- Answer If Attribute "Murray Region - Swan Hill area" from Q6 is SELECTED OR*
- Answer If Attribute "Murray Region - Mildura region" from Q6 is SELECTED OR*
- Answer If Attribute "Echuca area" from Q5 is SELECTED OR*
- Answer If Attribute "The Echuca Wharf" from Q17 is SELECTED OR*
- Answer If Attribute "Echuca Discovery Centre" from Q17 is SELECTED OR*
- Answer If Attribute "Echuca Visitor information centre" from Q17 is SELECTED OR*
- Answer If Attribute "Just look at Paddlesteamers" from Q17 is SELECTED OR*
- Answer If Attribute "Cruise river on a Paddlesteamer" from Q17 is SELECTED OR*
- Answer If Attribute "Take a walk in the old pebble street of Echuca" from Q17 is SELECTED OR*
- Answer If Attribute "The Echuca Wharf" from Q18 is SELECTED OR*
- Answer If Attribute "Echuca Discovery Centre" from Q18 is SELECTED OR*
- Answer If Attribute "Visitor information centre" from Q18 is SELECTED OR*
- Answer If Attribute "Just to look at Paddlesteamers" from Q18 is SELECTED OR*
- Answer If Attribute "Take a Paddle steamer cruise" from Q18 is SELECTED OR*
- Answer If Attribute "Take a walk in the old pebble street of Echuca" from Q18 is SELECTED OR*
- Answer If Attribute "Yes" from Q10 is SELECTED*

	0	1	2	3	4	5	6	7	8	9	10 - Do Extr n't em kno ely w likel y	
<i>Do not answer If Attribute "Murray Region - Echuca area" from Q6 is SELECTED</i>												
[Q6]	0	1	2	3	4	5	6	7	8	9	10	999
<i>Answer If Attribute "Echuca area" from Q5 is SELECTED OR</i>												
<i>Answer If Attribute "Yes" from Q10 is SELECTED</i>												

Q25_1

Echuca	0	1	2	3	4	5	6	7	8	9	10	999	Q25_2
<i>Answer If Attribute "The Echuca Wharf" from Q17 is SELECTED OR</i>													
<i>Answer If Attribute "Echuca Discovery Centre" from Q17 is SELECTED OR</i>													
<i>Answer If Attribute "Echuca Visitor information centre" from Q17 is SELECTED OR</i>													
<i>Answer If Attribute "Just look at Paddlesteamers" from Q17 is SELECTED OR</i>													
<i>Answer If Attribute "Cruise river on a Paddlesteamer" from Q17 is SELECTED OR</i>													
<i>Answer If Attribute "Take a walk in the old pebble street of Echuca" from Q17 is SELECTED OR</i>													
<i>Answer If Attribute "The Echuca Wharf" from Q18 is SELECTED OR</i>													
<i>Answer If Attribute "Echuca Discovery Centre" from Q18 is SELECTED OR</i>													
<i>Answer If Attribute "Visitor information centre" from Q18 is SELECTED OR</i>													
<i>Answer If Attribute "Just to look at Paddlesteamers" from Q18 is SELECTED OR</i>													
<i>Answer If Attribute "Take a Paddle steamer cruise" from Q18 is SELECTED OR</i>													
<i>Answer If Attribute "Take a walk in the old pebble street of Echuca" from Q18 is SELECTED</i>													
The Echuca Port Area	0	1	2	3	4	5	6	7	8	9	10	999	Q25_3

Q28. Thinking about all your leisure breaks or holidays over the past 3 years, what sources of information have you used when considering where to go to or when planning your trip? Please select all that apply

Travel commercials on TV	1	Q28_1
Travel shows on TV	2	Q28_2
Travel commercials on radio	3	Q28_3
Travel segments on radio	4	Q28_4
Travel sections in newspapers / magazines	5	Q28_5
Travel guides from State Travel authorities	6	Q28_6
Local travel centres	7	Q28_7
From a travel agent	8	Q28_8
Specialist travel websites (e.g. Trip Advisor)	9	Q28_9
Accommodation websites	10	Q28_10
Social media	11	Q28_11
Recommendations from family and friends	12	Q28_12
Internet search (e.g. Google, etc.)	13	Q28_13
		Q28_0

Q29. Overall, which of the sources of information (you have used) have you found MOST helpful when considering where to go to or when planning your trip? Please select one option

<i>Answer If Attribute "Travel commercials on TV" from Q28 is SELECTED OR</i>		
<i>Answer If Attribute "Travel shows on TV" from Q28 is SELECTED OR</i>		
<i>Answer If Attribute "Travel commercials on radio" from Q28 is SELECTED OR</i>		
<i>Answer If Attribute "Travel segments on radio" from Q28 is SELECTED OR</i>		
<i>Answer If Attribute "Travel sections in newspapers / magazines" from Q28 is SELECTED OR</i>		
<i>Answer If Attribute "Local travel centres" from Q28 is SELECTED OR</i>		
<i>Answer If Attribute "From a travel agent" from Q28 is SELECTED OR</i>		
<i>Answer If Attribute "Specialist travel websites (e.g. Trip Advisor)" from Q28 is SELECTED OR</i>		
<i>Answer If Attribute "Accommodation websites" from Q28 is SELECTED OR</i>		
<i>Answer If Attribute "Social media" from Q28 is SELECTED OR</i>		
<i>Answer If Attribute "Recommendations from family and friends" from Q28 is SELECTED OR</i>		
<i>Answer If Attribute "Internet search (e.g. Google, etc.)" from Q28 is SELECTED OR</i>		
<i>Answer If Attribute "Travel guides from State Travel authorities" from Q28 is SELECTED</i>		

Travel commercials on TV	1	
<i>Answer If Attribute "Travel commercials on TV" from Q28 is SELECTED</i>		
Travel shows on TV	2	
<i>Answer If Attribute "Travel shows on TV" from Q28 is SELECTED</i>		
Travel commercials on radio	3	
<i>Answer If Attribute "Travel commercials on radio" from Q28 is SELECTED</i>		
Travel segments on radio	4	
<i>Answer If Attribute "Travel segments on radio" from Q28 is SELECTED</i>		

Travel sections in newspapers / magazines	5
<i>Answer If Attribute "Travel sections in newspapers / magazines" from Q28 is SELECTED</i>	
Travel guides from State Travel authorities	6
<i>Answer If Attribute "Travel guides from State Travel authorities" from Q28 is SELECTED</i>	
Local travel centres	7
<i>Answer If Attribute "Local travel centres" from Q28 is SELECTED</i>	
From a travel agent	8
<i>Answer If Attribute "From a travel agent" from Q28 is SELECTED</i>	
Specialist travel websites (e.g. Trip Advisor)	9
<i>Answer If Attribute "Specialist travel websites (e.g. Trip Advisor)" from Q28 is SELECTED</i>	
Accommodation websites	10
<i>Answer If Attribute "Accommodation websites" from Q28 is SELECTED</i>	
Social media	11
<i>Answer If Attribute "Social media" from Q28 is SELECTED</i>	
Recommendations from family and friends	12
<i>Answer If Attribute "Recommendations from family and friends" from Q28 is SELECTED</i>	
Internet search (e.g. Google, etc.)	13
<i>Answer If Attribute "Internet search (e.g. Google, etc.)" from Q28 is SELECTED</i>	

Q29

Do not answer If true

QSEC Section 11: Demographics and End T11.

QAge. What is your age?

18-29 years	1
30-39 years	2
40-49 years	3
50-59 years	4
60-69 years	5
70-79 years	6
80 years and older	7

QAge

QGen What is your gender?

Male	1
Female	2
Other (non-binary)	3
Prefer not to say	888

QGender

QSeg. Which of the following best describes the type of getaway or holiday traveller you are. If not perfect, please select the best fit

Younger Single or couple	1
Family travelling with children	2
Older working singles or couples	3
Older non-working singles or couples	4

QSeg

QChil What are the ages of the children your travel with? Please select all that apply?

Answer If Attribute "Family travelling with children" from QSeg is SELECTED

0-4 years	1	QChild_1
5-10 years	2	QChild_2
11-15 years	3	QChild_3
16-18 years	4	QChild_4
19-24 years	5	QChild_5
25 years and older	6	QChild_6

QEnd. Please click "Next" to submit your responses. Thank you for taking the time to answer these questions. If you have any queries relating to the survey, please contact our office on 1800 807 535. If you want to read our Privacy Collection Statement or want to know more about newfocus, please visit our website: www.newfocus.com.au

THANK YOU



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