

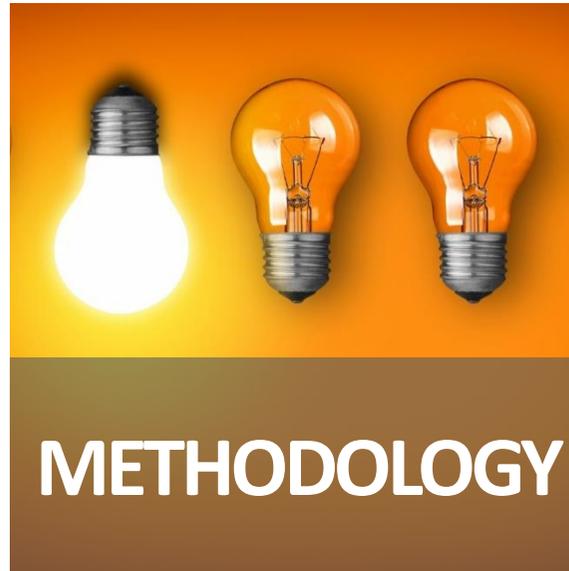


YORKE PENINSULA TOURISM
UNDERSTANDING SHACK
USERS ADELAIDE VISITORS
QUANTITATIVE RESEARCH REPORT

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The purpose of this research is to understand visitor behaviour related to the Yorke Peninsula, explore alternative products and experience gaps for visitors, and recommend activities with potential to encourage greater spend and length of stay in the region.



Market research has been conducted in accordance with ISO 202520.



An online survey was conducted between 15th February and 3rd March 2019 of adults (18+) residing in Adelaide who visited the Yorke Peninsula for an overnight holiday in the past 2 years.



413 respondents participated in the survey. Respondents included Shack Owners, Private Accommodation visitors, Caravan/Campers and Visiting Friends or Relatives (VFR).

Respondents were sourced from the McGregor Tan database and a link was forwarded to Yorke Peninsula Tourism to distribute to their database.

INSIGHTS SUMMARY



McGregor Tan was commissioned to conduct quantitative and qualitative market research in order to understand visitor behaviour related to the Yorke Peninsula, explore alternative products and experience gaps for visitors, and recommend activities with potential to encourage greater spend and length of stay in the region. For the qualitative research, four focus groups were conducted on the 29th and 30th of January 2019. For the quantitative research, the survey of 413 people was conducted between 15th February and 3rd March 2019.

The research enables Yorke Peninsula Tourism to understand the different types of visitors to the Yorke Peninsula region as well as identify opportunities to increase local expenditure from these visitor segments based on their spending behaviour exhibited through the answers to various questions posed. The research provides significant insights into different segments based on their awareness of existing attractions and activities, the appeal of each, the likelihood to participate and spend money on existing and potentially new activities.

SEGMENTS

This research isolated four visitor types, each with strengths and weaknesses in terms of visitation, dispersal and spend. These segments have been used throughout this report to identify the opportunities to increase spend in the Yorke Peninsula. The segments are summarised below in terms of attributes and engagement of activities on offer that may encourage spend. This research seeks to find the opportunities that are likely to encourage all visitors to spend more, or to maximise the opportunities to increase spend.

The priorities in this analysis is based on:

- Activities that appeal to all markets or activities that appeal to most/some markets; and critically,
- Activities that will generate the most increase in spend.

The combination of these attributes have been provided in the following pages to identify a specific list of activities that can be used for either driving awareness or for product/ experience development.

The four segments below have been identified and classified in order of priority markets:

1. Private Accommodation
2. Caravan and Camping
3. Visiting Friends or Relatives (VFR)
4. Shack Owners

KEY FINDINGS

1. The Private Accommodation market is the key segment to target for increasing spend.
2. Most of the activities the Private Accommodation market are willing to spend money on are also shared by the Caravan and Camping market and the Visiting Friends and Relatives market.
3. These three markets have low awareness of current activities available, whereas Shack Owners have a relatively high awareness. Increasing awareness of the specific activities identified through this research is the priority of communications.
4. Visitors to the Yorke Peninsula are mostly likely to rely on their own knowledge of the region when considering what there is to do.
5. Activities grouped in the food and beverage category are most likely to appeal to more segments, and are the activities most likely to increase spend.

Private Accommodation:

The Private Accommodation segment consisted of respondents who booked an apartment, hotel, shack, holiday home or cabin.

Representing the largest segment at 46% - Private Accommodation visitors stay just 3.3 nights on average, but spend \$210 per night. However, just 50% of them visit each year or more often.

Barriers: The barriers to increased spend were high, but given their already high spend, the key barriers of *budget constraints* (77%) and *not wanting to spend more money than they have to* (80%) should also be considered within the context that they also *didn't know what there was to do* (38%) and *didn't know what events were on* (50%).

Private Accommodation: Have very low awareness of activities on offer but rate most the activities as appealing. This group is willing to spend the most on the activities they find appealing and travel the furthest for the experiences presented.

Opportunity - Priority Market: As a result of these factors including their size, high spend, low awareness and high appeal, we are able to conclude that this segment is most likely to engage in more activities on holiday in the Yorke Peninsula, and ultimately spend more.

Communications: This market is the most likely to want to use the SATC website, so utilising this channel for the targeted communications is optimal. There are big gaps between the current use and preferred use for both social media (up from 12% currently to 29% preferred) and www.yorkepeninsula.com.au (up from 15% currently to 27% preferred).

29% of the Private accommodation segment indicated they prefer social media as a communications channel creating an opportunity to use this tool to drive traffic to the www.yorkepeninsula.com.au website.

Caravan and Camping:

The Caravan/Campers segment consisted of respondents who took a caravan or camped in the Yorke Peninsula region.

Representing 19% of the market – staying the longest (5.9 nights per trip), the Caravan and Camping segment have a high spend per trip (\$571) but a low spend per night (\$97), and 49% visit each year or more often.

Barriers: This segment has the fewest barriers, but budget constraints (76%) are more likely to represent a tighter variation given their already low spend per night.

Caravan and Camping have a low level of awareness of activities and a high level of appeal for those same activities, but are not likely to spend much money on doing the activities.

Opportunity – Limited Market: This market presents some opportunity for incremental spend, but not a particularly large spend.

Communications: This market is the most likely to use traditional channels, including visitor guides, maps and brochures (59% preferred), highlighting the value of participating in caravan and camping shows, as well as visitor centres (58% preferred). Channels with the biggest gap between current use and preferred use include:

- SA Tourism website (19% current to 36% preferred)
- www.yorkepeninsula.com.au (18% current to 34% preferred)
- Facebook/Instagram (4% current to 28% preferred)

With 28% of the caravan and camping segment indicating a preference for social media as a communications channel there is an opportunity to use this tool to drive traffic to the www.yorkepeninsula.com.au website.

Visiting Friends or Relatives (VFR):

The Visiting Friends or Relatives (VFR) segment consisted of respondents that stayed with friends or family who lived in the Yorke Peninsula region, or stayed at a friend's holiday shack or holiday home at no cost.

Representing 21% of the market, VFR stay a moderate 2.8 nights and spend \$117 per night. While this group spends no money on accommodation, almost two thirds (64%) are likely to visit each year or more often.

Barriers: Interestingly this market appears to have more money they might consider 'unspent' than the other segments, with just 66% reporting they didn't want to spend more money than they had too. They do have an awareness problem, and could be a very strong market to communicate to via a database given their strong frequency of visitation.

Visiting Friends or Relatives are not overly aware of the activities and find them appealing, but consider it unlikely that they would engage in these activities on their next trip despite that appeal.

Opportunity – Limited Market: Given their low awareness and likelihood to do the listed activities, this market represents one of limited opportunity. However, they do have a relatively high level of income and the second highest spend per night of all the segments.

Communications: This segment is naturally most likely to take recommendations from friends or relatives (72%), and given this who they are staying with this is no surprise. However, this is not the preferred channel for many (just 58%), and there are opportunities to communicate through channels not currently used, including:

- Social media (16% current to 40% preferred)
- SA Tourism website (13% current to 33% preferred)
- www.yorkepeninsula.com.au (13% current to 27% preferred)

40% of the VFR segment indicated they prefer social media as a communications channel creating an opportunity to use this tool to drive traffic to the www.yorkepeninsula.com.au website.

Shack Owners:

The Shack Owners segment consisted of respondents who stayed in their own or family's shack or holiday home.

Representing 14% of the market – Shack Owners have a high frequency of visitation (57% every 3 months or more often), stay 4.3 nights of average, but spend just \$72 dollars per night.

Shack Owners are aware of most activities but do not consider many to have much appeal, or there to be a high likelihood that they would engage in these activities on their next trip.

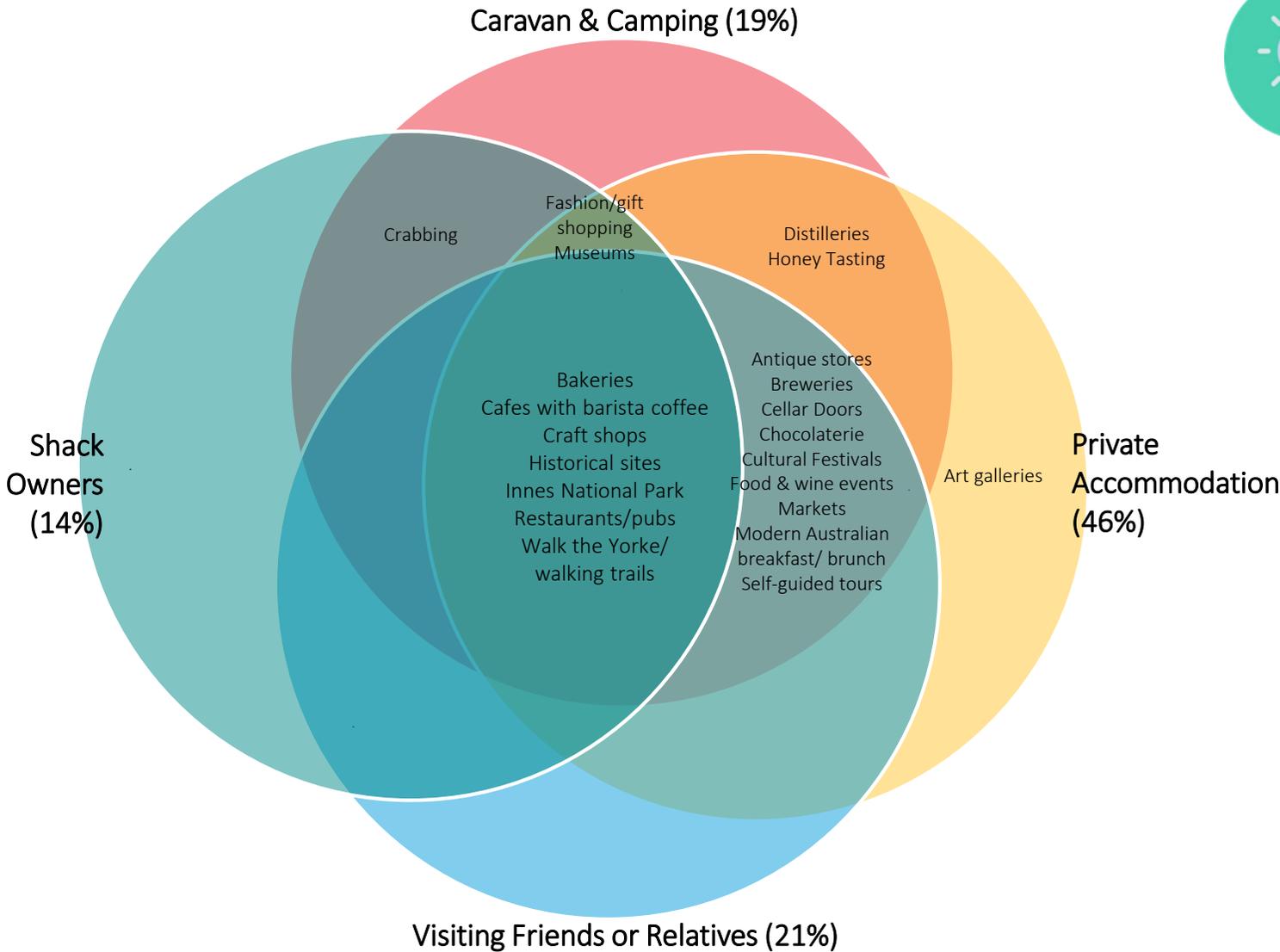
Barriers: Shack Owners have the most barriers to spend, including that they don't usually leave their shack (94%) and that they don't want to spend more money than they have to (88%). The qualitative research expanded this point to suggest that this market like the getaway aspect of their shack, but many would rather spend their money on a bigger interstate or overseas holiday. However, despite most reporting their awareness of the activities presented, they were most likely to say that they didn't know when events were on (73%) or just didn't know what to do (50%).

Opportunity – Limited Market: Despite their high visitation frequency, as a result of these factors there is limited opportunity in this market.

However, one opportunity that did present in this market from the qualitative research was their openness to be provided with communications to inform visitors who rent *their* accommodation with a guide of what there is to do while they stay. Targeting communications to this segment may be better received as a tool to enable their guests to have a better time in the region.

Communications: Shack Owners don't currently use social media to find out what is on (14%), but this is the preferred channel for them (36%). This is followed by word of mouth (36%), as this market like to hear about things from the locals.

OPPORTUNITIES FOR INCREASED SPEND



The diagram on this page represents the activities that we have isolated to represent only those activities that are appealing.

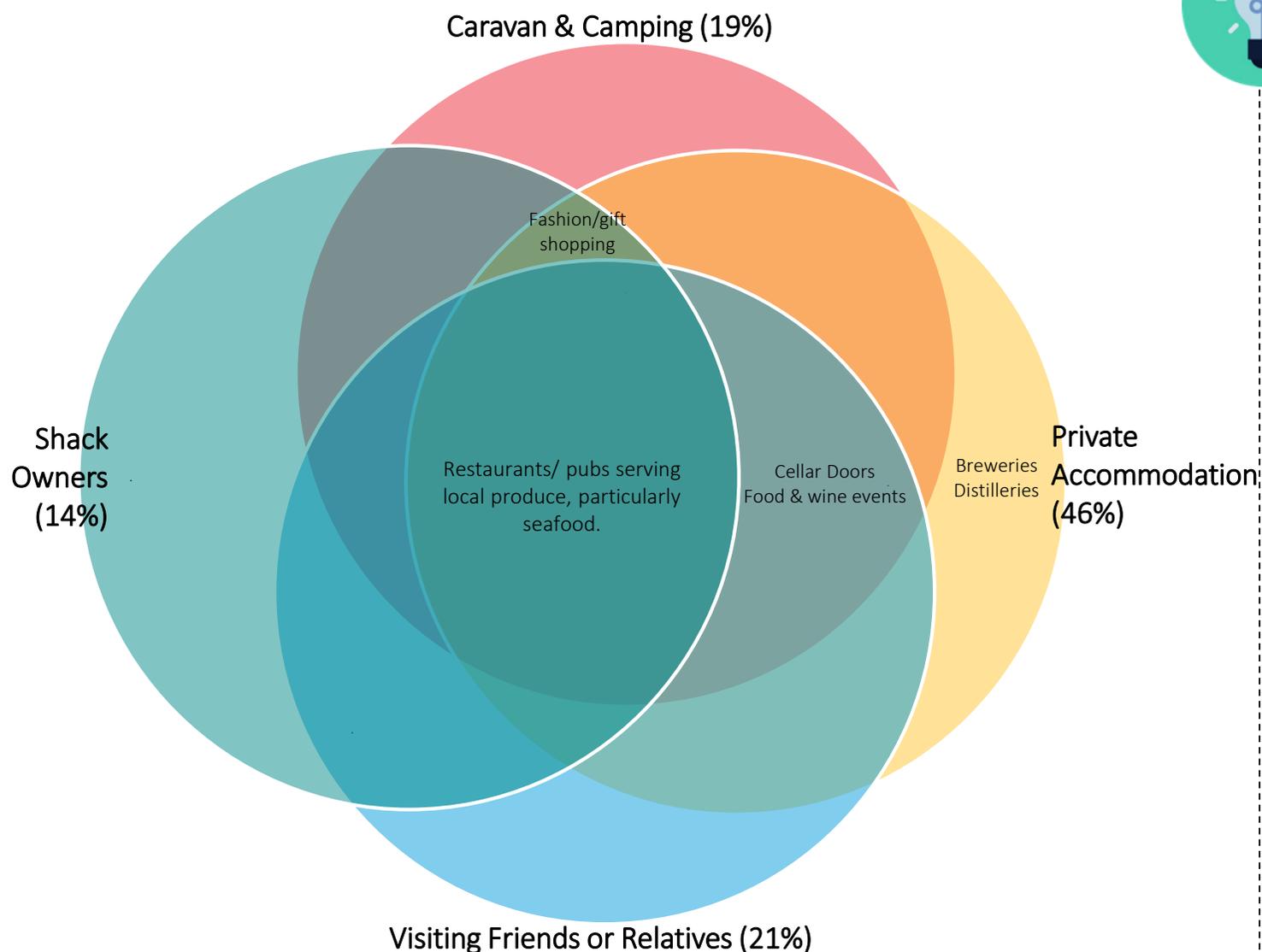
This graphical representation demonstrates two key findings:

1. Private Accommodation and Caravan and Camping segments have the largest number of activities they find appealing. Both these groups are typified as 'holiday visitors', make up two thirds of the market (65%), and have the highest spend per trip.
2. The activities that Shack Owners and VFR find appealing are shared with Private Accommodation and Caravan and Camping.

This page provides a list of activities that most visitors find appealing, and by combining the middle two lists we have a list of the best activities to promote that we know will appeal to most visitor types.

Accounting for over half of the two lists are 9 food and beverage offerings, including *bakeries, cafes with barista coffee, restaurant/ pubs serving local produce particularly seafood, food and wine events, breweries, cellar doors, chocolaterie and modern Australian breakfast/brunch.*

OPPORTUNITIES FOR INCREASED SPEND HIGH SPEND ATTRACTIONS / ACTIVITIES



The diagram on this page represents the same activities previously isolated but further filters the appealing activities to just those that the segments have stated they would spend a higher amount on, i.e:

- Appealing activities
- High spend activities

These six activities are the six most highly recommended activities to focus on to increase spend in the next 12 to 24 months.

1. Just one activity is common to all groups (100%), **restaurants/ pubs serving local produce, particularly seafood**. This activity should be considered by Yorke Peninsula Tourism as a marketing, experience development, and positioning priority.
2. Two activities rated as appealing and high spend for 86% of the market, namely Caravan and Camping, Private Accommodation and VFR are:
 - **Cellar Doors**
 - **Food and Wine events**
3. Private Accommodation (46%) have the additional appeal and high spend of:
 - **Breweries**
 - **Distilleries**
4. **Fashion and Gift Shopping** is appealing for Private Accommodation, Caravan and Camping, and Shack Owners (79% of the market) and is the only activity not related to food and beverages.

OPPORTUNITIES FOR INCREASED SPEND LOW SPEND ATTRACTIONS/ ACTIVITIES



The diagram on this page represents the activities previously isolated but filters the appealing activities to just those that the segments have stated they would NOT spend a higher amount on, i.e:

- Appealing activities
- Low spend activities

These activities are of interest as some of them may provide opportunity to promote in terms of both demand and supply, and while they may not increase spend significantly, they may serve to incrementally increase the average spend per day.

Aside from the previously mentioned food and beverage activities are four activities that all segments rate as appealing:

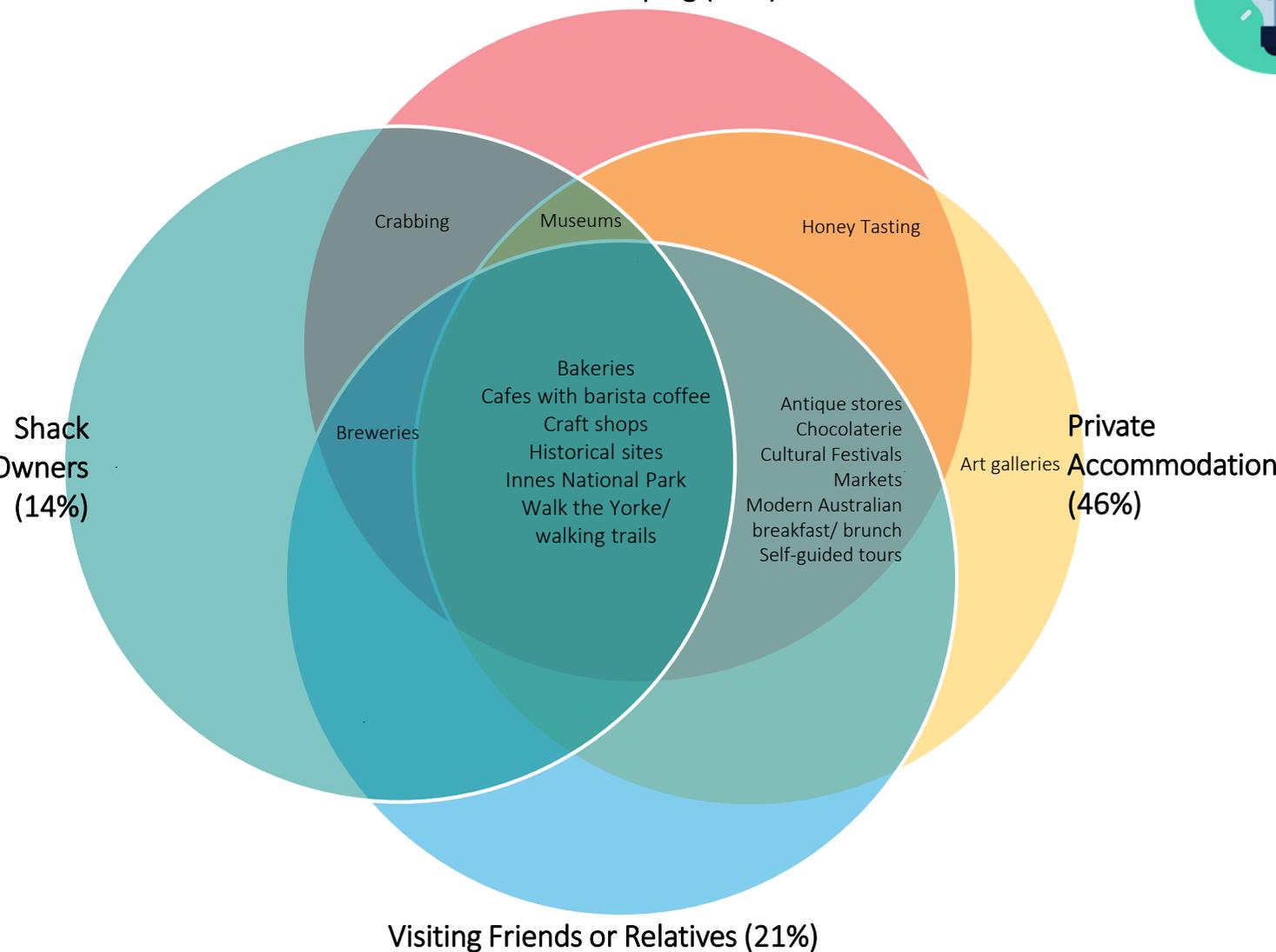
- Craft shops
- Historic sites
- Innes National Park
- Walk the Yorke/ walking trails

In addition, Private Accommodation, Caravan and Camping and VFR (86% of visitor market) find the following appealing:

- Antique stores
- Cultural festivals
- Markets
- Self-guided tours

Again, while these may not offer a large spend, there may be an opportunity to promote these activities as they are appealing to a large proportion of visitors.

Caravan & Camping (19%)



SEGMENT PROFILE



VISITOR SEGMENT PROFILE

Shack Owners

Respondents who indicated that they stayed in their own or family's shack or holiday home were considered to be Shack Owners. They spent more nights in the Yorke Peninsula region compared to the average but spent the least amount of money. They were more likely to go to bakeries, markets, and restaurants/pubs that served local produce, particularly seafood.



Private Accommodation

Respondents who indicated that they booked an apartment, hotel, shack, holiday home or cabin were grouped under Private Accommodation. They spent the most money despite spending fewer nights than average in the Yorke Peninsula region. They were more likely to go to bakeries, restaurants/pubs that served local produce, particularly seafood, and cafes with good barista made coffee.



Caravan/Campers

Respondents who indicated that they took their caravan or camped were grouped together as Caravan/Campers. They spent the most number of nights in the Yorke Peninsula region compared to other groups, and spent more than the average spend. They were more likely to go to bakeries, restaurants/pubs that served local produce, particularly seafood, and the Innes National Park.



VFR

Respondents who indicated that they stayed with friends or family who lived in the Yorke Peninsula region or stayed at a friend's holiday shack or holiday home at no cost in the Yorke Peninsula region were grouped under Visiting Friends and Relatives (VFR). They spent the least number of nights and the least amount of money in the Yorke Peninsula region, and are likely to go to restaurants and bakeries.



Shack Owners

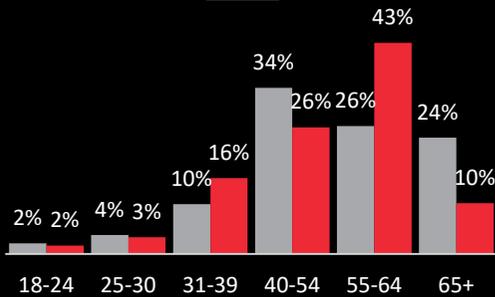


SHACK OWNERS



■ All Respondents ■ Shack Owners

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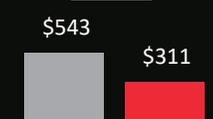
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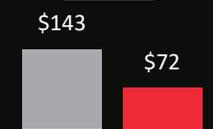
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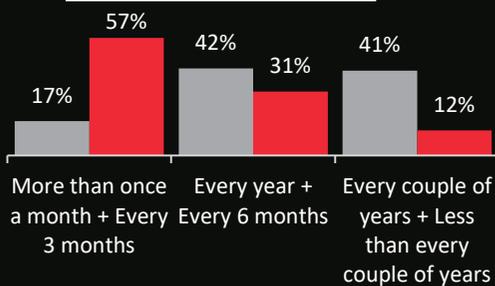
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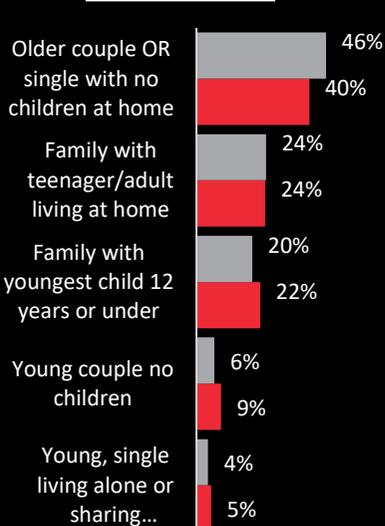
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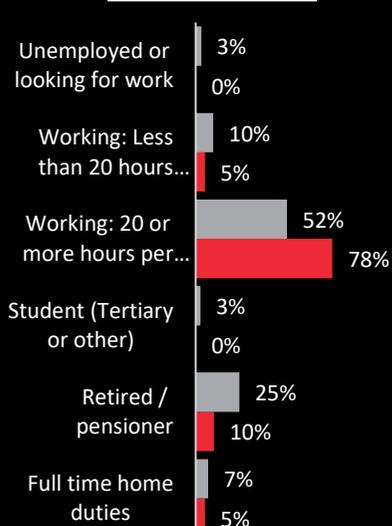
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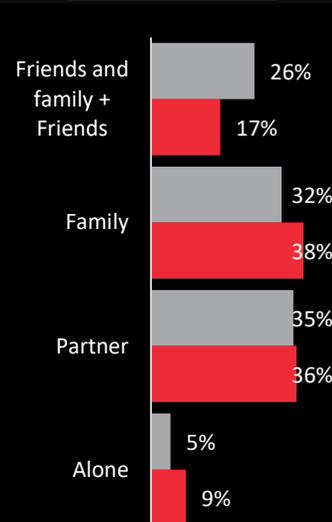
HOUSEHOLD



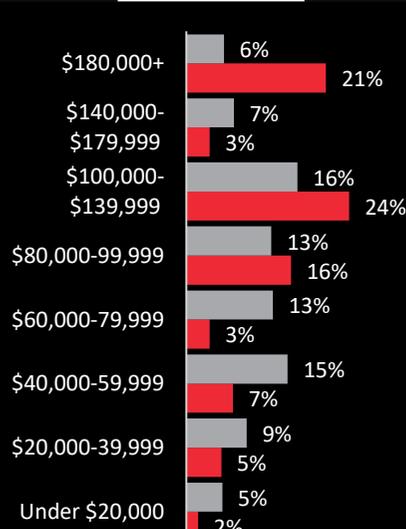
WORK STATUS



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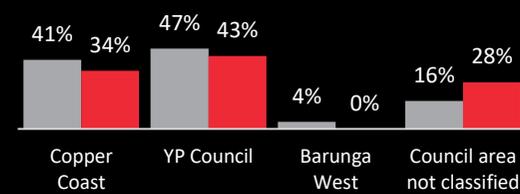


HOUSEHOLD INCOME PER ANNUM

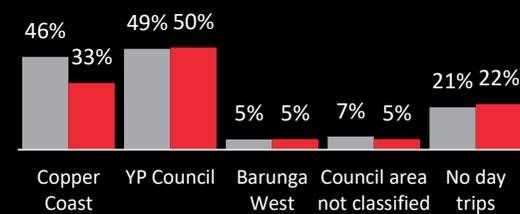


PLACES VISITED

Overnight Stays



Day Trips



Copper Coast Council:
Moonta, Moonta Bay,
Wallaroo, Kadina and Port
Hughes

Yorke Peninsula Council:
Ardrossan + Edithburgh +
Innes National Park +
Marion Bay
+ Minlaton + Point Turton +
Port Victoria + Port Vincent
+ Stansbury + Yorketown

Barunga West:
Port Broughton

PROFILE

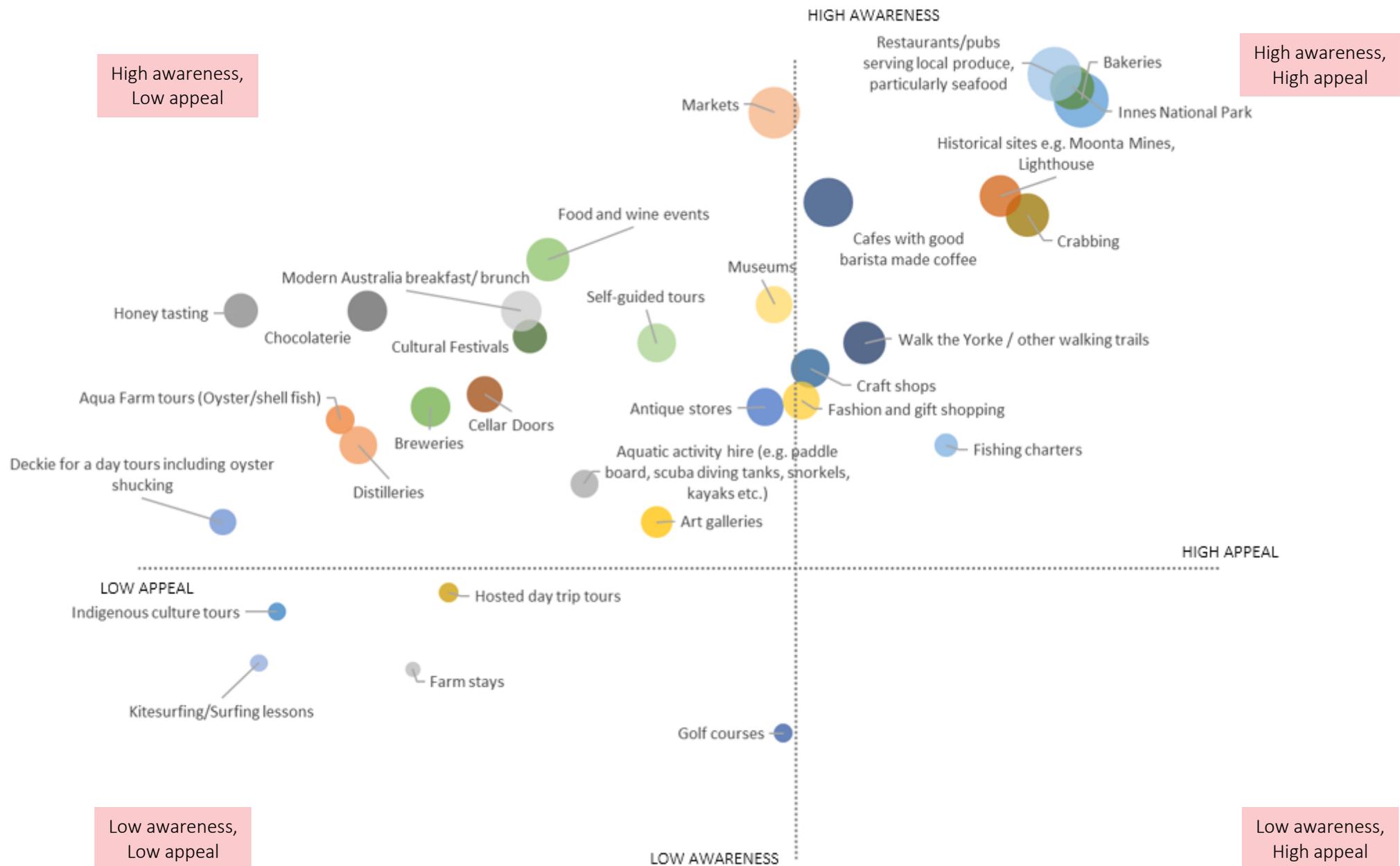
The Shack Owners segment consisted of respondents who stayed in their own or family's shack or holiday home and were more likely to be aged between 55 and 64 (43%).

They also had a higher percentage of respondents that worked for 20 or more hours per week (78%) and the highest percentage of respondents that had a gross household income of over \$180K per annum.

Two in five Shack Owners (40%) were an older couple or single with no children at home. This segment was more likely to visit the Yorke Peninsula region more than once a month or every 3 months, and spent more nights in the Yorke Peninsula region compared to the average, but spent the least amount of money.

SHACK OWNERS

AWARENESS AND APPEAL



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

SHACK OWNERS AWARENESS AND APPEAL



With majority of the attractions and activities plotted above the mid line, it is clear from the graph that Shack Owners are well aware of almost all the attractions and activities available in the Yorke Peninsula region, however not all are appealing to this group.

High awareness and high appeal

Shack Owners identified the following attractions and activities to have high awareness and high appeal. In order of likelihood, Shack Owners are more likely to do this activity or attraction on their next visit.

- Bakeries
- Restaurants/pubs serving local produce, particularly seafood
- Cafes with good barista made coffee
- Innes National Park
- Crabbing
- Walk the Yorke/ other walking trails
- Historical sites
- Craft shops
- Fashion and gift shopping
- Fishing charters

Low awareness and low appeal

The following activities had low awareness and low appeal for Shack Owners, there is an opportunity to increase awareness of these activities with Shack Owners, potentially moving them to a high appeal quadrant.

- Hosted day trip tours
- Golf courses
- Indigenous culture tours
- Kitesurfing/Surfing lessons
- Farm stays

SHACK OWNERS COST AND DISTANCE



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

SHACK OWNERS COST AND DISTANCE

High spend, long distance

Shack Owners indicated they would spend more and travel longer distances for the following attractions and activities. In order of likelihood, Shack Owners are more likely to do this activity or attraction on their next trip:

- Food and wine events
- Breweries
- Cellar Doors
- Deckie for a day tours including oyster shucking
- Fishing charters
- Hosted day trip tours
- Golf courses

High spend, short distance

Shack Owners are more likely to spend more, but would only travel a short distance for the following attractions and activities:

- Restaurants/pubs serving local produce, particularly seafood
- Antique stores
- Distilleries
- Fashion and gift shopping
- Kitesurfing/Surfing lessons
- Farm stays

Low spend, short distance

Shack Owners would travel short distances and expect their spend to be low for the following attractions and activities:

- Bakeries
- Cafes with good barista made coffee
- Crabbing
- Walk the Yorke / other walking trails
- Modern Australia breakfast/ brunch
- Chocolaterie
- Craft shops
- Self-guided tours
- Museums
- Honey tasting
- Cultural Festivals
- Art galleries
- Aqua Farm tours (Oyster/shell fish)
- Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)

Low spend, long distance

Shack Owners indicated they would travel further distances for the following attractions and activities but indicated their spend would be low:

- Markets
- Innes National Park
- Historical sites e.g. Moonta Mines, Lighthouse
- Indigenous culture tours

SHACK OWNERS

COST AND DISTANCE x APPEAL

Attractions and activities with the highest appeal were extrapolated and replotted.

High spend, long distance

Shack Owners indicated **fishing charters** were appealing and they would spend more and travel further to go on one, however the likelihood of them doing so on their next visit was small.

High spend, short distance

The following attractions and activities were appealing, within a short distance, however, Shack Owners were more likely to spend more:

- Restaurants/pubs serving local produce, particularly seafood
- Fashion and gift shopping

Low spend, short distance

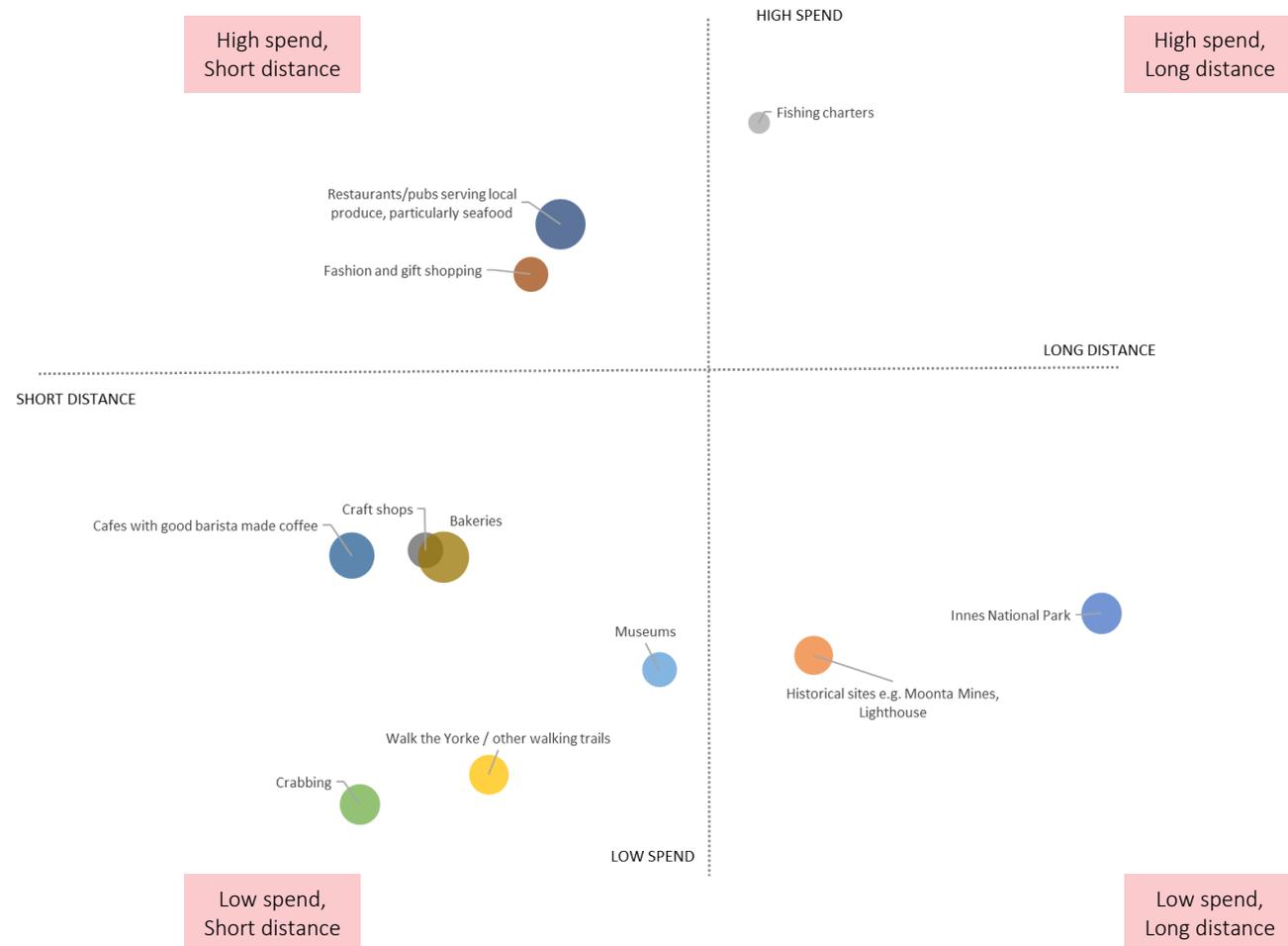
This group indicated the following were appealing within short distances and would expect their spend to be low:

- Bakeries
- Cafes with good barista made coffee
- Crabbing
- Walk the Yorke / other walking trails
- Craft shops
- Museums

Low spend, long distance

The following nature/cultural experiences were appealing to Shack Owners who would travel further distances but again, specified their spend would be low:

- Innes National Park
- Historical sites e.g. Moonta Mines, Lighthouse



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

SHACK OWNERS

COST, DISTANCE x APPEAL x LIKELIHOOD OF VISITING

Attractions and activities with the highest appeal and most likelihood of being visited were extrapolated and replotted.

High spend, long distance

Shack Owners indicated there were no attractions or activities they would spend high and travel long distances for on their next visit.

High spend, short distance

Within a short distance, both 'Restaurants/pubs serving local produce, particularly seafood' and 'Fashion and gift shopping' were both appealing and likely to be participated in on their next visit with Shack Owners specifying a higher spend for these activities.

Low spend, short distance

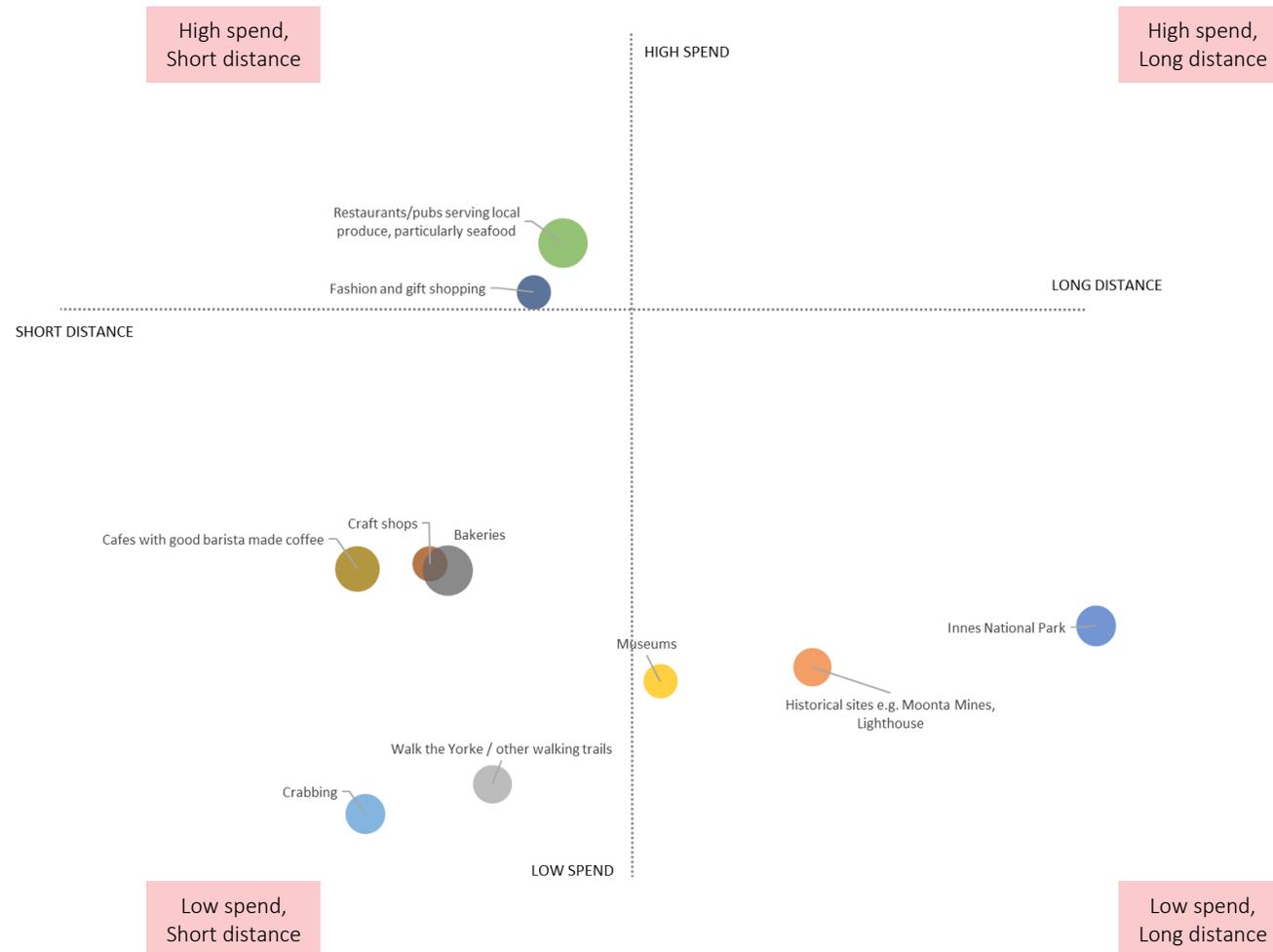
The following were appealing and likely to be participated in by Shack Owners on their next visit, however they would need to be close to their shack and they would not spend much:

- Bakeries
- Cafes with good barista made coffee
- Crabbing
- Walk the Yorke / other walking trails
- Craft shops

Low spend, long distance

The following nature/cultural experiences were appealing and likely to be visited by Shack Owners on their next visit, they would travel further distances but again indicated their spend would be low:

- Museums
- Innes National Park
- Historical sites e.g. Moonta Mines, Lighthouse



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

Private Accommodation Visitors

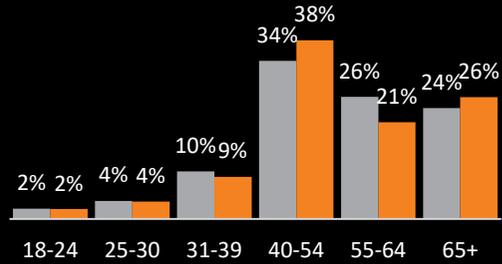


PRIVATE ACCOMMODATION



■ All Respondents ■ Private Accommodation

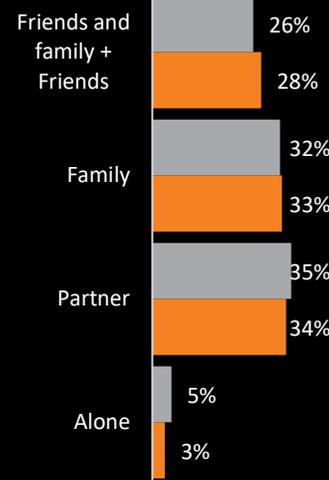
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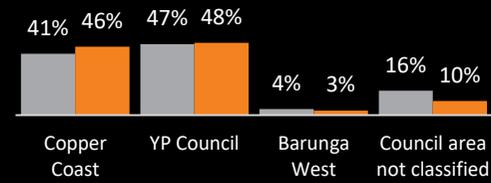


TRAVEL WITH:



PLACES VISITED

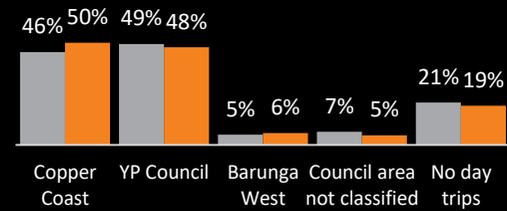
Overnight Stays



Copper Coast Council:
Moonta, Moonta Bay, Wallaroo, Kadina and Port Hughes

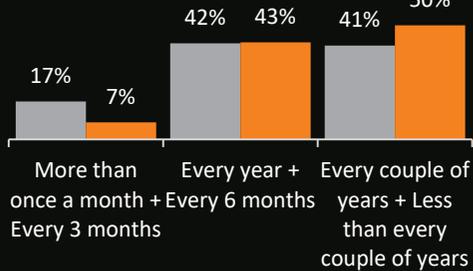
Yorke Peninsula Council:
Ardrossan + Edithburgh + Innes National Park + Marion Bay + Minlaton + Point Turton + Port Victoria + Port Vincent + Stansbury + Yorketown

Day Trips

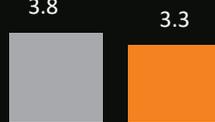


Barunga West:
Port Broughton

FREQUENCY OF VISIT



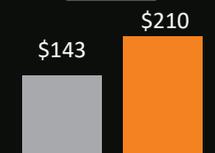
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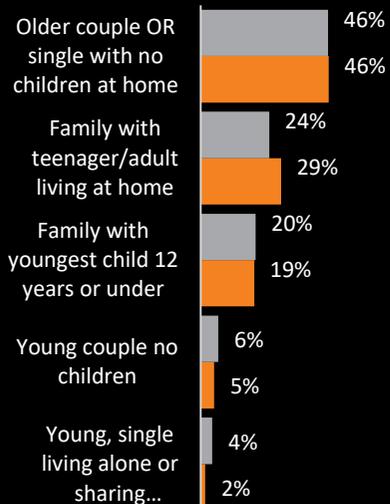


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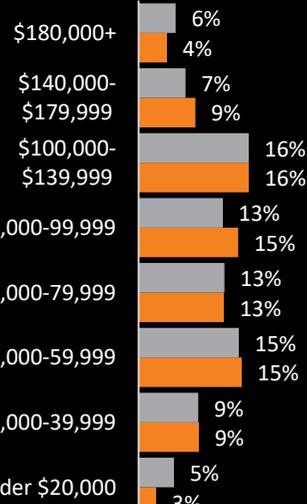
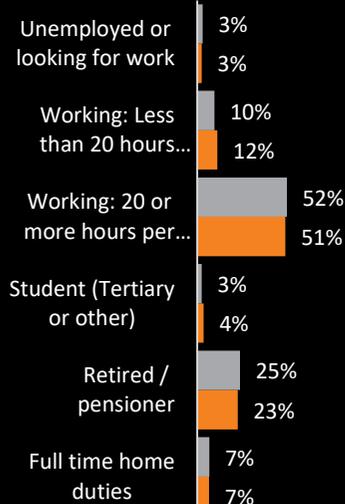


HOUSEHOLD INCOME PER ANNUM

HOUSEHOLD



WORK STATUS



PROFILE

The Private Accommodation segment consisted of respondents who booked an apartment, hotel, shack, holiday home or cabin, and were more likely to be aged between 40 and 54 (38%).

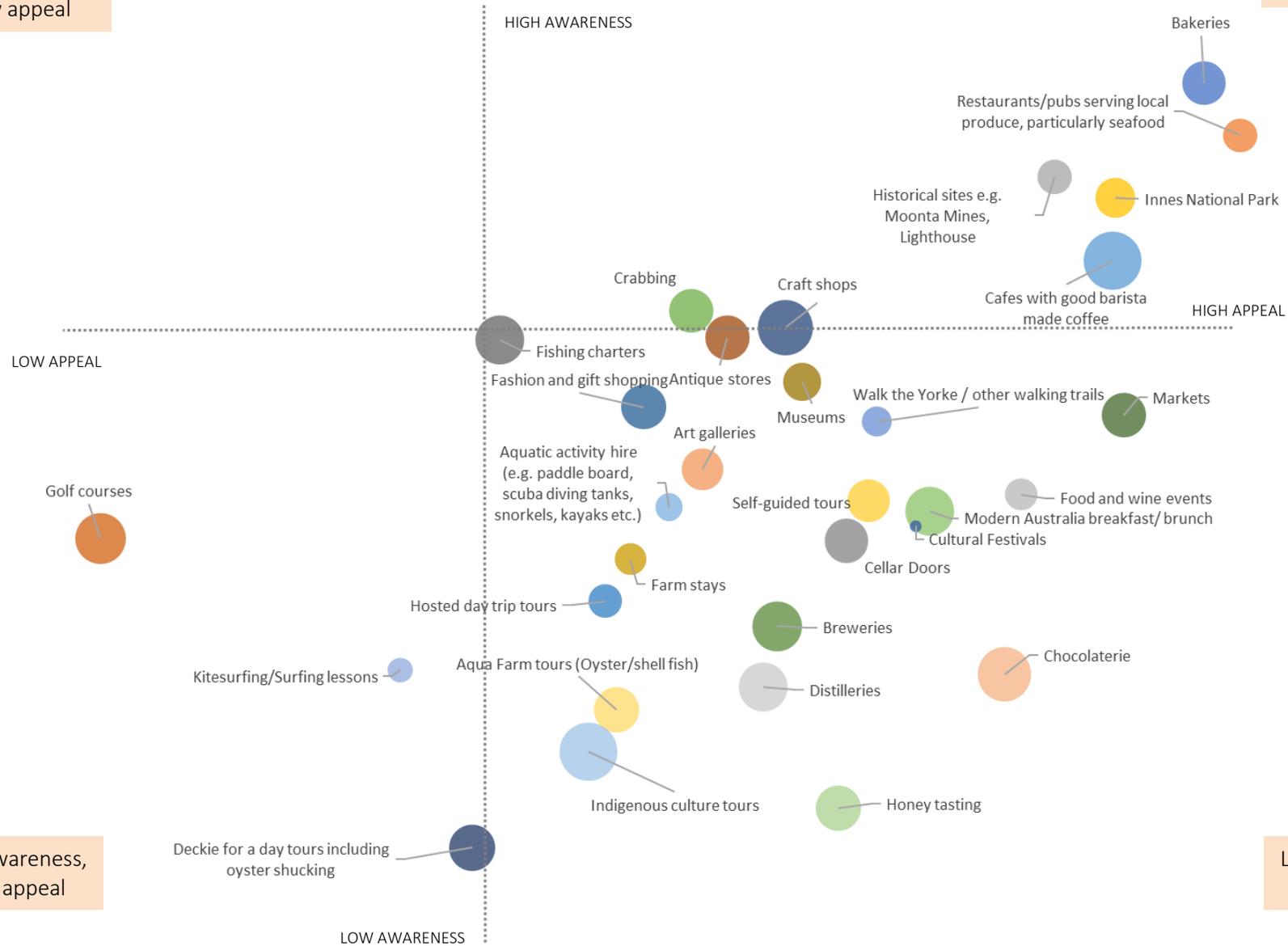
This segment accounted for the majority of respondents (46%) and visited the Yorke Peninsula region every couple of years or less than every couple of years. Even though they spent lower than the average number of nights among all respondents, their average spend (\$694) in the region was the most compared to other segments.

They were more likely to stay overnight at Moonta Bay (64%) or Stansbury (49%), and less likely to stay overnight at places (10%) other than the ones listed in the survey.

PRIVATE ACCOMMODATION VISITORS AWARENESS AND APPEAL

High awareness,
Low appeal

High awareness,
High appeal



Low awareness,
Low appeal

Low awareness,
High appeal

- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

PRIVATE ACCOMMODATION VISITORS

AWARENESS AND APPEAL



While Private Accommodation visitors were aware of and considered highly appealing seven activities and attractions, this group was not aware of most of the offerings of the Yorke Peninsula region. There should be a focus on promoting these activities and attractions to this group.

High awareness and high appeal

Private Accommodation visitors identified the following attractions and activities to have high awareness and high appeal. In order of likelihood, these visitors are more likely to do this activity or attraction on their next visit:

- Cafes with good barista made coffee
- Craft shops
- Crabbing
- Bakeries
- Innes National Park
- Historical sites e.g. Moonta Mines, Lighthouse
- Restaurants/pubs serving local produce, particularly seafood

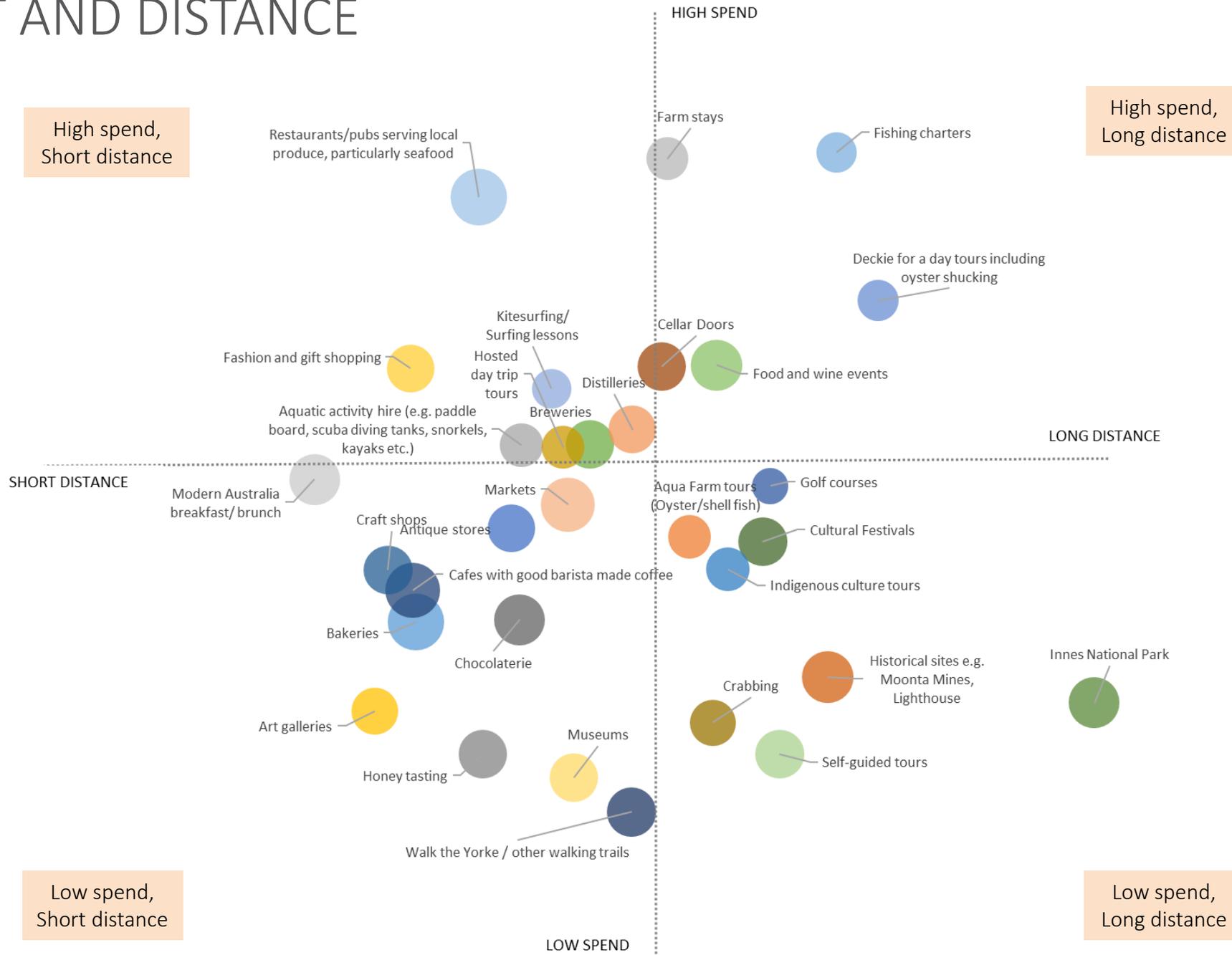
Low awareness and high appeal

The following activities and attractions had low awareness and high appeal, there is an opportunity to increase awareness, potentially moving them to a high awareness/high appeal quadrant:

- Indigenous culture tours
- Chocolaterie
- Breweries
- Distilleries
- Modern Australia breakfast/ brunch
- Fishing charters
- Honey tasting
- Fashion and gift shopping
- Aqua Farm tours (Oyster/shell fish)
- Markets
- Antique stores
- Cellar Doors
- Self-guided tours
- Art galleries
- Museums
- Hosted day trip tours
- Food and wine events
- Farm stays
- Walk the Yorke / other walking trails
- Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)

PRIVATE ACCOMMODATION VISITORS

COST AND DISTANCE



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

PRIVATE ACCOMMODATION VISITORS

COST AND DISTANCE

High spend, long distance

Private Accommodation visitors indicated they would spend more and travel longer distances for the following attractions and activities. In order of likelihood, these visitors are more likely to do this activity or attraction on their next trip:

- Food and wine events
- Cellar Doors
- Farm stays
- Deckie for a day tours including oyster shucking
- Fishing charters

High spend, short distance

This group are more likely to spend more but would only travel a short distance for the following attractions and activities:

- Restaurants/pubs serving local produce, particularly seafood
- Breweries
- Fashion and gift shopping
- Distilleries
- Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)
- Hosted day trip tours
- Kitesurfing/Surfing lessons

Low spend, short distance

These visitors would travel short distances and specified their spend would be low for the following attractions and activities:

- Bakeries
- Cafes with good barista made coffee
- Markets
- Modern Australia breakfast/ brunch
- Chocolaterie
- Walk the Yorke / other walking trails
- Craft shops
- Museums
- Honey tasting
- Antique stores
- Art galleries

Low spend, long distance

Private Accommodation visitors would travel further distances for the following attractions and activities but indicated their spend would be low:

- Historical sites e.g. Moonta Mines, Lighthouse
- Innes National Park
- Self-guided tours
- Cultural Festivals
- Crabbing
- Aqua Farm tours (Oyster/shell fish)
- Indigenous culture tours
- Golf courses

PRIVATE ACCOMMODATION VISITORS

COST AND DISTANCE x APPEAL

Attractions and activities with the highest appeal were extrapolated and replotted.

High spend, long distance

Private Accommodation visitors indicated the following attractions and activities were appealing and they would spend more and travel further to go:

- Food and wine events
- Cellar Doors
- Farm stays
- Fishing charters

High spend, short distance

The following attractions and activities were appealing, within a short distance, however, this group was more likely to spend more:

- Restaurants/pubs serving local produce, particularly seafood
- Breweries
- Fashion and gift shopping
- Distilleries
- Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)

Low spend, short distance

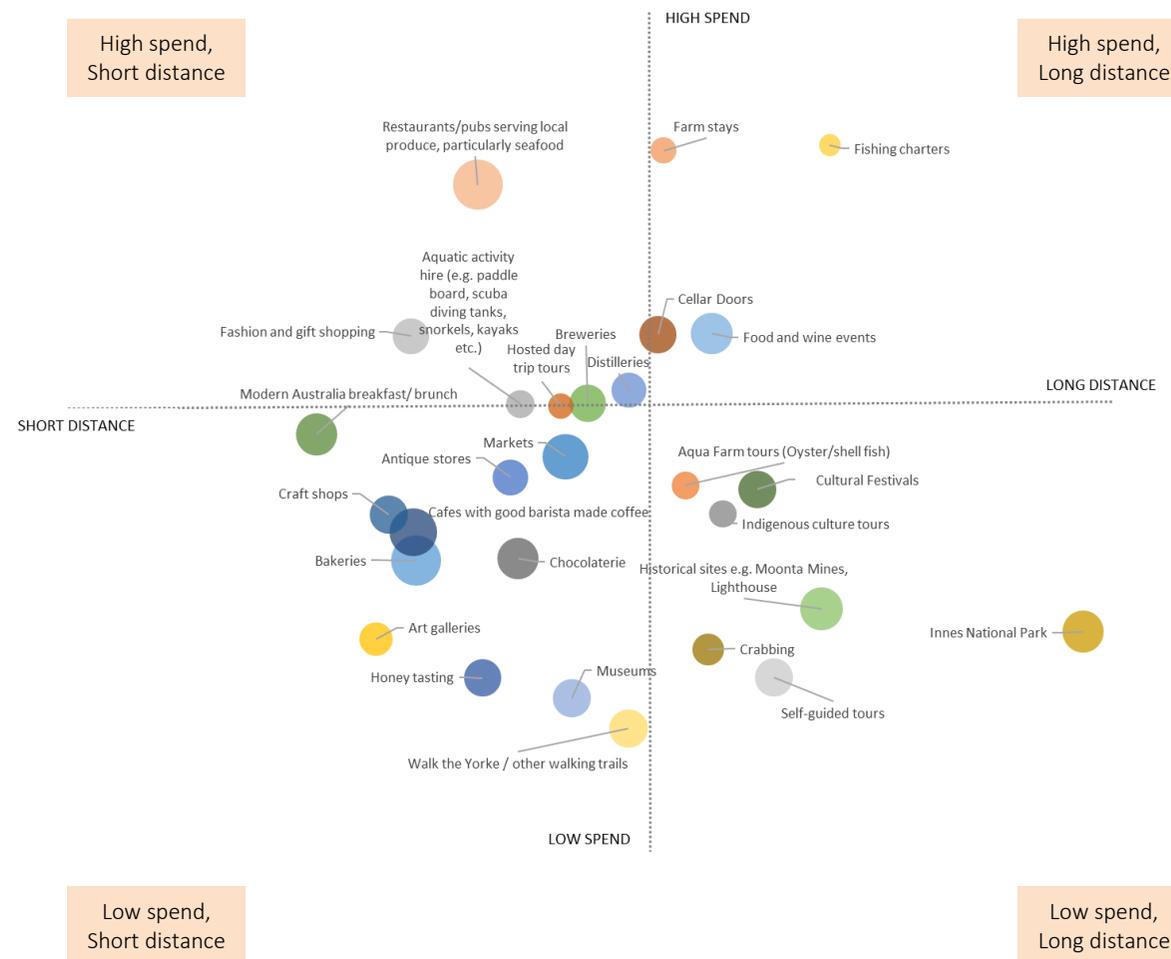
These visitors indicated the following were appealing within short distances and specified their spend to be low:

- Bakeries
- Cafes with good barista made coffee
- Markets
- Modern Australia breakfast/ brunch
- Chocolaterie
- Walk the Yorke / other walking trails
- Craft shops
- Museums
- Honey tasting
- Antique stores
- Art galleries
- Hosted day trip tours

Low spend, long distance

The following nature/cultural experiences were appealing to Private Accommodation visitors who would travel further distances but again indicated their spend would be low:

- Historical sites e.g. Moonta Mines, Lighthouse
- Innes National Park
- Self-guided tours
- Cultural Festivals
- Crabbing
- Aqua Farm tours (Oyster/shell fish)
- Indigenous culture tours



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

PRIVATE ACCOMMODATION VISITORS

COST, DISTANCE x APPEAL x LIKELIHOOD OF VISITING

Attractions and activities with the highest appeal and most likelihood of being visited were extrapolated and replotted.

High spend, long distance

Private Accommodation visitors indicated the following would entice them to spend high and travel long distances on their next visit:

- Food and wine events
- Cellar Doors

High spend, short distance

Provided they are within a short distance of their accommodation, food, fashion and alcohol were what this group found both appealing and likely to be participated in on their next visit with an indication they would spend more on these activities:

- Restaurants/pubs serving local produce, particularly seafood
- Breweries
- Fashion and gift shopping
- Distilleries

Low spend, short distance

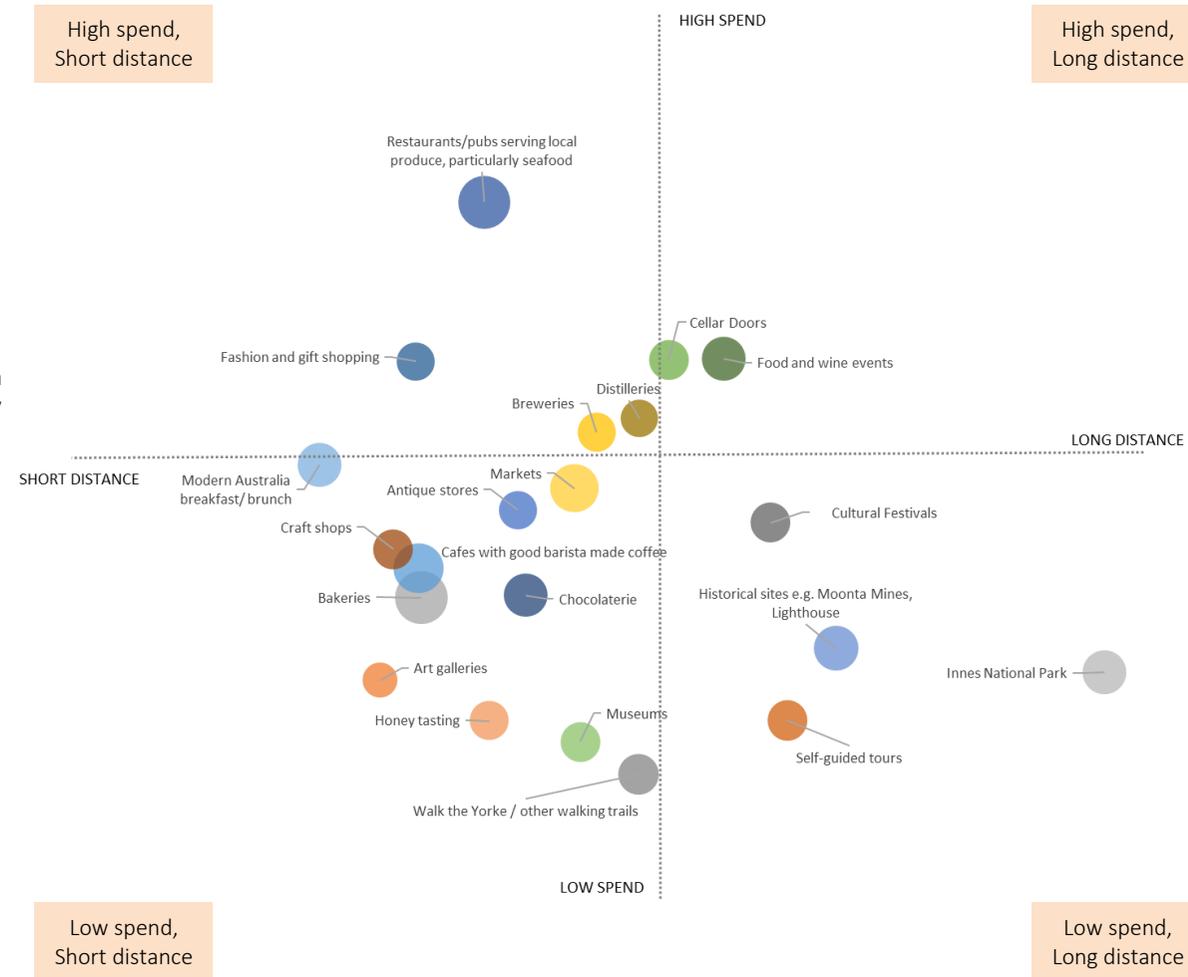
These visitors indicated the following were appealing and likely to be participated in on their next visit, however they would need to be close to their accommodation and they would not spend much:

- Bakeries
- Cafes with good barista made coffee
- Markets
- Modern Australia breakfast/ brunch
- Chocolaterie
- Walk the Yorke / other walking trails
- Craft shops
- Museums
- Honey tasting
- Antique stores
- Art galleries

Low spend, long distance

The following nature/cultural experiences were appealing and likely to be visited by Private Accommodation visitors on their next visit. They would travel further distances but again indicated their spend would be low:

- Historical sites e.g. Moonta Mines, Lighthouse
- Innes National Park
- Self-guided tours
- Cultural Festivals



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

Caravan and Camping Visitors

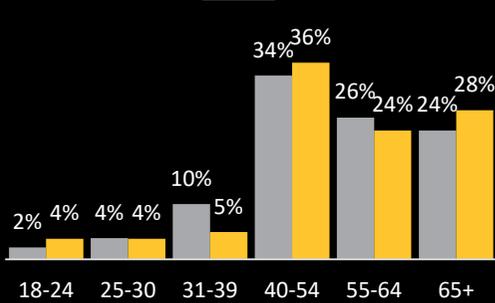


CARAVAN/CAMPERS



■ All Respondents ■ Caravan/Campers

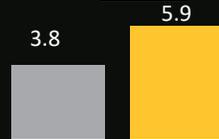
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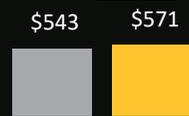
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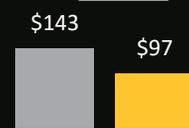
ALOS:



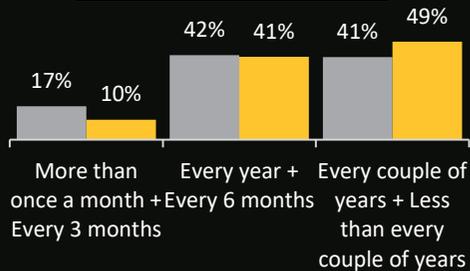
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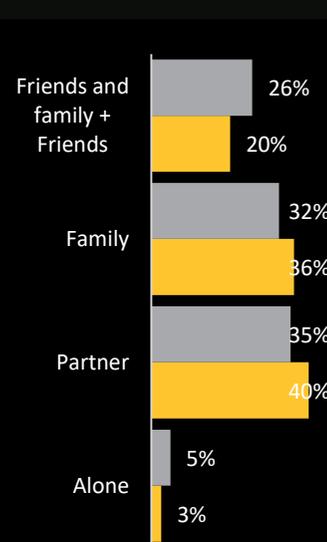
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FREQUENCY OF VISIT

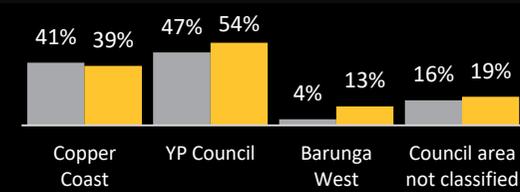


TRAVEL WITH:

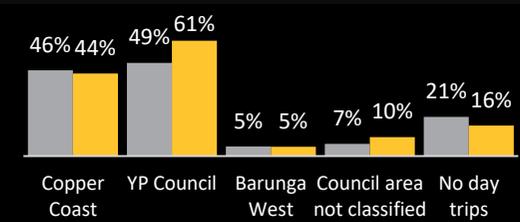


PLACES VISITED

Overnight Stays



Day Trips

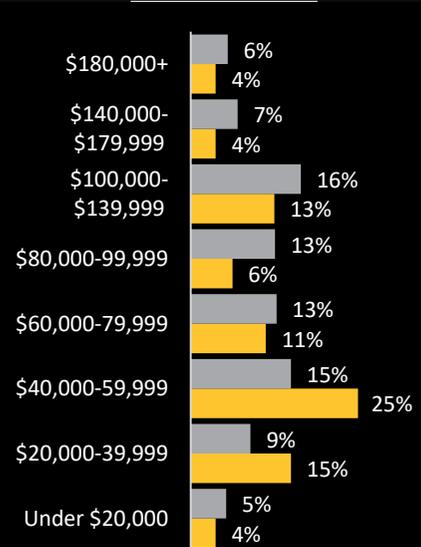


Copper Coast Council:
Moonta, Moonta Bay, Wallaroo, Kadina and Port Hughes

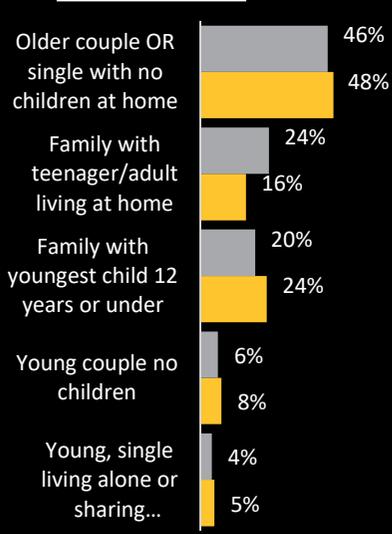
Yorke Peninsula Council:
Ardrossan + Edithburgh + Innes National Park + Marion Bay + Minlaton + Point Turton + Port Victoria + Port Vincent + Stansbury + Yorketown

Barunga West:
Port Broughton

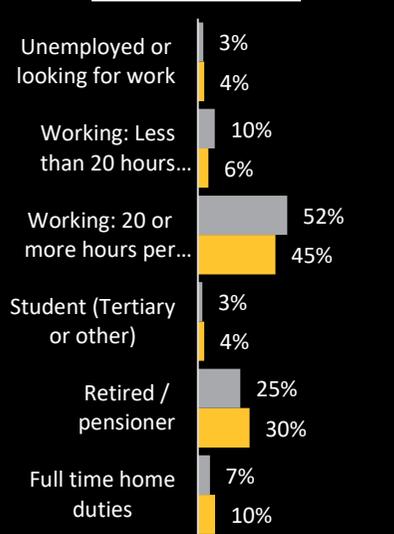
HOUSEHOLD INCOME PER ANNUM



HOUSEHOLD



WORK STATUS



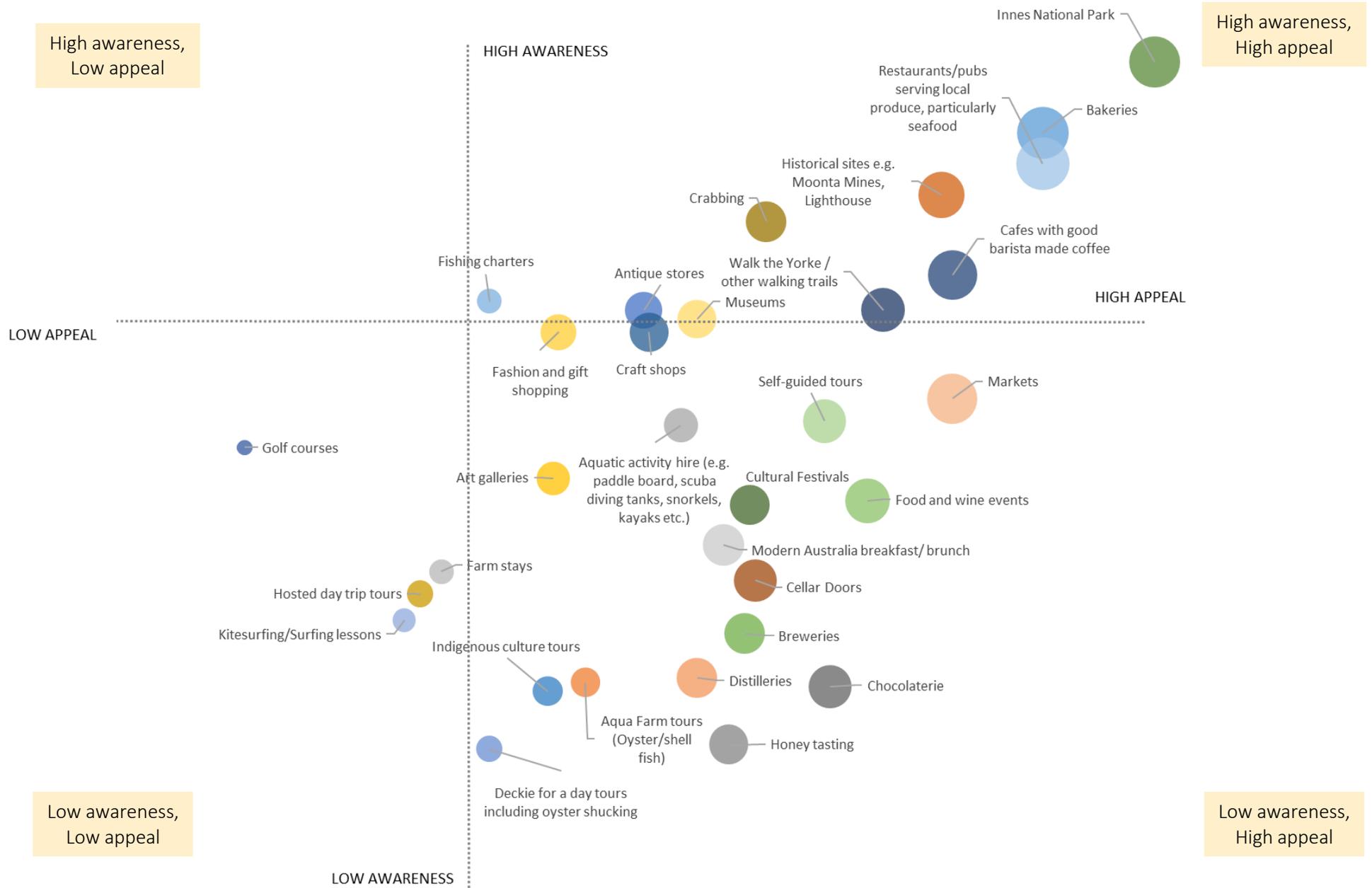
PROFILE

The Caravan/Campers segment consisted of respondents who took a caravan or camped in the Yorke Peninsula region. This segment were likely to visit the region every couple of years (49%) or every 6 months to a year (41%) and their average spend (\$571) was more than all other segments except the Private Accommodation segment. This segment was also more likely to spend 4-7 nights (49%) or more than 7 nights (20%) compared to other segments.

Caravan/Campers were more likely to stay overnight at Innes National Park (48%) and Port Broughton (40%) compared to other segments. They were more likely to travel with their partner (40%).

They were more likely to prefer visitor guides/maps/brochures (59%) and visitor centres (58%) to find out about attractions in the Yorke Peninsula region.

CARAVAN AND CAMPING VISITORS AWARENESS AND APPEAL



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

CARAVAN AND CAMPING VISITORS

AWARENESS AND APPEAL



While many activities and attractions were appealing for Caravan and Camping visitors, this group was also unaware of many of the offerings of the Yorke Peninsula region. There should be a focus on promoting these activities and attractions to this group.

High awareness and high appeal

Caravan and Camping visitors identified the following attractions and activities to have high awareness and high appeal. In order of likelihood, they are more likely to do this activity or attraction on their next visit:

- Restaurants/pubs serving local produce, particularly seafood
- Bakeries
- Innes National Park
- Cafes with good barista made coffee
- Historical sites e.g. Moonta Mines, Lighthouse
- Walk the Yorke / other walking trails
- Crabbing
- Museums
- Antique stores
- Fishing charters

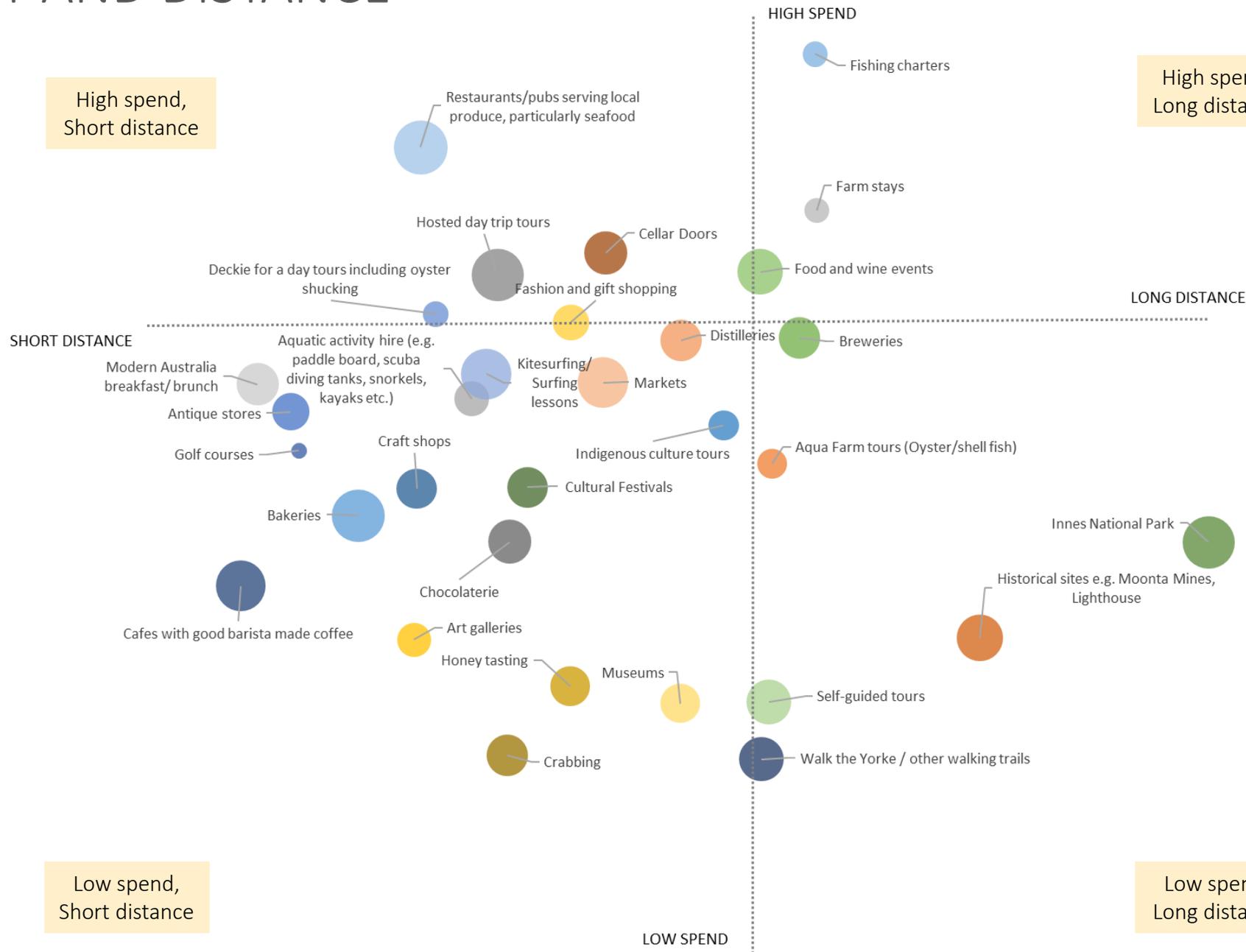
Low awareness and high appeal

The following activities and attractions had low awareness and high appeal, there is an opportunity to increase awareness, potentially moving them to a high awareness/high appeal quadrant:

- Markets
- Food and wine events
- Self-guided tours
- Chocolaterie
- Cellar Doors
- Modern Australia breakfast/ brunch
- Breweries
- Distilleries
- Cultural Festivals
- Craft shops
- Honey tasting
- Fashion and gift shopping
- Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)
- Art galleries
- Indigenous culture tours
- Aqua Farm tours (Oyster/shell fish)
- Deckie for a day tours including oyster shucking

CARAVAN AND CAMPING VISITORS

COST AND DISTANCE



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

CARAVAN AND CAMPING VISITORS

COST AND DISTANCE

High spend, long distance

Caravan and Camping visitors indicated they would spend more and travel longer distances for the following attractions and activities. In order of likelihood, Caravan and Camping visitors are more likely to do this activity or attraction on their next trip:

- Food and wine events
- Fishing charters
- Farm stays

High spend, short distance

This group are more likely to spend more but would only travel a short distance for the following attractions and activities:

- Restaurants/pubs serving local produce, particularly seafood
- Hosted day trip tours
- Cellar Doors
- Fashion and gift shopping
- Deckie for a day tours including oyster shucking

Low spend, short distance

Caravan and Camping visitors indicated they would travel short distances and expect their spend to be low for the following attractions and activities:

- Bakeries
- Kitesurfing/Surfing lessons
- Markets
- Cafes with good barista made coffee
- Chocolaterie
- Modern Australia breakfast/ brunch

- Crabbing
- Distilleries
- Cultural Festivals
- Craft shops
- Honey tasting
- Museums
- Antique stores
- Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)
- Art galleries
- Indigenous culture tours
- Golf courses

Low spend, long distance

These visitors would travel further distances for many of the nature/cultural attractions and activities but indicated their spend would be low:

- Innes National Park
- Historical sites e.g. Moonta Mines, Lighthouse
- Walk the Yorke / other walking trails
- Self-guided tours
- Breweries
- Aqua Farm tours (Oyster/shell fish)

CARAVAN AND CAMPING VISITORS

COST AND DISTANCE x APPEAL

Attractions and activities with the highest appeal were extrapolated and replotted.

High spend, long distance

Caravan and Camping visitors indicated the following attractions and activities were appealing and they would spend more and travel further for it:

- Food and wine events
- Fishing charters
- Farm stays

High spend, short distance

The following attractions and activities were appealing, within a short distance, however, this group was more likely to spend more:

- Restaurants/pubs serving local produce, particularly seafood
- Cellar Doors
- Fashion and gift shopping
- Deckie for a day tours including oyster shucking

Low spend, short distance

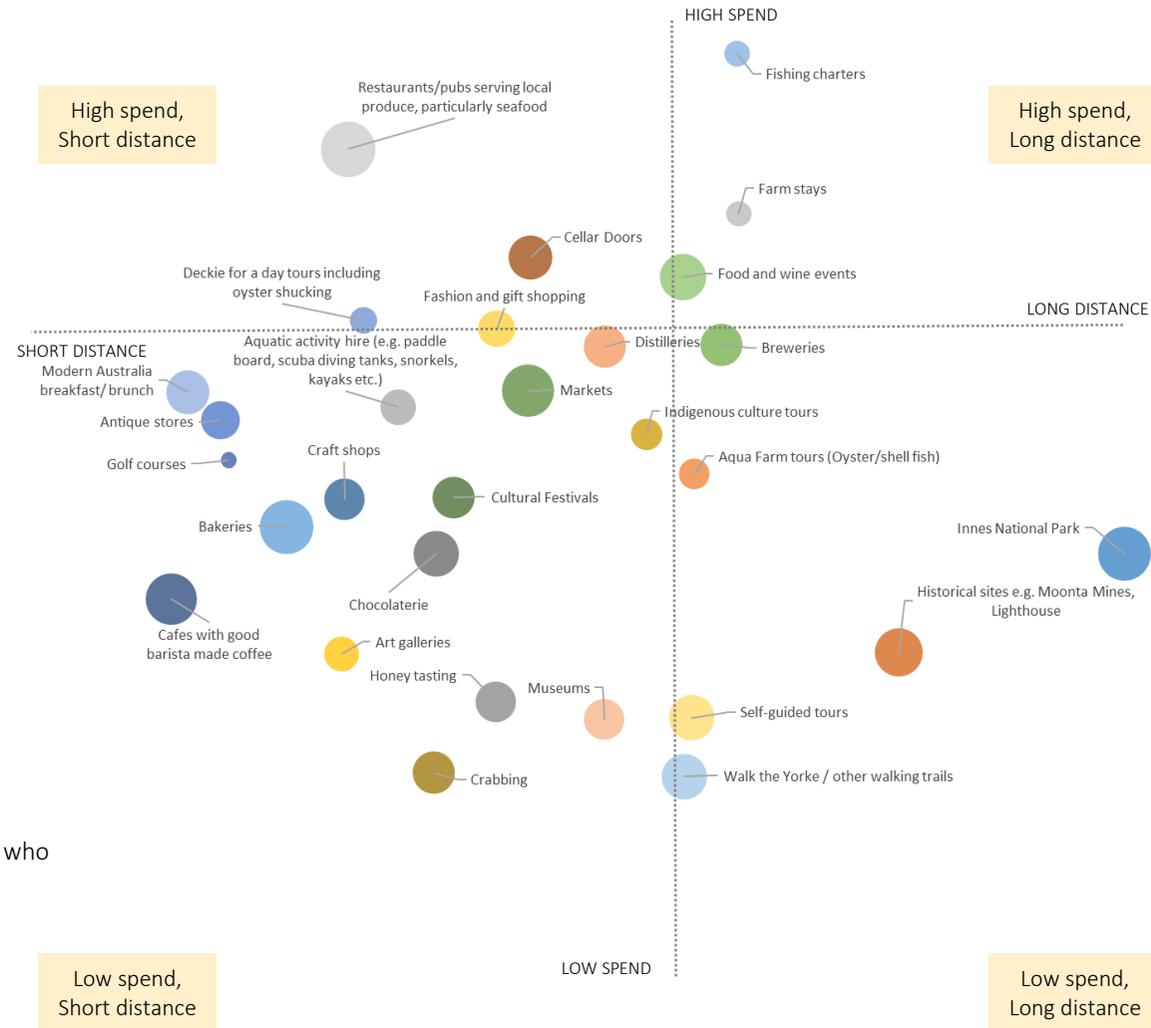
These visitors indicated there were many activities and attractions appealing within short distances and would expect their spend to be low:

- Bakeries
- Markets
- Cafes with good barista made coffee
- Chocolaterie
- "Modern Australia breakfast/ brunch"
- Crabbing
- Distilleries
- Cultural Festivals
- Craft shops
- Honey tasting
- Museums
- Antique stores
- Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)
- Art galleries
- Golf courses

Low spend, long distance

The following nature/cultural experiences were appealing to Caravan and Camping visitors who would travel further distances but again indicated their spend would be low:

- Innes National Park
- Historical sites e.g. Moonta Mines, Lighthouse
- Walk the Yorke / other walking trails
- Self-guided tours
- Breweries
- Indigenous culture tours
- Aqua Farm tours (Oyster/shell fish)



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

CARAVAN AND CAMPING VISITORS

COST, DISTANCE x APPEAL x LIKELIHOOD OF VISITING

Attractions and activities with the highest appeal and most likelihood of being visited were extrapolated and replotted.

High spend, long distance

Caravan and Camping visitors indicated the following would entice them to spend high and travel long distances during their next visit:

- Food and wine events

High spend, short distance

Provided they are within a short distance of their caravan/camping site, food, fashion and alcohol were what this group found both appealing and likely to be participated in on their next visit, with an indication they would spend more on these activities:

- Restaurants/pubs serving local produce, particularly seafood
- Cellar Doors
- Fashion and gift shopping

Low spend, short distance

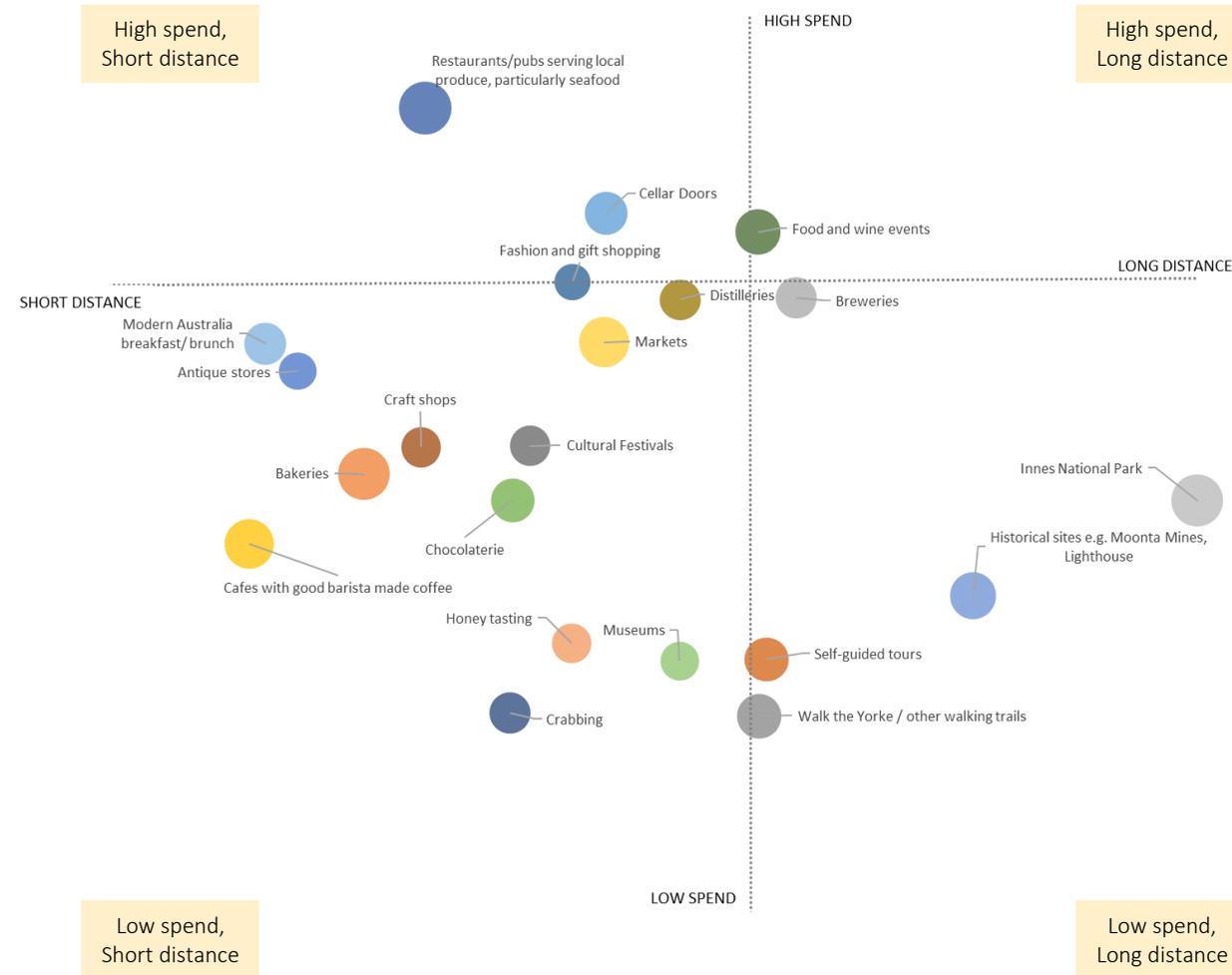
This group indicated the following were appealing and likely to be participated in on their next visit, however they would need to be close by and they would not spend much:

- Bakeries
- Markets
- Cafes with good barista made coffee
- Chocolaterie
- "Modern Australia breakfast/ brunch"
- Crabbing
- Distilleries
- Cultural Festivals
- Craft shops
- Honey tasting
- Museums
- Antique stores

Low spend, long distance

The following nature/cultural experiences were appealing and likely to be visited by these visitors on their next visit. They would travel further distances but again indicated their spend would be low:

- Innes National Park
- Historical sites e.g. Moonta Mines, Lighthouse
- Walk the Yorke / other walking trails
- Self-guided tours
- Breweries



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

YORKE GETAWAY

2019 CARAVAN AND CAMPING SHOW VISITORS



489 visitors to the 2019 Caravan and Camping Show were asked a short survey including how interested they were in a variety of activities while on holiday in the Yorke Peninsula.

The majority indicated they were interested in Festivals, events and markets (84% interested, 4.2 average mean) followed by homegrown food trails experiencing the best local products (75% interested, 3.9 average mean). Museums/art galleries were of least interest to this group (57% interested, 3.4).



Visiting Friends or Relatives

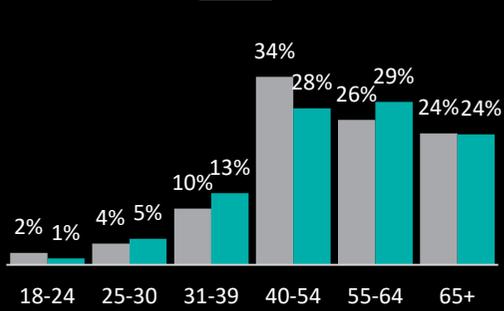


VISTING FRIENDS OR RELATIVES



■ All Respondents ■ VFR

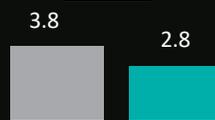
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SEGMENT SIZE:



ALOS:



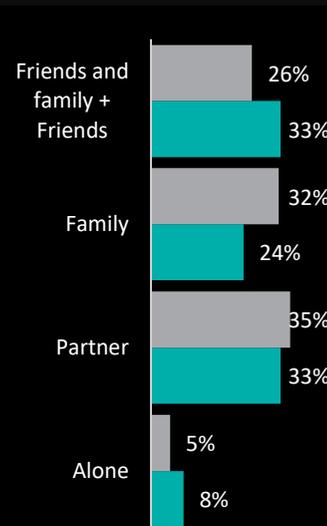
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ASPN:

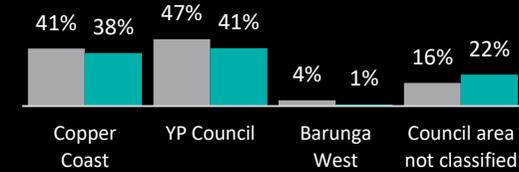


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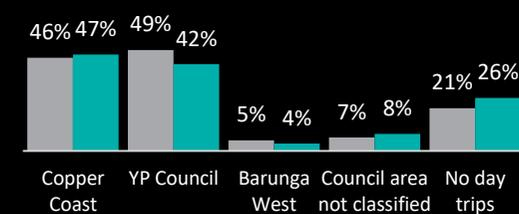


PLACES VISITED

Overnight Stays



Day Trips

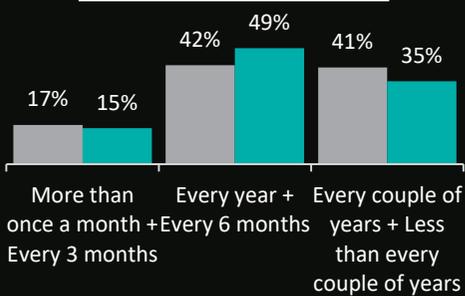


Copper Coast Council:
Moonta, Moonta Bay, Wallaroo, Kadina and Port Hughes

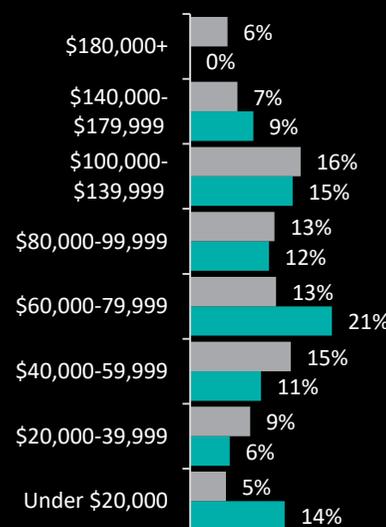
Yorke Peninsula Council:
Ardrossan + Edithburgh + Innes National Park + Marion Bay + Minlaton + Point Turton + Port Victoria + Port Vincent + Stansbury + Yorketown

Barunga West:
Port Broughton

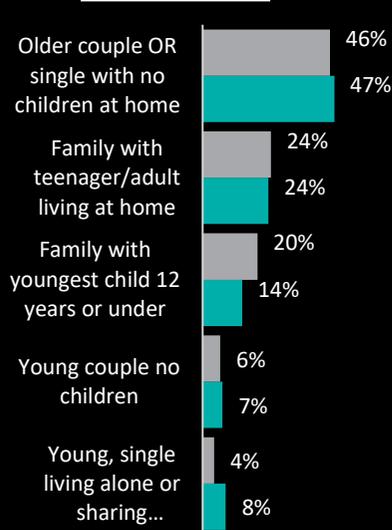
FREQUENCY OF VISIT



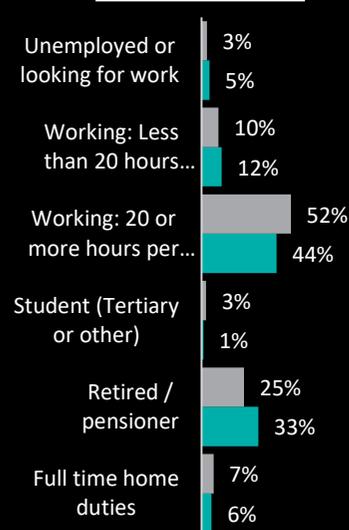
HOUSEHOLD INCOME PER ANNUM



HOUSEHOLD



WORK STATUS

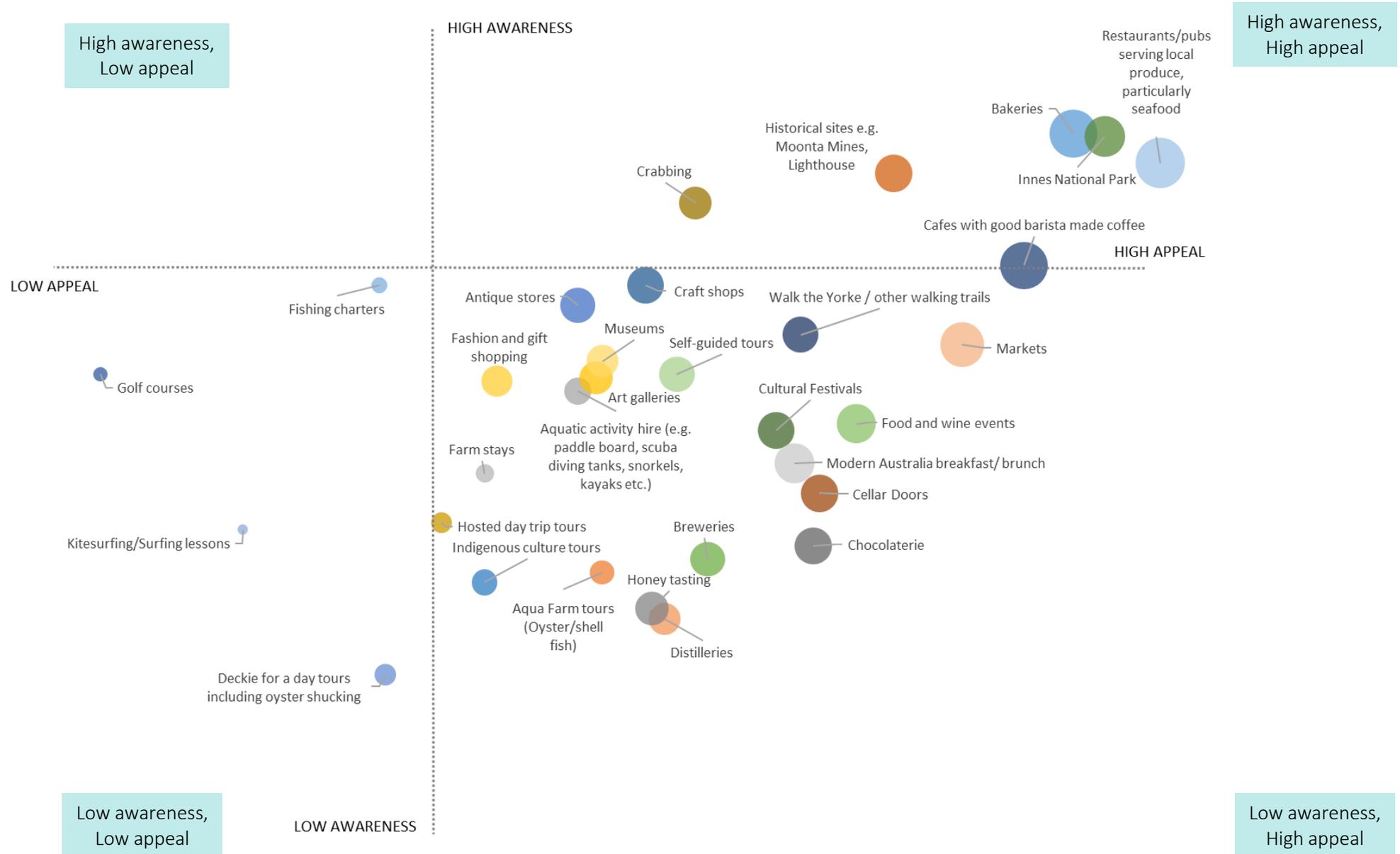


PROFILE

The Visiting Friends or Relatives (VFR) segment consisted of respondents that stayed with friends or family who lived in the Yorke Peninsula region, or stayed at a friend's holiday shack or holiday home at no cost.

This segment were likely to visit the region every 6 months to a year (49%) and their average spend (\$328) was the second lowest compared to all other segments. This segment was also more likely to spend just one night (22%) and had the lowest average number of nights spent (2.8).

VISITING FRIENDS OR RELATIVES AWARENESS AND APPEAL



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

VISITING FRIENDS OR RELATIVES AWARENESS AND APPEAL



While the Visiting Friends or Relatives segment were aware of and found appealing food offerings and nature/cultural activities, this group was unaware of many of the offerings of the Yorke Peninsula region. There should be a focus on promoting these activities and attractions to this group.

High awareness and high appeal

VFR identified the following attractions and activities to have high awareness and high appeal. In order of likelihood, they are more likely to do this activity or attraction on their next visit:

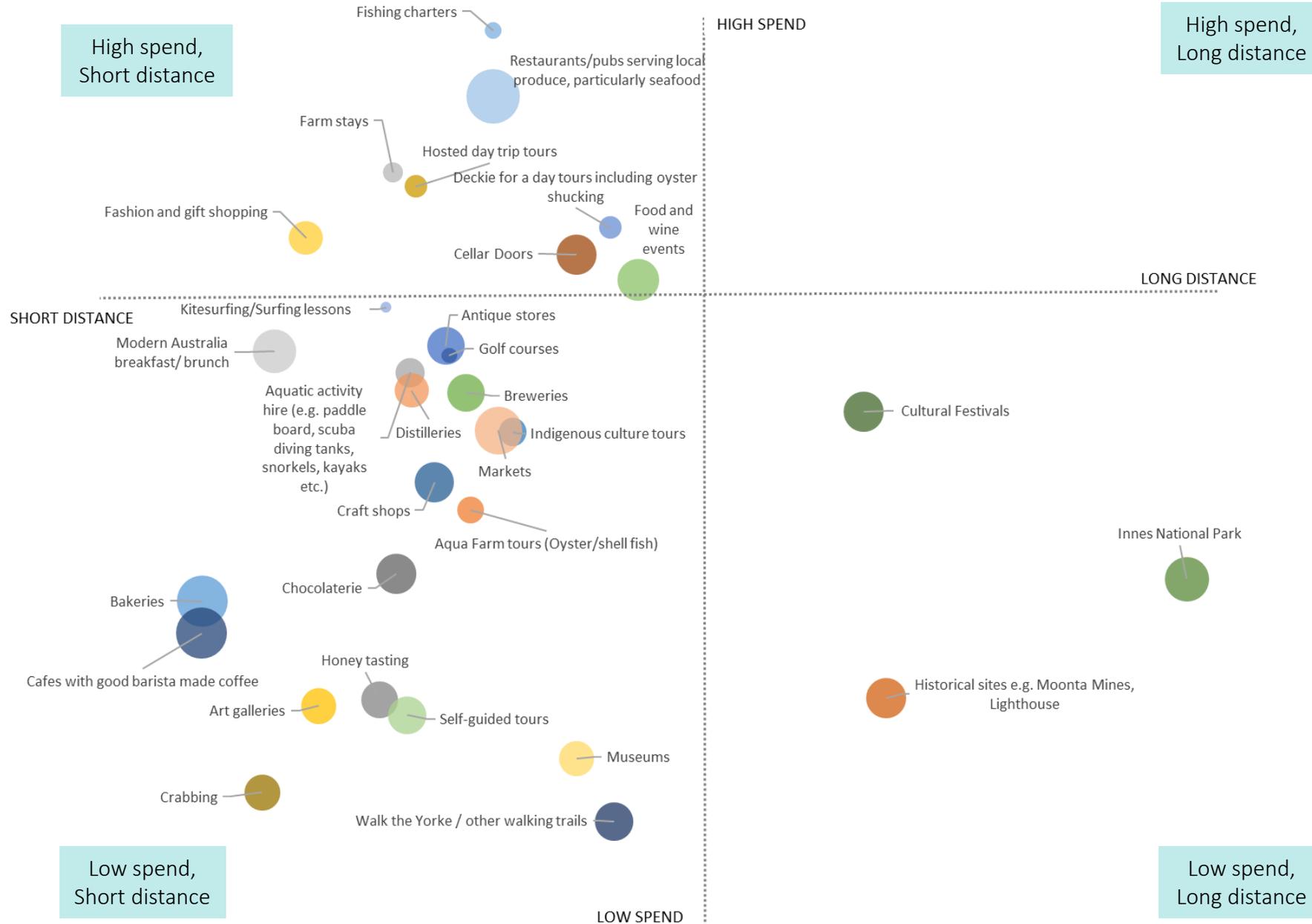
- Restaurants/pubs serving local produce, particularly seafood
- Bakeries
- Cafes with good barista made coffee
- Innes National Park
- Historical sites e.g. Moonta Mines, Lighthouse
- Crabbing

Low awareness and high appeal

The following activities and attractions had low awareness and high appeal, there is an opportunity to increase awareness, potentially moving them to a high awareness/high appeal quadrant:

- Markets
- Modern Australia breakfast/ brunch
- Food and wine events
- Cellar Doors
- Chocolaterie
- Craft shops
- Cultural Festivals
- Walk the Yorke / other walking trails
- Self-guided tours
- Antique stores
- Breweries
- Honey tasting
- Art galleries
- Museums
- Distilleries
- Fashion and gift shopping
- Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)
- Indigenous culture tours
- Aqua Farm tours (Oyster/shell fish)
- Hosted day trip tours
- Farm stays

VISITING FRIENDS OR RELATIVES COST AND DISTANCE



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

VISITING FRIENDS OR RELATIVES

COST AND DISTANCE

High spend, long distance

The Visiting Friends or Relatives segment indicated there was nothing they spend high on or travel long distances for in the Yorke Peninsula region.

High spend, short distance

This group are more likely to spend more but would only travel a short distance for the following attractions and activities. In order of likelihood, VFR are more likely to do this activity or attraction on their next trip:

- Restaurants/pubs serving local produce, particularly seafood
- Food and wine events
- Cellar Doors
- Fashion and gift shopping
- Deckie for a day tours including oyster shucking
- Hosted day trip tours
- Farm stays
- Fishing charters

Low spend, short distance

These visitors would travel short distances and expect their spend to be low for the following attractions and activities:

- Bakeries
- Cafes with good barista made coffee
- Markets
- "Modern Australia breakfast/ brunch"
- Chocolaterie
- Craft shops

- Walk the Yorke / other walking trails
- Self-guided tours
- Antique stores
- Breweries
- Honey tasting
- Art galleries
- Crabbing
- Museums
- Distilleries
- Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)
- Indigenous culture tours
- Aqua Farm tours (Oyster/shell fish)
- Golf courses
- Kitesurfing/Surfing lessons

Low spend, long distance

Visiting Friends or Relatives would travel further distances for the following attractions and activities but indicated their spend would be low:

- Innes National Park
- Historical sites e.g. Moonta Mines, Lighthouse
- Cultural Festivals

VISITING FRIENDS OR RELATIVES

COST AND DISTANCE x APPEAL

Attractions and activities with the highest appeal were extrapolated and replotted.

High spend, long distance

Visiting Friends or Relatives indicated there was nothing they spend high on or travel long distances for in the Yorke Peninsula region.

High spend, short distance

The following attractions and activities were appealing, within a short distance, however, this group was more likely to spend more:

- Restaurants/pubs serving local produce, particularly seafood
- Food and wine events
- Cellar Doors
- Fashion and gift shopping
- Hosted day trip tours
- Farm stays
- Fishing charters

Low spend, short distance

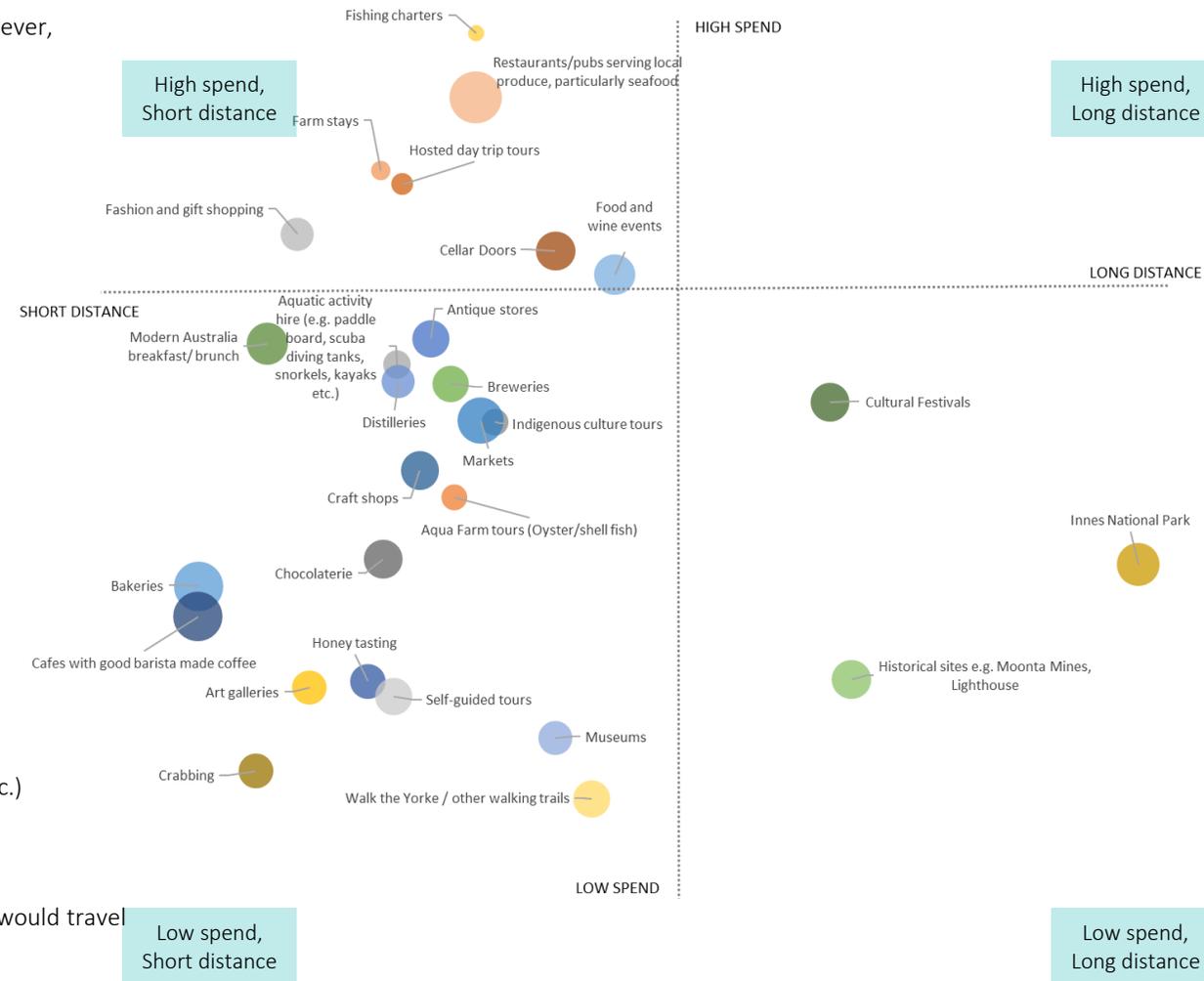
These visitors indicated the following were appealing within short distances and would expect their spend to be low:

- Bakeries
- Cafes with good barista made coffee
- Markets
- Modern Australia breakfast/ brunch
- Chocolaterie
- Craft shops
- Walk the Yorke / other walking trails
- Self-guided tours
- Antique stores
- Breweries
- Honey tasting
- Art galleries
- Crabbing
- Museums
- Distilleries
- Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)
- Indigenous culture tours
- Aqua Farm tours (Oyster/shell fish)

Low spend, long distance

The following nature/cultural experiences were appealing to the VFR segment who would travel further distances but again indicated their spend would be low:

- Innes National Park
- Historical sites e.g. Moonta Mines, Lighthouse
- Cultural Festivals



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

VISITING FRIENDS OR RELATIVES

COST, DISTANCE x APPEAL x LIKELIHOOD OF VISITING

Attractions and activities with the highest appeal and most likelihood of being visited were extrapolated and replotted.

High spend, long distance

Visiting Friends or Relatives indicated there was nothing they spend high on or travel long distances for in the Yorke Peninsula region.

High spend, short distance

Provided they are within a short distance of their accommodation, food, alcohol and markets were what this group found both appealing and likely to be participated in on their next visit with an indication they would spend more on these activities:

- Restaurants/pubs serving local produce, particularly seafood
- Food and wine events
- Cellar Doors

Low spend, short distance

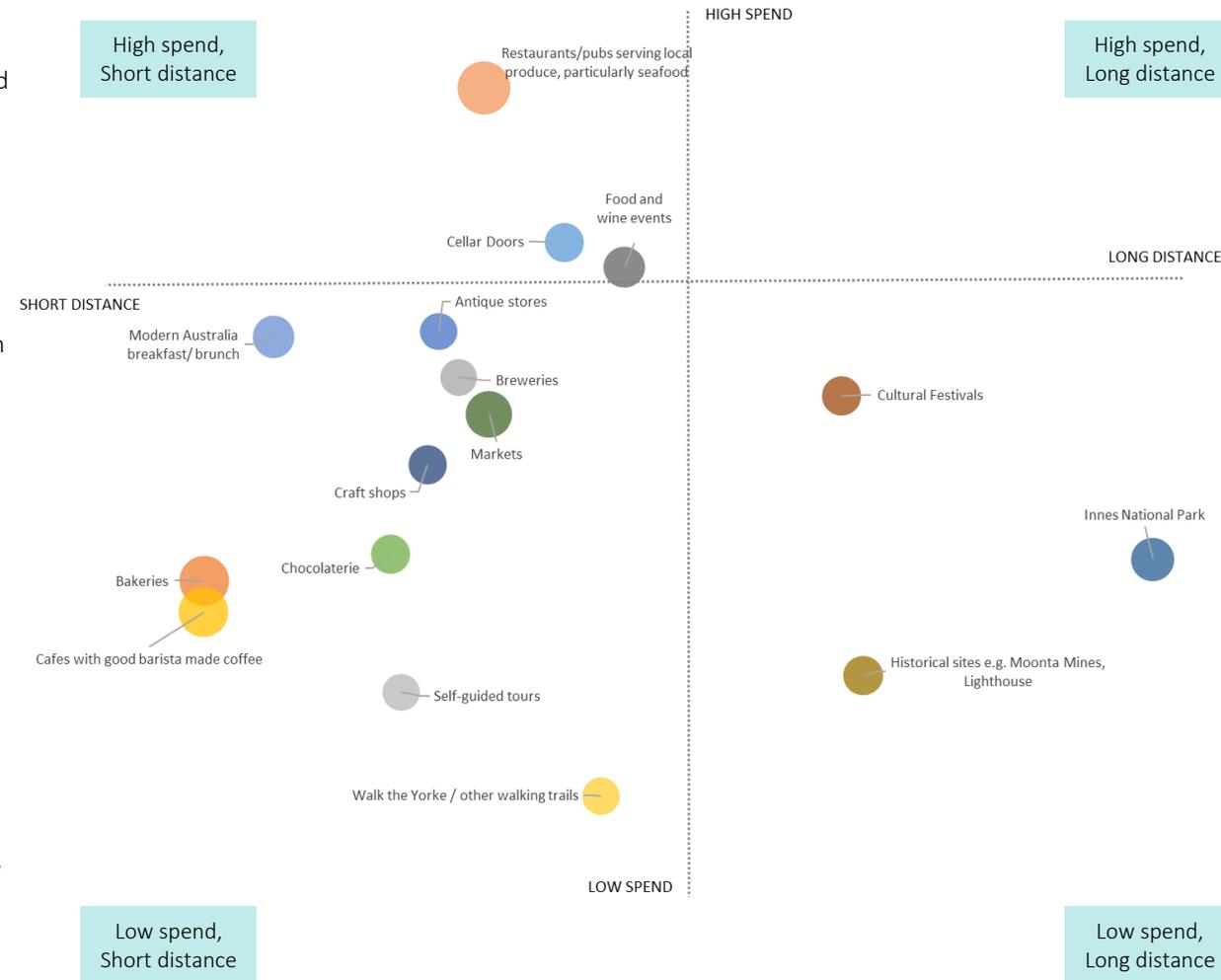
These visitors indicated the following were appealing and likely to be participated in on their next visit, however they would need to be close to their accommodation and they would not spend much:

- Bakeries
- Cafes with good barista made coffee
- Markets
- Modern Australia breakfast/ brunch
- Chocolaterie
- Craft shops
- Walk the Yorke / other walking trails
- Self-guided tours
- Antique stores
- Breweries

Low spend, long distance

The following nature/cultural experiences were appealing and likely to be visited by the VRF segment on their next visit. They would travel further distances but again indicated their spend would be low:

- Innes National Park
- Historical sites e.g. Moonta Mines, Lighthouse
- Cultural Festivals



- The larger the size of the bubble, the more likely respondents will participate in activity or attraction
- Colour has no relevance in this instance

VISITOR SPEND



AVERAGE SPEND ACROSS SEGMENTS

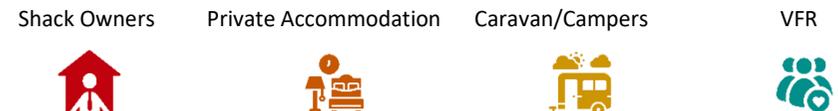
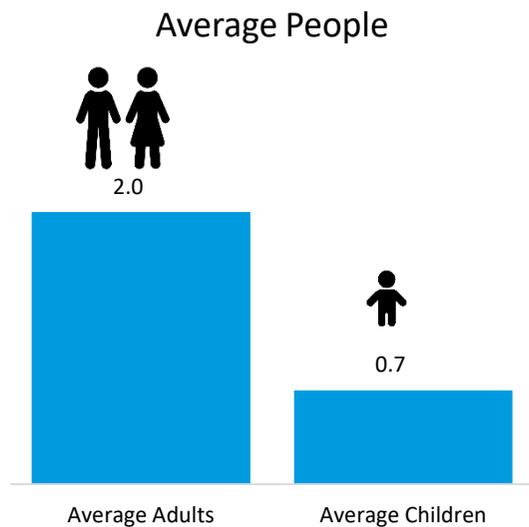
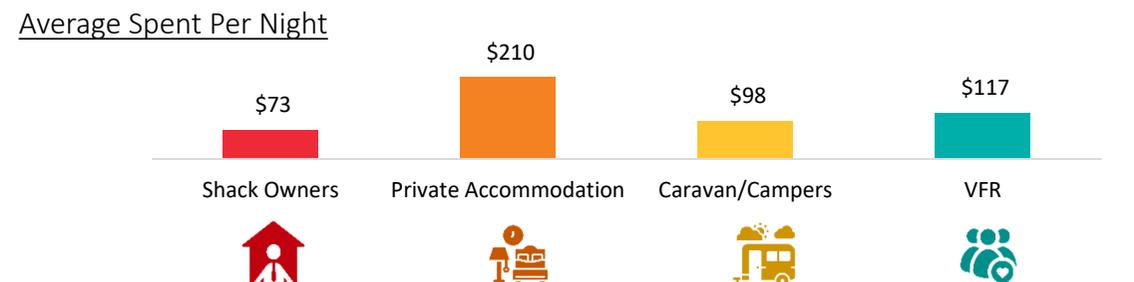
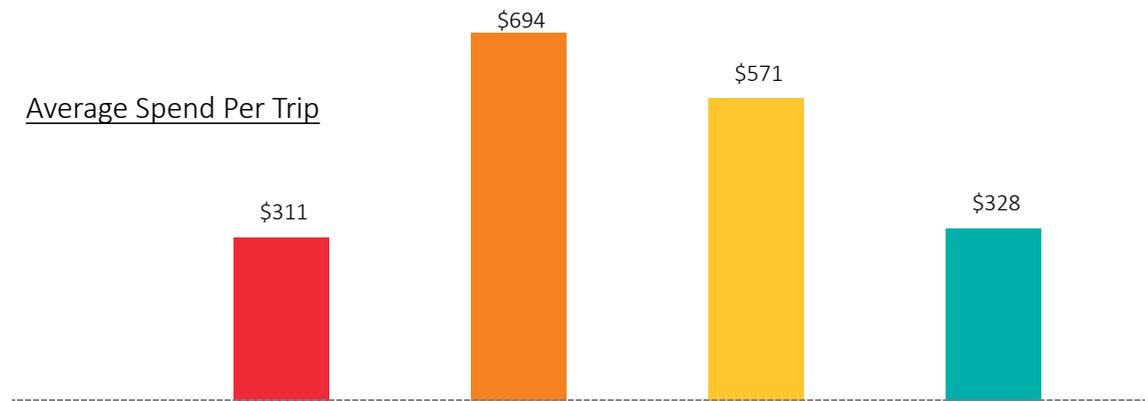
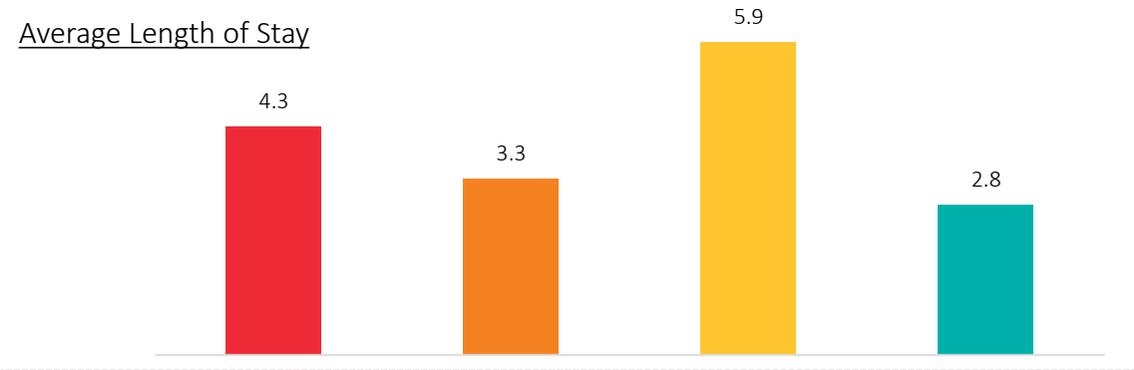


While the Private Accommodation segment has an average stay of 3.3 nights, they have the highest spend of all segments.

Private Accommodation segment (\$210) is more likely to have a higher average spend per night. They are also more likely (53%) to spend more than \$500 per trip.

Shack Owners (\$73) segment is more likely to have the lowest average spend per night.

VFR segment is more likely (32%) to spend less than \$100 per trip.



6. How many nights did you spend during your last trip to the Yorke Peninsula? BASE: All respondents (n=413)

8. Approximately how much did you spend in the Yorke Peninsula on your last trip, including accommodation, petrol, dining out.... BASE: All respondents (n=413)

9. How many people did this spend cover? BASE: All respondents (n=413)

ATTRACTIONS SPEND

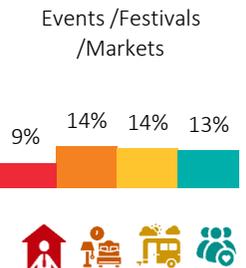
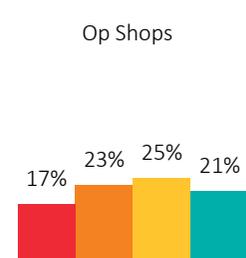
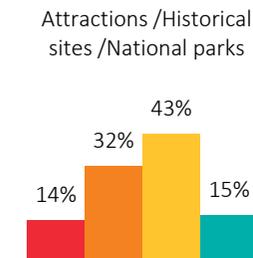
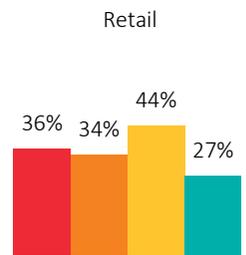
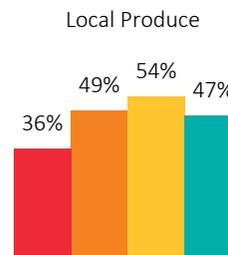
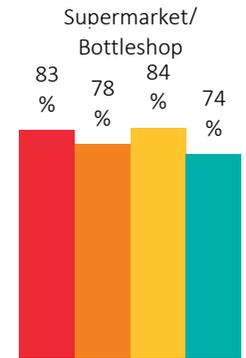
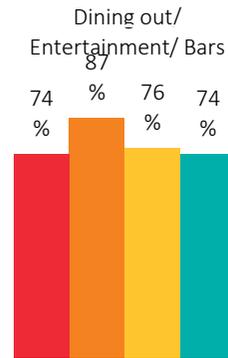
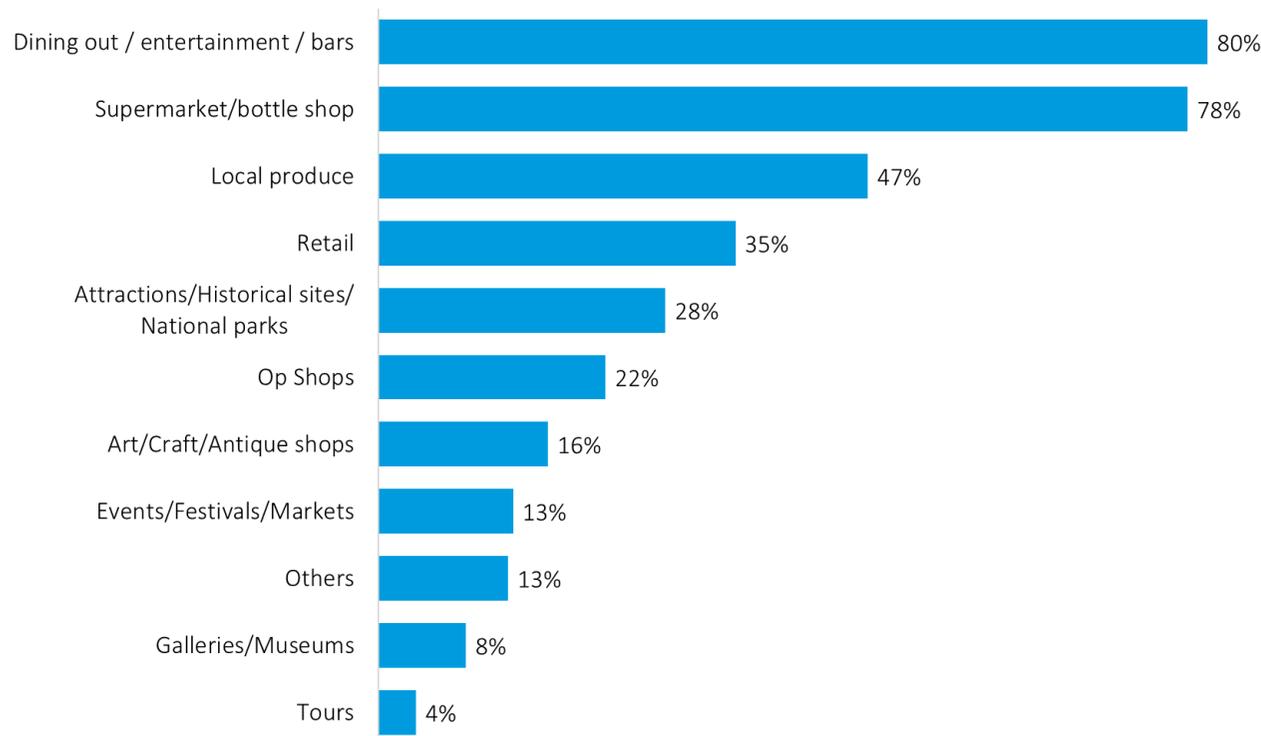


Dining out/entertainment/bars, Supermarket/bottle shop and local produce are the top 3 categories in which all the segments spent their money on during their last trip to the Yorke Peninsula.

Private Accommodation segment is more likely to have spent money on dining out/entertainment/bars (87%) and tours (7%) compared to other segments.

Caravan/Campers segment is more likely to have spent money on Attractions/Historical sites/National Parks (43%), compared to the VFR segment (15%) and Shack Owners (14%).

Attractions Spend



FACTORS THAT PREVENTED SPEND

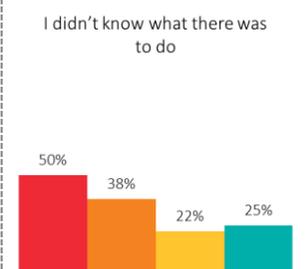
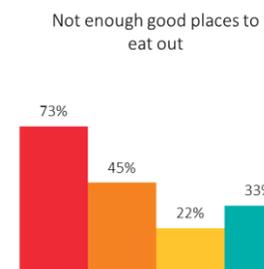
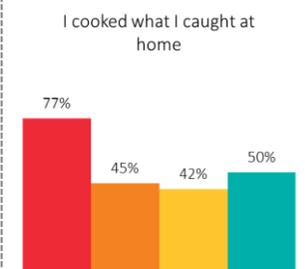
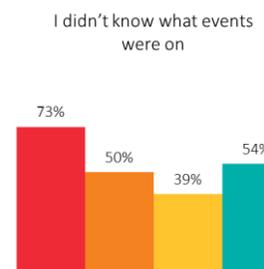
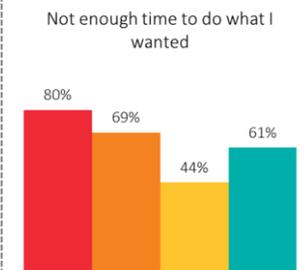
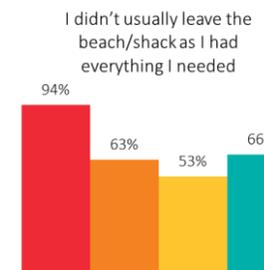
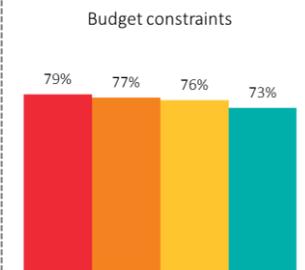
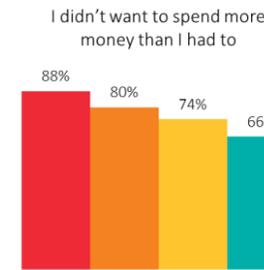
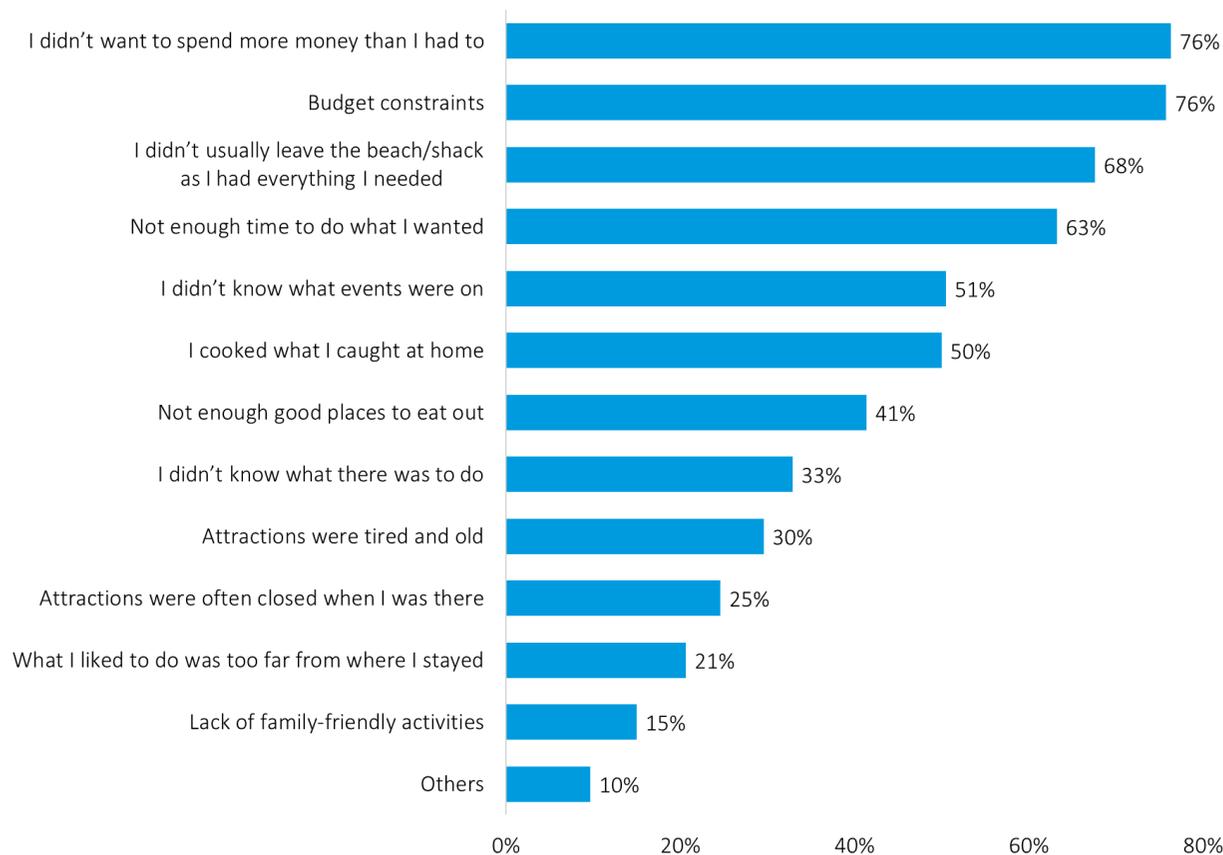


Three in four respondents indicated they did not want to spend more money they had to (76%) and budgets constraints (76%) as reasons that prevented them from spending more money.

Shack Owners are more likely than other segments to not leave the beach/shack as they had everything they needed (94%).

Budget constraints is a top factor that prevented spend in Caravan/Campers (76%) and VFR (73%).

Factors that Prevented Spend



11. What, if anything, prevented you from spending more money on your last trip to the Yorke Peninsula? BASE: All respondents (n=413)
4. Which of the following best describes your accommodation on your last visit to the Yorke Peninsula? BASE: All respondents (n=413)

LIKELIHOOD TO SPEND MONEY ON NEW ACTIVITIES



Almost three in five (59%) respondents are likely to be encouraged by new activities or attractions to spend more money in the Yorke Peninsula.

Extremely unlikely	Somewhat unlikely	Neither	Somewhat likely	Extremely likely	Mean score	Commentary
					 3.6	Shack Owners Total Likely: 62% Total Unlikely: 12% More than 3 in 5 (62%) respondents in Shack Owners segment are likely to spend money on new activities.
					 3.6	Private Accommodation Total Likely: 60% Total Unlikely: 12% 3 in 5 (60%) respondents in Private Accommodation segment are likely to spend money on new activities.
					 3.4	Caravan/Campers Total Likely: 54% Total Unlikely: 18% While over half (54%) are likely, including 11% extremely likely, almost 1 in 5 respondents (18%) in this segment are unlikely to spend money on new activities.
					 3.6	VFR Total Likely: 61% Total Unlikely: 14% While 3 in five (61%) indicate they are likely, the majority (47%) of respondents in this segment are only somewhat likely to spend money on new activities.

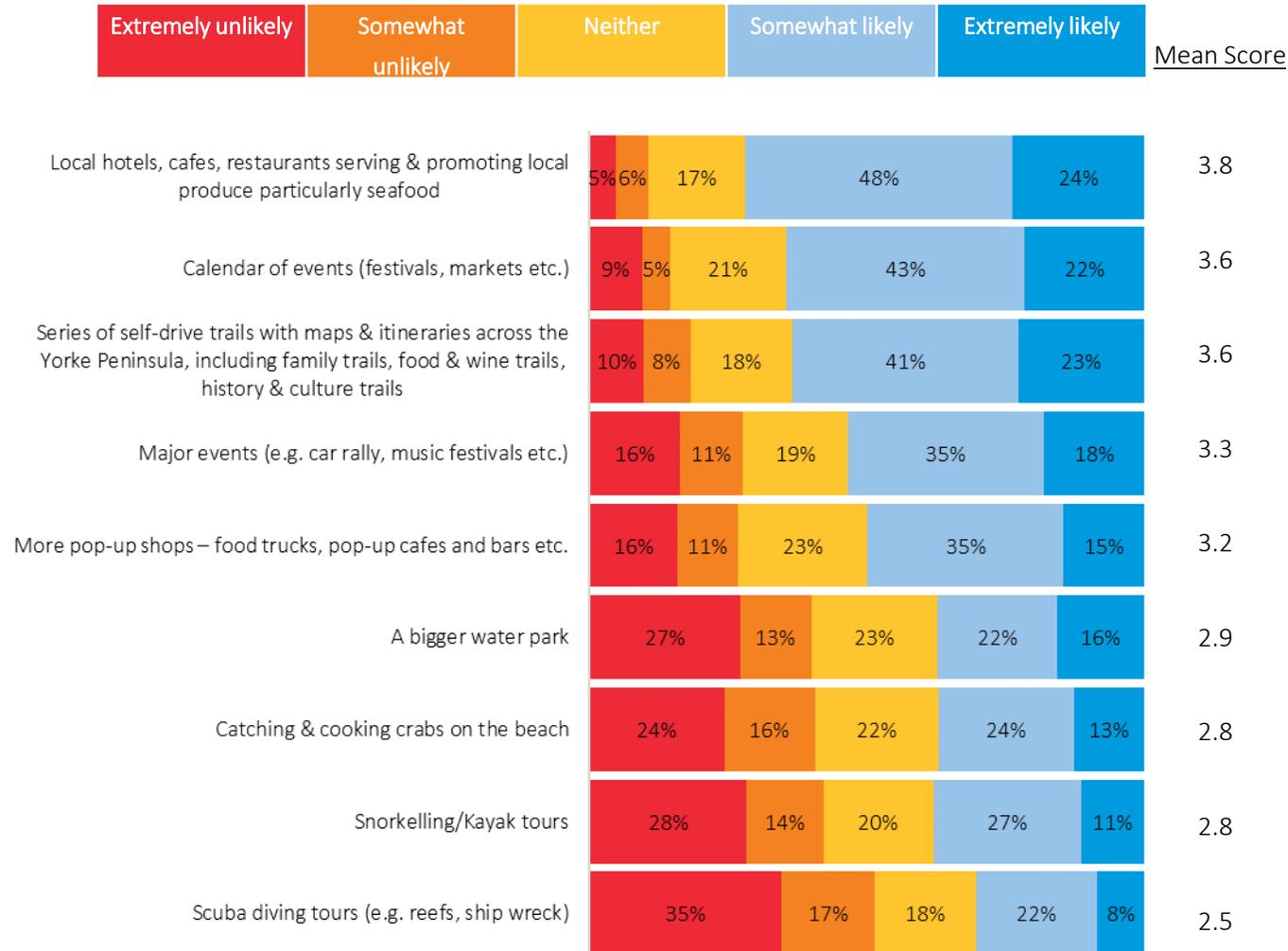
POTENTIAL ATTRACTIONS THAT COULD ENCOURAGE MONEY SPEND



Respondents indicated mixed to moderate levels of likelihood in terms of spending more money on the potential attractions tested.

Local hotels/cafes that served and promoted local produce, particularly seafood (72%) and calendar events (65%) would encourage respondents most to spend more money.

Shack Owners are more likely than other segments to be encouraged into spending more money on Pop-up shops such as food trucks and pop-up cafes.

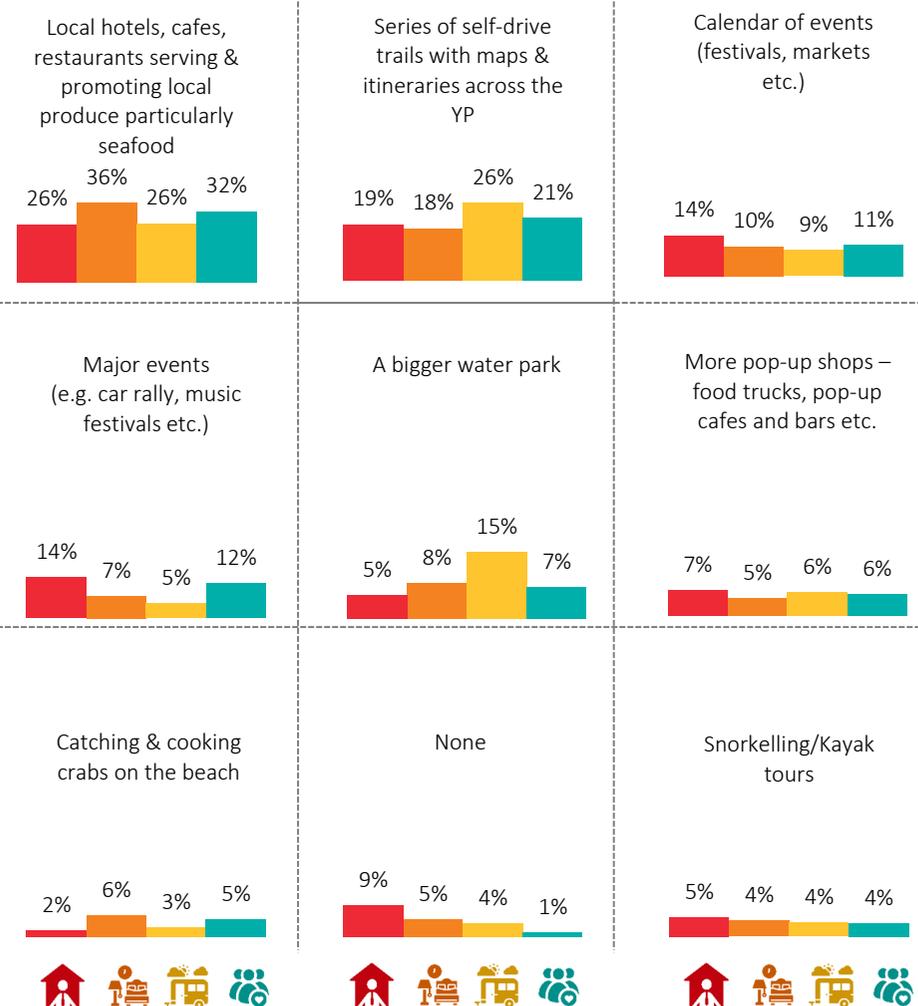
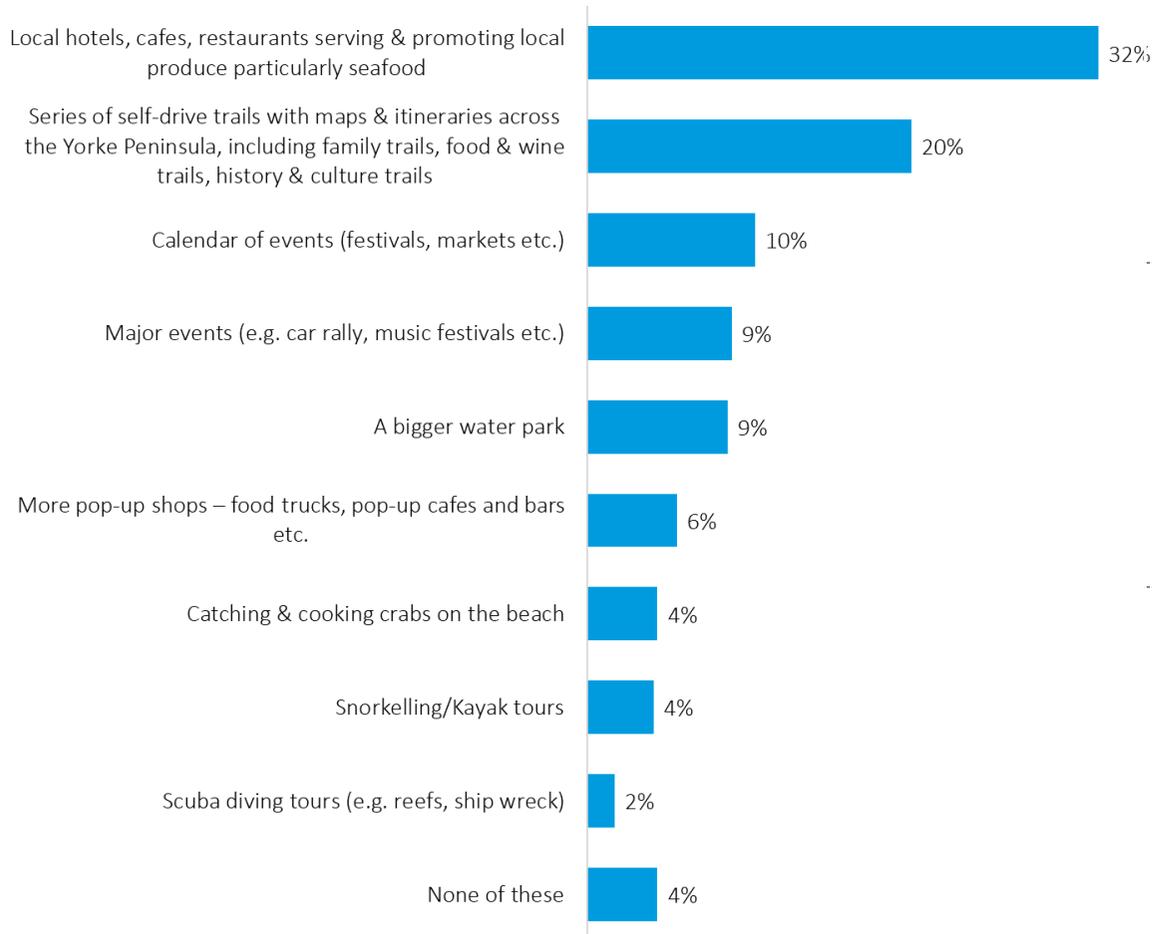


ATTRACTIONS MOST LIKELY TO SPEND MONEY ON



Respondents across all segments are more likely to spend money on Local hotels, cafes that served and promoted local food, particularly seafood (32%), and Series of self-drive trails with maps & itineraries (20%).

Most likely to spend money on



19. Which of the following are you most likely to spend money on in the Yorke Peninsula? BASE: All respondents (n=413)

COMMUNICATION



SOURCE OF COMMUNICATION – CURRENT VS. PREFERRED



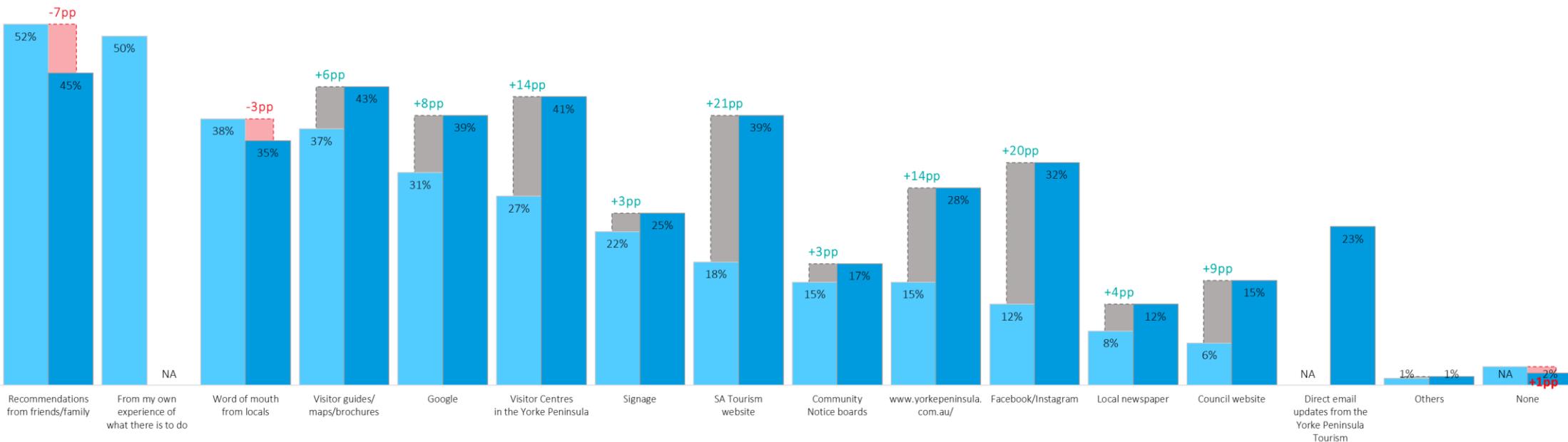
The Caravan/Campers segment is more likely to have used Visitor Centres in the Yorke Peninsula to find out about attractions, while the VFR segment is more likely to have relied on Recommendations from friends/family.



The Caravan/Campers segment is more likely to indicate Visitor guides/maps/brochures and Visitor Centres in the Yorke Peninsula as their preferred sources of communication regarding attractions in the region.

Private Accommodation segment is more likely to rely on SA Tourism website and Recommendations from friend/family as preferred sources of communication.

■ Positive difference ■ Negative difference ■ Current Communication Source ■ Preferred Communication Source



20. When you last visited the Yorke Peninsula, how did you find out what there is to see and do? BASE: All respondents (n=413)

21. Thinking about your next holiday to the Yorke Peninsula, how would you like to find out what there is to see and do, or what is your preferred source of communication? BASE: All respondents (n=413)

SOURCE OF COMMUNICATION – PREFERRED COMPARISON

The top preferred channels of communication for each group were:



Visitor guides/maps/brochures (36%, overall preferred 43%) and Facebook/Instagram (36%, overall preferred 32%),



SA Tourism website (45%, overall preferred 39%),



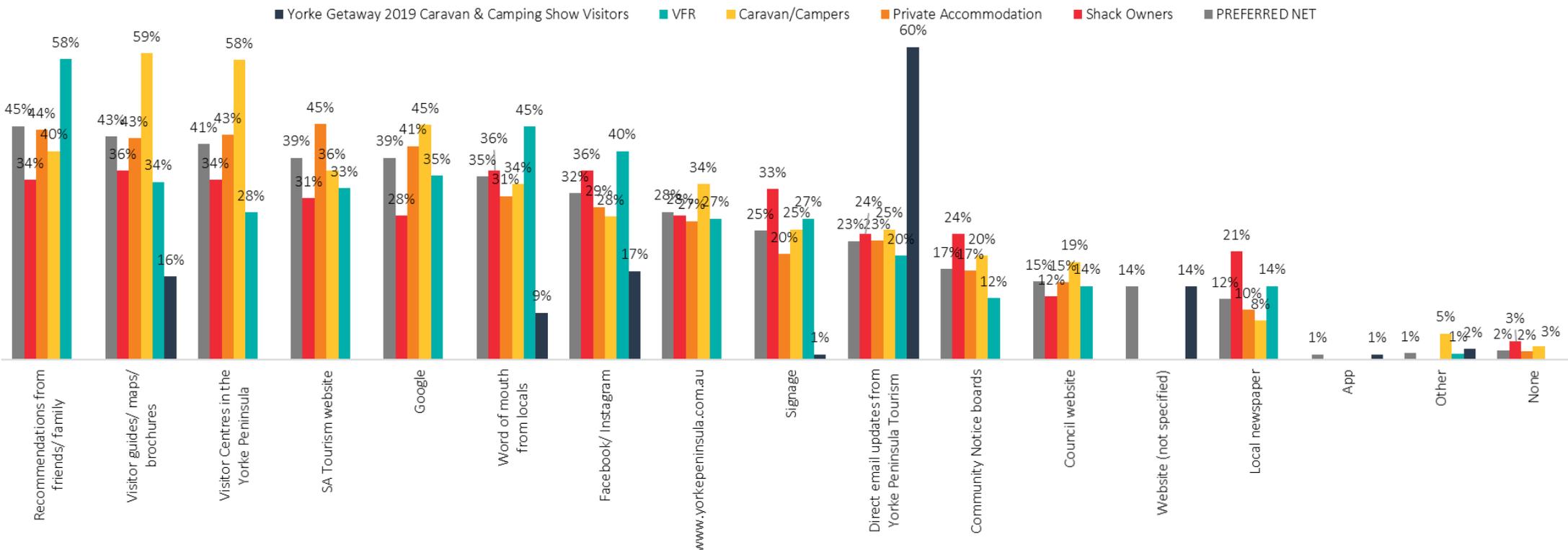
Visitor guides/maps/brochures (59%, overall preferred 43%), and



Recommendations from friends/family (58%, overall preferred 45%).

489 visitors to the 2019 Caravan and Camping Show were asked a very short Yorke Getaway survey including a question about their preferred communications channels. This group indicated they preferred to be communicated by via email (60%).

Preferred Source of Communication



20. When you last visited the Yorke Peninsula, how did you find out what there is to see and do? BASE: All respondents (n=413)

21. Thinking about your next holiday to the Yorke Peninsula, how would you like to find out what there is to see and do, or what is your preferred source of communication? BASE: All respondents (n=413)

Shack Owners



Private Accommodation



Caravan/Campers



VFR



SHACK OWNERS: COMMUNICATION – CURRENT VS. PREFERRED

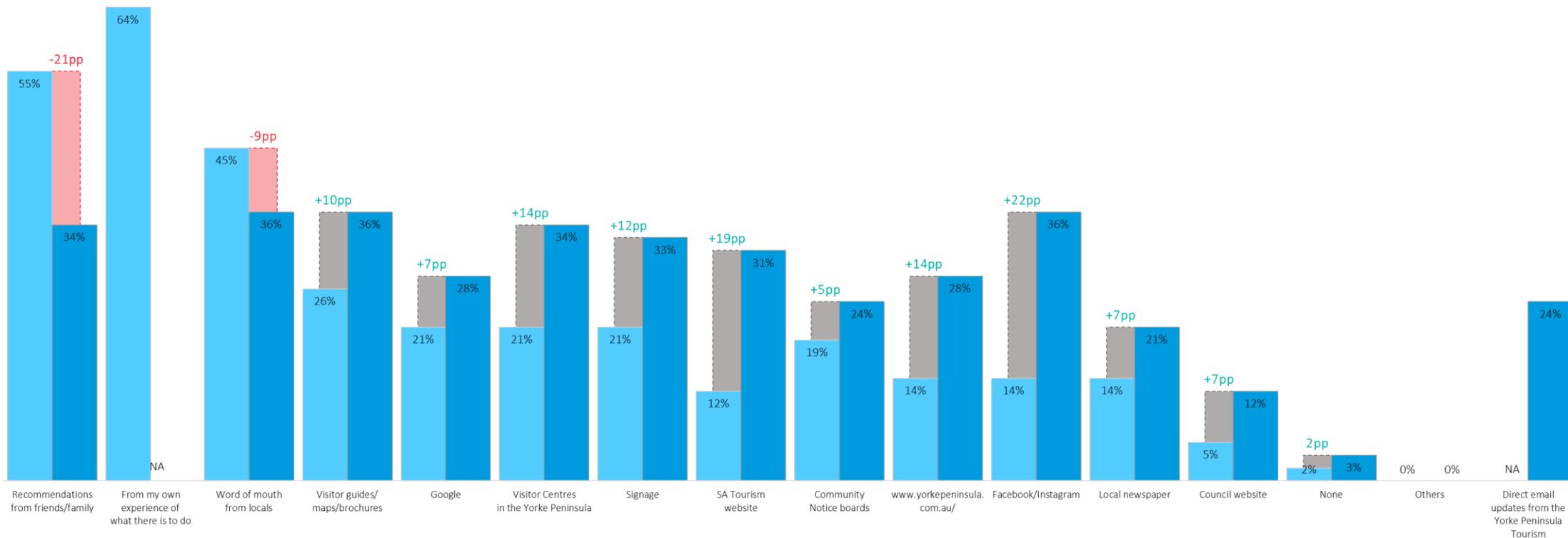


Shack owners (64%), of all segments, have the highest current incidence of finding out what they can see and do by their own experience.

They have the second highest current incidence of finding out what to do by recommendations from friends and family (55%). However, they have a significantly lower value of respondents that would like to find out what to see and do by recommendations from friend and family (34%).

The two preferred method of finding out what to see and do for these respondents are Facebook/Instagram (36 %, ↑22pp), visitors guides/ maps/ brochures (36%, ↑10pp).

■ Positive difference ■ Negative difference ■ Current Communication Source ■ Preferred Communication Source



20. When you last visited the Yorke Peninsula, how did you find out what there is to see and do? BASE: Shack Owners (n=58)

21. Thinking about your next holiday to the Yorke Peninsula, how would you like to find out what there is to see and do, or what is your preferred source of communication? BASE: Shack Owners (n=58)

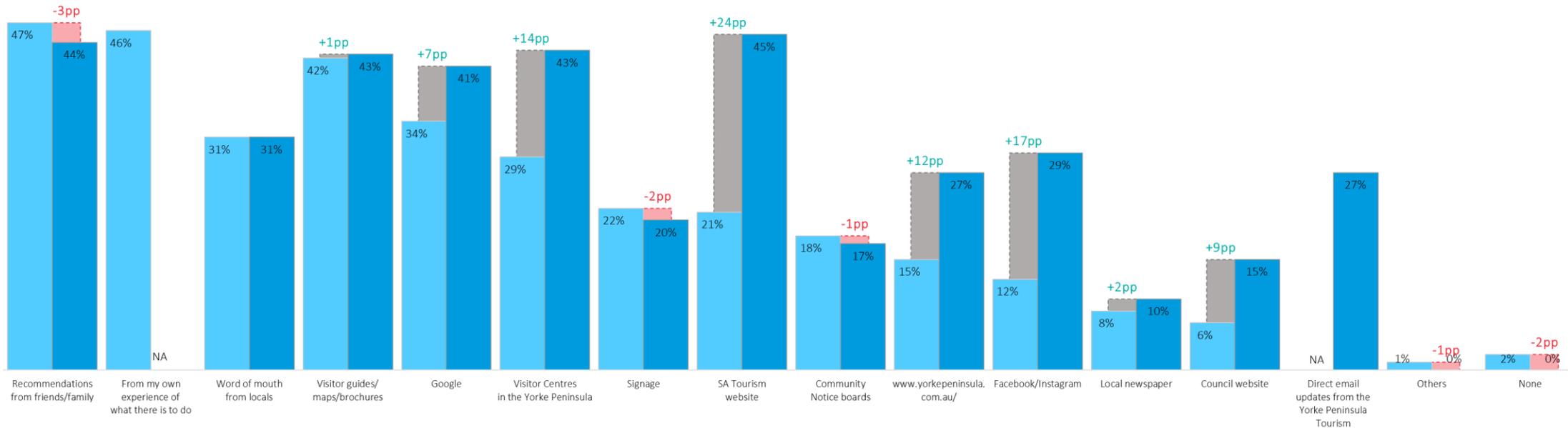
PRIVATE ACCOMMODATION: COMMUNICATION – CURRENT VS. PREFERRED



The preferred method to find out what to see and do for private accommodation respondents is the SA Tourism website (45%) and this point has the largest difference between preferred and current (↑24pp).

Visitor Centres in the Yorke Peninsula is one of the most preferred sources which has a large difference (↑14pp) between preferred (43%) and current (29%).

■ Positive difference ■ Negative difference ■ Current Communication Source ■ Preferred Communication Source



20. When you last visited the Yorke Peninsula, how did you find out what there is to see and do? BASE: Private Accommodation (n=188)

21. Thinking about your next holiday to the Yorke Peninsula, how would you like to find out what there is to see and do, or what is your preferred source of communication? BASE: Private Accommodation (n=188)

CARAVAN/CAMPERS

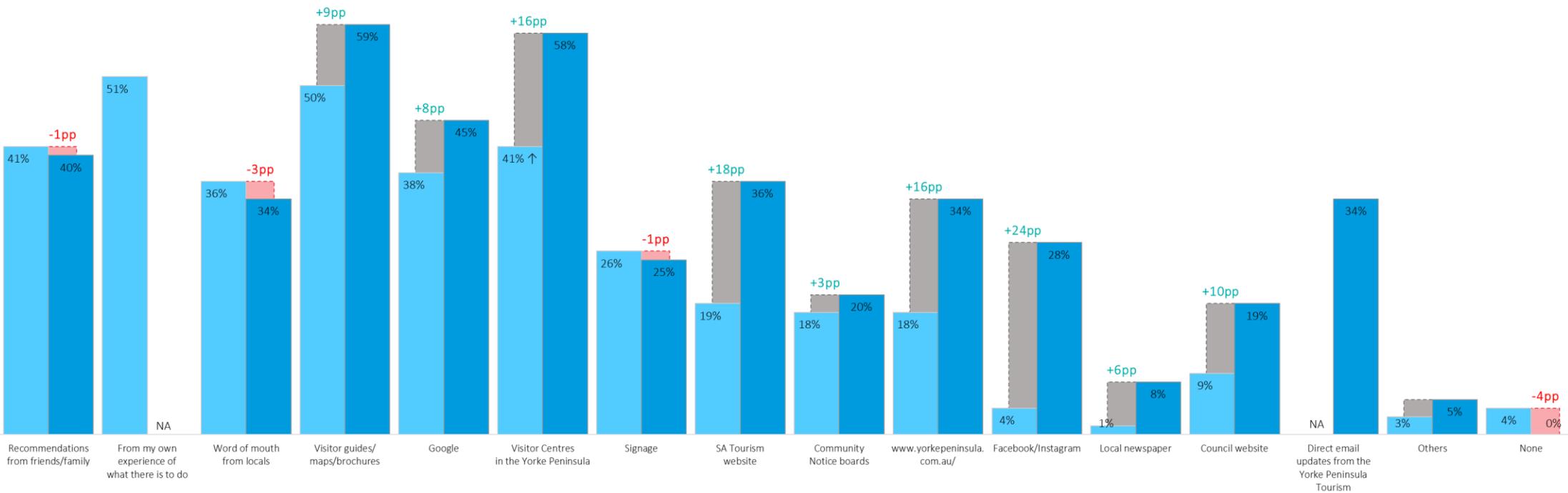
COMMUNICATION – CURRENT VS. PREFERRED



The two preferred sources of communication for Caravan/Campers are visitor guides/ maps/ brochures (59%, ↑9pp) and visitor centres in the Yorke Peninsula (58%, ↑16pp).

This segment has the lowest percentage of respondents that indicated Facebook/Instagram as their current source of information (4%), however, this source represents the largest difference between current and preferred (28%, ↑24pp).

■ Positive difference ■ Negative difference ■ Current Communication Source ■ Preferred Communication Source



20. When you last visited the Yorke Peninsula, how did you find out what there is to see and do? BASE: Caravan/Campers(n=80)

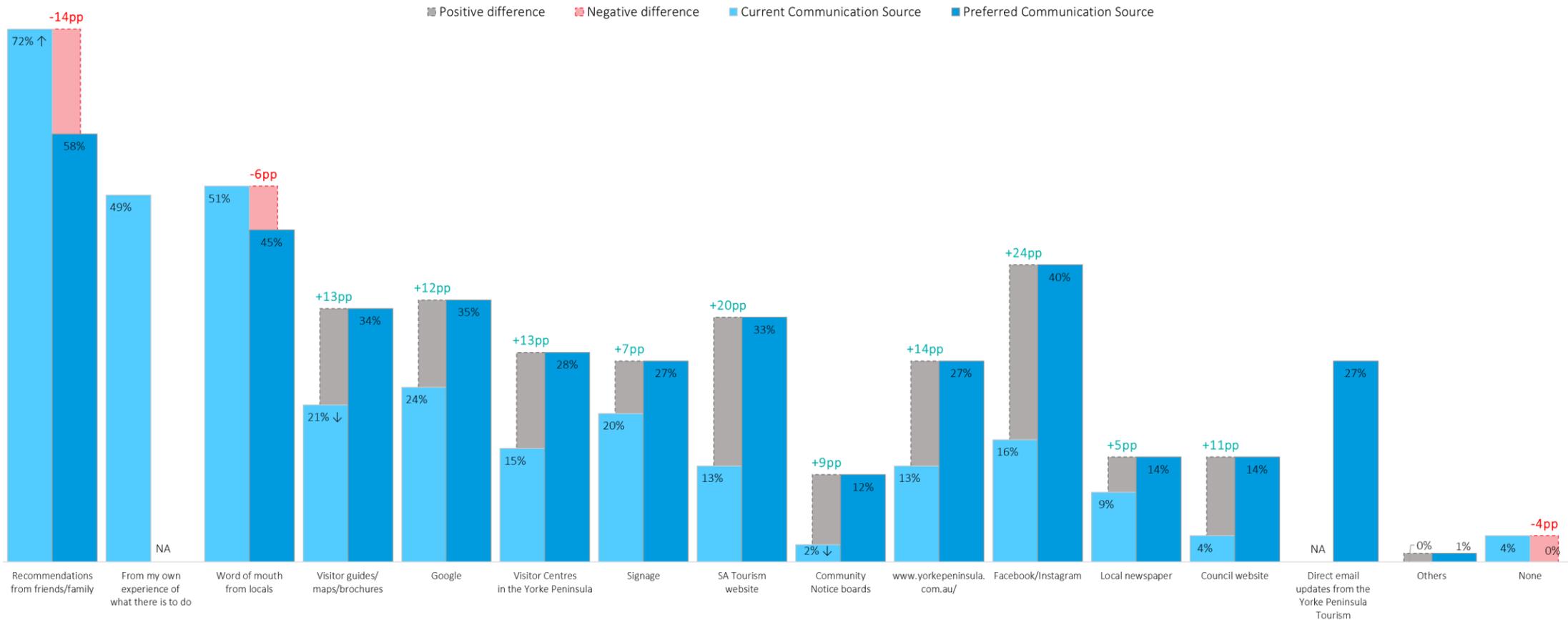
21. Thinking about your next holiday to the Yorke Peninsula, how would you like to find out what there is to see and do, or what is your preferred source of communication? BASE: Caravan/Campers(n=80)

VISITING FRIENDS OR RELATIVES COMMUNICATION – CURRENT VS. PREFERRED



VFR has the highest percentage of respondents that identified their current source of information is the recommendation from friends and family (72%). However, the percentage of respondents of this segment that preferred this source of communication is significantly lower (58%, ↓14pp).

This segments has the highest percentage of respondents that considered Facebook/Instagram (40%, ↑24pp) their preferred source of information.



20. When you last visited the Yorke Peninsula, how did you find out what there is to see and do? BASE: VFR (n=85)

21. Thinking about your next holiday to the Yorke Peninsula, how would you like to find out what there is to see and do, or what is your preferred source of communication? BASE: VFR (n=85)

VISITOR PROFILE



YORKE PENINSULA – VISITOR PROFILE

The majority of visitors (46%) are in the Private Accommodation segment.

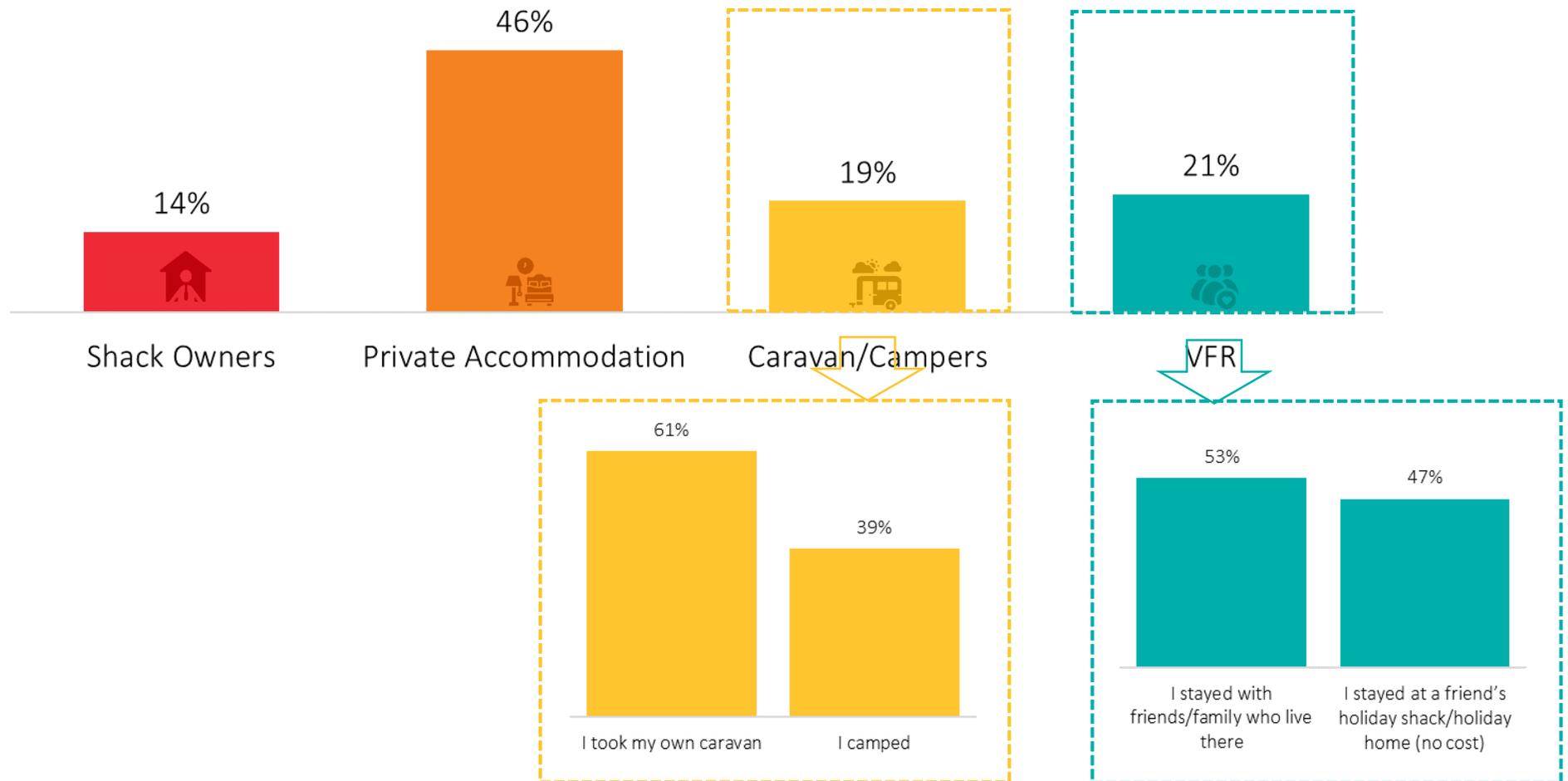
More than one in five respondents (21%) are in the VFR segment – among them, more than half (53%) stay with friends or family who lived there in the Yorke Peninsula, the remaining 47% stay at a friend's holiday shack/holiday home.

Almost one in five respondents (19%) are in the Caravan/Campers segment – among them, more than three in five (61%) take their own caravan, rest camp (39%).

14% of visitors are in the Shack Owners segment.



Visitor Profile



4. Which of the following best describes your accommodation on your last visit to the Yorke Peninsula? BASE: All respondents (n=413)

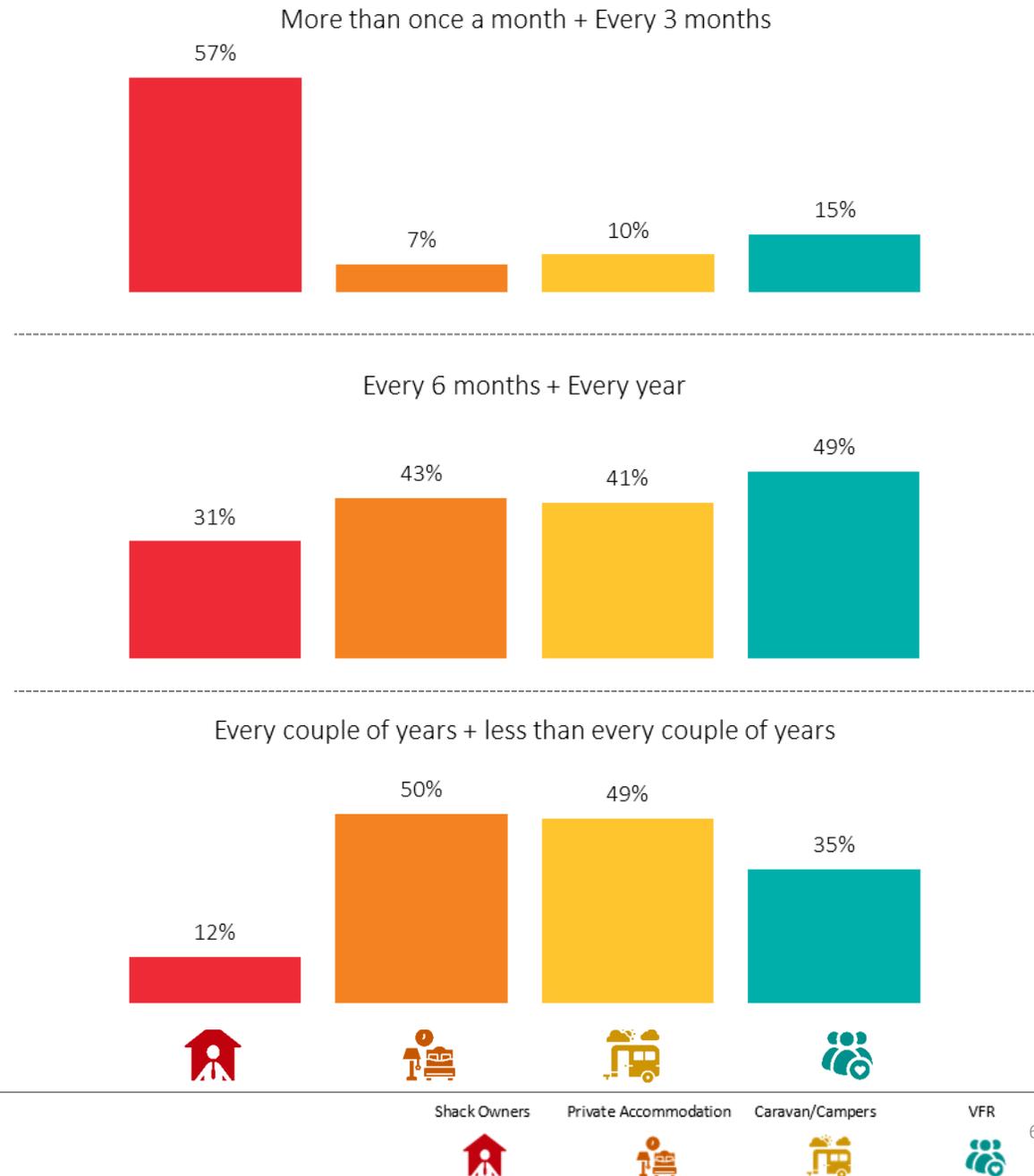
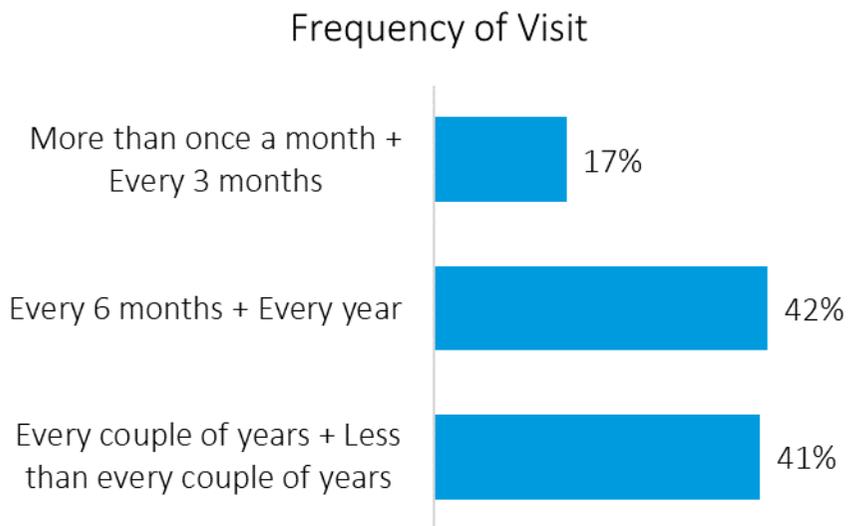
FREQUENCY OF VISIT



Shack Owners (57%) are more likely to visit the Yorke Peninsula more than once a month + every 3 months.

VFR (49%) are more likely to visit the region every 6 months + every year.

Private Accommodation visitors (50%) and Caravan/Campers (49%) are more likely to visit the region every couple of years + less than every couple of years.



LIKELIHOOD OF VISITING THE YORKE PENINSULA IN NEXT 2 YEARS



Nine in ten (90%) of respondents indicated they are likely to visit the Yorke Peninsula in the next 2 years.

Extremely unlikely	Somewhat unlikely	Neither	Somewhat likely	Extremely likely	Mean score	Commentary
					 4.8	Shack Owners Total Likely: 93% Total Unlikely: 3% Nine in ten (90%) Shack Owners are extremely likely to visit the Yorke Peninsula in the next two years.
					 4.4	Private Accommodation Total Likely: 88% Total Unlikely: 4% More than half (54%) of those in the Private Accommodation segment are extremely likely to visit the Yorke Peninsula in the next two years.
					 4.5	Caravan/Campers Total Likely: 89% Total Unlikely: 3% Almost nine in ten (89%) respondents in the Caravan/Campers segment are likely to visit the Yorke Peninsula in the next two years (63% extremely likely).
					 4.5	VFR Total Likely: 92% Total Unlikely: 2% More than nine in ten (92%) VFR respondents are likely to visit the Yorke Peninsula in the next two years (62% extremely likely).

2. How likely are you to visit the Yorke Peninsula in the next 2 years? BASE: All respondents (n=413)

4. Which of the following best describes your accommodation on your last visit to the Yorke Peninsula? BASE: All respondents (n=413)

REASONS FOR BEING UNLIKELY TO VISIT THE YORKE PENINSULA



Private Accommodation Visitors (4%) are more unlikely to visit the Yorke Peninsula, mainly due to holidaying at other destinations.



Why unlikely to visit the YP?

Work

Why unlikely to visit the YP?

Besides Port Lincoln and shark diving, not enough reason to go

Holidaying elsewhere

Time restraints

It was a boring place to visit

Health reasons

Have other destinations in mind

Due to plans for the upcoming few years, such as travelling elsewhere

If I'm ill

Why unlikely to visit the YP?

Building a house but will go after that

Family circumstances

Why unlikely to visit the YP?

Caravanning

Grandma no longer lives there

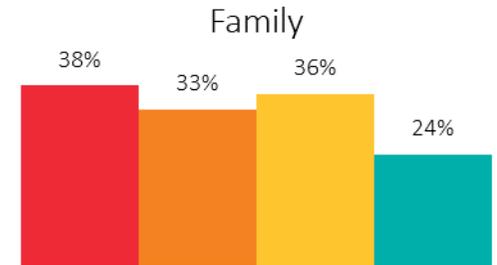
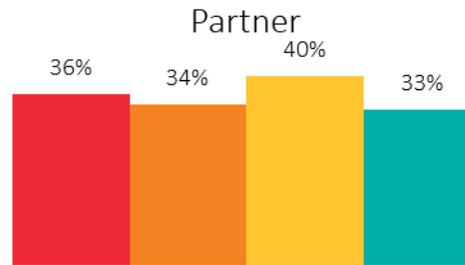


TRAVELLING COMPANIONS

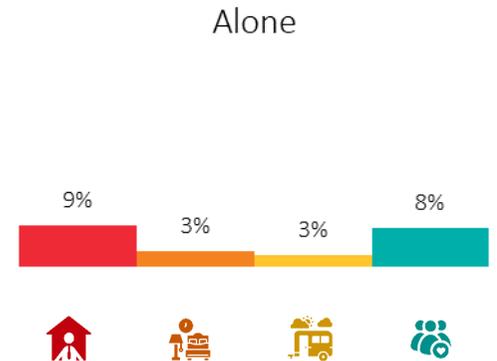
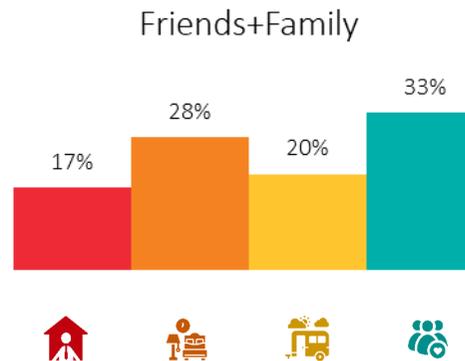
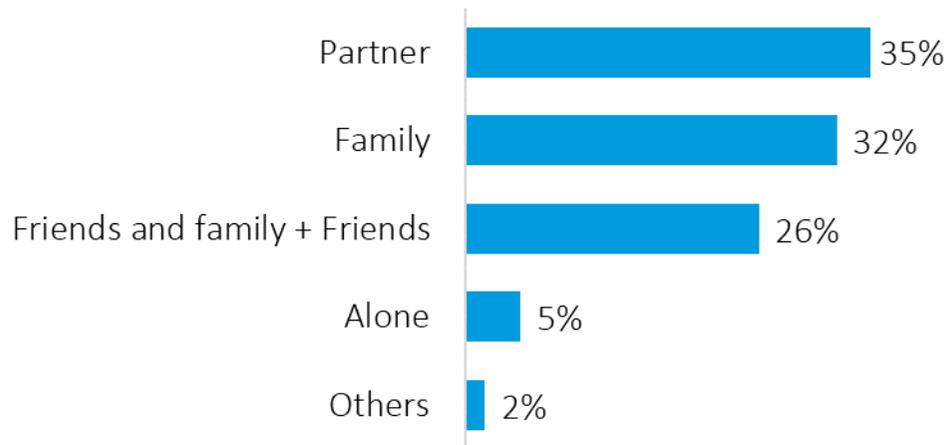


More than one in three (35%) respondents travel to the Yorke Peninsula with their partner; almost one in three (32%) travel with family.

Caravan/Campers (40%) are more likely to travel with their partner, Shack Owners (38%) are more likely to travel with their family, and VFR (33%) with friends/family.



Travel Companion



5. Who did you travel with on your last trip to the Yorke Peninsula? BASE: All respondents (n=413)

4. Which of the following best describes your accommodation on your last visit to the Yorke Peninsula? BASE: All respondents (n=413)



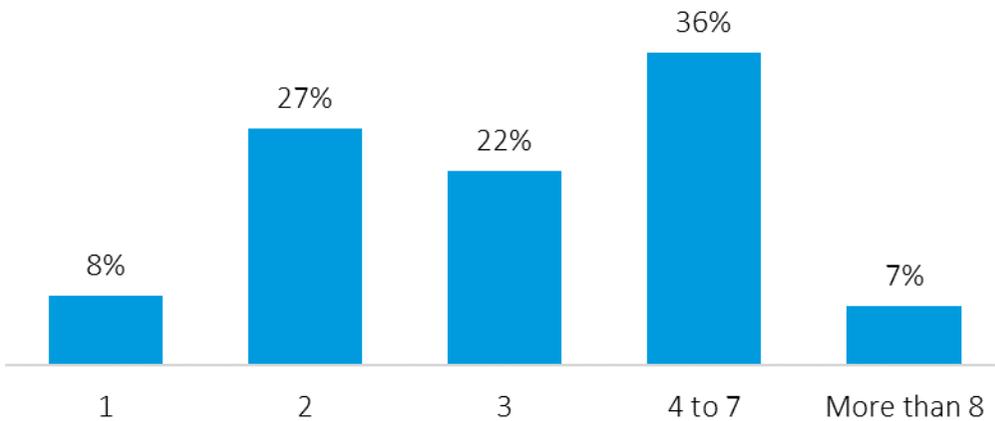
AVERAGE NUMBER OF NIGHTS SPENT



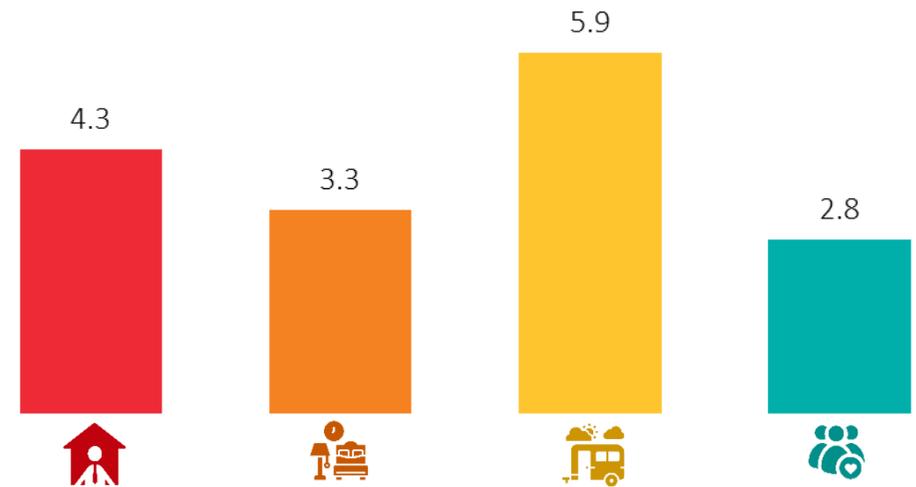
Caravan/Campers segment is more likely to spend 4 to 7 nights (49%) or more than 7 nights (20%), while VFR is more likely to spend 1 night (22%).

Private Accommodation (2%) and VFR (1%) are least likely to spend more than 7 nights (2%).

Number of Nights Spent



Average Number of Nights Spent by Segment



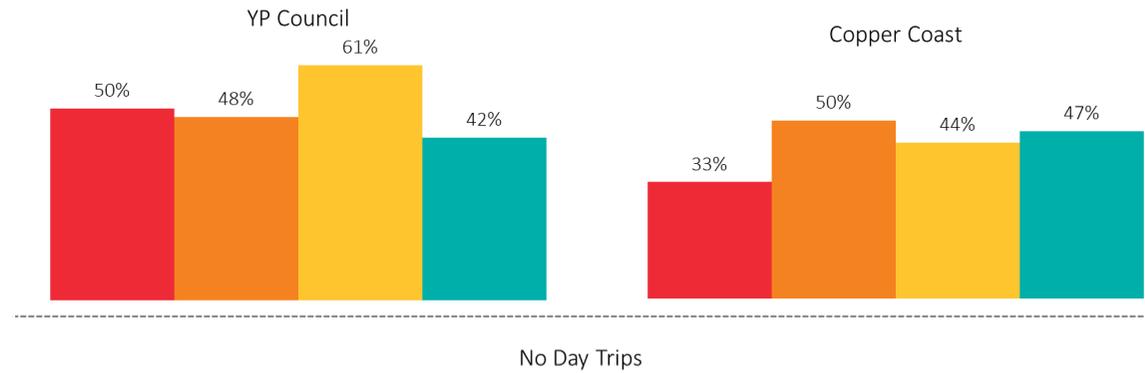
DAY TRIP PLACES



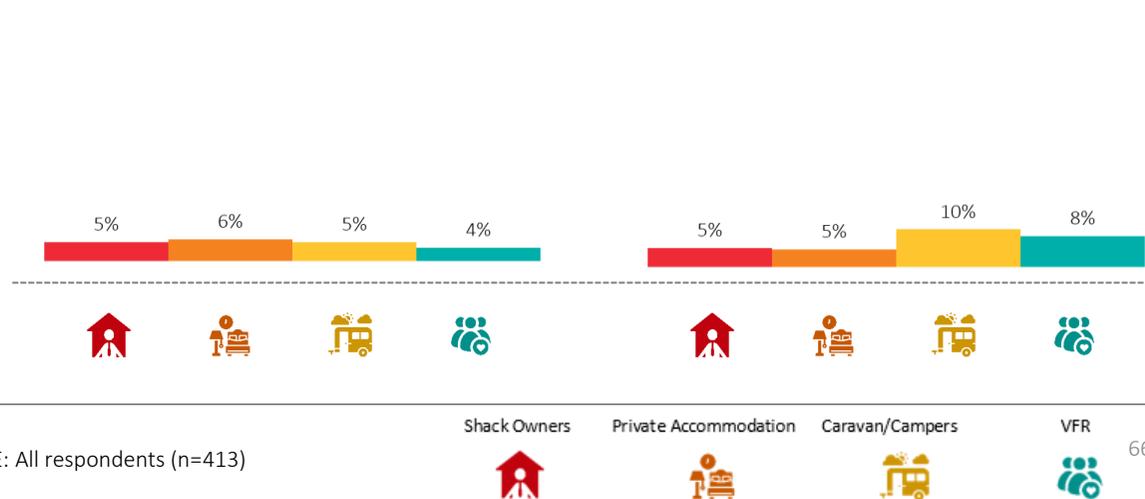
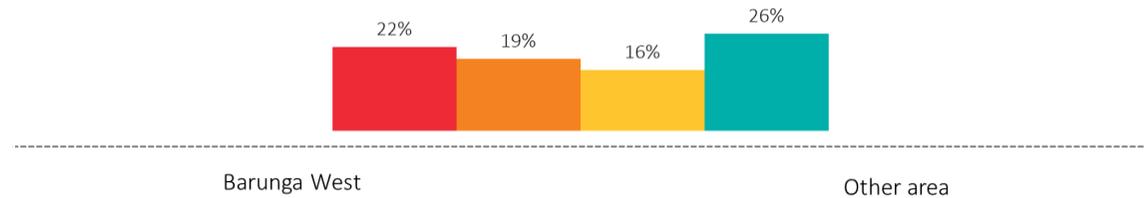
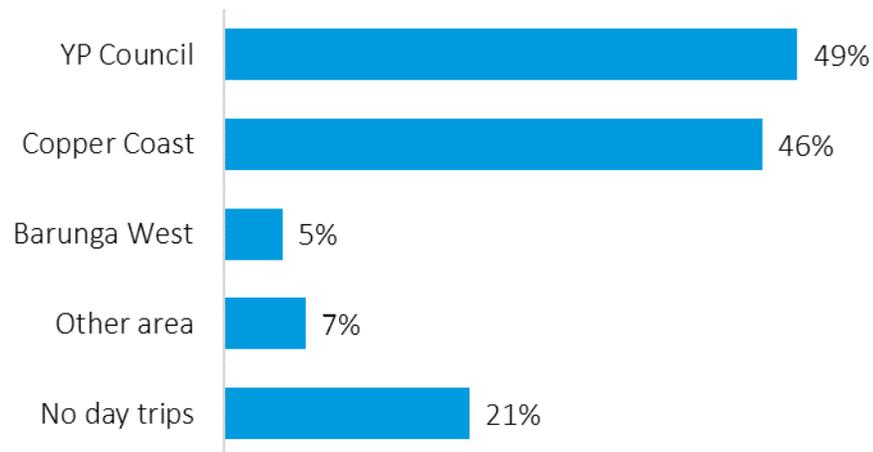
Private Accommodation segment is more likely to do day trips to Moonta (84%) and Kadina (82%).

Caravan/Campers segment is more likely to do day trips to Moonta Bay (76%), Innes National Park (74%) and Moonta (74%).

Shack Owners (81%) and VFR (73%) are the least likely to do day trips.



Day Trip Places



7. Where did you stay or visit on your last trip to the Yorke Peninsula? BASE: All respondents (n=413)

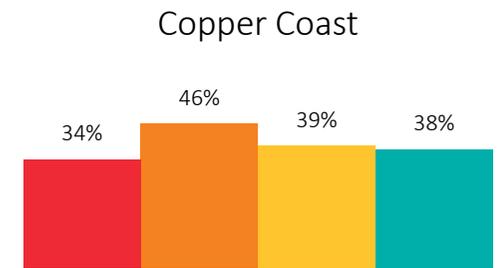
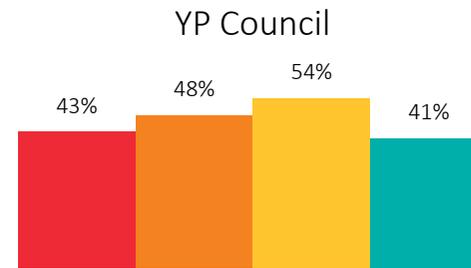
4. Which of the following best describes your accommodation on your last visit to the Yorke Peninsula? BASE: All respondents (n=413)

OVERNIGHT STAY PLACES

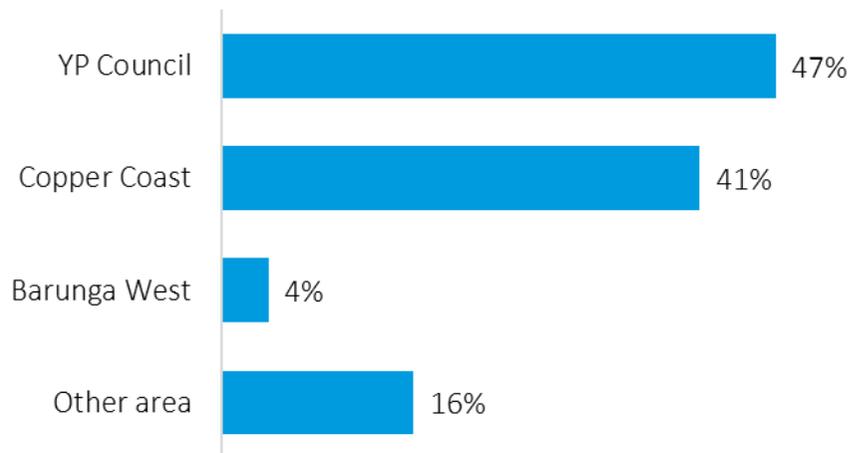


Private Accommodation segment is more likely to do overnight stays to Moonta Bay (84%) and Wallaroo (60%).

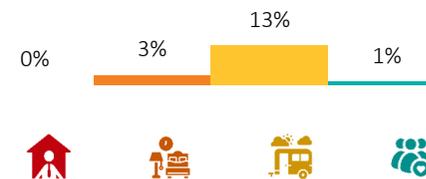
Caravan/Campers segment is more likely to do overnight stays in Moonta Bay (57%), Innes National Park (48%) and Wallaroo (46%).



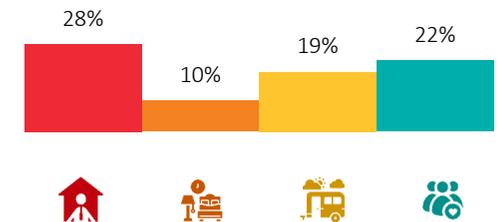
Overnight Stay Places



Barunga West



Other area



7. Where did you stay or visit on your last trip to the Yorke Peninsula? BASE: All respondents (n=413)

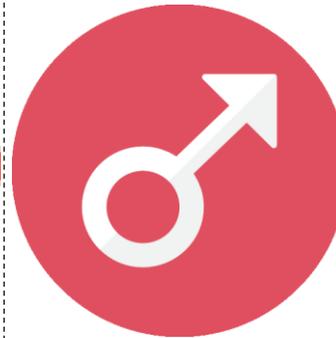
4. Which of the following best describes your accommodation on your last visit to the Yorke Peninsula? BASE: All respondents (n=413)



GENDER PROFILE



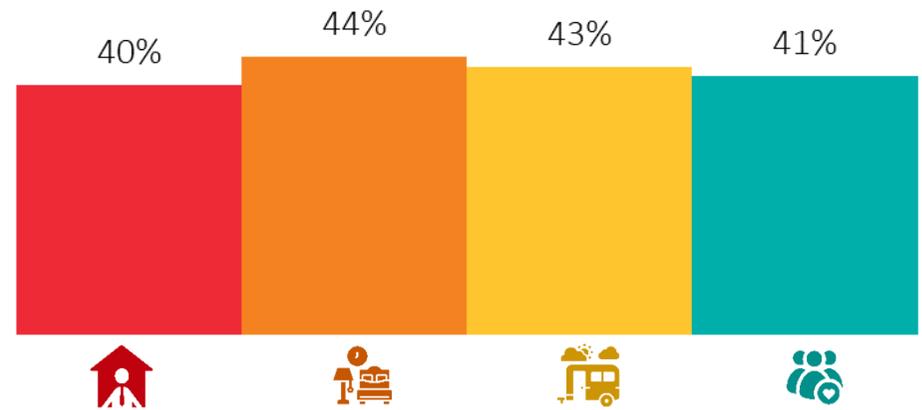
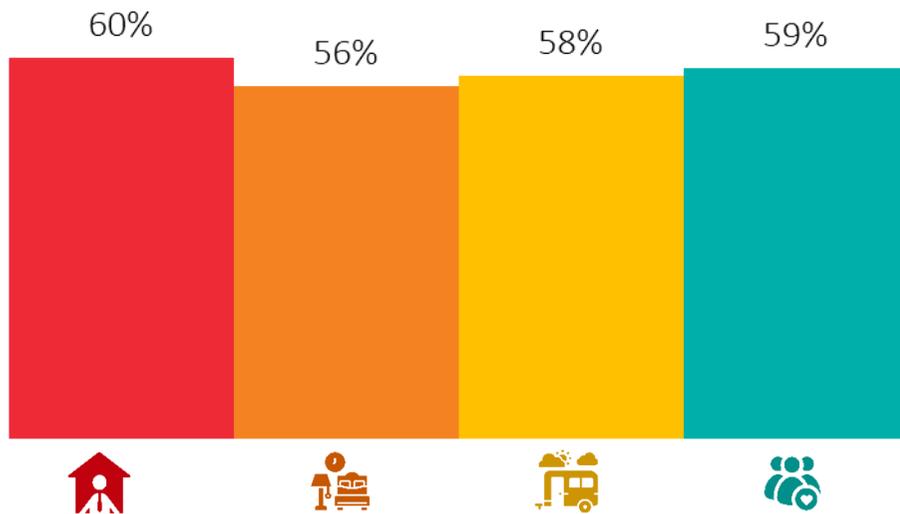
Females
58%



Males
42%

Female

Male



Shack Owners

Private Accommodation

Caravan/Campers

VFR



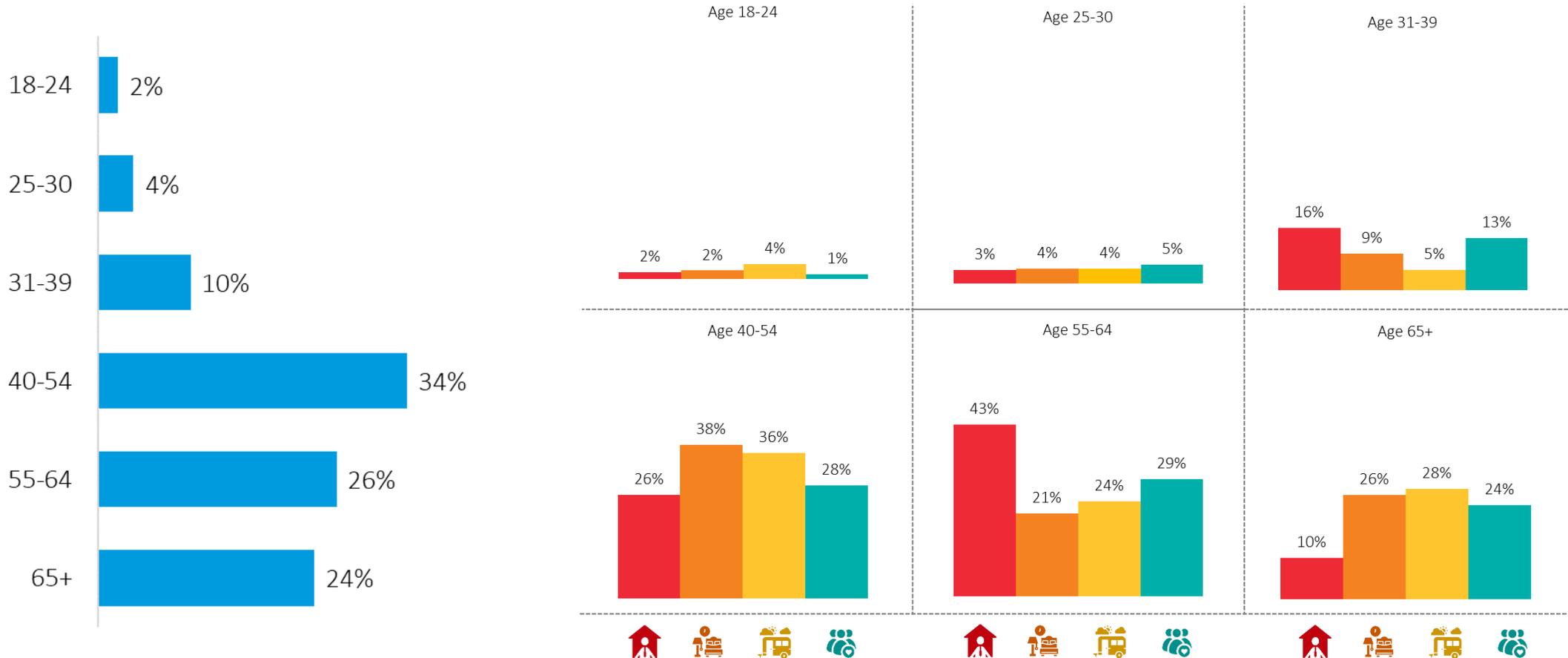
23. Do you identify as... BASE: All respondents (n=413)

4. Which of the following best describes your accommodation on your last visit to the Yorke Peninsula? BASE: All respondents (n=413)

AGE PROFILE



Shack Owners are more likely to be aged between 55 and 64 (43%).



22. In which year were you born? BASE: All respondents (n=413)

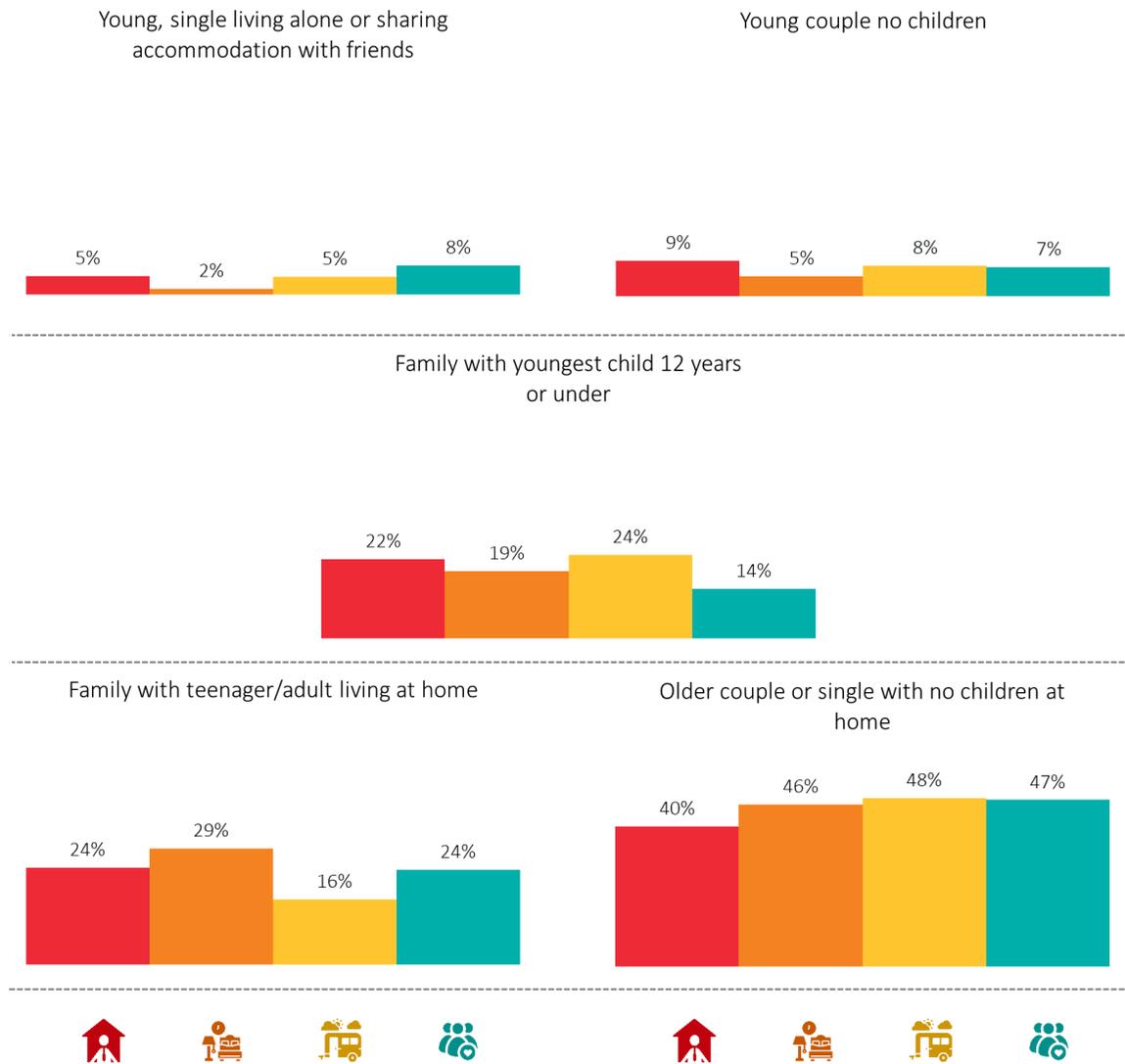
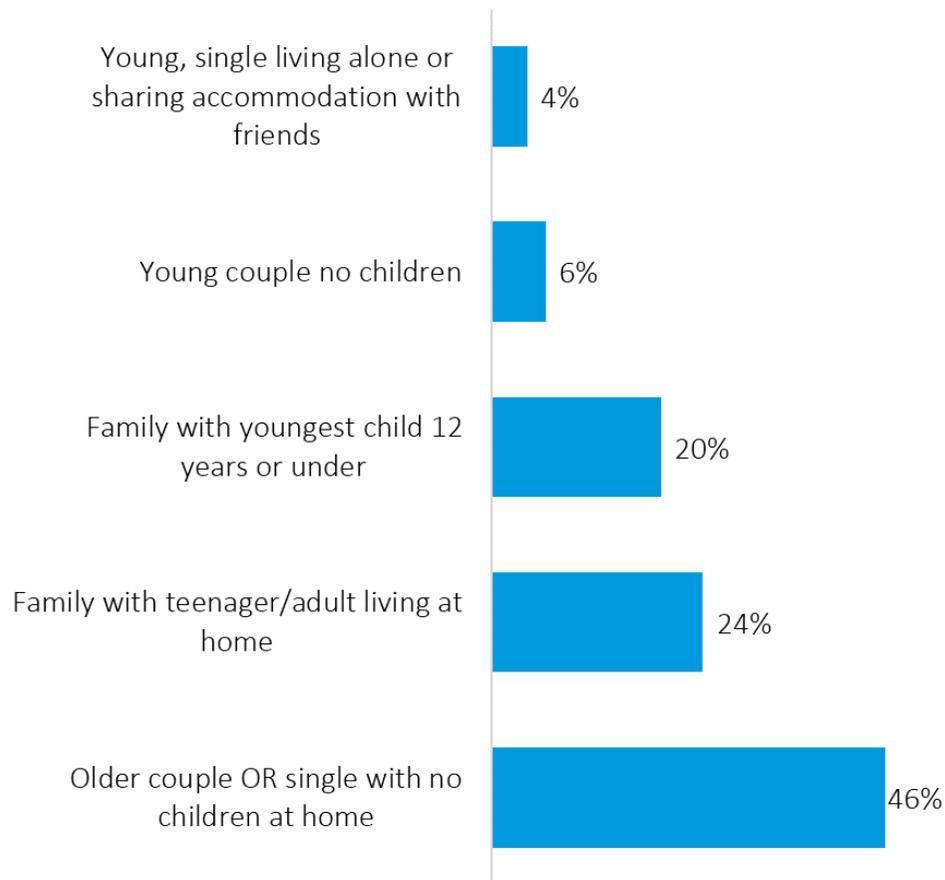
4. Which of the following best describes your accommodation on your last visit to the Yorke Peninsula? BASE: All respondents (n=413)



HOUSEHOLD PROFILE



Almost half (48%) of Caravan/Campers respondents are an older couple or single with no children at home.



25. Which of the following describes your household? BASE: All respondents (n=413)

4. Which of the following best describes your accommodation on your last visit to the Yorke Peninsula? BASE: All respondents (n=413)

Shack Owners

Private Accommodation

Caravan/Campers

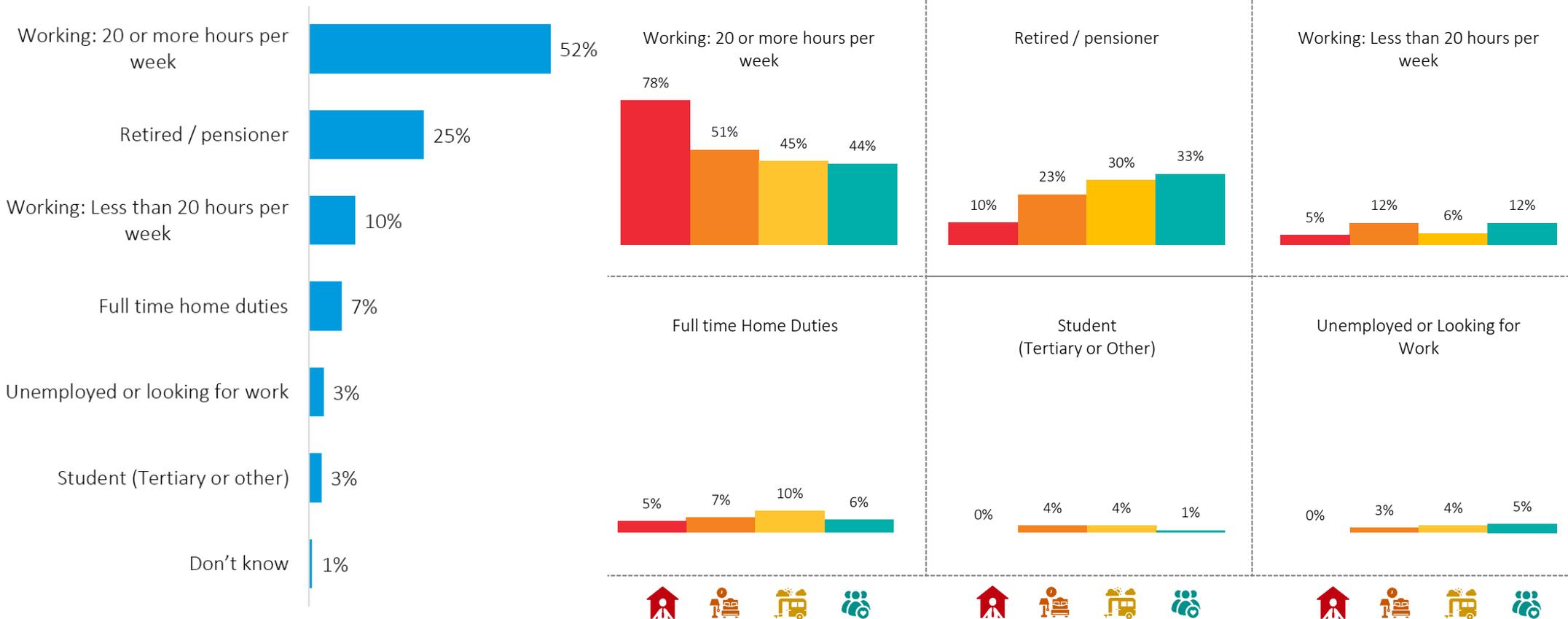
VFR



WORK STATUS PROFILE



Shack Owners (78%) are more likely to be working for 20 or more hours per week.

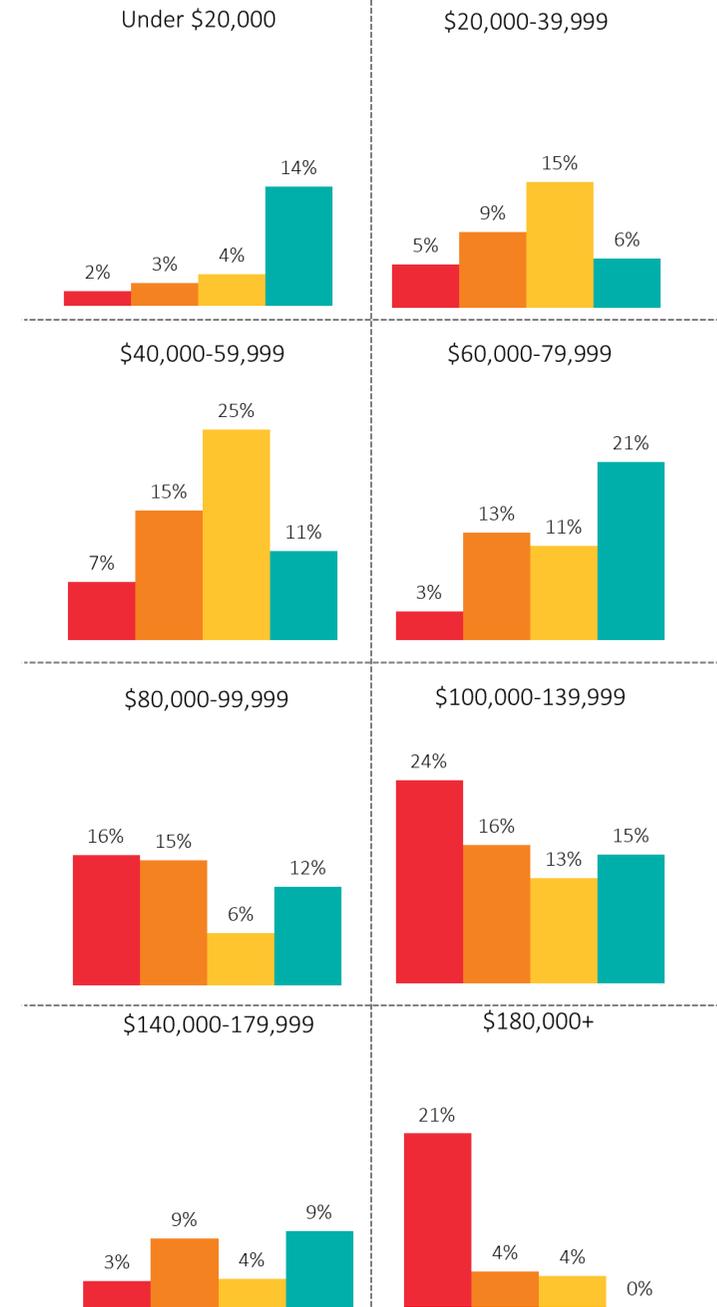
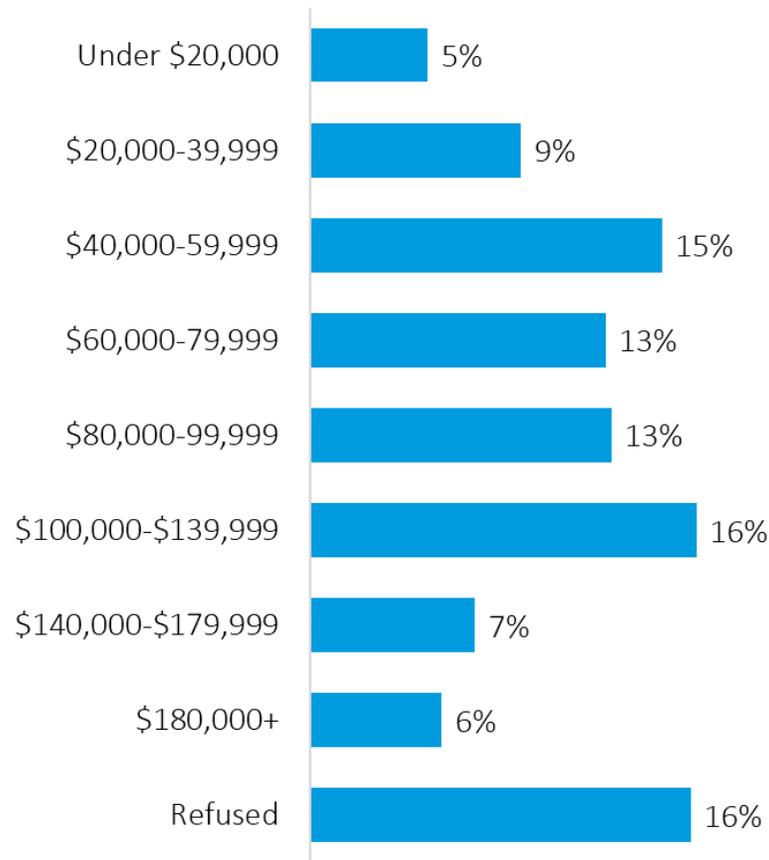


HOUSEHOLD INCOME PROFILE



Shack Owners segment (21%) is more likely to have an household income of more than \$180K per annum.

VFR (14%) is more likely to have an household income of less than \$20K per annum.



27. Which of the following best describes your gross (before tax) Household Income? BASE: All respondents (n=413)
4. Which of the following best describes your accommodation on your last visit to the Yorke Peninsula? BASE: All respondents (n=413)

ATTRACTIONS AND ACTIVITIES



AWARENESS OF ATTRACTIONS

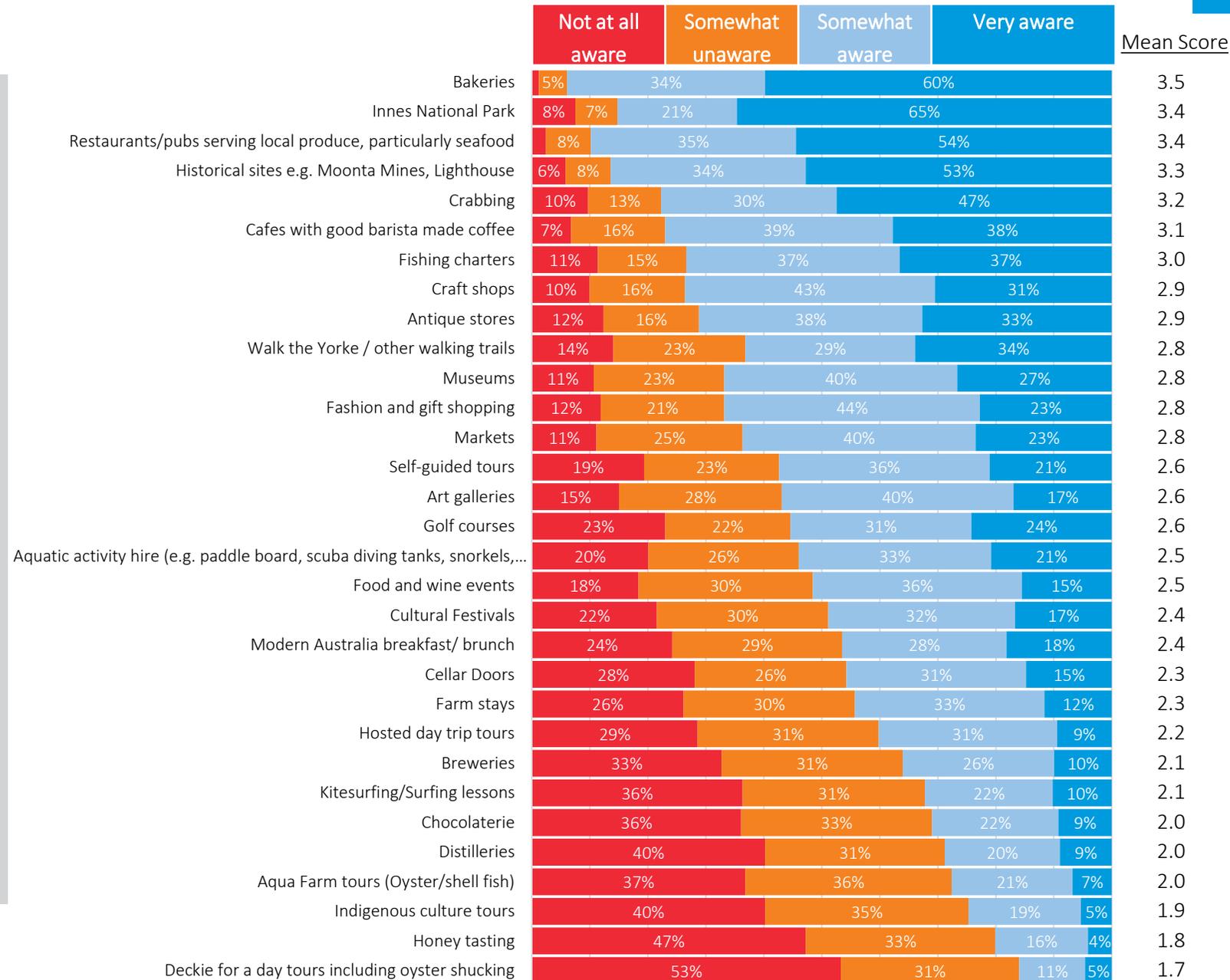


Respondents are more likely to be **very aware** of attractions related to food such as Bakeries (60%), Restaurants/ Pubs (54%), and Cafes (38%) but less likely to be very aware of Food and wine events (15%), Chocolateries (9%), Honey tasting (4%), Distilleries (9%), and Breweries (10%).

Shack owners are more likely to be aware of Crabbing (83%) and Fishing Charters (79%) than other segments.

The Private Accommodation segment is more likely to be aware of Bakeries (96%) and Restaurants/Pubs (91%) than other segments.

Caravan/Campers are more likely to be aware of the Innes National Park (94%) and Museums (73%) than other segments.



APPEAL OF ATTRACTIONS

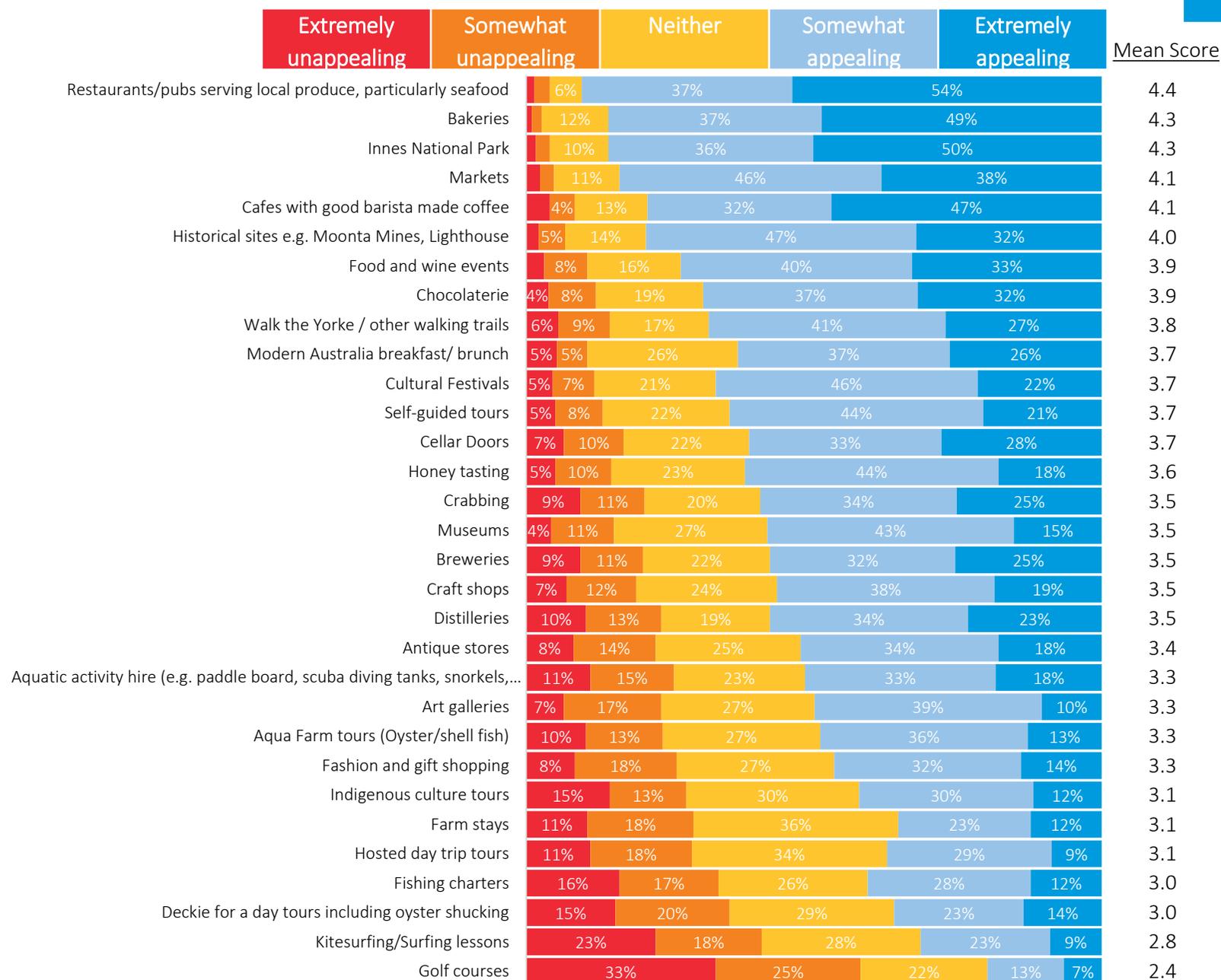


Respondents are more likely to have appeal for food and beverage-related attractions such as Restaurants/Pubs, Bakeries, Cafes, Food & Wine events, Chocolaterie, and Cellar Doors.

Shack Owners segment is more likely to have appeal for Crabbing, while the Private Accommodation segment is more likely to find it extremely unappealing (13%).

All segments except Shack Owners are more likely to find Fishing Carters unappealing.

Private Accommodation (67%) and Caravan/Campers (73%) segments are more likely to find Self-Guided Tours appealing, but awareness of the same is only at a moderate level.



LIKELIHOOD OF DOING ATTRACTIONS

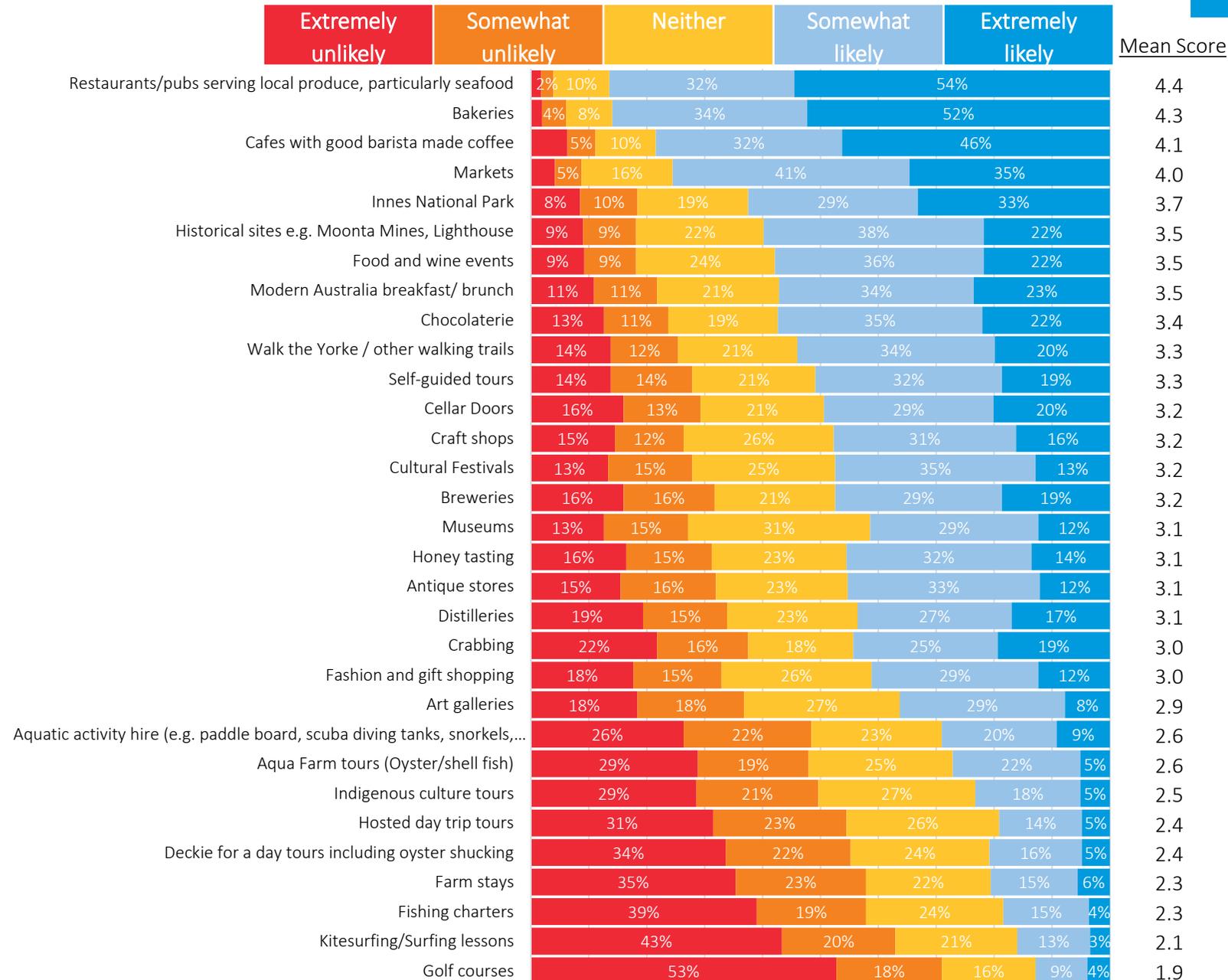


Respondents are more likely to participate in food and beverage-related attractions such as Restaurants/Pubs (86%), Bakeries (86%), Cafes (78%), Food & Wine events (58%), Modern Australia breakfast/brunch (57%), and Chocolaterie (57%).

The Shack Owners segment is more likely to do Crabbing (59%), while other segments are less likely to do it.

52% of Shack Owners indicated they find Fishing Charters appealing, but are unlikely to do it (60%).

The Private Accommodation segment is more likely to do Walk the Yorke/Other Walking Trails (57%).



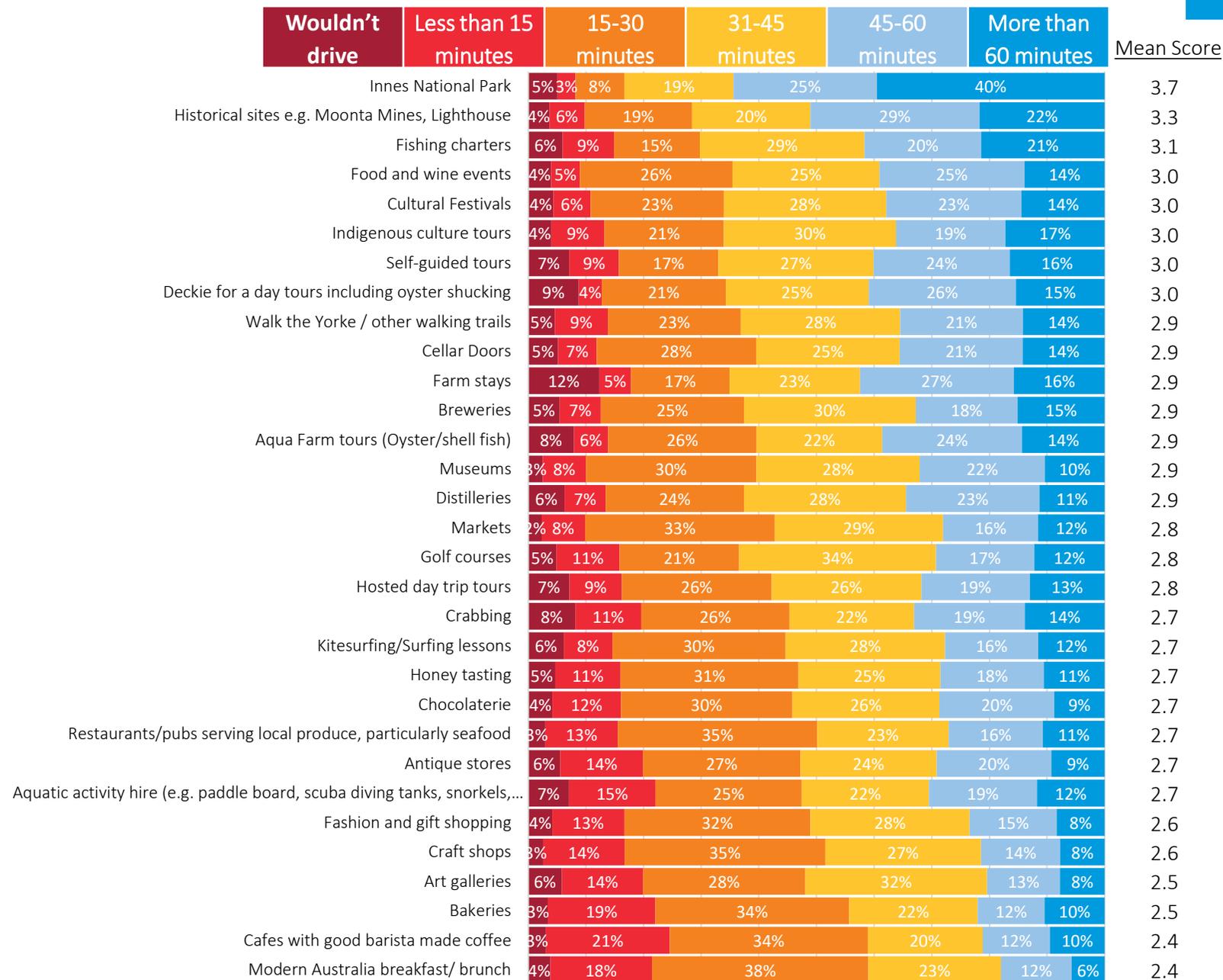
TIME TO TRAVEL TO ATTRACTIONS



Respondents across all segments are more likely to travel for more than 60 minutes to go to Innes National Park.

Private Accommodation visitors are more likely to travel for less than 15 minutes to go to Bakeries (18%) and Cafes with Good Barista Made Coffee (21%).

One in four (25%) VFR visitors are more likely to travel more than 60 minutes to Cultural Festivals.



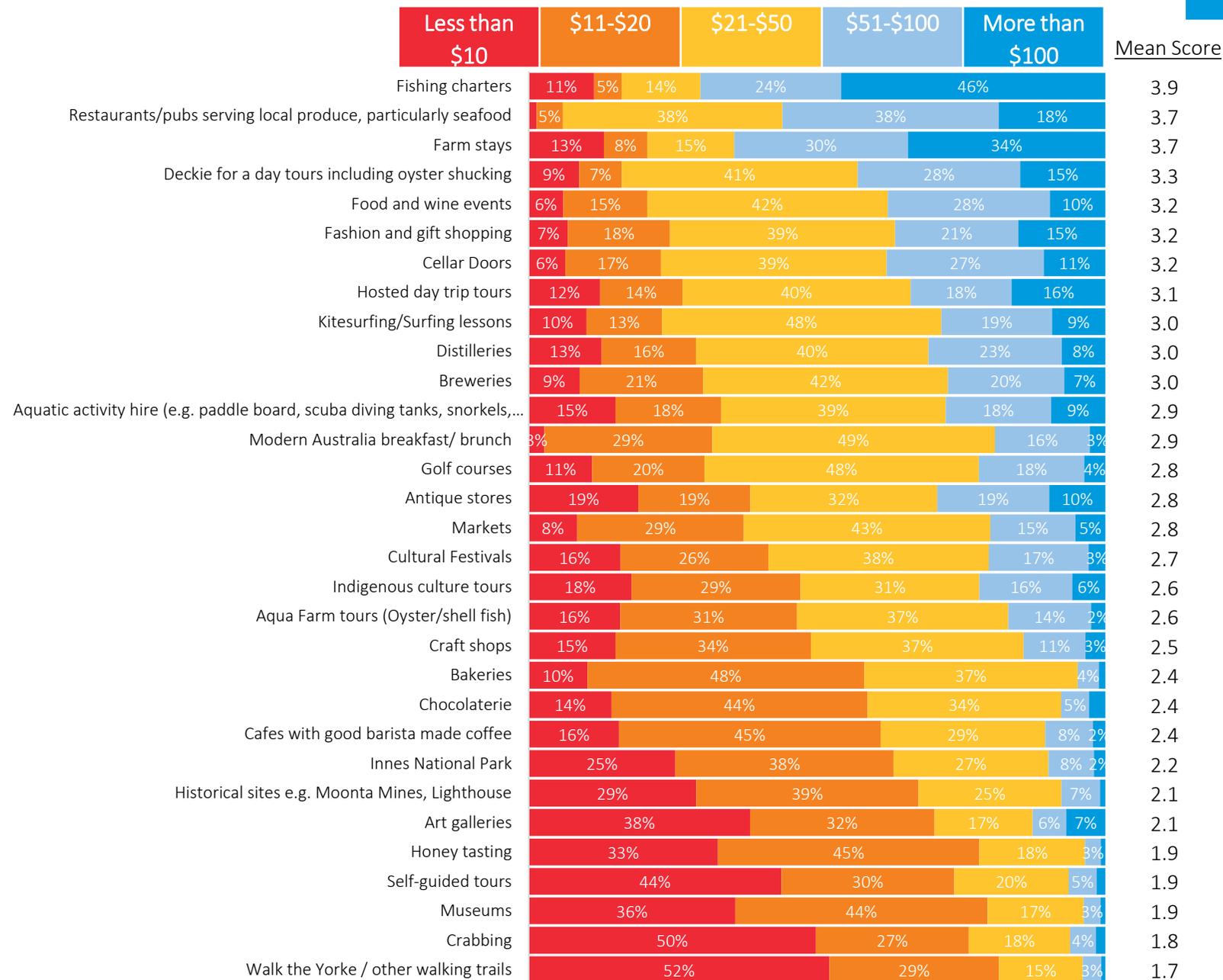
AMOUNT OF SPEND IN ATTRACTIONS



Respondents are willing to spend moderate levels of money for the activities listed and more likely to spend money on Fishing Charters, Restaurants/Pubs serving local produce, Farm Stays, and Deckie for a Day Tours.

Shack Owners (50%), Private Accommodation (50%), Caravan/Campers (47%) and VFR (31%) are more likely to spend more than \$100 for Fishing Charters.

Private Accommodation visitors are also more likely to spend more than \$100 for Farm Stays (42%), Deckie for a Day Tours (20%) and Restaurants/Pubs serving local produce (19%).





APPENDIX 1: ADDITIONAL COMMENTS

This section lists a selection of responses, made by individual interviewees, which did not fit within the coded responses.

These comments are included for completeness, but always remember they are minor responses, negligible in relation to the main, coded data. In other words, remember that these are generally isolated comments, providing flavour but not constituting the main ingredients.

To retain the colour and authenticity of the verbatim comments, they have been left largely unedited except for minimal spell checking.

ADDITIONAL COMMENTS (CONT.)

Yorke Peninsula Tourism – 2019 SURVEY

4. Which of the following best describes your accommodation on your last visit to the Yorke Peninsula? Other.

Sailing.

Live Here.

5. Who did you travel with on your last trip to the Yorke Peninsula? Other.

I didn't travel with children.

My employers.

School group.

Family but it was mixed. My sister, her partner, her kids and step grandchild.

My 2 sons.

Myself and my daughter.

Grandparent, children and their children.

ADDITIONAL COMMENTS (CONT.)

7. Where did you stay or visit on your last trip to the Yorke Peninsula (day trip)? Other.

Berry Bay.

Black Point.

Cable Bay.

Coobowie.

Corny Point.

Curramulka, Black Point, Port Julia, Pine Point, Sheoak Flat.

Flaherty's Beach.

Greens Plains.

Hardwicke Bay.

Hardwicke Bay.

Hardwicke Bay, Parsons Beach.

Maitland.

None.

Parsons Beach, Waterloo.

Port Pirie.

Port Rickaby and Hardwicke Bay.

Port Rickaby, Corny Point, Edithburgh, Wool Bay, Pine Point.

Port Pirie.

I spent a lot of time driving around the coast - and visiting friends who have a holiday home.

Stenhouse Bay.

The whole trip was travelling & camping - We visited everywhere.

Wool Bay.

Stenhouse Bay.

Yorketown, Port Moorowie.

ADDITIONAL COMMENTS (CONT.)

7. Where did you stay or visit on your last trip to the Yorke Peninsula (overnight trip)? Other.

Bakers Rocks.

Maitland.

Troubridge Island.

Balgowan.

Mundoora.

Warooka.

Black Point.

Pine Point.

Wauraltee.

Butlers Beach.

Point Neill.

Weetulta.

Coobowie.

Point Souttar.

Whyalla.

Coobowie Caravan Park.

Port Clinton.

Wool Bay.

Corny Point.

Port Clinton.

Couch Beach.

Port Julia.

Curramulka.

Port Moorowie.

Elliston Beach.

Port Rickaby.

Foul Bay.

Price.

Gleasons Landing, Pondalowie Bay.

Private farm property.

Had to say 1 night to previous question but went up and back in one day. About 4 weeks ago I stayed about 5 nights.

Second Valley.

The Pines.

Hardwicke Bay.

Tiddy Widdy Beach.

ADDITIONAL COMMENTS (CONT.)

10. On which of the following did you spend money on your last trip to the Yorke Peninsula? Other.

Accommodation

4wd travelling & camping.

Accommodation.

Accommodation.

Accommodation.

Accommodation.

Accommodation \$600 dollars.

Camp fees.

Camp grounds.

Camping fees. Hardware/camping shop.

Campsite.

Caravan park.

Caravan park expenses.

Petrol & accommodation.

Site fees.

Fuel

Bakeries and petrol.

Fuel.

Fuel.

Fuel, wines.

Petrol.

Petrol & accommodation.

Petrol, snacks.

Other

\$50.

Bakery.

Bakeries and petrol.

Boat ramp.

Fishing.

Golf.

Moved up here.

None.

Take away.

Winery.

ADDITIONAL COMMENTS (CONT.)

11. What, if anything, prevented you from spending more money on your last trip to the Yorke Peninsula?

Allergies so nervous to try new places.

Birthday party.

Combination of camping/cooking own meals and topping up as required.

Did everything we wanted to do.

Events were not on while we were there. Have been there so many times already done most things previously.

Family gave us other meals.

Friends catered for me.

Friends looked after and mostly fed me so just fitted in with them for much of the time.

Happy to veg out on campsite.

Happy with being on holidays and just spending time there.

Happy with what we did.

I go there to catch squid and relax, and between my group I feel spending around \$250pp is reasonable to achieve that.

Lack of 4wd based activities & reasonable priced access to places & beaches, tracks, etc.

Nil.

None.

None. Did as wanted, spent as needed.

Nothing.

Poor weather.

Relaxing was the key to the trip not spending money.

Sailing and self-provisioning.

Short stay only for a family event.

Stayed mostly in national park.

Stayed overnight in Wallaroo before boarding Sealink ferry next morning.

The things I wanted to do were free.

The things we did were mostly free!!

Trip interrupted by illness.

Was involved in running a holiday program for children/families. I did not have time to visit other attractions on this occasion.

Was only there for a birthday celebration and it was a day trip.

We attended a conference and no spare time.

We enjoyed the free natural attractions of Innes National Park.

We just took my elderly father out once.

We spend whatever is required to be happy and comfortable and to enjoy our visit.

We went to relax, not run around.

We weren't there long enough and were travelling with a baby so limited in what we could do.

ADDITIONAL COMMENTS (CONT.)

20. When you last visited the Yorke Peninsula, how did you find out what there is to see and do? Other.

Department for environment and water website.

Environment SA.

TripAdvisor.

We go there to kick back and relax not run around to do things.

21. Thinking about your next holiday to the Yorke Peninsula, how would you like to find out what there is to see and do, or what is your preferred source of communication? Other.

4WD magazines & forums.

A lot of councils website s are so poorly managed, that I am not even sure that I would bother to look.

Online blog.

TripAdvisor.

Tv ads and radio.

APPENDIX 2: GUIDE TO READING THE REPORT



GUIDE TO READING THE REPORT

The core report is typically analysed in order of the questions asked in the survey. Relevant statistically significant findings as well as other observations of interest are analysed in this report.

Please note that, because of rounding, answers in single response questions will not always sum precisely to 100%.

In addition, as the base for percentages is the number of respondents answering a particular question (rather than the number of responses) multiple response questions sum to more than 100%.

The use of arrows may have been used in this report to show movement between surveys.

- ↑ The current year % is up from the previous survey
- ↓ The current year % is down from the previous survey
- ↔ The current year % is the same as the previous survey

Survey, participants may have been to rate a variety of aspects on a 1 to 5 scale for importance, satisfaction or agreement. 1 being the lowest rating and 5 being the highest rating possible.

Typically in studies of this nature, an average rating of:

- 4.5 or above represents an extremely high level of importance, satisfaction or agreement
- 4.0 to 4.4 a high level
- 3.5 to 3.9 a moderate level
- between 2.5 and 3.4 a mixed rating and
- 2.4 and below a low level of importance, satisfaction or agreement

RATING LEVEL				
Extremely High	High	Moderate	Mixed	Low
4.5 or above	4.0 to 4.4	3.5 to 3.9	2.5 to 3.4	2.4 or below

Disclaimer Statement

The material in this report is assembled in good faith and is based on the perceptions of respondents who may have been surveyed. It is made available on the understanding that any views, suggestions or recommendations expressed in this report does not constitute professional advice, and McGregor Tan Research accepts no liability for its use.

1-7 SCALE GUIDE TO READING THE REPORT

The core report is typically analysed in order of the questions asked in the survey. Relevant statistically significant findings as well as other observations of interest are analysed in this report.

Please note that, because of rounding, answers in single response questions will not always sum precisely to 100%.

In addition, as the base for percentages is the number of respondents answering a particular question (rather than the number of responses) multiple response questions sum to more than 100%.

Survey, participants may have been to rate a variety of aspects on a 1 to 7 scale for importance, satisfaction or agreement. 1 being the lowest rating and 7 being the highest rating possible.

Typically in studies of this nature, an average rating of:

- 6.0 or above represents an extremely high level of importance, satisfaction or agreement
- 5.0 to 5.9 a high level
- 4.0 to 4.9 a moderate level
- between 3.0 and 3.9 a mixed rating and
- 2.9 and below a low level of influence, likelihood, importance or agreement

RATING LEVEL				
Extremely High	High	Moderate	Mixed	Low
6.0 to 7.0	5.0 to 5.9	4.0 to 4.9	3.0 to 3.9	2.9 or below

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APPENDIX 3: SAMPLING TOLERANCE



Sampling Tolerance

It should be borne in mind throughout this report that all data based on sample surveys are subject to a sampling tolerance.

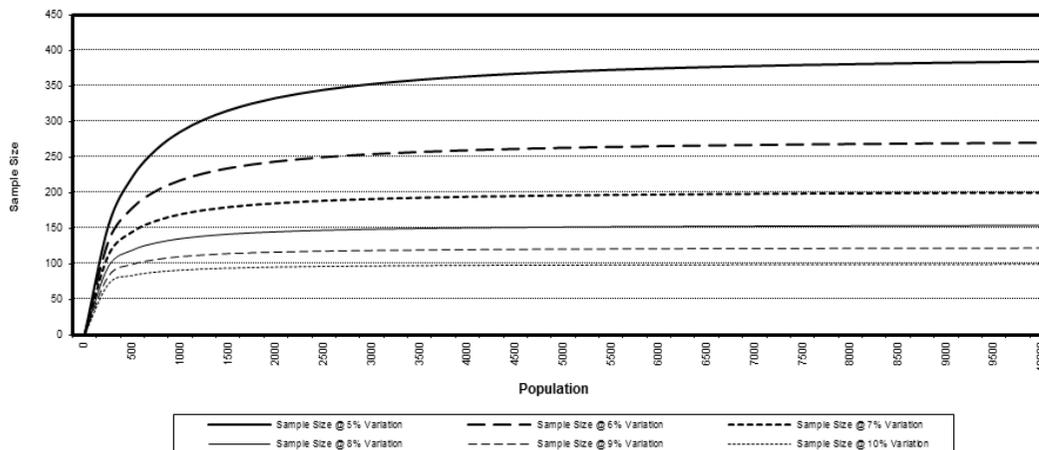
That is, where a sample is used to represent an entire population, the resulting figures should not be regarded as absolute values, but rather as the mid-point of a range plus or minus x% (see sampling tolerance table).

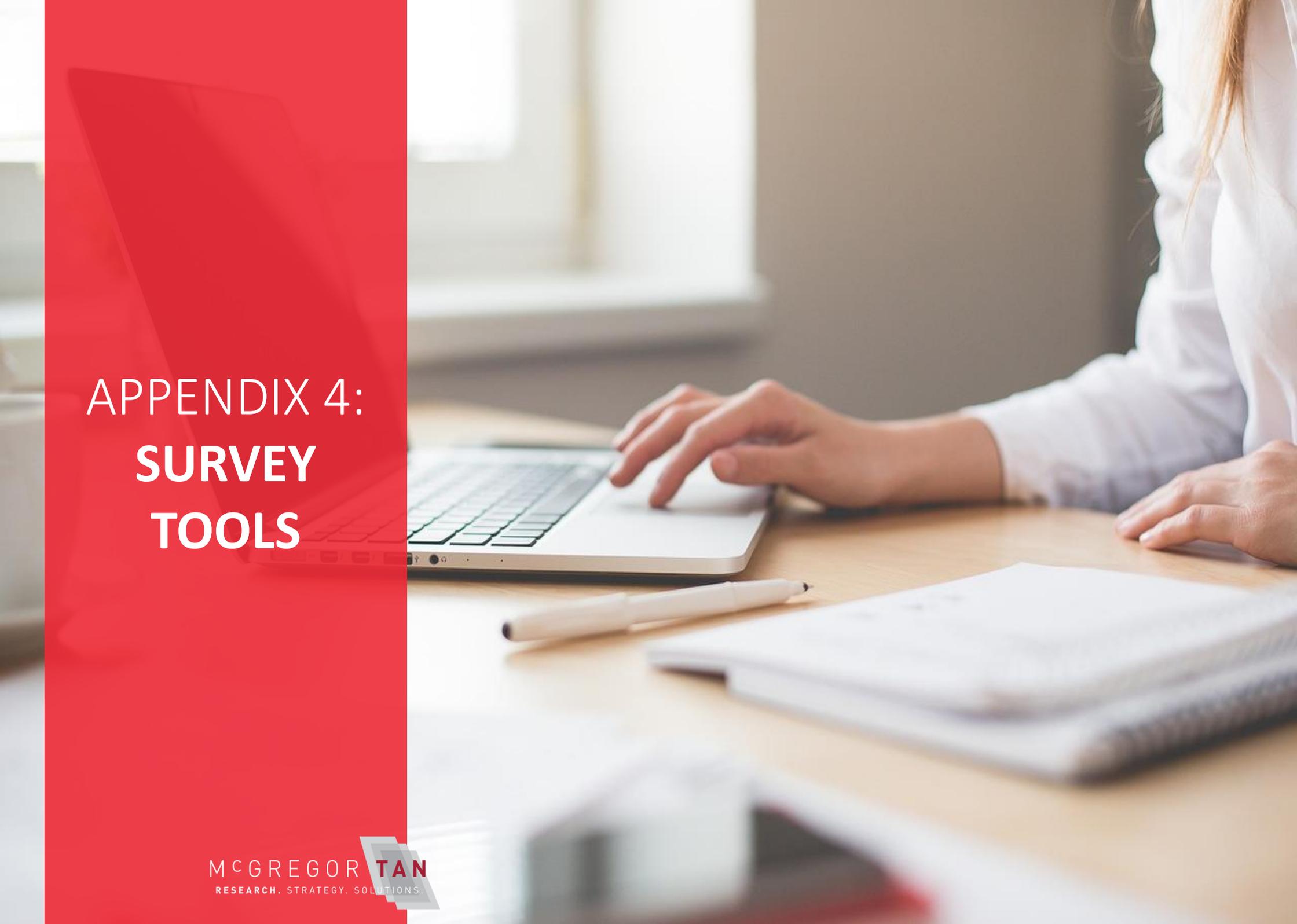
Only variations clearly designated as significantly different are statistically valid differences and these are clearly pointed out in the report.

Other divergences are within the normal range of fluctuation at a 95% confidence level; they should be viewed with some caution and not treated as statistically reliable changes.

MARGIN OF ERROR TABLE (95% confidence level)										
SAMPLE SIZE ↓	Percentages giving a particular answer									
	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%
50	6	9	10	11	12	13	14	14	14	14
100	4	6	7	8	9	9	10	10	10	10
150	4	5	6	7	7	8	8	8	8	8
200	3	4	5	6	6	6	7	7	7	7
250	3	4	5	5	6	6	6	6	6	6
300	3	4	4	5	5	5	6	6	6	6
400	2	3	4	4	4	5	5	5	5	5
500	2	3	3	4	4	4	4	4	4	5
600	2	2	3	3	4	4	4	4	4	4
700	2	2	3	3	3	4	4	4	4	4
800	2	2	3	3	3	3	3	4	4	4
900	2	2	2	3	3	3	3	3	3	3
1000	1	2	2	3	3	3	3	3	3	3
1500	1	2	3	2	2	2	3	3	3	3
2000	1	1	2	2	2	2	2	2	2	2
3000	1	1	1	2	2	2	2	2	2	2

Optimum Sample Sizes to Ensure the Given Maximum Variation



A photograph of a person with long hair, wearing a white long-sleeved shirt, sitting at a wooden desk. They are typing on a silver laptop. In front of the laptop is a white pen and a spiral-bound notebook. The background is a blurred office setting with a window. A large red semi-transparent shape is overlaid on the left side of the image, containing the text.

APPENDIX 4: SURVEY TOOLS

Project No: 11248

Yorke Peninsula Tourism

COMMERCIAL IN CONFIDENCE

FINAL VERSION

Online introduction:

McGregor Tan, an independent social and market research company, is conducting a **survey** to gain an understanding of visitors and their perceptions of various attractions in the Yorke Peninsula.

S1: Have you visited the Yorke Peninsula for an overnight holiday (including a leisure trip, break, getaway, visiting friends or family etc.) in the past 2 years?

1.	Yes
2.	No – terminate

1. How often do you visit the Yorke Peninsula? [\[choose one only\]](#)

1.	More than once a month
2.	Every 3 months
3.	Every 6 months
4.	Every year
5.	Every couple of years
6.	Less than every couple of years

2. How likely are you to visit the Yorke Peninsula in the next 2 years? [\[choose one only\]](#)

1.	Extremely unlikely
2.	Somewhat unlikely
3.	Neither unlikely nor likely
4.	Somewhat likely
5.	Extremely likely

SURVEY TOOL (CONT.)

3. [Unlikely: Code 1 or 2 from Q2] Why are you unlikely to visit the Yorke Peninsula in the next 2 years? [open]

Text box

4. Which of the following best describes your accommodation on your last visit to the Yorke Peninsula? [choose one only]

1.	I stayed in my own/family's shack/holiday home
2.	I booked an apartment/hotel/shack/holiday home/cabin
3.	I took my own caravan
4.	I camped
5.	I stayed with friends/family who live there
6.	I stayed at a friend's holiday shack/holiday home (no cost)
7.	Other (specify)

LAST TRIP

5. Who did you travel with on your last trip to the Yorke Peninsula? [choose one only]
If you travelled with multiple aged children, please select the group your eldest child travelling with you fits into.

1.	Alone
2.	Partner
3.	Siblings aged 18+ (no parents, no one aged under 18)
4.	Family with kids (eldest child 12 or under)
5.	Family with kids (eldest child aged 13-17)
6.	Family (parents with adult children [eldest child 18+])
7.	Friends and family
8.	Friends
9.	Other (specify)

SURVEY TOOL (CONT.)

6. How many nights did you spend during your last trip to the Yorke Peninsula?

Enter 0 if none

Numeric box

7. Where did you stay or visit on your last trip to the Yorke Peninsula? [\[choose all that apply\]](#)

	Stayed overnight	Visited (day trip)
Ardrossan	1	1
Edithburgh	2	2
Innes National Park	3	3
Kadina	4	4
Marion Bay	5	5
Minlaton	6	6
Moonta	7	7
Moonta Bay	8	8
Port Broughton	9	9
Port Hughes	10	10
Point Turton	11	11
Port Victoria	12	12
Port Vincent	13	13
Stansbury	14	14
Wallaroo	15	15
Yorke town	16	16
Other (specify)	17	17

SURVEY TOOL (CONT.)

8. Approximately how much did you spend in the Yorke Peninsula on your last trip, including accommodation, petrol, dining out, coffee, alcohol, leisure activities (e.g. tours, attractions, equipment hire, charters etc.), supermarket, retail shopping (e.g. clothes, fishing gear, specialty shops, gifts etc.), personal services (e.g. hair, health etc.), and anything else?

\$Numeric box

9. How many people did this spend cover?

Adults	Numeric box <input type="text"/> <input type="text"/>
Children (under 18)	Numeric box <input type="text"/> <input type="text"/>

10. On which of the following did you spend money on your last trip to the Yorke Peninsula? [\[choose all that apply\]](#) (rotate)

1.	Art/Craft/Antique shops
2.	Attractions/Historical sites/National parks
3.	Dining out / entertainment / bars
4.	Events/Festivals/Markets
5.	Galleries/Museums
6.	Local produce
7.	Op Shops
8.	Retail (e.g. clothes, fishing gear, specialty shops, gifts etc.)
9.	Supermarket/bottle shop
10.	Tours
11.	Other (specify)

SURVEY TOOL (CONT.)

11. What, if anything, prevented you from spending more money on your last trip to the Yorke Peninsula? [\[choose all that apply\]](#) [\[rotate\]](#)

1.	Attractions were often closed when I was there
2.	Attractions were tired and old
3.	Budget constraints
4.	I cooked what I caught at home
5.	I didn't know what events were on
6.	I didn't know what there was to do
7.	I didn't usually leave the beach/shack as I had everything I needed
8.	I didn't want to spend more money than I had to
9.	Lack of family-friendly activities
10.	Not enough good places to eat out
11.	Not enough time to do what I wanted
12.	What I liked to do was too far from where I stayed
13.	Other (specify)

APPEAL

12. How aware are you that you can do the following attractions or activities in the Yorke Peninsula? [\[rotate\]](#)

Attractions/Activities	Not at all aware	Somewhat unaware	Somewhat aware	Extremely aware
Antique stores	1	2	3	4
Aqua Farm tours (Oyster/shell fish)	1	2	3	4

SURVEY TOOL (CONT.)

APPEAL

12. How aware are you that you can do the following attractions or activities in the Yorke Peninsula? **CONT.**
[rotate]

Attractions/Activities	Not at all aware	Somewhat unaware	Somewhat aware	Extremely aware
Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)	1	2	3	4
Art galleries	1	2	3	4
Bakeries	1	2	3	4
Breweries	1	2	3	4
Cafes with good barista made coffee	1	2	3	4
Cellar Doors	1	2	3	4
Chocolaterie	1	2	3	4
Crabbing	1	2	3	4
Craft shops	1	2	3	4
Cultural Festivals	1	2	3	4
Deckie for a day tours including oyster shucking	1	2	3	4
Distilleries	1	2	3	4
Farm stays	1	2	3	4
Fashion and gift shopping	1	2	3	4
Fishing charters	1	2	3	4
Food and wine events	1	2	3	4
Golf courses	1	2	3	4
Historical sites e.g. Moonta Mines, Lighthouse	1	2	3	4
Honey tasting	1	2	3	4
Hosted day trip tours	1	2	3	4
Indigenous culture tours	1	2	3	4

SURVEY TOOL (CONT.)

APPEAL

12. How aware are you that you can do the following attractions or activities in the Yorke Peninsula? **CONT.**
[rotate]

Attractions/Activities	Not at all aware	Somewhat unaware	Somewhat aware	Extremely aware
Innes National Park	1	2	3	4
Kitesurfing/Surfing lessons	1	2	3	4
Markets	1	2	3	4
Modern Australia breakfast/brunch	1	2	3	4
Museums	1	2	3	4
Restaurants/pubs serving local produce, particularly seafood	1	2	3	4
Self-guided tours	1	2	3	4
Walk the Yorke / other walking trails	1	2	3	4

13. Thinking about the Yorke Peninsula, how appealing or unappealing are the following attractions or activities to you? [rotate]

Attractions/Activities	Extremely unappealing	Somewhat unappealing	Neither appealing nor unappealing	Somewhat appealing	Extremely appealing
Antique stores	1	2	3	4	5
Aqua Farm tours (Oyster/shell fish)	1	2	3	4	5
Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)	1	2	3	4	5
Art galleries	1	2	3	4	5

SURVEY TOOL (CONT.)

13. Thinking about the Yorke Peninsula, how appealing or unappealing are the following attractions or activities to you? **CONT.**
[rotate]

Attractions/Activities	Extremely unappealing	Somewhat unappealing	Neither appealing nor unappealing	Somewhat appealing	Extremely appealing
Bakeries	1	2	3	4	5
Breweries	1	2	3	4	5
Cafes with good barista made coffee	1	2	3	4	5
Cellar Doors	1	2	3	4	5
Chocolaterie	1	2	3	4	5
Crabbing	1	2	3	4	5
Craft shops	1	2	3	4	5
Cultural Festivals	1	2	3	4	5
Deckie for a day tours including oyster shucking	1	2	3	4	5
Distilleries	1	2	3	4	5
Farm stays	1	2	3	4	5
Fashion and gift shopping	1	2	3	4	5
Fishing charters	1	2	3	4	5
Food and wine events	1	2	3	4	5
Golf courses	1	2	3	4	5
Historical sites e.g. Moonta Mines, Lighthouse	1	2	3	4	5
Honey tasting	1	2	3	4	5
Hosted day trip tours	1	2	3	4	5
Indigenous culture tours	1	2	3	4	5
Innes National Park	1	2	3	4	5
Kitesurfing/Surfing lessons	1	2	3	4	5
Markets	1	2	3	4	5

SURVEY TOOL (CONT.)

13. Thinking about the Yorke Peninsula, how appealing or unappealing are the following attractions or activities to you? **CONT.**
[rotate]

Attractions/Activities	Extremely unappealing	Somewhat unappealing	Neither appealing nor unappealing	Somewhat appealing	Extremely appealing
Modern Australia breakfast/brunch	1	2	3	4	5
Museums	1	2	3	4	5
Restaurants/pubs serving local produce, particularly seafood	1	2	3	4	5
Self-guided tours	1	2	3	4	5
Walk the Yorke / other walking trails	1	2	3	4	5

14. Thinking about your next trip to the Yorke Peninsula, how likely or unlikely are you to do the following attractions or activities? [rotate]

Attractions/Activities	Extremely unlikely	Somewhat unlikely	Neither likely nor unlikely	Somewhat likely	Extremely likely
Antique stores	1	2	3	4	5
Aqua Farm tours (Oyster/shell fish)	1	2	3	4	5
Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)	1	2	3	4	5
Art galleries	1	2	3	4	5
Bakeries	1	2	3	4	5
Breweries	1	2	3	4	5
Cafes with good barista made coffee	1	2	3	4	5
Cellar Doors	1	2	3	4	5

SURVEY TOOL (CONT.)

14. Thinking about your next trip to the Yorke Peninsula, how likely or unlikely are you to do the following attractions or activities? **CONT.**
[rotate]

Attractions/Activities	Extremely unlikely	Somewhat unlikely	Neither likely nor unlikely	Somewhat likely	Extremely likely
Chocolaterie	1	2	3	4	5
Crabbing	1	2	3	4	5
Craft shops	1	2	3	4	5
Cultural Festivals	1	2	3	4	5
Deckie for a day tours including oyster shucking	1	2	3	4	5
Distilleries	1	2	3	4	5
Farm stays	1	2	3	4	5
Fashion and gift shopping	1	2	3	4	5
Fishing charters	1	2	3	4	5
Food and wine events	1	2	3	4	5
Golf courses	1	2	3	4	5
Historical sites e.g. Moonta Mines, Lighthouse	1	2	3	4	5
Honey tasting	1	2	3	4	5
Hosted day trip tours	1	2	3	4	5
Indigenous culture tours	1	2	3	4	5
Innes National Park	1	2	3	4	5
Kitesurfing/Surfing lessons	1	2	3	4	5
Markets	1	2	3	4	5
Modern Australia breakfast/brunch	1	2	3	4	5
Museums	1	2	3	4	5
Restaurants/pubs serving local produce, particularly seafood	1	2	3	4	5
Self-guided tours	1	2	3	4	5
Walk the Yorke / other walking trails	1	2	3	4	5

SURVEY TOOL (CONT.)

15. **[Pipe in ONLY if code 4 or 5 from Q13 Appeal]** How far would you drive (one-way) from where you are staying to do attractions or activities you find appealing in the Yorke Peninsula? [\[rotate\]](#)

Attractions/Activities	Less than 15 minutes	15-30 minutes	31-45 minutes	46-60 minutes	More than 60 minutes	Wouldn't drive
Antique stores	1	2	3	4	5	6
Aqua Farm tours (Oyster/shell fish)	1	2	3	4	5	6
Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)	1	2	3	4	5	6
Art galleries	1	2	3	4	5	6
Bakeries	1	2	3	4	5	6
Breweries	1	2	3	4	5	6
Cafes with good barista made coffee	1	2	3	4	5	6
Cellar Doors	1	2	3	4	5	6
Chocolaterie	1	2	3	4	5	6
Crabbing	1	2	3	4	5	6
Craft shops	1	2	3	4	5	6
Cultural Festivals	1	2	3	4	5	6

SURVEY TOOL (CONT.)

15. **[Pipe in ONLY if code 4 or 5 from Q13 Appeal]** How far would you drive (one-way) from where you are staying to do attractions or activities you find appealing in the Yorke Peninsula? **CONT.** [\[rotate\]](#)

Attractions/Activities	Less than 15	15-30	31-45	46-60	More	Wouldn't drive
	minutes	minutes	minutes	minutes	than 60 minutes	
Deckie for a day tours including oyster shucking	1	2	3	4	5	6
Distilleries	1	2	3	4	5	6
Farm stays	1	2	3	4	5	6
Fashion and gift shopping	1	2	3	4	5	6
Fishing charters	1	2	3	4	5	6
Food and wine events	1	2	3	4	5	6
Golf courses	1	2	3	4	5	6
Historical sites e.g. Moonta Mines, Lighthouse	1	2	3	4	5	6
Honey tasting	1	2	3	4	5	6
Hosted day trip tours	1	2	3	4	5	6
Indigenous culture tours	1	2	3	4	5	6
Innes National Park	1	2	3	4	5	6
Kitesurfing/Surfing lessons	1	2	3	4	5	6
Markets	1	2	3	4	5	6
Modern Australia breakfast/brunch	1	2	3	4	5	6
Museums	1	2	3	4	5	6
Restaurants/pubs serving local produce, particularly seafood	1	2	3	4	5	6
Self-guided tours	1	2	3	4	5	6
Walk the Yorke / other walking trails	1	2	3	4	5	6

SURVEY TOOL (CONT.)

16. [Pipe in ONLY if code 4 or 5 from Q13 Appeal] How much would you spend for the following activities in the Yorke Peninsula? [rotate]

Attractions/Activities	Less than \$10	\$11-\$20	\$21-\$50	\$51-\$100	More than \$100
Antique stores	1	2	3	4	5
Aqua Farm tours (Oyster/shell fish)	1	2	3	4	5
Aquatic activity hire (e.g. paddle board, scuba diving tanks, snorkels, kayaks etc.)	1	2	3	4	5
Art galleries	1	2	3	4	5
Bakeries	1	2	3	4	5
Breweries	1	2	3	4	5
Cafes with good barista made coffee	1	2	3	4	5
Cellar Doors	1	2	3	4	5
Chocolaterie	1	2	3	4	5
Crabbing	1	2	3	4	5
Craft shops	1	2	3	4	5
Cultural Festivals	1	2	3	4	5
Deckie for a day tours including oyster shucking	1	2	3	4	5
Distilleries	1	2	3	4	5
Farm stays	1	2	3	4	5

SURVEY TOOL (CONT.)

16. [Pipe in ONLY if code 4 or 5 from Q13 Appeal] How much would you spend for the following activities in the Yorke Peninsula? CONT. [rotate]

Attractions/Activities	Less than				More than
	\$10	\$11-\$20	\$21-\$50	\$51-\$100	\$100
Fashion and gift shopping	1	2	3	4	5
Fishing charters	1	2	3	4	5
Food and wine events	1	2	3	4	5
Golf courses	1	2	3	4	5
Historical sites e.g. Moonta Mines, Lighthouse	1	2	3	4	5
Honey tasting	1	2	3	4	5
Hosted day trip tours	1	2	3	4	5
Indigenous culture tours	1	2	3	4	5
Innes National Park	1	2	3	4	5
Kitesurfing/Surfing lessons	1	2	3	4	5
Markets	1	2	3	4	5
Modern Australia breakfast/brunch	1	2	3	4	5
Museums	1	2	3	4	5
Restaurants/pubs serving local produce, particularly seafood	1	2	3	4	5
Self-guided tours	1	2	3	4	5
Walk the Yorke / other walking trails	1	2	3	4	5

SURVEY TOOL (CONT.)

DEMAND TESTING

17. To what extent would new activities or attractions encourage you to spend more money in the Yorke Peninsula?

1.	Extremely unlikely
2.	Somewhat unlikely
3.	Neither unlikely nor likely
4.	Somewhat likely
5.	Extremely likely

18. To what extent would the following potential activities encourage you to spend more money in the Yorke Peninsula? [\[rotate\]](#)

Activities	Very unlikely	Somewhat unlikely	Neither likely nor unlikely	Somewhat likely	Very likely
A bigger water park	1	2	3	4	5
Calendar of events (festivals, markets etc.)	1	2	3	4	5
Catching & cooking crabs on the beach	1	2	3	4	5
Local hotels, cafes, restaurants serving & promoting local produce particularly seafood	1	2	3	4	5
Major events (e.g. car rally, music festivals etc.)	1	2	3	4	5

SURVEY TOOL (CONT.)

18. To what extent would the following potential activities encourage you to spend more money in the Yorke Peninsula? **CONT.**
[rotate]

Activities	Very unlikely	Somewhat unlikely	Neither likely nor unlikely	Somewhat likely	Very likely
More pop-up shops – food trucks, pop-up cafes and bars etc.	1	2	3	4	5
Scuba diving tours (e.g. reefs, ship wreck)	1	2	3	4	5
Series of self-drive trails with maps & itineraries across the Yorke Peninsula, including family trails, food & wine trails, history & culture trails	1	2	3	4	5
Snorkelling/Kayak tours	1	2	3	4	5

19. Which of the following are you most likely to spend money on in the Yorke Peninsula? [choose one only] [rotate]

1.	A bigger water park
2.	Calendar of events (festivals, markets etc.)
3.	Catching & cooking crabs on the beach
4.	Local hotels, cafes, restaurants serving & promoting local produce particularly seafood
5.	Major events (e.g. car rally, music festivals etc.)
6.	More pop-up shops – food trucks, pop-up cafes and bars etc.
7.	Scuba diving tours (e.g. reefs, ship wreck)
8.	Series of self-drive trails with maps & itineraries across the Yorke Peninsula, including family trails, food & wine trails, history & culture trails
9.	Snorkelling/Kayak tours
10.	None of these

SURVEY TOOL (CONT.)

COMMUNICATIONS

20. When you last visited the Yorke Peninsula, how did you find out what there is to see and do? [choose all that apply] [rotate]

1.	Community Notice boards
2.	Council website
3.	Facebook/Instagram
4.	From my own experience of what there is to do
5.	Google
6.	Local newspaper
7.	Recommendations from friends/family
8.	SA Tourism website
9.	Signage
10.	Visitor Centres in the Yorke Peninsula
11.	Visitor guides/maps/brochures
12.	Word of mouth from locals
13.	www.yorkepeninsula.com.au/
14.	Other (specify)
15.	None

21. Thinking about your next holiday to the Yorke Peninsula, how would you like to find out what there is to see and do, or what is your preferred source of communication? [choose all that apply] [rotate]

1.	Community Notice boards
2.	Council website
3.	Direct email updates from the Yorke Peninsula Tourism
4.	Facebook/Instagram
5.	Google
6.	Local newspaper
7.	Recommendations from friends/family
8.	SA Tourism website
9.	Signage
10.	Visitor Centres in the Yorke Peninsula
11.	Visitor guides/maps/brochures
12.	Word of mouth from locals
13.	www.yorkepeninsula.com.au/
14.	Other (specify)
15.	None

DEMOGRAPHICS

22. In which year were you born?

<i>Hidden: Automatic recode into the following age groups</i>	
1.	18 to 24
2.	25 to 30
3.	31 to 39
4.	40 to 54
5.	55 to 64
6.	65+

23. Do you identify as...

1.	Male
2.	Female

24. What is the postcode and suburb of where you live?

Postcode	
Suburb	

25. Which of the following describes your household? [\[choose one only\]](#)

1.	Young, single living alone or sharing accommodation with friends
2.	Young couple no children
3.	Family with youngest child 12 years or under
4.	Family with teenager/adult living at home
5.	Older couple OR single with no children at home

SURVEY TOOL (CONT.)

26. Which of the following best describes you? [choose one only]

1.	Full time home duties
2.	Retired / pensioner
3.	Student (Tertiary or other)
4.	Working: 20 or more hours per week
5.	Working: Less than 20 hours per week
6.	Unemployed or looking for work
7.	Don't know

27. Which of the following best describes your gross (before tax) Household Income? [choose one only]

1.	Under \$20,000 pa
2.	\$20,000-39,999 pa
3.	\$40,000-59,999 pa
4.	\$60,000-79,999 pa
5.	\$80,000-99,999 pa
6.	\$100,000-\$139,999 pa
7.	\$140,000-\$179,999 pa
8.	\$180,000+ pa
9.	Refused

ADD PRIZE DRAW

McGregor Tan is accredited to the highest professional industry standards (CIRQ ISO 20252) for the full scope of research and strategy services including customised research for consumer, social and commercial studies, as recognised by the Australian Market and Social Research Society.



A close-up photograph of a person's hands holding a silver smartphone. The person has bright pink nail polish and is wearing a ring on their left hand. The phone is held over a silver laptop keyboard. The background is a blurred office setting with a wooden desk and a person in a blue shirt. A large red vertical bar is on the left side of the image.

APPENDIX 6: **COMPUTER TABULATIONS**

HOW TO READ THE COMPUTER TABULATIONS

The computer tabulations in the report show the comparisons between [1] the answers given by the total number of respondents and [2] those given by the various subgroups. This is done in the form of percentages. Under certain data, you may notice the presence of + or - signs. These indicate where there is a statistically significant difference between the responses of the subgroup (e.g. males, people over 65, etc.) and the group as a whole. When the responses of the subgroup are significantly less than the group as a whole, this is shown by a minus (-) sign. If, on the other hand, there is a significantly higher response by the subgroup, then a plus (+) sign appears. The degree of significance of difference is also indicated. Where a single (- or +), double (-- or ++) or triple (--- or +++) sign occurs, you can be, respectively, 90%, 95% or 99% sure that the subgroup is in fact answering differently to the group as a whole, and that it is unlikely to be a random fluctuation in the data. (See example opposite)

Please note that, because of rounding, answers in single response questions will not always sum precisely to 100%.

In addition, as the base for percentages is the number of respondents answering a particular question (rather than the number of responses) multiple response questions sum to more than 100%.

Example: How would you describe yourself?

	GENDER			AGE GROUP				
	TOTAL	Male	Female	16-24	25-34	35-44	45-54	55+
Complete non-smoker	298 72%	148 70%	150 74%	59 67%	56 63%	55 69%	78 76%	50 89% +++
No. of respondents	416 100%	212 100%	204 100%	88 100%	89 100%	80 100%	103 100%	56 100%

72% of all respondents said that they were complete non-smokers

74% of all females surveyed said that they were complete non-smokers. This is not a significantly different proportion to the total of 72% (no plus or minus signs)

63% of all 25-34 year olds said that they were complete non-smokers. We are 90% sure that this age group's response is significantly fewer than the total of 72% (single minus (-) sign)

89% of all 55+ year olds said that they are complete non-smokers. We are 99% sure that this age group's response is significantly higher than the total of 72% (triple plus (+++) sign)

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