



Destination Visitor Survey Strategic Regional Research – Australian Capital Territory

Australian consumer perceptions of Canberra as a short break holiday destination

Introduction

This study was undertaken by Tourism Research Australia (TRA) and Australian Capital Tourism with the aim of understanding the perceptions that Australians have of Canberra as a short break¹ holiday destination.

In 2009, Australian Capital Tourism released their *Five year strategic plan 2009-13* to provide new direction for the organisation. One of the key trends noted in the plan was the consumer perception that the Canberra offering was focused around history and politics. The plan also included the goal of changing this perception by increasing awareness of the broader range of experiences Canberra has to offer as a destination.

Australian Capital Tourism identified the need to better understand the current consumer perceptions of Canberra as a short break destination, particularly by **those who have not visited Canberra before or haven't visited for a number of years**. In addition, Australian Capital Tourism was keen to understand the motivations behind visitation by **those who regularly visit Canberra** for a holiday or short break.

There were five main objectives of the study, which included identifying:

- the current perceptions of Canberra as a short break destination
- the strengths and weaknesses of Canberra as a short break destination
- the drivers of the repeat short break market in Canberra
- possible motivators for visitors to consider Canberra for a short break
- the competitive advantages Canberra holds relative to its competitors in the area of short breaks.

¹ A short break was defined as a holiday/leisure trip of two to four days



This research was conducted in three stages:

Stage 1 – Industry insights through a group workshop with representatives from the local tourism industry

Stage 2 – Qualitative exploration through nine focus groups held in Sydney, Melbourne, Brisbane and regional New South Wales

Stage 3 – A quantitative online survey with 631 residents from New South Wales, Victoria, Queensland and South Australia over 18 years of age.

This document contains the key findings from all three stages.

Stage 1 - Industry insights

Stage 1 of the project involved a workshop in Canberra to identify ways of making Canberra relevant to more consumers and was attended by 20 industry representatives.

The workshop identified the following potential characteristics for the Canberra brand.

Potential characteristics for the Canberra brand	Opportunities to reinforce the brand characteristics
Sophisticated, smart/clever and fun	Canberra's bars nightclubs and restaurants; food and wine; a water-based nightclub and restaurant area; underground bunkers; behind closed doors; smart city
Easier and more convenient	High quality packages – transport, accommodation and hospitality; connect with the business market – make sure they get a taste of Canberra (free ticket to a cultural institution)
Be more welcoming '...inclusive ...connected ... like a trip to Mecca'	It's your city; home stays with locals; Facebook of a nation (ambassadors), speed socialising for individuals and groups matching people and groups with similar interests; welcome pack for new residents; connect people to exclusive experiences; open national cultural treasures late at night with a glass of wine
Not just the constant adult ... 'take the piss out' of Canberra	Flash mobbing; create an event like the Parkes Elvis festival; Summer Nats; Rock concert on Lake Burley Griffin (Famous Aussie band – rites of passage to becoming a national rock treasure); annual nude photo in front of Parliament House, annual swim across Lake Burley Griffin on 25 July
Seasons/environment	Embrace the weather – 'it's cold - come and enjoy it'; nature based activities - mountain bike parks/rides and horse riding - leverage the environment
Work with future visitors – school students	Adventure festival for kids; space flights from Canberra – link with observatory
Own some days – like Australia Day, Anzac Day and Canberra Day	Biggest two up game; Biggest Dawn Service Breakfast; Dinner around Parliament House on the road ways
Interactive/learning	National Portrait Gallery; Questacon; National Film and Sound Archive; National Museum of Australia
Identity/national journey	There were no suggestions for this characteristic

Stage 2 - Qualitative insights

The objective of the qualitative stage was to explore consumer perceptions of Canberra and explore the role and impact of the new ideas about Canberra that came out of the industry workshop. Some of the key insights from the qualitative stage included:

- Short break holidays were considered to embody and meet consumers' main requirements for 'indulgence', 'expressing myself', 'fun and excitement' and 'freedom'.
- Canberra, on the other hand, was seen as being a destination that met the needs for 'tradition', 'control' and 'wisdom and knowledge'.
- The gap between the short break needs of Australians and those perceived of Canberra suggest that

Canberra needs to be repositioned to better meet the core short break needs of Australians.

- Furthermore, short break competitors such as Sydney, Brisbane, SE Queensland and Melbourne were positioned on these core needs much more strongly than Canberra.
- The focus groups also suggested there were aspects of Canberra that could be used to position Canberra better such as:
 - music events
 - arts events
 - sophisticated short breaks
 - once-in-a-lifetime experiences
 - authentic real experiences (like bike riding, kayaking and bushwalking).

Suggestions on how Canberra's identity, or brand, could be enhanced included:

- build on sophistication by linking stays with real experiences in low accommodation periods
- events are key triggers for short breaks - establish a series of high quality events
- real and authentic holiday experiences such as hiking and mountain biking emerge as opportunities to encourage singles and young couples to visit Canberra
- promote seasonal holidays, with particular emphasis on the changing environment across seasons.

Stage 3 - Quantitative measurement

The main objective of the quantitative stage was to quantify the findings from the qualitative stages and provide information to support the development of the Canberra brand and further suggestions for attracting new visitors to Canberra for a short break.

What does a short break mean to visitors?

Respondents in the survey agreed that a typical short break was about:

- Spoiling themselves (63%)
- Shopping around for the best deals (56%)
- Avoiding the main tourist areas (55%)
- Doing cultural and historical things (51%)
- Seeing famous sights (49%)
- Lying on the beach and relaxing (45%)
- Having food and wine experiences (41%).

They also agreed that the following impacted on their choice of short break destination:

- Offered good value for money (76%)
- Chance to go to places they had never been (70%)
- Price of an advertised package (70%)
- Price of an advertised fare (68%)
- Standard of accommodation (68%)
- To visit friends and relatives (68%)
- Recommendations (66%).

What is the market for short breaks in Canberra?

- Canberra has been visited for a short break in the last 12 months by 9% of the respondents. It is actively being considered for a short break in the next two years by about 23% of the market.
- About 6% had been to Canberra for a short break in the last 12 months and would consider it again in the next two years.
- Nearly three quarters (73%) had not been to Canberra in the last 12 months and would not consider visiting in the next two years.
- Key competitor destinations that were being considered for a short break in the next two years included Melbourne (65%), Gold Coast (61%), Country NSW (58%) and Country Victoria (57%).
- The views of those who have visited Canberra in the past for a non-business trip were split regarding the appeal of Canberra as a place for a great short break. Nearly half (48%) were ambivalent about recommending Canberra as a short break destination and 13% were not likely to recommend Canberra.
- However, there was a sizeable advocate group (39%) who would recommend Canberra for a short break – a high proportion lived in Country NSW (22%), were part of a couple (64%) and/or retired/pensioners (28%).

What are the perceptions of Canberra as a short break destination?

The perceptions of Canberra as a short break holiday destination (includes those who have not visited for some time/never visited) support the findings from the qualitative research.

Canberra was perceived to be strongly branded as:

- A place to learn about our nation (82% agree)
- Providing a memorable cultural experience (75% agree)
- A great short break for mature people (74% agree)
- A unique short break experience (60% agree)
- A great place to go for families (59% agree).

Although agreement on the first two perceptions was consistent across most visitor groups, *a great short break for mature people*, *a unique short break experience* and *a great place for a family holiday* were more likely to be agreed with by those who had visited Canberra before and those who intend to visit in the next two years.

Canberra's position was unclear with regard to a number of attributes strongly aligned with short breaks (these may represent opportunities to further develop the Canberra brand):

- Providing a place to go for great outdoor experiences (52% unsure and 32% agree)
- Offering a good food and wine experience (50% unsure and 41% agree)
- Providing experiences in the natural environment (46% unsure and 48% agree)
- Provides luxury short break experiences (47% unsure and 40% agree)
- Provides an active short break experience (43% unsure and 42% agree).

Canberra was perceived poorly with regard to:

- Being a fashionable destination (35% disagree)
- Providing a romantic short break destination (37% disagree)
- A great short break for young people (28% disagree)
- A great place to go for sporting events, or cultural shows and entertainment (20% disagree).

What are Canberra's strengths and weaknesses as a short break destination?

Canberra's strengths as a short break destination include:

- arts and culture
- being somewhere to tour around and explore, and thus well positioned as part of driving holidays
- providing a chance to learn something new
- experiencing our nation's history
- its proximity to Sydney, and accessible to regional NSW, Melbourne, Adelaide and South East Queensland
- its uniqueness in the world of short breaks - offering an alternative short break to that of *indulgence*, *expressing myself* and *fun and excitement*.

Although not regarded as core benefits for a short break destination, Canberra also performs strongly in relation to:

- Encompassing a sense of tradition
- Providing a sense of security.

Canberra's weaknesses as a short break destination (as perceived by respondents) include:

- not fitting the aspirational short break category
- not being a fashionable short break destination
- not a short break destination for young people
- not a destination associated with sporting events, shows and entertainment
- not being a fun and active destination – but many are unsure so this perception could be changed
- not offering a food and wine experience – although many are unsure and the local industry could be leveraged to change this view
- not offering nature based attractions and activities – although many are unsure so this could also be altered with authentic product
- not being a friendly destination (36% unsure and 9% disagree that Canberra is friendly) but this perception could also be changed.

Repeat visitation to Canberra

Nearly three quarters (74%) of those surveyed had visited Canberra previously.

- A quarter (26%) had been once before, 20% twice before and the remainder three or more times.
- Two in five (41%) visited Canberra for a short break on their most recent visit, 24% to visit friends and relatives and 11% for business.
- Just over half (52%) of those who travelled to Canberra for business had never been to Canberra for any other reason.

For those who had visited Canberra previously, the main reasons given for visiting on their most recent non-business trip were:

- Family holiday/visit (40%)
- Event of some kind (15%)
- Cultural/historical short break (11%)
- See a specific site unique to Canberra (10%).

The family holiday/visit group gave *visiting friends and relatives* as the main reason for visiting Canberra on their most recent trip and in general were more likely than other groups to choose short breaks recommended by family or friends who had been there before.

In contrast, the other groups gave *a short break* as the main reason for visiting Canberra and were more likely than the family group to agree that Canberra gave the *chance to learn about our nation through interactive attractions/experiences/exhibits* and *had memorable cultural experiences*.

What would attract future visitors to Canberra for a short break?

Endorsement of a destination is important for attracting visitors to a destination. Nearly two in five visitors (39%) were strong advocates of Canberra. Understanding the perceptions of this group presents an opportunity for attracting visitors. Statistical modelling suggests there were five perceptions of Canberra as a short break destination which led them to recommend Canberra to others:

- Great place to go for families (25%)
- Unique short break experience (24%)
- Active short break experience (19%)
- Luxury short break experience (18%)
- Fun short break experience (15%).

In addition, there were three key holiday types that appealed to all visitors and motivated them to visit Canberra within five years:

- A self-drive holiday that takes in Canberra (25% of all respondents)
- A family holiday (16%)
- A holiday just to go to a major event (14%).

To further explore the factors that drive consideration of Canberra as a short break destination, a marketing experiment was included in the survey to test a number of the ideas that came out of the first two stages of the study. Eight aspects of a Canberra short break were tested among all survey respondents, including:

- suggested itineraries
- special deals
- indulgent short breaks
- Canberra being welcoming
- new events
- attractions (new knowledge)
- having fun in Canberra
- making cultural institutions more inviting.

The marketing experiment demonstrated that presenting new ideas about Canberra can encourage many to consider Canberra for a short break, and that consideration of Canberra for a short break could be increased from 23% to 65% of the market.

The key drivers of this change in consideration were those ideas around *suggested itineraries*, *special deals*, *indulgent short breaks* (core territory for the short break market), *Canberra being welcoming* and *new events*.

Communicating the message

The study showed there to be three key channels for communicating with potential consumers of short breaks in Canberra:

- The **Internet** was a key source of information about short breaks and the ACT Tourism consumer website, www.visitcanberra.com.au, is the main area of focus for getting information about Canberra into the public domain.
- Similarly, **standard promotional efforts with the media** through the facilitation of articles, documentaries etc remain important.

- Developing a Canberra social community **data base**, or tapping into existing data bases would allow repeat visitors to be kept informed of upcoming or new events, the latest news about Canberra and special deals available from time to time.

Summary and recommendations

There are a number of competitive advantages Canberra holds relative to its competitors, which include:

- history, culture, famous sights and the emerging food and wine industry
- value for money and the ability to discount good quality accommodation
- being conveniently located to the Sydney market and regional NSW.

The research findings indicate that the Canberra brand needs development to enable Canberra to capture a greater share of the short break market. Associating the brand with luxury, active and fun short breaks appears to be one option for doing this. This could include:

- a more sophisticated or indulgent positioning using the emerging wine industry and supported by the strong food offer in Canberra
- a more active positioning using mountain bike riding and Canberra's unique environment
- a special events driven offer using a mix of sporting, cultural and entertainment events (high quality events rather than quantity).

For both repeat and new short break visitors, the study results point toward strategic communications including suggested itineraries and special deals. For the short breaks market, building itineraries should provide a high convenience factor valued by time poor consumers.

For both repeat and first-time visitors, there would appear to be benefit in communicating key messages about Canberra which include its indulgent short break offer, friendliness and welcoming character. Messages about new events are likely to act as key triggers for new visitors.

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