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VISITOR PERCEPTIONS OF THE ACT

Executive summary

AUGUST 2014

Image: Lake Burley Griffin and National Museum of Australia, Canberra Balloon Spectacular 2014. Image courtesy of VisitCanberra.

VISITOR PERCEPTIONS OF THE ACT

Tourism Research Australia and VisitCanberra contracted BDA Marketing Planning to investigate perception gaps for the ACT's four key tourism experience pillars:

- Food and Wine
- Arts and Culture
- Family Fun
- Outdoor Adventure.

By understanding and addressing the identified perception gaps, the ACT tourism industry can enhance their tourism product offering and maximise the tourism potential of the Canberra region.

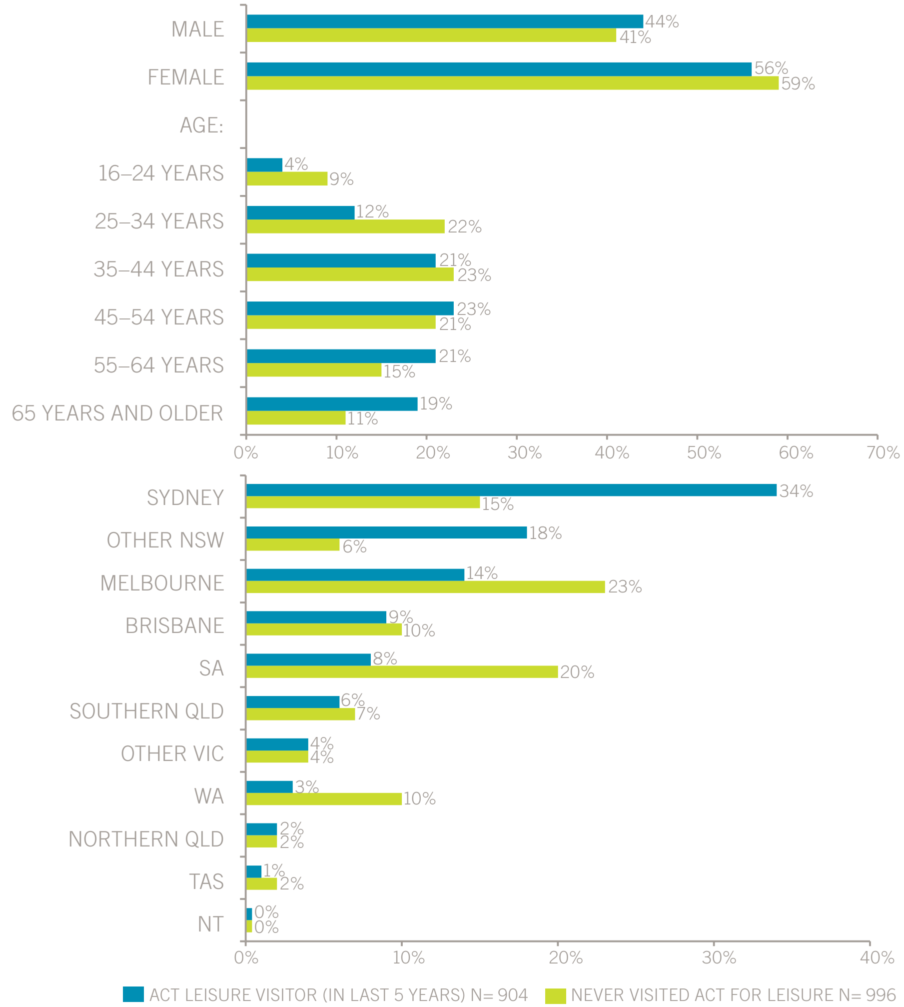
METHODOLOGY

The research was conducted in three phases throughout April and May 2014. Along with desk top analysis of previous research, quantitative and qualitative research was conducted with respondents who had visited Canberra in the last 5 years for leisure purposes, and those who had never visited Canberra for leisure.

The online quantitative survey required each respondent to view stimulus for Canberra and a selection of key competitive destinations in Australia for two of the experience pillars. Responses for each destination and pillar were gathered on awareness, uniqueness, relative competitive appeal, elements of appeal and intention to visit.

The qualitative research was conducted via an online forum and explored the needs of respondents across each experience pillar, investigated perceptions of Canberra among visitors and non-visitors, and explored respondents' preferences for competing destinations across the four pillars.

FIGURE 1: GENDER, AGE AND LOCATION OF QUANTITATIVE SURVEY RESPONDENTS



Prior to seeing stimulus material for Canberra's tourism offering, respondents' impressions of Canberra were recorded.

IMPRESSIONS OF CANBERRA BY REPEAT LEISURE VISITORS

- Widely recognised for its significance as the nation's capital, although appeal varied
- A range of iconic attractions
  - Large range of activities
  - Strong perception that attractions are focused on education
- Mixed impression of the city itself
  - Sprawling layout can result in an empty feeling, but wide open spaces/lack of traffic were appealing
- Doesn't always translate to a desired 'holiday' feel
  - A 'been there, done that' destination.

IMPRESSIONS OF CANBERRA BY THOSE WHO HAVE NEVER VISITED FOR LEISURE

- National icons recognised as significant, but sometimes dull
- Iconic attractions prominent
  - valued for their national significance
  - experiential learning for the whole family
- Politics, government and a sombre, respectful feeling
- Offer doesn't entice everyone
  - seasonal climate not valued
  - perception of limited activities
  - lacking excitement for some
- Reputation for expensive travel
  - deters spontaneous leisure trips.

Image: Mocan and Green Grout, New Acton, Canberra. Image courtesy of VisitCanberra.

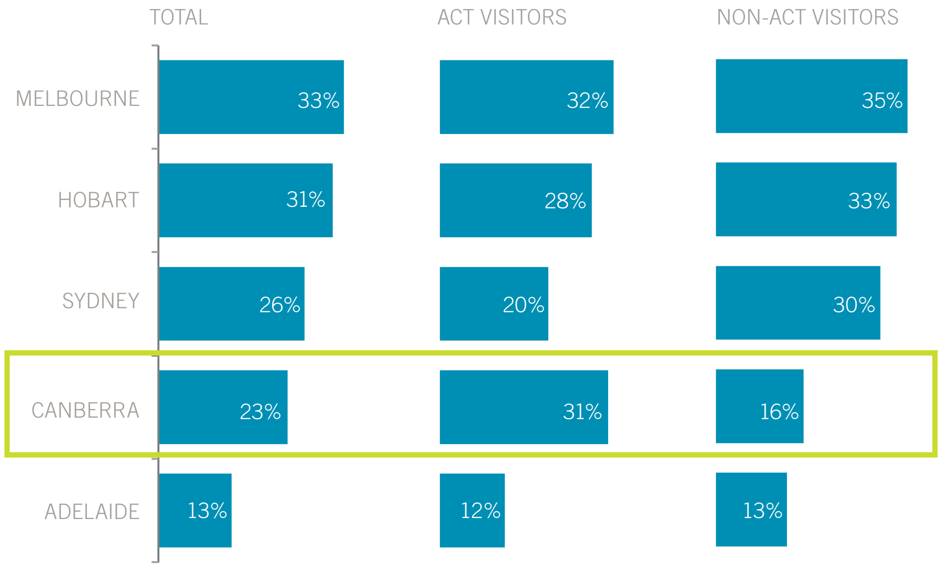
KEY FINDINGS

ARTS AND CULTURE

Arts and culture was rated as the strongest of the four pillars and has the most potential as a driver of visitation. Canberra was ranked fourth overall (Melbourne and Hobart lead) but viewed more strongly (second) among recent visitors to the ACT. It was also rated among the most appealing destinations by NSW visitors.

The biggest gap was between those who had visited and those who had not. This indicates some latent demand, or low awareness of the Canberra offer, but solid appeal and a positive shift in intention to visit after viewing the Canberra offer.

FIGURE 2: RANKING – ARTS AND CULTURE



Question: Having seen all this information, please rank the appeal of the arts and culture experiences you have seen (please rank all where 1 is the most appealing).
Note: Competing destinations were identified by VisitCanberra.

Icons of national significance played a key role in driving demand, though a range of other experiences such as markets and events were also cited, particularly among past visitors.

Canberra's existing strong reputation for hosting world class exhibitions and events was also a key factor. Importantly, this provides a point of difference over other Australian cities and a reason to trigger a visit at a given point in time.

While Canberra was perceived to deliver quite strongly on 'arts', the perception of Canberra's 'culture' was not as strong.

Culture was considered as a more immersive concept, rather than one delivered by structured attractions. Being a newer, planned city, Canberra was generally perceived to be lacking on this component.

"Depth of experiences on a national scale and relevant to everyone in the country"

"Canberra is lucky to have such exclusivity when it comes to international art and museum exhibitions"

"We tend to feel that the cultural aspects of travel are based around immersing yourself in the life of a place, rather than the 'places/things' you can visit"

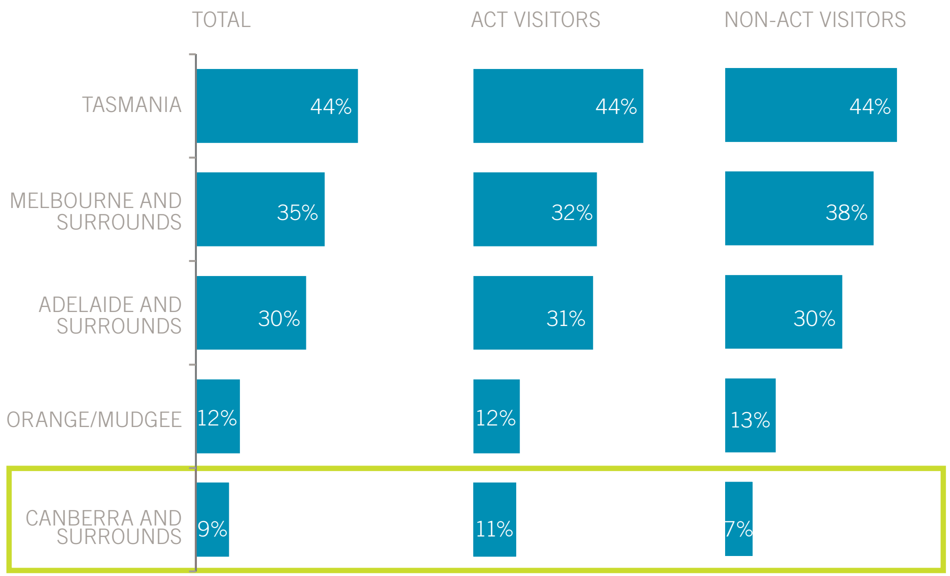
"Doesn't seem to have much feeling … as in soul"

FOOD AND WINE

Canberra's food and wine offering is currently lacking the credibility to compete with other food and wine regions across Australia.

While there was some appeal for Canberra's offer, it was not considered unique or compelling enough to drive visitation. This was evidenced by the lowest rank in competitive testing and a relatively low ranking among recent visitors. Tasmania and Melbourne were the most appealing destinations from a food and wine perspective.

FIGURE 3: RANKING – FOOD AND WINE



Question: Having seen all this information, please rank the appeal of the food and wine experiences you have seen (please rank all where 1 is the most appealing).
Note: Competing destinations were identified by VisitCanberra.

The perception of Canberra as a food and wine destination is still lacking. Some recent visitors to Canberra had positive experiences but the feeling was that local knowledge was required to find the best (often suburban) venues. The perception remains of a quiet place, lacking vibrancy, energy and nightlife.

The Canberra wine region generated some interest but was not a trigger for visitation at this stage. Differentiation against other more established wine regions will be important to the success of the region, as will the development of compelling wine tourism experiences. Over time, the Canberra wine region will also need to develop a brand with impact.

For most respondents, food and wine remains a key element of the visitor experience and helps to drive visitor satisfaction. Hence, it is an obvious focus for continued experience development.

Food and wine experiences are particularly influential among a subset of 'foodies' for whom food and wine is a central travel theme. For this group, authentic engagement through fresh and local produce is highly appealing.

"Sure, good food exists, but I think you need a local to tell you what's good and what isn't"

"The wineries, although they do sound appealing to a degree, wouldn't make me rush off to see them"

"Good food and wine is an important part of my life at home and away"

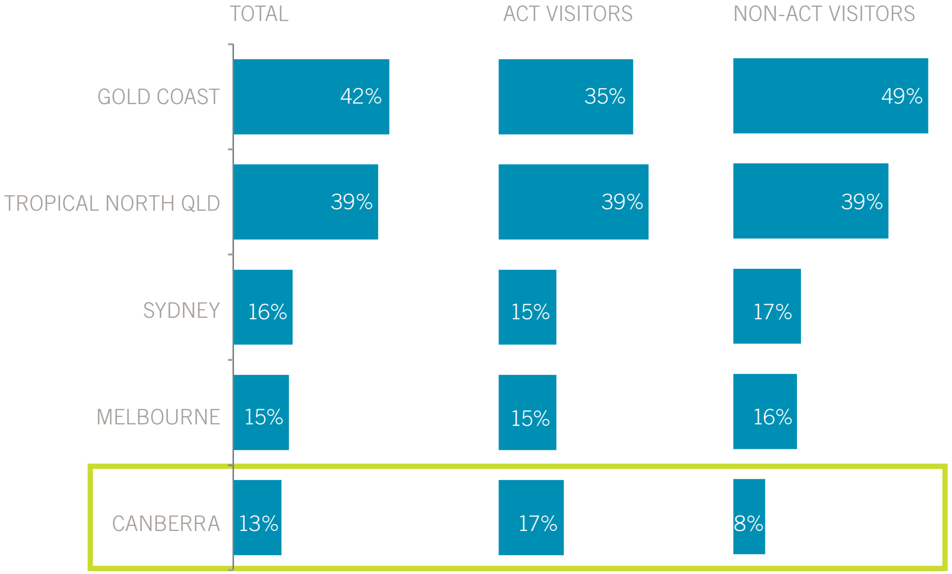
"Great representations of what the local area has to offer"

FAMILY FUN

There is relatively narrow appeal for family experiences in Canberra.

While not competitive with established coastal destinations (Gold Coast/Tropical North Queensland), the Canberra offer is competitive with Melbourne and Sydney (achieving a higher rating among recent visitors to the ACT) and does have some appeal for families with school aged children.

FIGURE 4: RANKING – FAMILY FUN



Question: Having seen all this information, please rank the appeal of the family experiences you have seen (please rank all where 1 is the most appealing).
Note: Competing destinations were identified by VisitCanberra.

Appealing family-friendly attractions had a degree of synergy with Canberra's arts and culture appeal – with museums and educational attractions being the key drivers. There is potential to incorporate the arts and culture pillar with family fun experiences to drive demand.

A clear consumer preference exists for educational, but 'hands on', fun experiences. Questacon was very highly rated among past visitors for this reason and also had a strong perception among those who haven't visited Canberra.

In general, however, awareness of Canberra's family experiences was low among those who have not visited. Canberra's family experiences rate markedly higher for those who have previously visited, suggesting if people know more about what's on offer they may be more likely to visit. Furthermore, satisfaction was generally high with families who did visit Canberra, though a visit was likely to be viewed as a 'one-off' trip.

"We actively select holiday destinations and activities based on what the children will get out of it"

"We like activities that we all enjoy – a compromise"

"It was new, interesting, inspiring, thought provoking… Especially for a young teen who is starting to get a handle on how the world works"

"A visit to Questacon is a must with kids and anyone who loves learning 'hands on'"

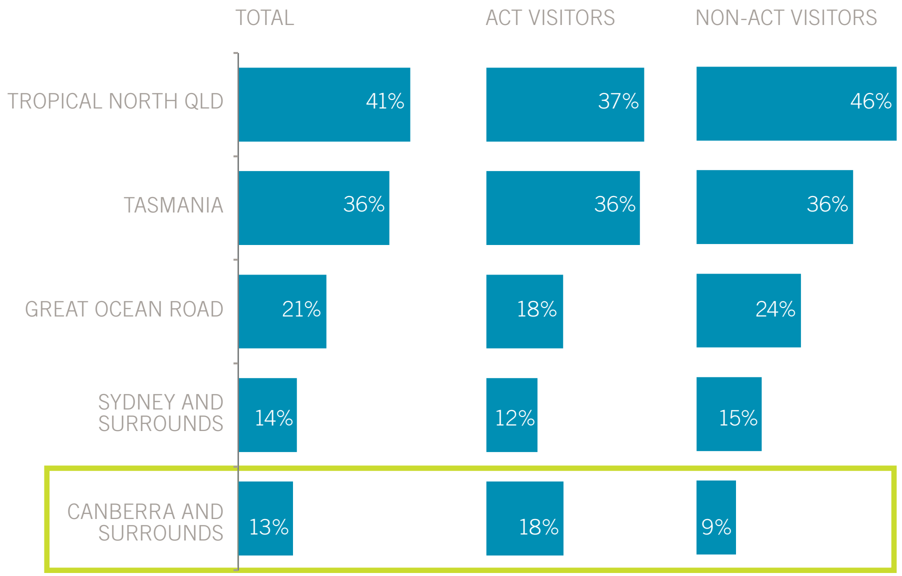
"I would recommend that all families visit these places at least once in their lives"

OUTDOOR AND ADVENTURE

Outdoor and adventure has the least potential for Canberra. Canberra ranked lowest overall, with Tropical North Queensland and Tasmania the dominant destinations in this competitive set.

Canberra was more competitive with the Great Ocean Road and Sydney and surrounds among recent visitors to the ACT.

FIGURE 5: RANKING – OUTDOOR AND ADVENTURE



Question: Having seen all this information, please rank the appeal of the outdoor and adventure experiences you have seen (please rank all where 1 is the most appealing).Note: Competing destinations were identified by VisitCanberra.

For many, outdoor adventure usually only forms a small part of a well-rounded holiday experience.

However, Canberra was not perceived as a competitor for genuine 'adventure' experiences, particularly among younger age groups.

Softer engagement with Canberra's outdoors did hold some appeal, particularly with older age groups who were keen to experience the region's parks and gardens. This forms part of the overall experience in Canberra, but is not a key driver of demand.

"My impression is that these activities are probably more interesting and varied in bigger places"

"It seems to offer some great outdoor experiences without the need for a thirst for danger"

"I do adventure activities by chance, I never intend to do them prior to heading to a destination"

BARRIERS TO CANBERRA VISITATION

Aspiration and access pose the most significant barriers to Canberra demand.

In terms of aspiration, while some consumers were simply not interested in the destination, many had other destinations higher on their list. Alternatively, they may have been before and don't feel the need to return. This implies a lack of unique and compelling experiences to drive repeat visitation.

For those consumers more interested in visiting Canberra, many were deterred by the high cost of flights. This has an impact on those considering Canberra as a short break destination, as other destinations are more competitive in terms of cost.

"It doesn't match the excitement and energy of Melbourne and its laneways"

"I have NT and Queensland to tick off before considering going to Canberra again"

"If airlines like Jetstar and Tigerair offered cheap flights I'd be more interested"

Image: National Gallery Gold and the Incas Projections at Enlighten 2014, Canberra. Image courtesy of VisitCanberra.

CONCLUSION

EXPERIENCE DEVELOPMENT

Canberra was ranked below key competitors across each of the four experience pillars after respondents viewed stimulus on each destination. Therefore, further experience development is required.

ARTS AND CULTURE	FOOD AND WINE	FAMILY FUN	OUTDOOR AND ADVENTURE
Current products have appeal, but need to provide new reasons to visit and triggers for repeat visits.	Highlight Canberra's food and wine precincts to lift vibrancy and foster a food and wine culture.	Currently have some appeal for a narrow age group (10-15 years), but many don't see the need to visit more than once.	Lower priority.
Create a contemporary and ever-changing feel through new attractions/events as well as new ways to experience existing attractions.	Develop the tourism experience, not just the reputation of the wine.	Develop new ways to interact with attractions across a range of kids' ages.	'Outdoors' activities can be incorporated into offerings from the other three experience pillars.
	Food and Wine meets Arts and Culture events are likely to be appealing.	Experiences can be educational but need to be fun and 'hands on'.	

MAXIMISE CURRENT DEMAND

No single pillar currently appears to be compelling enough as a marketing focus. Broad positioning (rather than specific product focus) may be most appealing with the current product offer.

Integration of seasonal events (acting as triggers) is likely to be appealing.

At a more basic level, it seems that a lack of knowledge of the best tourist experiences, and how to access them, could be addressed through a creative map of the region. The map should highlight attractions that appeal to holiday visitors.

LOW COST AIR ACCESS

Canberra is not currently serviced by a low cost airline. When combined with relatively moderate holiday appeal, this becomes a major barrier – especially for short breaks.

The introduction of a low cost carrier is likely to provide more trial and repeat visits.