ACT Government
Chief Minister, Treasury and Economic Development

Freedom of Information Publication Coversheet

The following information is provided pursuant to section 28 of the *Freedom of Information Act 2016*.

FOI Reference: CMTEDDFOI 2020-134

Information to be published	Status
1. Access application	Published
2. Decision notice	Published
3. Documents and schedule	Published
4. Additional information identified	Yes
5. Fees	Waived
6. Processing time (in working days)	25
7. Decision made by Ombudsman	N/A
8. Additional information identified by Ombudsman	N/A
9. Decision made by ACAT	N/A
10. Additional information identified by ACAT	N/A

From: [redacted]
To: [redacted]
Cc: [redacted]
Subject: Surveys and polls
Date: Wednesday, 8 July 2020 7:56:02 PM

Good evening

I write to request under the *Freedom of Information Act 2016* the final results for all surveys and polls commissioned or received by the ACT Government since my last request. Surveys and polls may include, but are not limited to, research performed by Orima Research Pty Ltd, Q&A Market Research, or received as part of a YourSay Community Panel or consultation.

These documents may include but are not limited to reports issued by the consultants or contractors and include questions, results, conclusions, analysis and/or recommendations.

Should you require any further information or clarification about my request, please contact my office on [redacted]

Kind regards

[redacted]

ACT
Government
Chief Minister, Treasury and
Economic Development

Our ref: CMTEDDFOI2020-134

[redacted]

via email: [redacted]

Dear [redacted]

FREEDOM OF INFORMATION REQUEST

I refer to your application under section 30 of the *Freedom of Information Act 2016* (the Act), received by the Chief Minister, Treasury and Economic Development Directorate (CMTEDD) on 8 July 2020, in which you sought access to the final results for all surveys and polls commissioned or received by the ACT Government since your last request.

Specifically, you are seeking:

"…the final results for all surveys and polls commissioned or received by the ACT Government since my last request. Surveys and polls may include, but are not limited to, research performed by Orima Research Pty Ltd, Q&A Market Research, or received as part of a YourSay Community Panel or consultation.

These documents may include but are not limited to reports issued by the consultants or contractors and include questions, results, conclusions, analysis and/or recommendations".

Your request has been interpreted to be a request for all information in the possession of CMTEDD in relation to the results of any Surveys and Polls conducted for or within CMTEDD from 8 August 2019 to 8 July 2020.

On 17 July 2020 you agreed to a staged release of the documents as seven documents are subject to third party consultation.

On 28 July 2020 your office agreed to refine the scope of the request to exclude the ACT Lifetime Care and Support poll results due to the extremely low number of participants (two).

Authority

I am an Information Officer appointed by the Director-General under section 18 of the Act to deal with access applications made under Part 5 of the Act.

Third party consultation

In determining this access request, we identified that some of the information may reasonably be expected to be of concern to two third parties. In accordance with section 38 of the Act, we have undertaken third party consultation and the third parties were given until 11 August 2020 to respond. One of the third parties has responded and their view was considered in making this decision. The second third party has not yet responded, and I note that they are still within the prescribed timeframe to respond.

Timeframes

In accordance with section 40 of the Act, CMTEDD is required to provide a decision on your access application by 26 August 2020.

Decision on access

Searches were completed for relevant documents and 43 documents were identified that fall within the scope of your request.

This decision is on 42 of those documents as one document is currently subject to third party consultation. I have decided to grant access in full to 41 documents and partial access to one document and exempt one document in full.

I have included as **Attachment A** to this decision the schedule of relevant documents. This provides a description of each document that falls within the scope of your request and the access decision for each of those documents.

My access decisions are detailed further in the following statement of reasons and the documents released to you are provided as **Attachment B** to this letter.

In accordance with section 54(2) of the Act a statement of reasons outlining my decisions is below.

Statement of Reasons

In reaching my access decisions, I have taken the following into account:

- the Act;
- the content of the documents that fall within the scope of your request;
- the views of the relevant third party; and
- the *Human Rights Act 2004*.

Exemption claimed

My reasons for deciding not to grant full access to the identified documents are as follows:

<u>Public Interest</u>

The Act has a presumption in favour of disclosure. As a decision maker I am required to decide where, on balance, public interest lies. As part of this process I must consider factors favouring disclosure and factors favouring non-disclosure.

In *Hogan v Hinch* (2011) 243 CLR 506, [31] French CJ stated that when 'used in a statute, the term [public interest] derives its content from "the subject matter and the scope and purpose" of the enactment in which it appears'. Section 17(1) of the Act sets out the test, to be applied to determine whether disclosure of information would be contrary to the public interest. These factors are found in subsection 17(2) and Schedule 2 of the Act.

<u>*Factors favouring disclosure (Schedule 2 section 2.1)*</u>

Taking into consideration the information contained in the documents found to be within the scope of your request, I have identified that the following public interest factor in favour of disclosure is relevant to determine if release of the information contained within these documents is within the 'public interest':

(a) disclosure of the information could reasonably be expected to do any of the following:

(i) promote open discussion of public affairs and enhance the government's accountability.

Having considered the factor identified as relevant in this matter, I consider that release of the information within the scope of the request may contribute to open discussion of public affairs and enhance the government's accountability. I consider there is a public interest in the results of surveys conducted by the ACT Government. I am satisfied that there is a significant public interest in releasing this information.

Factors favouring non-disclosure (Schedule 2 section 2.2)

As required in the public interest test set out in section 17 of the Act, I have also identified the following public interest factor in favour of non-disclosure that I believe is relevant to determine if release of the information contained within these documents is within the 'public interest':

(a) disclosure of the information could reasonably be expected to do any of the following:

(xi) prejudice trade secrets, business affairs or research of an agency or person*;*

When considering the documents and factors in favour of non-disclosure, I have considered the information contained in the *VSS Supplier Survey* (document reference 17) being the list of suppliers who completed the survey. I consider that it is unreasonable to release the list of suppliers as this may impact the business affairs of suppliers where it is not publicly known they supply services to the ACT Government.

Noting the pro-disclosure intent of the Act, I am satisfied that redacting only the information that is not in the public interest to release, while releasing the rest of the information will ensure that the intent of the Act is met and will provide you with access to the majority of information held by CMTEDD within the scope of your request.

Charges

Pursuant to *Freedom of Information (Fees) Determination 2017 (No 2)* processing charges have been waived in accordance with section 107(2)(e) of the Act.

Online publishing – Disclosure Log

Under section 28 of the Act, CMTEDD maintains an online record of access applications called a disclosure log. Your original access application, my decision and documents released to you in response to your access application will be published on the CMTEDD disclosure log three days after the date of this decision. Your personal contact details will not be published. You may view the disclosure log here CMTEDD disclosure log.

Ombudsman Review

My decision on your access request is a reviewable decision as identified in Schedule 3 of the Act. You have the right to seek Ombudsman review of this outcome under section 73 of the Act within 20 working days from the day that my decision is published in CMTEDD disclosure log, or a longer period allowed by the Ombudsman.

We recommend using this form *Applying for an Ombudsman Review* to ensure you provide all of the required information. Alternatively, you may write to the Ombudsman at:

The ACT Ombudsman
GPO Box 442
CANBERRA ACT 2601

Via email: actfoi@ombudsman.gov.au

ACT Civil and Administrative Tribunal (ACAT) Review

Under section 84 of the Act, if a decision is made under section 82(1) on an Ombudsman review, you may apply to the ACAT for review of the Ombudsman decision. Further information may be obtained from the ACAT at:

ACT Civil and Administrative Tribunal
Level 4, 1 Moore St
GPO Box 370
Canberra City ACT 2601
Telephone: (02) 6207 1740
http://www.acat.act.gov.au/
Should you have any queries in relation to your request please contact me by telephone on 6207 7754 or email CMTEDDFOI@act.gov.au.

Yours sincerely,

Philip Dachs
Information Officer
Information Access Team
Chief Minister, Treasury and Economic Development Directorate

29 July 2020

ACT Government

Chief Minister, Treasury and Economic Development

FREEDOM OF INFORMATION REQUEST SCHEDULE

WHAT ARE THE PARAMETERS OF THE REQUEST	Reference NO.
The final results for all surveys and polls commissioned or received by the ACT Government from 8 August 2019 to 8 July 2020	CMTEDDFOI2020-134

Ref No	Page number	Description	Date	Status	Reason for Exemption	Online Release Status
1	N/A	The OCDO undertook two YourSay engagements to seek community feedback on the new Digital Strategy: 1. between 17 April to 14 June 2019 2. between 23 September to 24 November 2019. The engagement, along with the listening reports, are publicly available on the YourSay site here	Various	Full release	N/A	N/A
2	1-39	Campaign performance among key markets for Enlighten 2020	24/03/2020	Full release	N/A	Yes
3	40-51	Campaign performance and creative assessment among locals	24/03/2020	Full release	N/A	Yes
4	52-124	Participation in Tourism Australia's consumer demand project tracking appeal of Australia and Australian experiences domestically and in key international markets	16/04/2020	Full release	N/A	Yes
5	125-135	Tracking local attitudes toward promotion of Canberra as a tourist destination and tracking attitudes toward travel from Canberrans and key interstate markets	From June 2020	Full release	N/A	Yes
6	136-174	Visitor feedback and satisfaction research at the CRVC	2019-2020 FY	Full release	N/A	Yes
7	175-176	Visitor satisfaction research for Windows to the World 2019	06/01/2020	Full release	N/A	Yes
8	177-220	Economic Impact and visitor satisfaction research for Floriade 2019	21/02/2020	Full release	N/A	Yes
9	221-222	Visitor satisfaction research for Canberra Day 2019	24/04/2020	Full release	N/A	Yes
10	223-266	Economic Impact and visitor satisfaction research for the Enlighten Festival 2020	18/06/2020	Full release	N/A	Yes
11	267-304	Economic Impact and visitor satisfaction research for the Canberra Balloon Spectacular 2020	18/06/2020	Full release	N/A	Yes

12	305-325	Community survey on the Reconciliation Day event in 2020 (delivered in a fully online format due to COVID-19)	10/06/2020	Full release	N/A	Yes
13	326-328	Accountability Indicator 82c	2020	Full release	N/A	Yes
14	329-339	Gas survey responses	17/09/2019	Full release	N/A	Yes
15	340-351	National Arboretum Canberra Visitors Survey	08/07/2020	Full release	N/A	Yes
16	352-356	PCSP - Supplier feedback	2020	Full release	N/A	Yes
17	357-358	VSS Supplier Survey	26/02/2020	Partial release	Schedule 2.2(a)(ii)	Yes
18	359-386	Canberra Olympic Report	2020	Full release	N/A	Yes
19	387-413	Dickson Aquatic Report	2020	Full release	N/A	Yes
20	414-441	Gungahlin Leisure Report	2020	Full release	N/A	Yes
21	442-469	Lakeside Leisure Report	2020	Full release	N/A	Yes
22	470-495	Manuka Swimming Pool Report – Third Party Consultation underway	2020	Full release	N/A	Yes
23	496-497	Overview of pools reports – Third Party Consultation underway	2020	Full release	N/A	Yes
24	498-501	Community Views Research - RG Table - October 2019	2020	Full release	N/A	Yes
25	502-524	Community Views Research Report - October 2019	Oct 2019	Full release	N/A	Yes
26	525-533	YourSay Community Panel - Bulky Waste Survey - Final Report	14/01/2020	Full release	N/A	Yes
27	534-551	YourSay Community Panel - Bushfire Preparedness Survey - Final Report	29/04/2020	Full release	N/A	Yes
28	552-560	YourSay Community Panel - Coat of Arms Survey - Final Report	27/11/2019	Full release	N/A	Yes
29	561-569	YourSay Community Panel - Contact Tracing App Survey - Final Report	29/06/2020	Full release	N/A	Yes
30	570-584	YourSay Community Panel - Cost of Living Survey - Final Report	29/04/2020	Full release	N/A	Yes

31	585-600	YourSay Community Panel - COVID-19 Survey Round 1 - Final Report	29/04/2020	Full release	N/A	Yes
32	601-623	YourSay Community Panel - COVID-19 Survey Round 2 - Final Report	29/06/2020	Full release	N/A	Yes
33	624-655	YourSay Community Panel - COVID-19 Survey Round 3 - Final Report	29/06/2020	Full release	N/A	Yes
34	656-692	YourSay Community Panel - COVID-19 Youth Survey - Final Report	15/01/2020	Full release	N/A	Yes
35	693-708	YourSay Community Panel - Electricity Pricing Comparability survey - Final Report	14/01/2020	Full release	N/A	Yes
36	709-725	YourSay Community Panel – Integrated Plan for Red Hill Nature Reserve Survey	06/01/2020	Full release	N/A	Yes
37	726-737	YourSay Community Panel - Motor Accident Injuries Survey - Final Report	09/09/2019	Full release	N/A	Yes
38	738-752	YourSay Community Panel - Places and Spaces Survey - Final Report	14/01/2020	Full release	N/A	Yes
39	753-772	YourSay Community Panel - Transport Survey - Final Report	11/06/2020	Full release	N/A	Yes
40	773-790	YourSay Community Panel - Wellbeing Indicators Survey - Final Report	14/01/2020	Full release	N/A	Yes
41	791-798	YourSay Community Panel - Wellbeing Survey - Final Report	02/09/2019	Full release	N/A	Yes
42	799-812	YourSay Community Panel - Wintervention Survey - Final Report	28/08/2019	Full release	N/A	Yes
43	TBA	MAYEPP Report PRF4 11 Feb 2020_Final	THIRD PARTY CONSULTATION UNDERWAY	THIRD PARTY CONSULTATION UNDERWAY	THIRD PARTY CONSULTATION UNDERWAY	N/A
Total No of Docs						
43 (812 pages)						

Visit Canberra Enlighten Tracking

March 2020

Background

One Good Thing After Another (OGTAA) is the creative platform underlying VisitCanberra's marketing activities.

Originally launching in 2016,the OGTAA campaign focuses on Canberra's great diversity of visitor experiences and their close proximity to one another. For 2018, Canberra was rated as the 3rd best city to visit by Lonely Planet. This rating became a core element of marketing activities during this time, but the brand is moving to **One big, perfect little moment** to support the Masterbrand.

In addition, there are specific events to promote, such as Enlighten and Floriade.

To evaluate the effectiveness of their marketing campaigns, a program of research was set up to measure their impact on awareness, appeal and intent to visit. This program has been running since the original benchmark in Oct 2017.

The program incorporates other relevant marketing activities as needed, for example #HolidayHereThisYear and partner advertising.

Research Objectives

Overall the objective of this research is to understand the impact of Visit Canberra's marketing activities on the brand.

Specifically, this wave of research will focus on:

Overall Effectiveness of Enlighten activities:
- How many people saw the different elements of the Enlighten campaign – video, OOH, print, digital etc.
- Measure creative quality – message takeout, likeability, relevance
- Did it impact how they feel about Canberra?
- Did it prompt any action?

Impact on Brand
- Did perceptions of Canberra as a desirable place to visit strengthen?
- Who is Canberra appealing to? Is this changing?
- How have Visit Canberra key metrics improved since the campaign aired?

#HolidayHereThisYear
- Awareness of the #HHTY campaign
- How the campaign is understood

Timeline

Oct 17: Benchmark

Dec 17: Masterbrand campaign (Lonely Planet)

Apr 18: Masterbrand with Canberra/Cantberra

Jul 18: Masterbrand (FMM) plus Canberra in a Can

Oct 18: Spring, Floriade and Nightfest

Dec 18: Masterbrand campaign (revised Brand 30s)

Mar 20: Enlighten campaign, #HHTY

Our Approach

Invite & Screening

Undirected questions

Recognition & Impact Questions

Sample Details

Sample recruited to be:

- Mix of males and females
- Mix of Sydney & NSW other
- All aged 25-70
- Must not be working in tourism marketing or sales
- Must have travelled within Australia in the last 2 years or less **OR** intending to travel within Australia in the next 12 months

Results are weighted by Gender, Age and Location

Fieldwork: 12–16 March 2020
Sample: Dynata

		NSW/Mel						NSW
		23-24 Oct '17	14-20 Dec '17	9-12 Apr '18	3-13 July '18	3-5 Oct '18	7-11 Dec '18	12-16 Mar'20
		Benchmark Oct'17 (n=160)	Wave 2 Dec '17 (n=315)	Wave 3 Apr '18 (n=316)	Wave 4 July '18 (n=297)	Wave 5 Oct '18 (n=316)	Wave 6 Dec '18 (n=313)	Wave 7 Mar'20 (n=300)
Gender	Males	50%	50%	50%	50%	50%	50%	50%
	Females	50%	50%	50%	50%	50%	50%	50%
Location	Sydney	33%	33%	33%	33%	33%	33%	50%
	Regional NSW	33%	33%	33%	33%	33%	33%	50%
	Melbourne	33%	33%	33%	33%	33%	33%	-
Age	25-39	33%	33%	33%	33%	33%	33%	33%
	40-54	33%	33%	33%	33%	33%	33%	34%
	55-70	33%	33%	33%	33%	33%	33%	33%

Key Segments

The self selection method was used in Mar'20 due to survey length – helps to give us an idea of segment views, but is not as accurate in identifying Variety Seekers, Family Visitors or Event Seekers.

	Segmented by algorithm					Self Selected
	*Original Segmentation	May'18	Jul'18	Oct'18	Dec'18	Mar'20
Event Seekers	8%	14%	9%	6%	12% ⇧	4% ⇩
Discoverers & Learners	14%	18%	18%	16%	14%	8%
Family Visitors	14%	21%	17%	20%	15%	25% ⇧
Rechargers	19%	16%	14%	14%	16%	25% ⇧
Family Memory Makers	17%	13%	14%	10%	12%	21% ⇧
Variety Seekers	29%	18%	29%	34%	30%	17% ⇩

⇧⇩ Indicates a significantly different result (at 95%+) compared to **previous period**

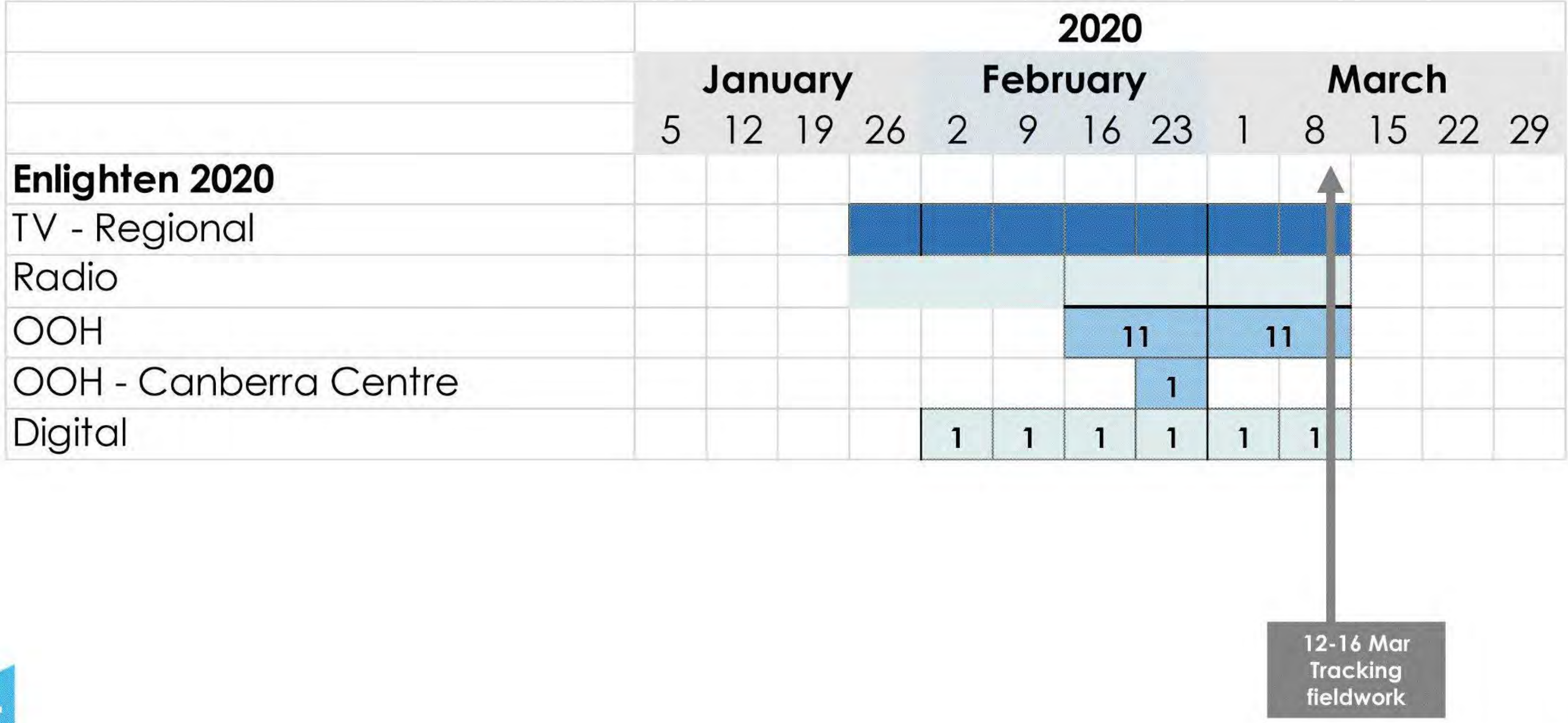
Source: S1-S13 Segmentation Allocation . Based on each list, please select the one reason that is the most likely you would take a short break and the one reason that is the least likely you would take a short break.
May '18 n=100, Jul '18 n=300, Oct '18 n=316, Dec '18 n=313, Mar'20 n=300
*Original Segmentation data supplied by Visit Canberra, based on weighted segment sizes for people
*W7 Mar'20: Algorithms not used, self select question used instead due to survey length (included #HHTY)

VISIT CANBERRA

Luma

Media Support

The 2020 Enlighten campaign had support in NSW and the ACT. TV, radio, OOH and digital ads were in market, plus the always on social campaign.



What We Tracked

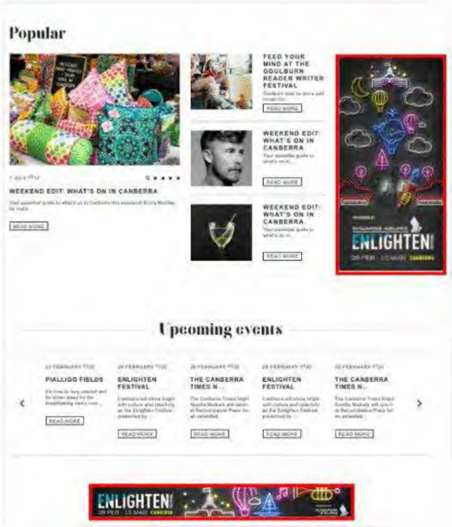
In this wave, we tracked the following ads asking NSW dwellers questions to identify recognition, likeability and relevance, except the social (Facebook) where only recognition was asked.

Enlighten TVC 30s (video)

Enlighten Radio (audio)

Enlighten festival brings together Canberra's best events night, and day. Be there as the illumination lights up the national attractions with stunning architectural projections. Tempt your taste buds at the Canberra Night Noodle Markets. Receive exclusive access to the national attractions after dark. And wake up to a sky full of soaring hot air balloons at Canberra Balloons Spectacular, plus so much more. Enlighten Festival, presented by Singapore Airlines. Returns Feb 28 till Mar15. EnlightenCanberra.com

Enlighten Digital (static)



Enlighten Social (static)

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Campaign Awareness

Claimed Ad Awareness

Claimed ad awareness for Canberra is just under a third after the Enlighten campaign, with higher recall amongst family and Sydneysiders.

	NSW/Mel				NSW	
	Oct'17	July '18	Oct '18	Dec '18	Dec'18	Mar'20
Seen Any	27%	23%	34%⇧	29%	32%	31%
TV	19%	16%	21%	17%	19%	20%
Online (e.g. on websites)	6%	8%	9%	7%	9%	11%
Social media	4%	6%	9%	7%	7%	10%
Newspapers/ magazines	8%	6%	7%	5%	5%	5%
Radio	1%	2%	4%	4%	3%	3%
Billboards/ buses posters/bus shelters	3%	2%	3%	1%	1%	3%
Talked about it in the news	6%	4%	4%	3%	5%	2%

Mar'20

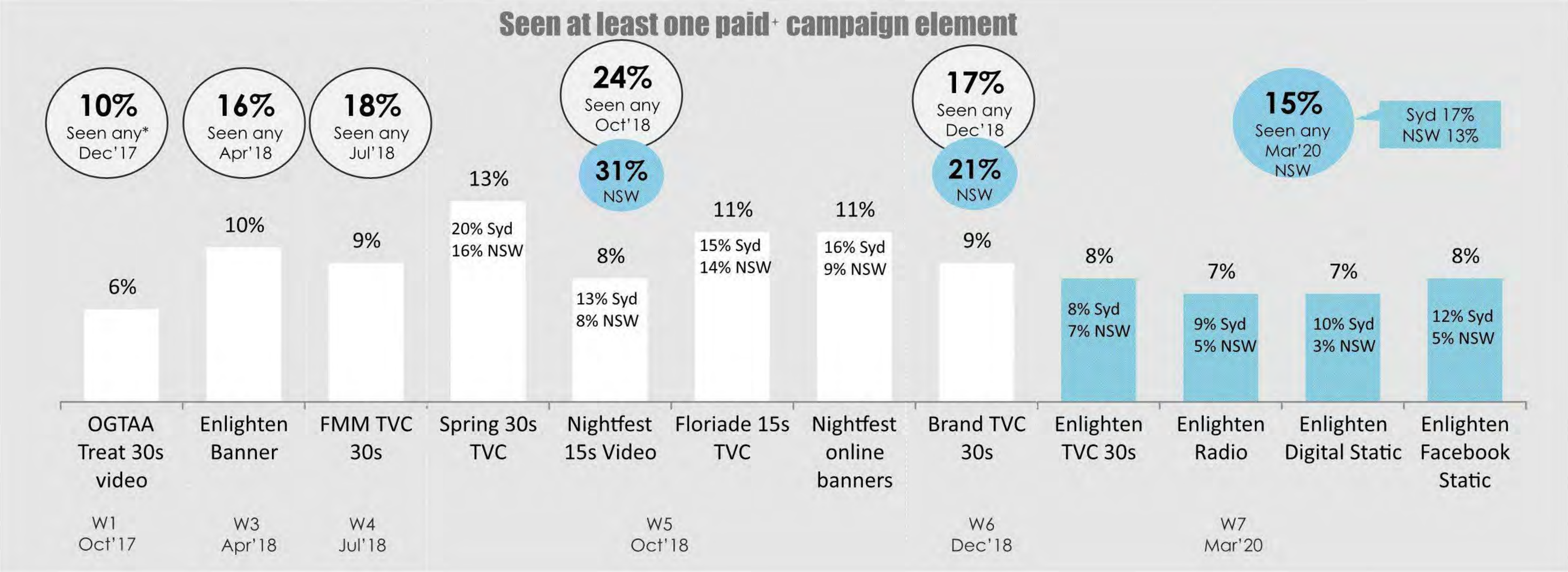
Families	Non Families	Sydney	NSW other
37%	27%	35%	28%

⇧⇩ Indicates a significantly different result (at 95%+) compared to **previous period**

Base: NSW/Mel Oct'17 n=160, Dec'17 n=315, Apr'18 n=316, July '18 n=297, Oct '18 n=316, Dec '18 n=313, Base NSW Dec18 n=209 Mar'20 n=300. Source: E1. Where have you seen advertising for Canberra recently?

Campaign Recognition

About 1 in 7 have seen the Enlighten campaign in NSW – this is lower than previous campaigns. Higher recall for radio, digital and social in Sydney compared to regional NSW. Lower spend for Enlighten TVC vs Spring?



Indicates a significantly different result (at 95%+) compared to **previous period**

Base: NSW/Mel Oct'17 n=160, Dec'17 n=315, Apr'18 n=316, July '18 n=297, Oct '18 n=316, Dec '18 n=313, NSW Oct'18 n=211 Dec'18 n=210 Mar'20 n=300.
Source: Have you seen/heard this ad before? *only 2 ads asked in Oct'17
*only relevant ads across waves shown (videos/campaign/events-related) + paid: Excludes Lonely Planet awareness and partner ads (eg Rome, War Memorial)

Enlighten Festival Awareness

In NSW, about 12% have heard of the Enlighten Festival, with highest awareness amongst FMM and Family Visitor segments. Recall of the campaign helps build awareness. Amongst those aware nearly all can correctly associate at least one event – most likely Night Noodle market, Lights!Canberra!Action! or the Balloon Spectacular.

12% *Heard of Enlighten Festival*

11%	Sydney
13%	Other NSW
19%	Family MM
19%	Family Visitors
52%	Seen any Enlighten

Activities part of Enlighten Festival (amongst aware)

88% net correct

Night Noodle Markets	37%
Lights! Canberra! Action!	37%
Canberra Balloon Spectacular	34%
The Illuminations	31%
Canberra Day	28%
Skyfire	26%
Symphony in the Park	17%
Average # correct events associated	**2.1**
Groovin the Moo	20%
National Folk Festival	12%
Floriade	14%
Summernats	14%
Don't Know	9%

F1. Have you ever heard of the Enlighten Festival?
F2. Which of the following events and activities are part of the Enlighten Festival?
Base NSW: Total n=300 Aware of Enlighten n=35 Seen any Enlighten campaign n=45

Performance of Campaign Elements

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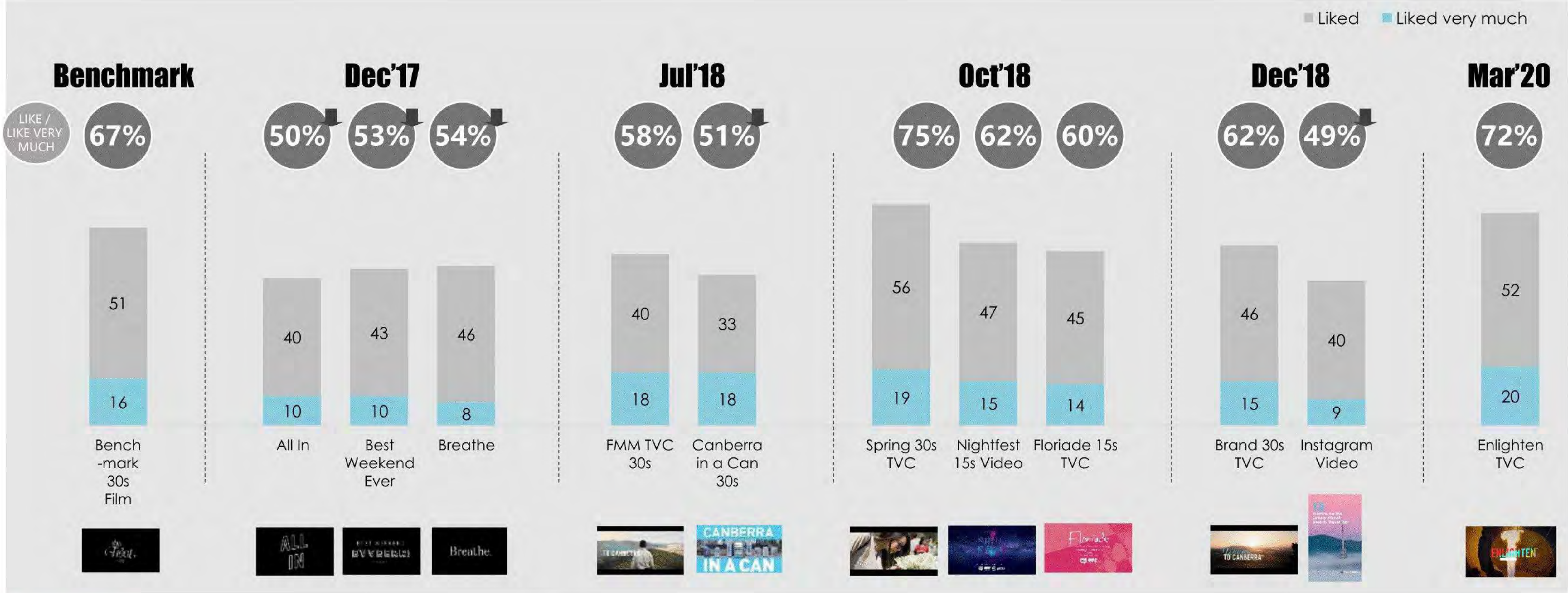
insight. create. inspire.

Video Likeability

The Enlighten TVC is highly likeable, with nearly three quarters liking the ad – similar to Spring. The appeal of the events probably helping appeal of the ads compared to the Masterbrand executions.

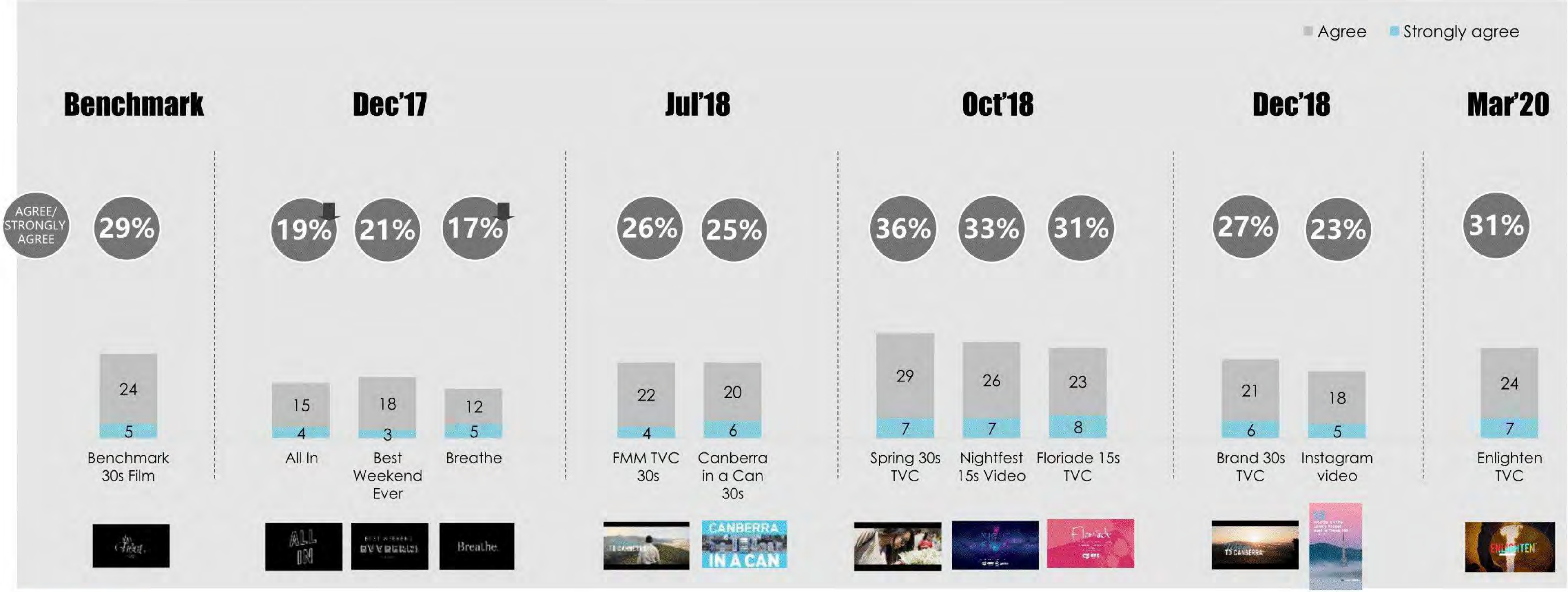


Indicates a significantly different result (at 9%+) to **Benchmark**

Base: Benchmark Oct'17 n=160, Dec'17 n=315,, July '18 n=297, Oct'18 n=316, Dec '18 n=313, Mar'20 n=300
Source: E3/4/7a/10a. Which statement best describes your feeling about the ad?

Video Relevance

Relevance of the new Enlighten TVC is also strong at nearly a third – in line with the previous Nightfest and Floriade videos (both event specific). The Spring TVC of 2018 is rated as the most relevant.

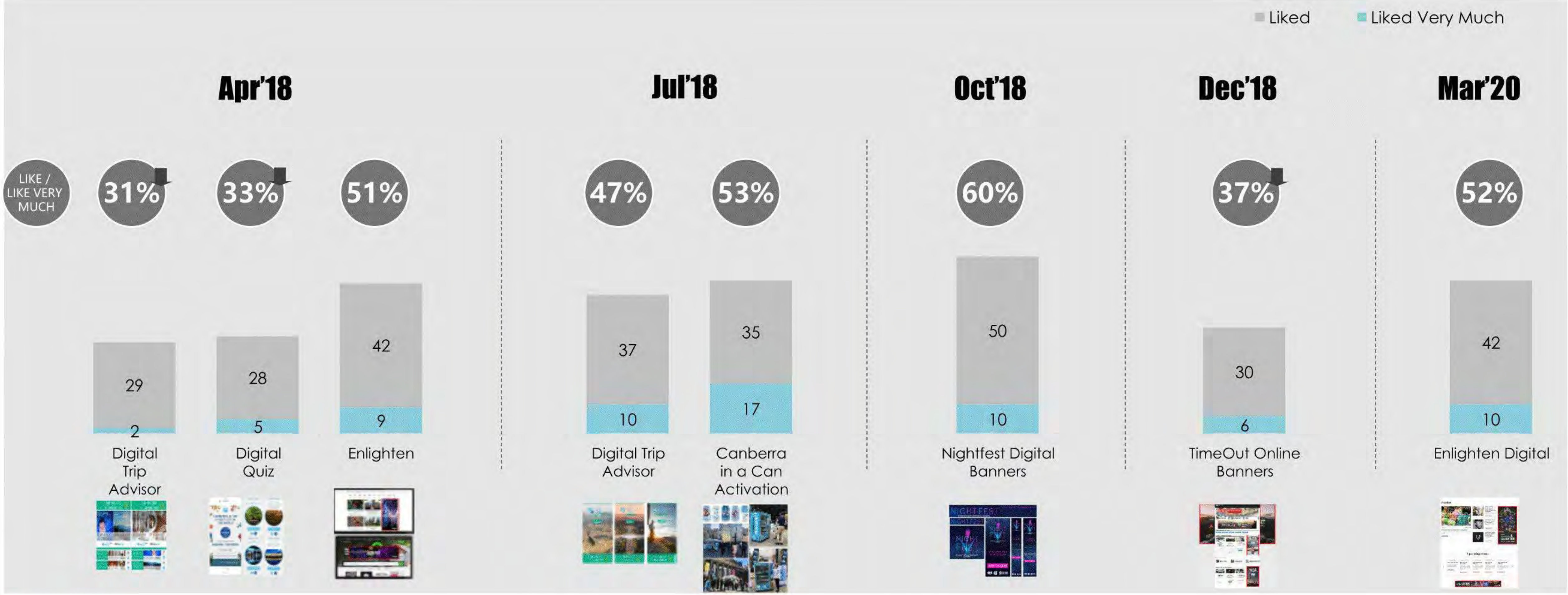


Indicates a significantly different result (at 9%+) to **Benchmark**

Base: NSW/Mel: Oct'17 n=160, Dec'17 n=315, July '18 n=297, Oct'18 n=316, Dec '18 n=313, NSW: Mar'20 n=300
Source: E4/4c/5/6a/7c. How much do you agree or disagree that this ad is relevant to me?

Digital Likeability

Likeability of the Enlighten digital ad is high and similar to the previous Enlighten 2018 execution, suggesting that appeal of the festival also helps. NightFest remains the most appealing digital execution.



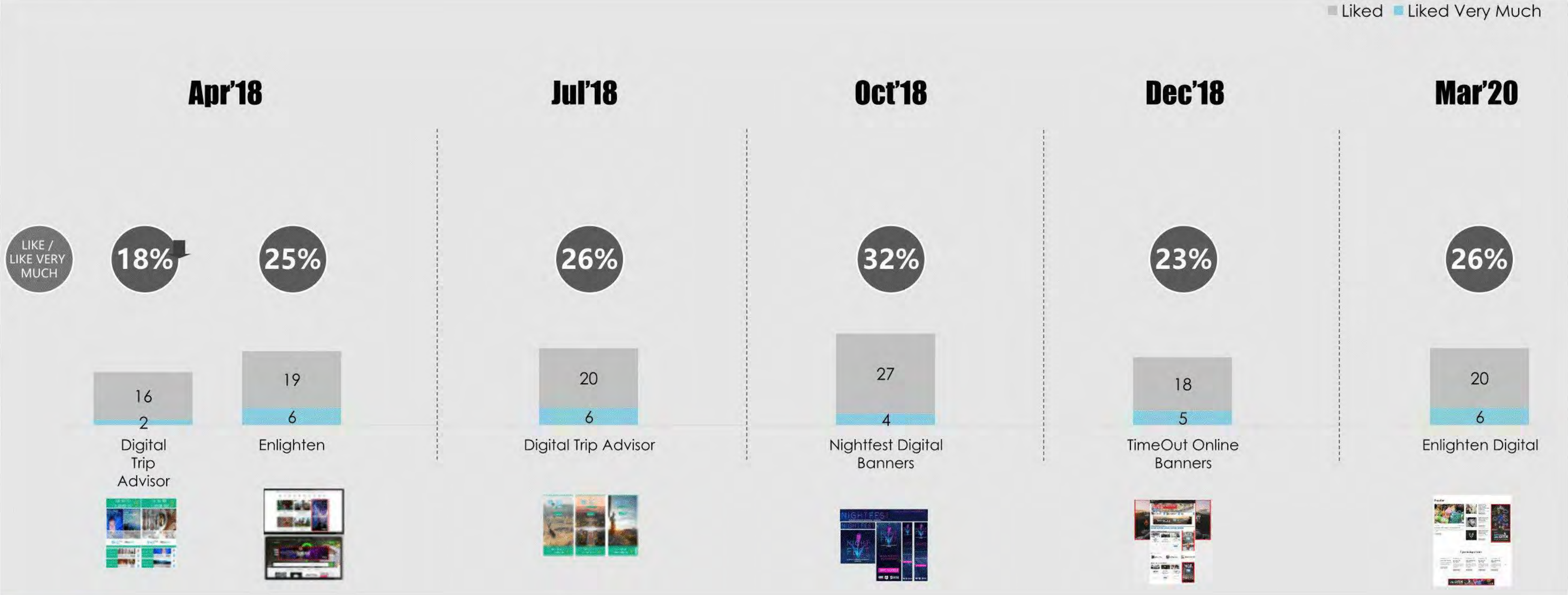
Indicates a significantly different result (at 9%+) to **Enlighten**

Base: NSW/Mel Apr '18 n=316, July '18 n=297, Oct'18 n=316, Dec '18 n=313, NSW Mar'20 n=300

Source: E3/4/7a/10a. Which statement best describes your feeling about the ad?

Digital Relevance

The relevance of the Enlighten digital ad is also similar to the 2018 Enlighten execution, with NightFest performing most strongly.



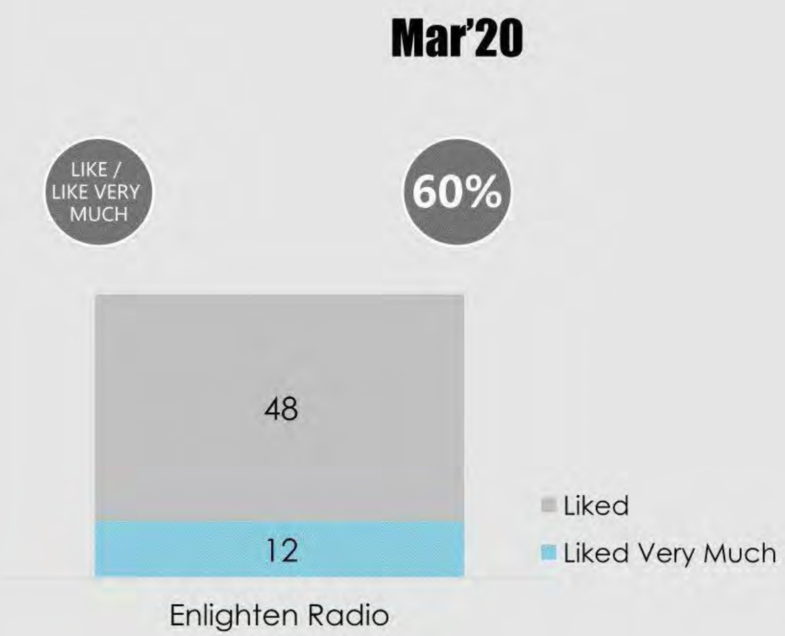
Indicates a significantly different result (at 9%+) to **Enlighten**

Base: NSW/Mel Apr '18 n=316, July '18 n=297, Oct'18 n=316, Dec '18 n=313, NSW Mar'20 n=300
Source: E3/4/7a/10a. Which statement best describes your feeling about the ad?

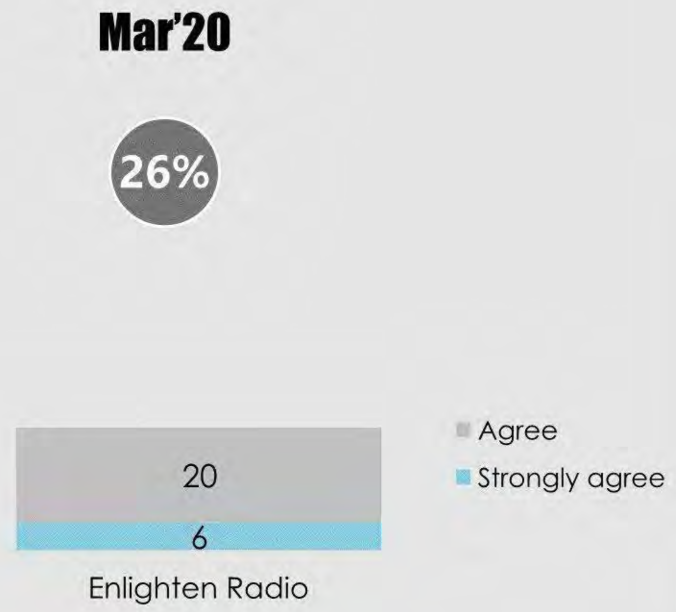
Radio Likeability & Relevance

The Enlighten radio execution is well liked (less than video, but more than digital) and is seen to be as relevant as the digital executions.

Radio Likeability



Radio Relevance



Enlighten festival brings together Canberra's best events night, and day. Be there as the illumination lights up the national attractions with stunning architectural projections. Tempt your taste buds at the Canberra Night Noodle Markets. Receive exclusive access to the national attractions after dark. And wake up to a sky full of soaring hot air balloons at Canberra Balloons Spectacular, plus so much more. Enlighten Festival, presented by Singapore Airlines. Returns Feb 28 till Mar15. EnlightenCanberra.com

Base: NSW Mar'20 n=300
Source: E13a. Which statement best describes your feeling about the ad?
E13c. After hearing this ad, how much do you agree or disagree that: **This ad is relevant to me**

Brand Metrics

Short Break Consideration

Gold Coast and Melbourne top the destinations considered for a short break or weekend in Mar'20. About 1 in 7 consider Canberra, similar to Dec'18.

	NSW/Mel						NSW	
	Oct'17	Dec '17	Apr '18	July '18	Oct '18	Dec '18	Dec'18	Mar'20
Gold Coast/Surfers paradise	29%	23%	34%	26%	23%	23%	24%	31%
Melbourne/Melb	29%	24%	30%	26%	21%	20%	28%	34%
Sydney	29%	23%	28%	34%	23%	23%	19%	27%
Tasmania/Tassie/Tas	22%	18%	22%	23%	17%	14%	13%	18%
Queensland/QLD	19%	14%	7%	10%	11%	10%	8%	16%
Adelaide	12%	16%	16%	20%	13%	14%	12%	13%
Brisbane	9%	12%	11%	12%	10%	11%	13%	12%
Perth	9%	12%	14%	16%	9%	9%	6%	7%
Sunshine Coast	9%	6%	7%	5%	5%	5%	6%	5%
Blue Mountains	8%	6%	12%	8%	9%	10%	14%	15%
Canberra	**8%**	**11%**	**13%**	**13%**	**11%**	**10%**	**14%**	**15%**
Hunter Valley	7%	6%	8%	8%	8%	7%	10%	9%
South Coast	7%	9%	9%	10%	7%	8%	11%	16%

Indicates a significantly different result (at 9%+) to **previous period**

Source: B1: We'd like you to think about Australian destinations for short breaks or weekends. Which destination in Australia would you consider?

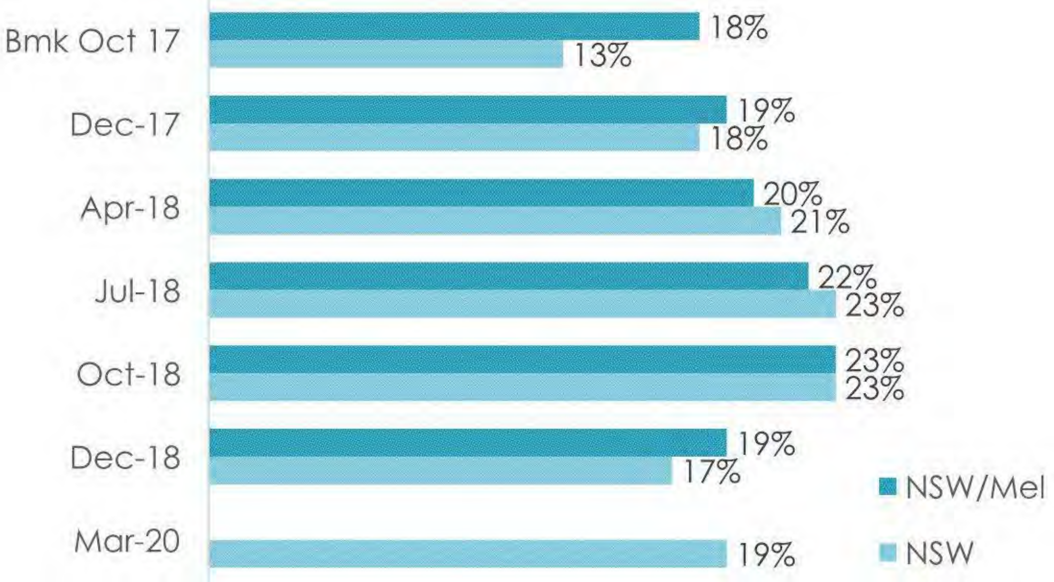
Base: NSW/Mel Oct'17 n=160, Dec'17 n=315, Apr '18 n=316, July '18 n=297, Oct'18 n=316, Dec '18 n=313, NSW: Dec 18 n=211 Mar'20 n=300

OGTAA Awareness & Association

During the Enlighten campaign, about a fifth of NSW have heard of OGTAA. Of those aware of OGTAA, about a fifth associate it with the Gold Coast, 17% with Sydney followed by Canberra at 12%.

Have you ever heard of the line OGTAA?

ONE Good Thing AFTER ANOTHER



Which destination do you most associate with OGTAA?

(amongst aware)

	NSW/Mel				NSW	
	Oct'17	July '18	Oct '18	Dec '18	Dec'18	Mar'20
Gold Coast	26%	23%	23%	21%	17%	21%
Sydney	17%	11%	10%	5%	5%	17%
Melbourne	10%	5%	12%	14%	6%	4%
Canberra	**10%**	**13%**	**12%**	**11%**	**15%**	**12%**
Hunter Valley	7%	10%	5%	11%	15%	2%
Blue Mountains	3%	6%	7%	8%	8%	9%
Snowy Mountains	3%	6%	5%	6%	6%	9%
Don't know	13%	17%	12%	15%	14%	12%
(Base: Aware OGTAA) n=	29	64	74	59	36	56

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B2: Have you ever heard of the line "One Good Thing After Another" to describe a destination? B3: Which destination do you most associate One Good Thing After Another with? (Base=have heard of OGTAA) Base: Benchmark Oct'17 n=160, Dec'17 n=315, Apr '18 n=316, July '18 n=297, Oct'18 n=316, Dec '18 n=313, Mar'20 n=300

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Canberra Who For?

Canberra is still primarily seen to be a destination for mature travellers – with increasing perceptions as a destination for families with kids. Slight increase as a destination for younger people after the Enlighten campaign.

	NSW/Mel						NSW	
	Oct'17	Dec '17	Apr '18	July '18	Oct '18	Dec '18	Dec'18	Mar'20
Mature Travellers	68%	62%	60%	62%	64%	63%	65%	63%
Family mainly primary school kids	50%	45%	44%	53%⬆	48%	39%⬇	45%	54%⬆
Family mainly high school kids	39%	32%	27%	38%⬆	38%	35%	36%	44%
People looking for romantic short break	37%	24%⬇	26%	28%	30%	30%	34%	36%
Family pre school kids	32%	26%	22%	27%	22%	26%	31%	30%
Younger people	25%	19%	17%	24%	23%	22%	23%	28%
Don't know	8%	10%	11%	12%	9%	13%	13%	10%

⬇⬆ Indicates a significantly different result (at 9%+) to **previous period**

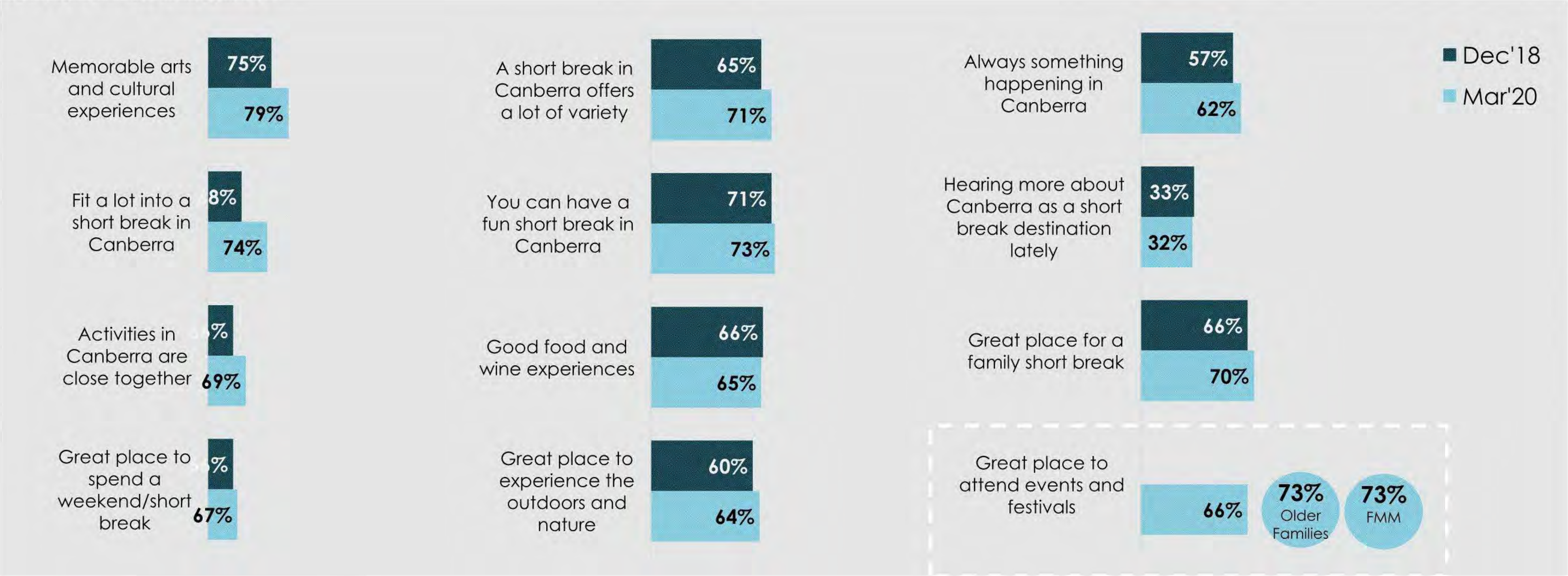
Source: C20. Who do you think Canberra would be a great short break destination for?

Base: NSW/Mel Oct'17 n=160, Dec'17 n=315, Apr '18 n=316, July '18 n=297, Oct'18 n=316, Dec '18 n=313, NSW: Dec 18 n=210 Mar'20 n=300

Imagery

Perceptions of Canberra as a destination remain fairly stable since Dec'18 at a total market level. About two thirds see Canberra as a great place to attend events and festivals, slightly higher amongst Older Families and FMM.

NSW: Dec '18 vs Mar'20



Indicates a significantly different result (at 9%+) to **previous period**

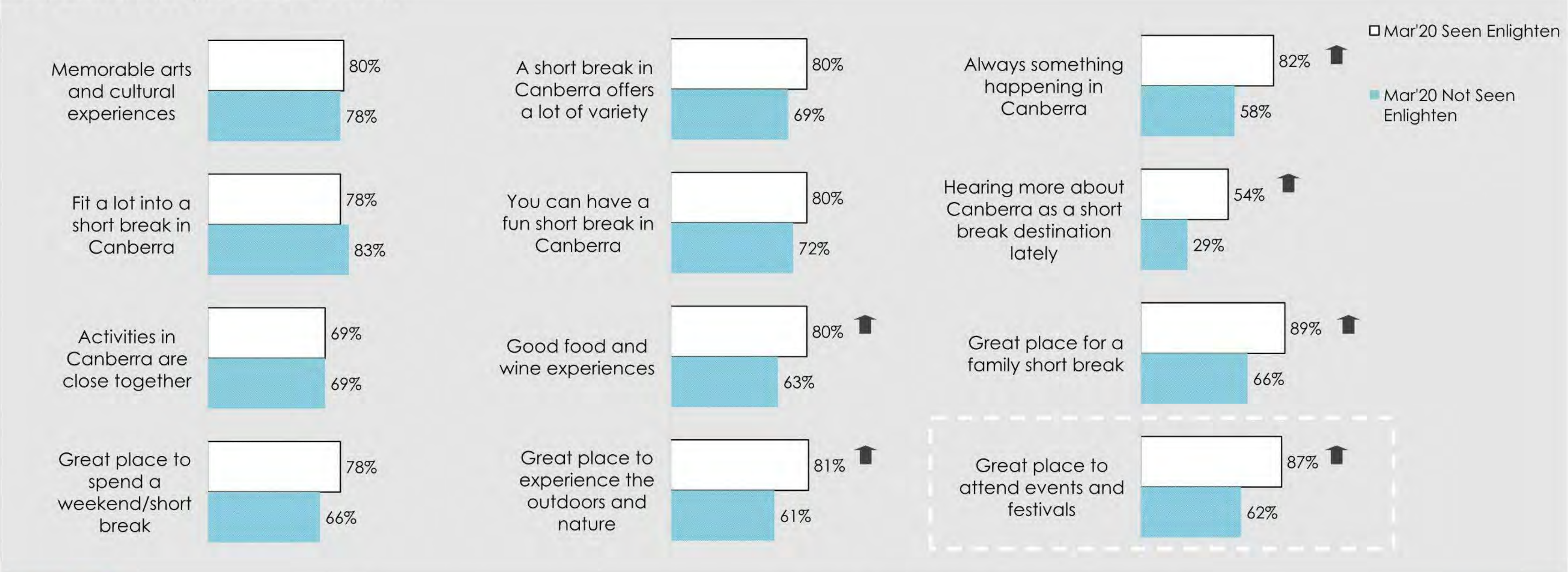
Source: C20. Who do you think Canberra would be a great short break destination for?

Base NSW: Dec'18 m=210 Mar'20 n=300, Older Families n=42, FMM n=63.

Imagery Campaign Impact

Seeing the Enlighten campaign helps strengthen perceptions of Canberra in terms of hearing news, great place for festival/event or as a destination for family short break, food & wine and the outdoors.

NSW: Seen Enlighten vs Not Seen



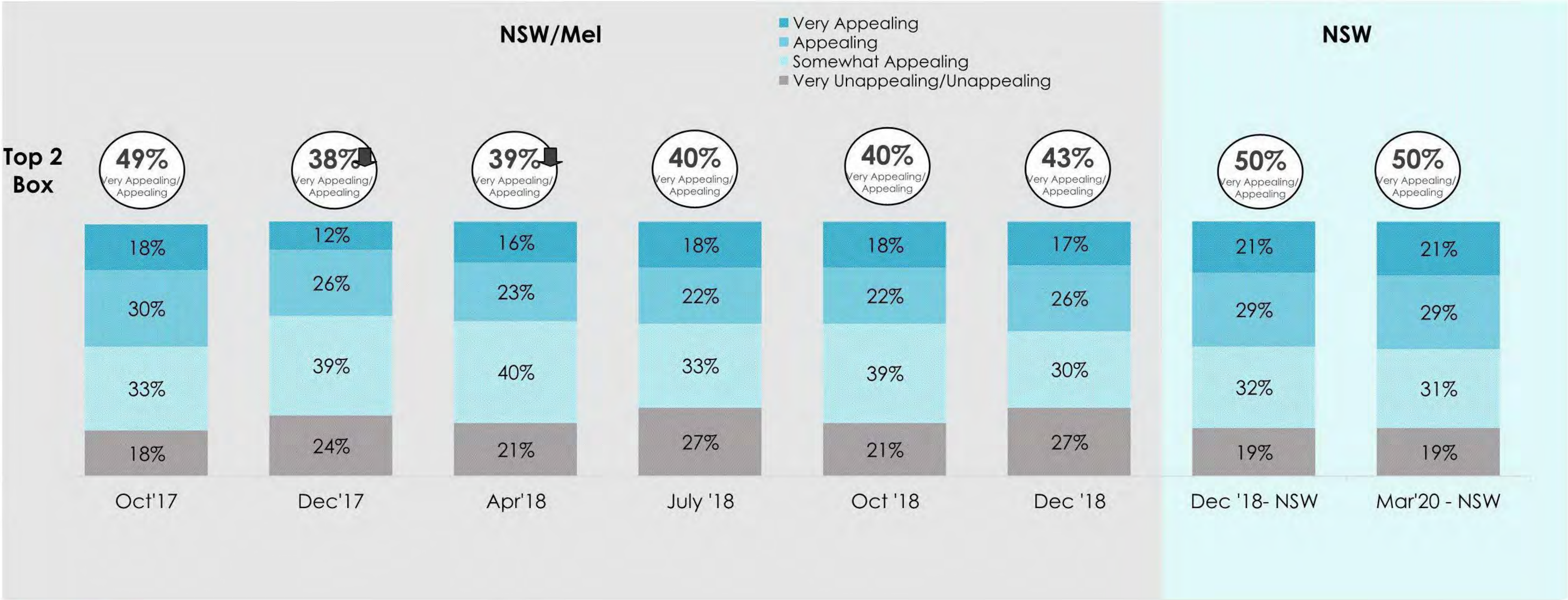
Indicates a significantly different result (at 9%+) to **those who have seen at least one element in the campaign**

Source: C20. Who do you think Canberra would be a great short break destination for?

Base: Mar'20 n=300, Seen any n=43, Seen none n=223

Short Break Appeal

Appeal of Canberra as a short break destination is stable compared to Dec'18 in NSW. Half find the idea of going to Canberra for a weekend appealing.

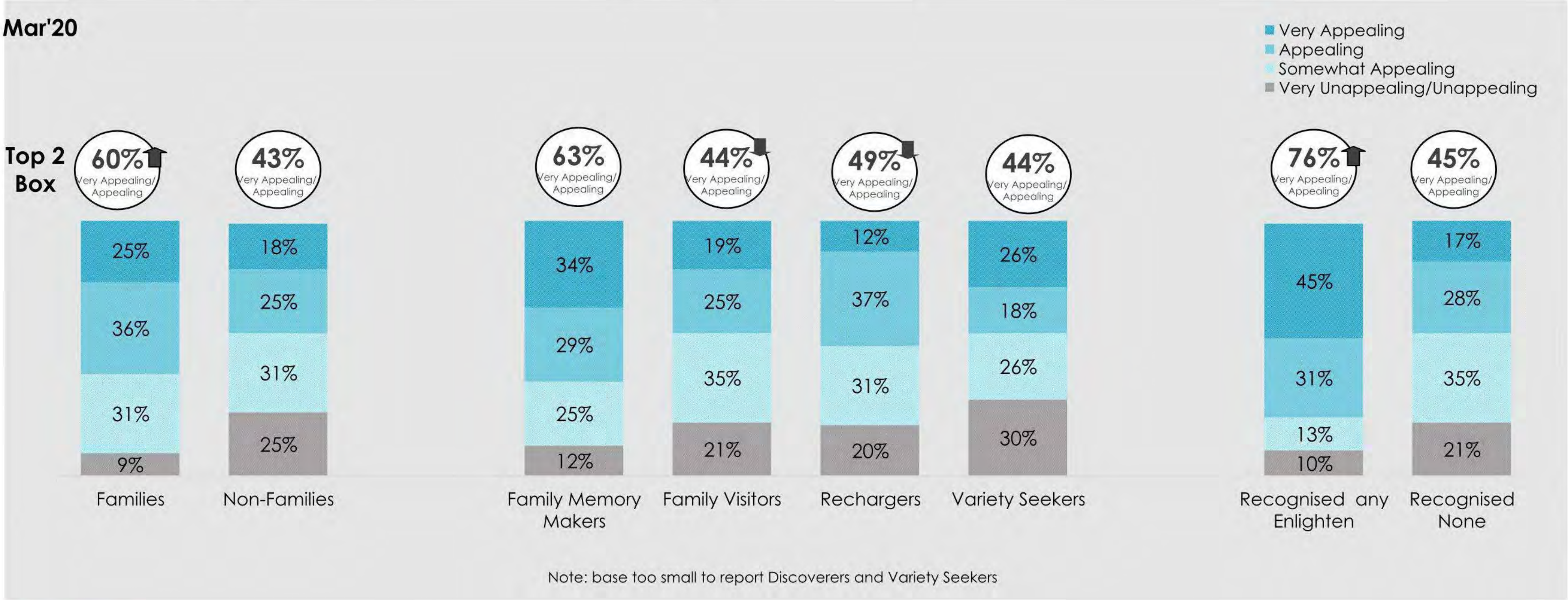


Indicates a significantly different result (at 9%+) to **benchmark**

Source: B4. How appealing is the idea of going to Canberra for a short break or weekend? % very appealing/appealing.
Base: NSW/Mel Oct'17=160, Dec'17 n=315, Apr'18 n=316, July '18 n=297, Oct'18 n=316, Dec '18 n=313, NSW: Dec'18 n=210, Mar'20 n=300

Short Break Appeal by Segments

The appeal of Canberra is stronger amongst families and is also significantly stronger amongst those who recall the Enlighten campaign. Canberra is also most appealing to the FMM segment.



Indicates a significantly different result (at 9%+) when **compared to the left most within segment**

Source: B4. How appealing is the idea of going to Canberra for a short break or weekend? % very appealing/appealing.

Base: Mar'20 Families n=107, Non-Families n=187, Family Memory Makers n=63, Family Visitors n=76 ,Rechargers n=76, Discoverers and Learners n=24, Variety Seekers n=50, Event Seekers n=11, Seen Any n=45, Seen none n=253.

Likelihood to Visit

Little change in overall likelihood to visit in Mar'20, but some improvement amongst rejectors.

NSW/Mel

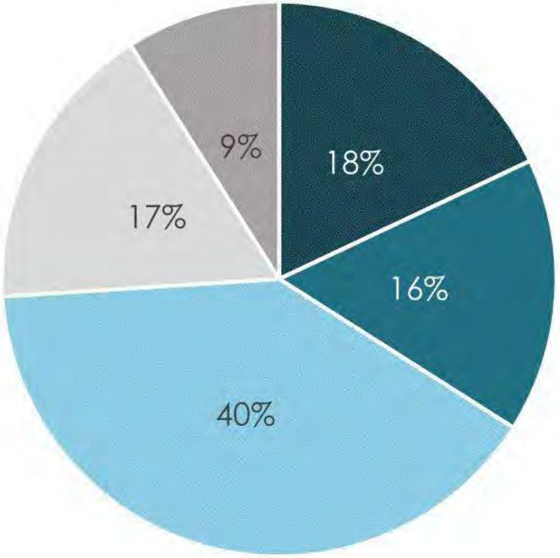
Jul'18	Oct '18	Dec'18
27% Definitely/ Probably visit	**28%** Definitely/ Probably visit	**27%** Definitely/ Probably visit

NSW

Dec'18	Mar'20
33% Definitely/ Probably visit	**34%** Definitely/ Probably visit

Total – Mar'20

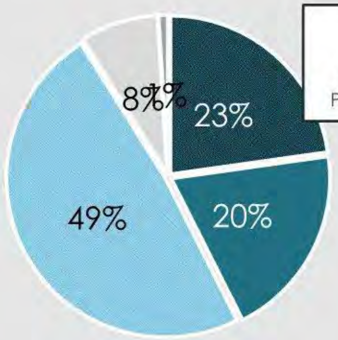
- I will definitely visit Canberra
- I will probably visit Canberra
- I will consider visiting Canberra
- I am unlikely to visit Canberra
- I will not visit Canberra



NSW

Visitors
(65%)

Visited Canberra before and happily go again

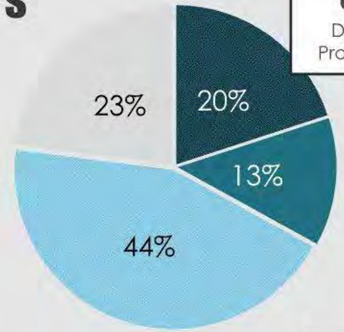


43% Definitely/ Probably visit

42% Dec'18

Considerers
(13%)

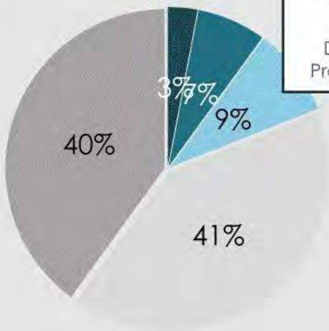
Never visited before, but would like to/open to idea



33% Definitely/ Probably visit

28% Dec'18

Rejectors
(22%)



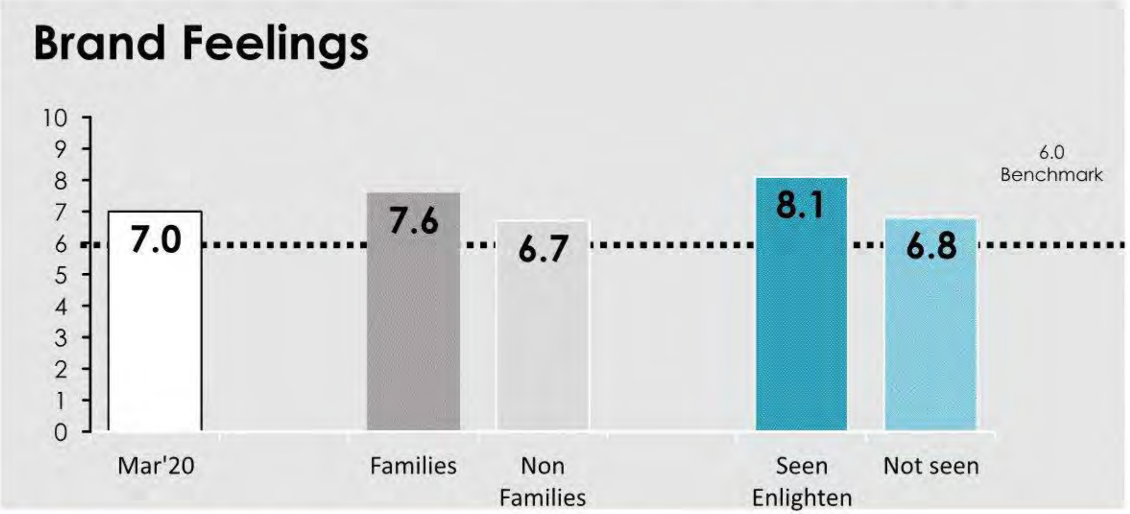
10% Definitely/ Probably visit

3% Dec'18

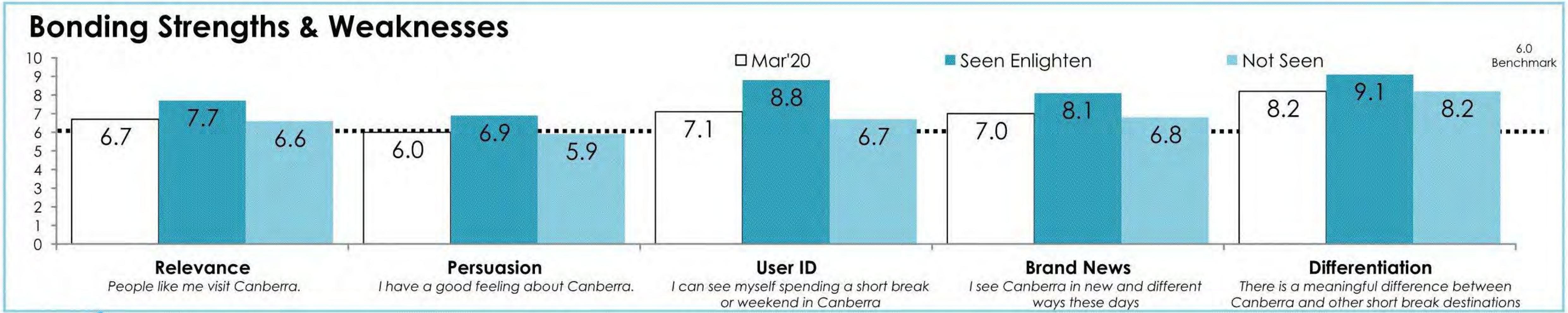
Base: Mar'20 n=300 Visitors n=195, Net Considerers n=40 , Net Rejectors n=65
Source: B5a. The next time you go on a short break or weekend away, how likely are you to visit Canberra?

Bonding

Overall, people feel positively about Canberra, particularly families.



People who **recall the Enlighten campaign** have more positive feelings – they feel Canberra is more relevant, is for people like them which helps them to feel good about Canberra as a destination.



Indicates a significantly different result (at 9%+) to **benchmark**

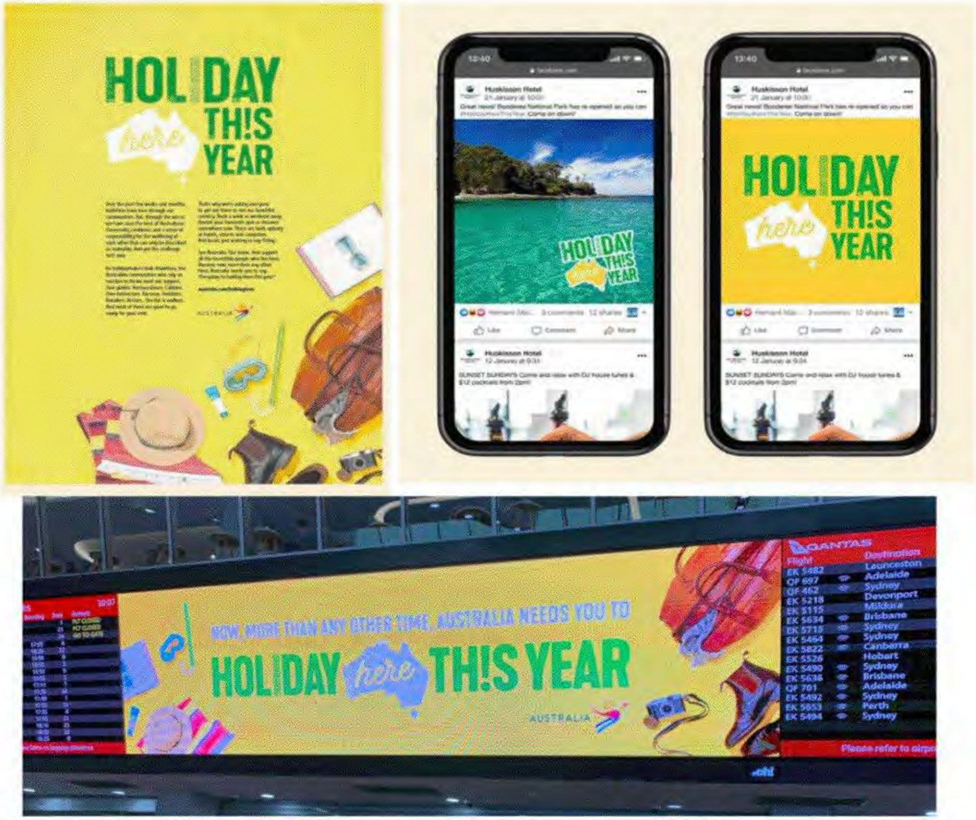
Source: Cut-down Add+Impact Bonding Statements.

Base: NSW Mar'20 n=300, Families n=17, Non Families n=187, Seen any Enlighten n=45 Not seen n=253

#HolidayHere ThisYear

Holiday Here This Year Recognition

Just under a fifth of NSW residents have heard of HHTY, higher amongst young families and Family Visitor segments. Recognition of the national assets was a little lower, at 1 in 7, with family segments a little more likely to notice.



'Holiday Here This Year' Tagline

18%

28% Young Families	22% Family MM	29% Family Visitors
9%⬇ Adult HH	12% Variety Seekers	13% Rechargers

Seen National Assets

16%

24% Young Families	21% Family MM	21% Family Visitors
7%⬇ Adult HH	14% Variety Seekers	8% Rechargers

HH1. Have you ever heard of the line "Holiday Here This Year"? / HH2. Have you ever seen any ads like this with the line "Holiday Here This Year" / HH2_CBR Have you seen any of these ads recently? They may have been online, billboards, posters at shopping centres or bus stops
Base: Total n=300, Young Families n=65, Adult HHs 57, FMM n=63, FV n=76, Rechargers n=76, Variety Seekers n=50 Other segments too small to report.
⬆⬇ Sig different between age groups at 95% CI

Holiday Here This Year Meaning

About a quarter thought HHTY meant holiday in Australia, with 6% specifically mentioning Canberra. About a quarter didn't know what it meant, with about a fifth being unclear about the holiday destination.

What does "Holiday Here This Year" mean to you...

Holiday within Australia, not overseas	25%	
Go on a holiday "there" (no location mentioned)	21%	
Support local communities/the economy by holiday at home	7%	
Trying to get people to visit bushfire/drought affected areas	7%	12%
General holiday mentions	7%	
Holiday in Canberra/Visit Canberra	**6%**	
Other	9%	
Don't Know/Nothing	26%	

i think it means to book your holidays in Australia this year (instead of overseas) to support local economies who are doing it tough from the drought and bushfires and not other natural disasters.

Taking a holiday in Australia rather than overseas

Instead of taking your money overseas & spending it to boost another countries economy stay in Australia & boost ours

spend your holiday in Australia to help our economy and recover after bushfires

means come to canberra in the near future

Not sure maybe go to Canberra

HH3. What does "Holiday Here This Year" mean to you?
Base: Total n=300

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Holiday Here This Year Destination Association

Just over a quarter thought HHTY meant any destination in Australia, while about one in six associated with NSW, and 14% associated with Canberra. Nearly a quarter didn't know which destination to associate to the tagline.

Which destination to you most associate with HHTY?

Anywhere in Australia	28%
NSW	17%
Australian Capital Territory	14%
Queensland	7%
South Australia	3%
Victoria	2%
Tasmania	2%
Western Australia	1%
Northern Territory	1%
Other	1%
Don't Know	24%

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HH4. Which destination do you most associate "Holiday Here This Year" with?
Base: Total n=300

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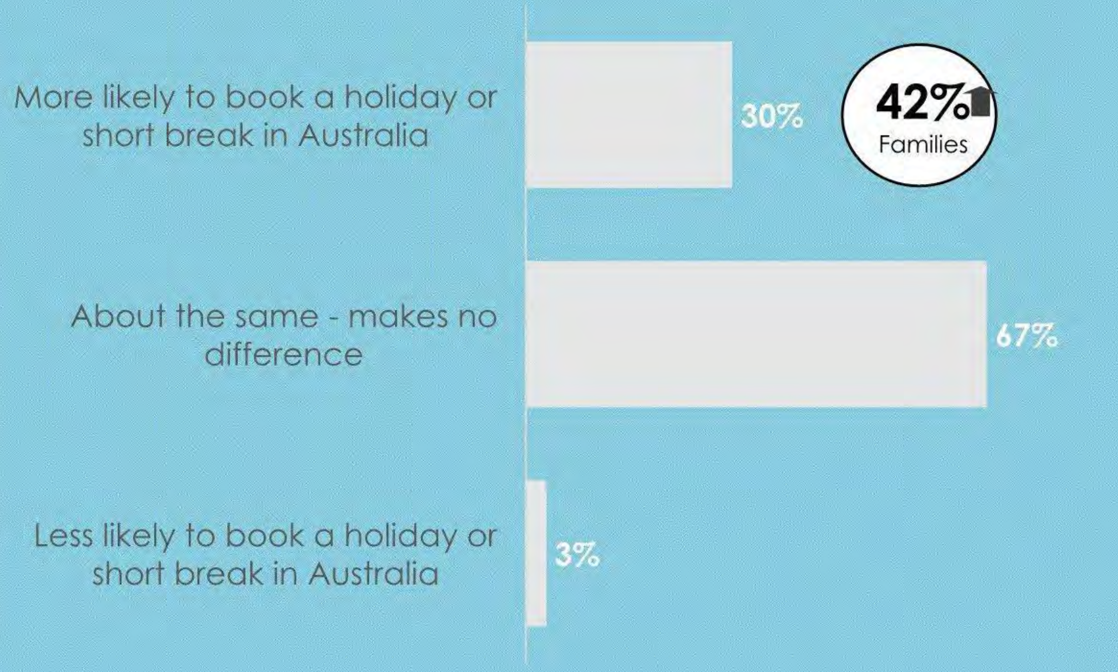
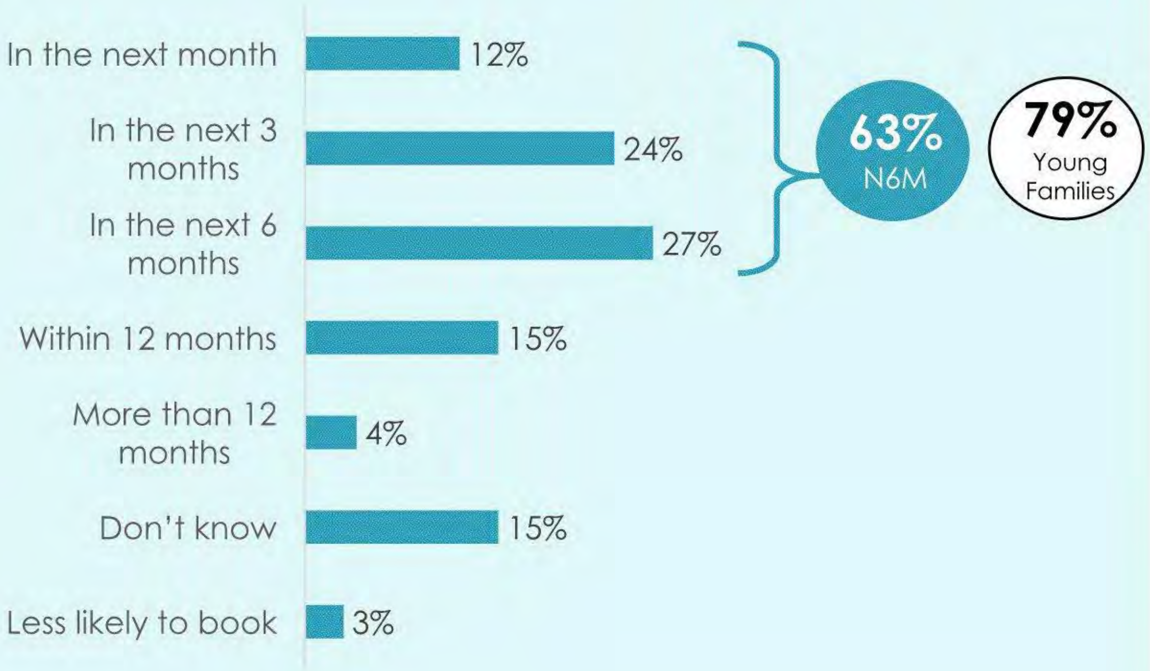
Holiday Here This Year Domestic Intention

Nearly a third of NSW residents say the HHTY campaign makes them more likely to book a holiday in Australia, and is significantly higher amongst families. In particular, Young Families are most likely to plan a holiday in Oz in the next 6 months.

Does HHTY campaign make you more/less likely to book a holiday or short break in Australia?



When are you likely to plan a holiday or short break in Australia?



Indicates a significantly different result (at 9%+) to **total**

HH5. Does the "Holiday Here This Year" campaign make you more/less likely to book a holiday or short break in Australia?

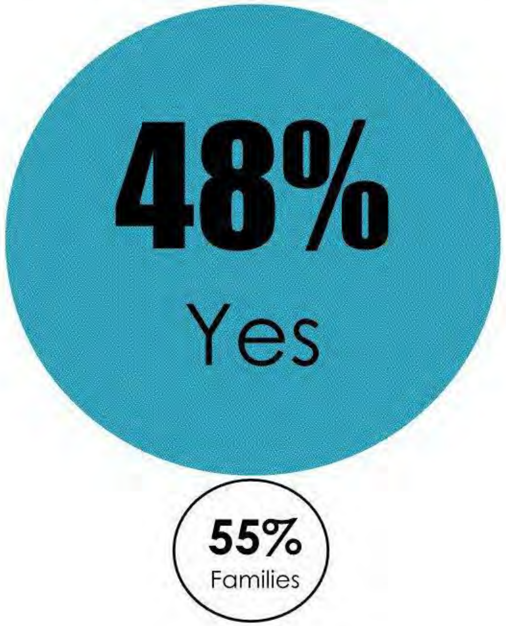
HH6. If you were going to book a holiday or short break in Australia, when are you likely to book?

Base: NSW Total n=300,

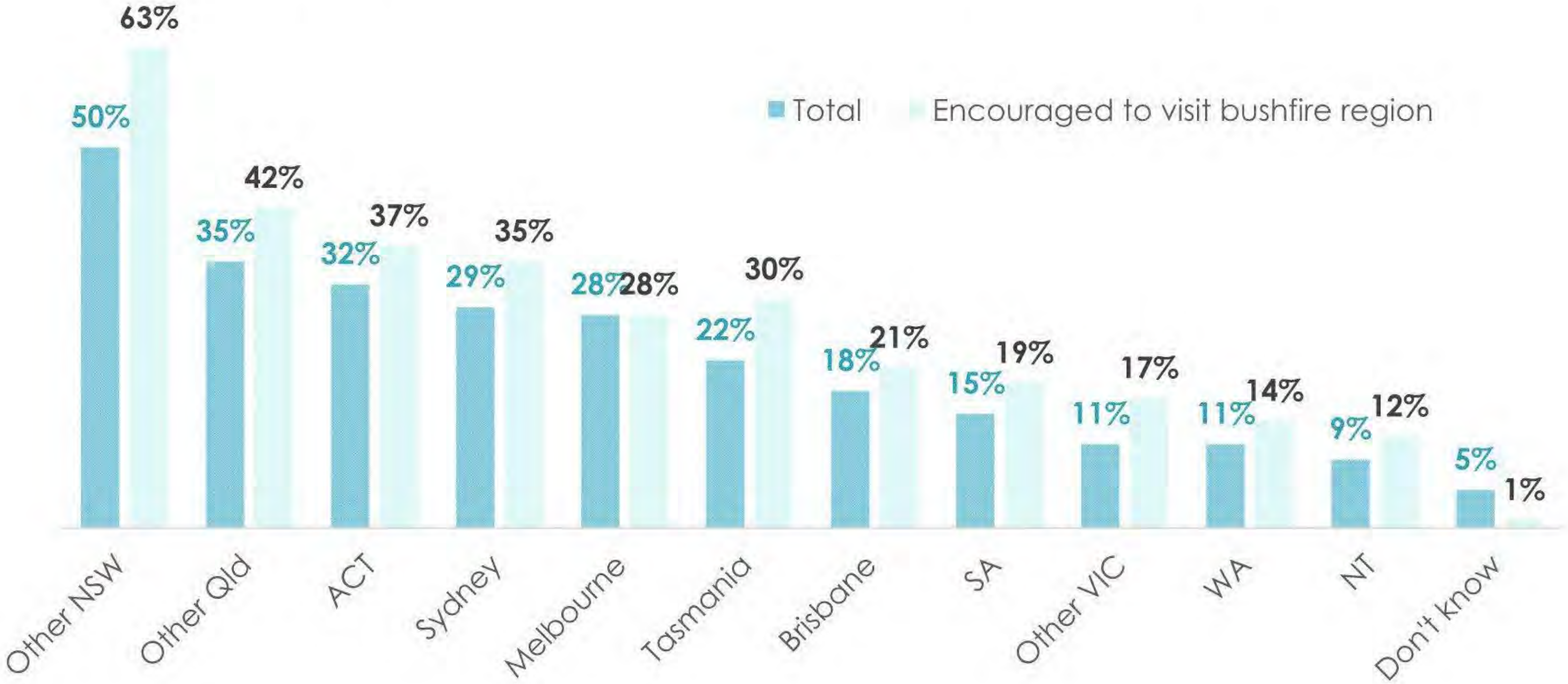
Holiday Here This Year Domestic Destination

About half of NSW residents felt the HHTY campaign encouraged them to visit a bush fire affected region. In terms of intended destination for a short break, all locations amongst this group were higher except for Melbourne.

Does HHTY Encourage You to Visit to a Region Affected by Bushfires?



If planning a short break in Australia, where would you consider going?



Indicates a significantly different result (at 9%+) to **total**

HH7. And if you were planning a holiday or short break in Australia, where would you consider going?

HH8: Does the campaign "Holiday Here This Year" encourage you to visit a region that was affected by the bushfires?

Base: n=300 Felt encouraged to visit bushfire region n=145

COVID-19 Impact on Holiday Plans

Just under half are holding a "wait & see" approach to their holiday plans, with a third saying they keeping their booked holidays. About a fifth are planning more domestic holidays than international. Two fifths say their domestic holidays will remain intact, but 30% are holding off booking.

How is COVID-19 Affecting Your Holiday Plans this year?

How is COVID-19 Affecting Your Australian holiday/short break plans this year?

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HH9. How is the current coronavirus (COVID-19) situation impacting your international and Australian holiday plans this year?
HH10: How is the current coronavirus (COID-19) situation impacting your Australian holiday/short break plans this year?
Base: NSW n=300

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What Have We Learned?

Key Performance Metrics

Slightly lower recognition of the Enlighten campaign compared to previous, but post campaign metrics holding steady.

		NSW/Mel				NSW	
		Apr'18 n=316	July'18 n=297	Oct'18 n= 316	Dec'18 n=313	Dec'18 n=210	Mar'20 n=300
Salience	Recognise at least one marketing activity (excluding War Memorial / Rome/ Lonely Planet rating)	16%	18%	24%	17%	21%	15%
	Claimed ad awareness	23%	23%	34%	29%	32%	31%
	Heard of tagline 'One Good Thing After Another'	20%	22%	23%	19%	17%	19%
	Associate OGTAA with Canberra (amongst aware)	14%	13%	12%	11%	15%	12%
	Aware of Lonely Planet #3 rating	10%	11%	10%	13%	14%	n/a
	Top of Mind destination for short break/weekend	13%	13%	14%	10%	14%	15%
Core perceptions	**% Strongly Agree/Agree**						
	Great place to spend a short break	57%	59%	60%	57%	66%	67%
	Activities are close together	63%	63%	63%	59%	66%	69%
	Offers a lot of variety	63%	59%	64%	58%	65%	71%
Appeal	% Very appealing/appealing	39%⇩	40%	40%	43%	50%	50%
Consideration	Visitors	63%	59%	61%	53%	67%	65%
	Net Considerers	16%	16%	19%	19%	14%	13%
	Net Rejectors	21%	24%	20%	27%	21%	22%
Intention	% Definitely/probably visit Canberra for next short break or weekend	28%	27%	28%	27%	33%	34%
Bonding	Bonding (overall positive feelings)	6.7	6.6	6.8	6.7	7.1	7.0

⬇⬆ Indicates a significantly different result with the benchmark (at 95%+)

What Have We Learned?

12% of NSW aware of Enlighten

Overall, 12% of NSW residents are aware of the Enlighten festival, with highest association to Night Noodle Market, Lights!Canberra!Action! or Balloon Spectacular.

15% saw Enlighten campaign

About 1 in 7 recognised some element of the Enlighten campaign, which helped contributed to stronger awareness of the Enlighten festival. Digital, radio and social had higher recall in Sydney.

Enlighten Performance

The Enlighten TVC is highly likeable, and performs similarly to Spring TVC for likeability and relevance.

The digital ad is also well liked – in line with other digital ads for specific events (Nightfest, Enlighten '18), and is stronger than TimeOut and Trip Advisor ads.

The radio ad is seen to be as relevant as the digital ads (26%), and the appeal of the event helps with likeability.

Brand Metrics Stable

While there was slightly lower recognition of the Enlighten activities, post campaign brand metrics are similar to other campaigns.

Top of mind destination salience, appeal and intention are all steady.

Positively, a directional increase in "offers a lot of variety" core positioning.

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What Have We Learned?

Holiday Here This Year (HHTY)

About a fifth (18%) had heard of HHTY in NSW – mainly understood to mean having a holiday in Australia (25%), not overseas. 12% talked about supporting local communities/bushfire affected areas.

16% saw the national assets, highest amongst family segments.

About a quarter thought HHTY meant anywhere in Australia (28%), followed by NSW (17%), ACT (14%), while a quarter didn't know.

HHTY Encourages Domestic Holidays

Nearly a third of NSW residents said HHTY made them more likely to book a holiday in Australia, and this is significantly higher amongst families (42%).

63% of people said they are likely to plan a holiday or short break in Australia in the next 6 months – most likely other NSW, other Qld or ACT.

Nearly half (48%) said HHTY encourages them to visit a bushfire affected region.

CV-19 Affecting Holiday Plans

44% are taking a "wait & see" approach, with a third planning to keep the holidays they've booked. Nearly a fifth (17%) say they are planning more domestic holidays this year.

Domestically, 41% say they are keeping their booked holidays as planned, with another 40% delaying plans or holding off on booking.

Thankyou!
How can we help?

Contact: kate.platter@lumaresearch.com

Insight. Create. Inspire.

Visit Canberra – Local Enlighten Campaign

March 2020

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Context & Methodology

Understanding the performance of the local Enlighten campaign

The Enlighten campaign is a major marketing event on the VisitCanberra calendar. As well as a broader campaign, there was also a local campaign. VisitCanberra wanted to understand how well the local campaign performed.

Specifically:

- How many Canberrans saw the local Enlighten elements?
- How appealing are the assets?
- How well do they work together to communicate a wider Enlighten festival? (i.e. no longer just Illuminations and noodle market, but also balloon spectacular, lights Canberra action, Symphony in the Park, Canberra Day, Sky Fire etc).

Methodology:

A short online survey was asked of n=100 ACT residents:

- Live in the ACT
- Aged 18+
- Mix of gender
- Not work in tourism

Fieldwork was conducted 12-16 March, 2020 using sample from Dynata. Data was weighted by gender.

		Mar 2020 n=100
Gender	Males	50%
	Females	50%
Location	ACT	100%
Age	18-39	28%
	40-54	20%
	55-70	40%
	70+	12%

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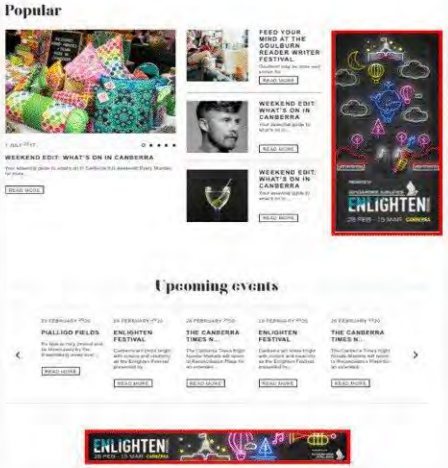
What We Tracked

Enlighten TVC 30s (video)

Enlighten Digital (static)



Enlighten Social (static)

Enlighten OOH (static)

Holiday Here This Year (National Asset)

Holiday Here This Year (CBR Asset)

Enlighten Festival Awareness

Overall, four fifths of Canberrans have heard of Enlighten, with Night Noodle Markets, Balloon Spectacular and the Illuminations most well known. Of those aware, nearly all can correctly associate at least one event. Symphony in the Park is least associated with Enlighten.

83% *Heard of Enlighten Festival*

Activities part of Enlighten Festival (amongst aware)

Night Noodle Markets	71%
Canberra Balloon Spectacular	66%
The Illuminations	52%
Lights! Canberra! Action!	44%
Canberra Day	44%
Skyfire	34%
Symphony in the Park	16%
National Folk Festival	8%
Floriade	7%
Summernats	4%
Groovin the Moo	4%
Other	1%
Don't Know	5%

94% net correct

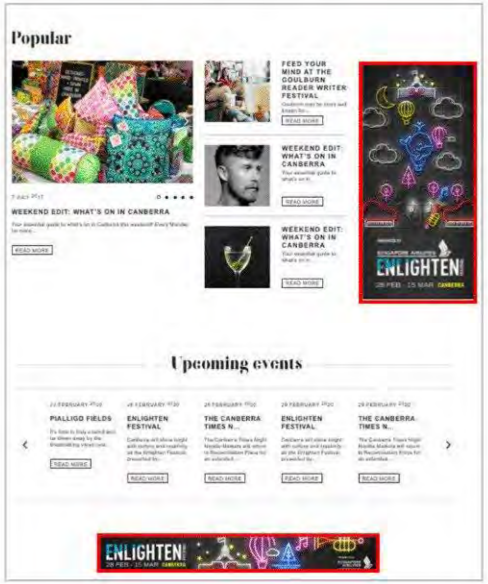
5% correct

B1. Have you ever heard of the Enlighten Festival?
B2. Which of the following events and activities are part of the Enlighten Festival?
Base: Total n=100

Enlighten Festival Recognition

The static ads had the highest level of recognition with nearly a third of Canberrans recalling. About a fifth saw the TVC, with some also seeing online support. Overall, nearly half of ACT residents saw an element of the Enlighten campaign.

TVC	Online	Social Media	Static Ads (OOH/Online/Local Papers)	Seen Any
22%	16%	16%	30%	44%



E1. Below are some pictures from a TV ad. Have you seen this ad recently? / E2. Have you seen these ads online anywhere? E3. Have you seen any of these posts on social media e.g. Facebook or Instagram / E4. Have you seen any of these ads recently? They might have been posters at shopping centres or bus stops or online or in local papers.
Base: Total n=100

Enlighten Festival Diagnostics

The individual ads are working well overall to communicate that the Enlighten Festival is made up of many events and work well to describe the whole festival. About four fifths find the campaign appealing and makes Enlighten feel exciting. Just over 60% said the ads made them feel proud to be from Canberra.

E5. Please look at this advertising again. How much do you agree or disagree with each of the following statements?
Base: Total n=100

Impact of Campaign on Festival Understanding

While there is already high awareness of Enlighten and most are able to correctly attribute events to the festival, there are some directional improvements for specific events amongst those who recall the campaign, particularly Symphony.

Activities part of Enlighten Festival	Total	Aware of Enlighten	Recognise campaign
% of ACT RESIDENTS	100%	83%	44%
NET CORRECT	**78%**	**94%**	**89%**
Night Noodle Markets	59%	71%	75%
Canberra Balloon Spectacular	55%	66%	70%
The Illuminations	43%	52% →	59%
Lights! Canberra! Action!	37%	44%	43%
Canberra Day	28%	44%	48%
Skyfire	28%	34%	39%
Symphony in the Park	13%	16% →	25%
Average # of correct events associated	**2.6**	**3.3**	**3.6**
Correctly associated all events	**5%**	**6%**	**11%**
Base n=	100	83	44

B1. Have you ever heard of the Enlighten Festival?
B2. Which of the following events and activities are part of the Enlighten Festival?
E1-E4: Have you seen these ads recently? (TV, online, social, static ads)

Holiday Here This Year Recognition

About a third of Canberrans are aware of HHTY, and significantly higher amongst 55+ segment. About a quarter had seen the national assets, with only a few recalling the specific CBR assets. No differences by gender.

'Holiday Here This Year' Tagline

33%

23% 18-54

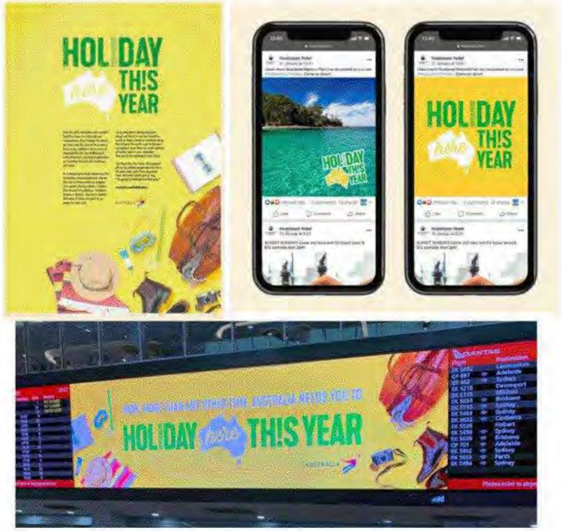
42% 55+ ⬆

National Assets

26%

19% 18-54

33% 55+



CBR Assets

8%

10% 18-54

6% 55+

HH1. Have you ever heard of the line "Holiday Here This Year"? / HH2. Have you ever seen any ads like this with the line "Holiday Here This Year" / HH2_CBR Have you seen any of these ads recently? They may have been online, billboards, posters at shopping centres or bus stops
Base: Total n=100, 18-54 yrs n=48, 55+yrs n=52 ⬆⬇ Sig different between age groups at 95% CI

Holiday Here This Year Meaning

About a fifth though HHTY meant locally or at least within Australia. Just under a fifth of Canberrans thought it meant holiday in Canberra.

What does "Holiday Here This Year" mean to you...

Support local communities/the economy by holiday at home	22%
Holiday within Australia, not overseas	21%
Holiday in Canberra/Visit Canberra	**18%**
Go on a holiday "there" (no location mentioned)	9%
Trying to get people to visit bushfire/drought affected areas	6%
General holiday mentions	4%
Other	10%
Don't Know/Nothing	17%

Support Australia towns and businesses

stay at home to holiday and support your local community

Stay in Australia, holiday local

Taking a holiday in Australia rather than travelling overseas.

We need to holiday in Canberra because of the terrible summer we've had

holiday in Canberra instead of going overseas

Spend some time in Canberra and make the most of it.

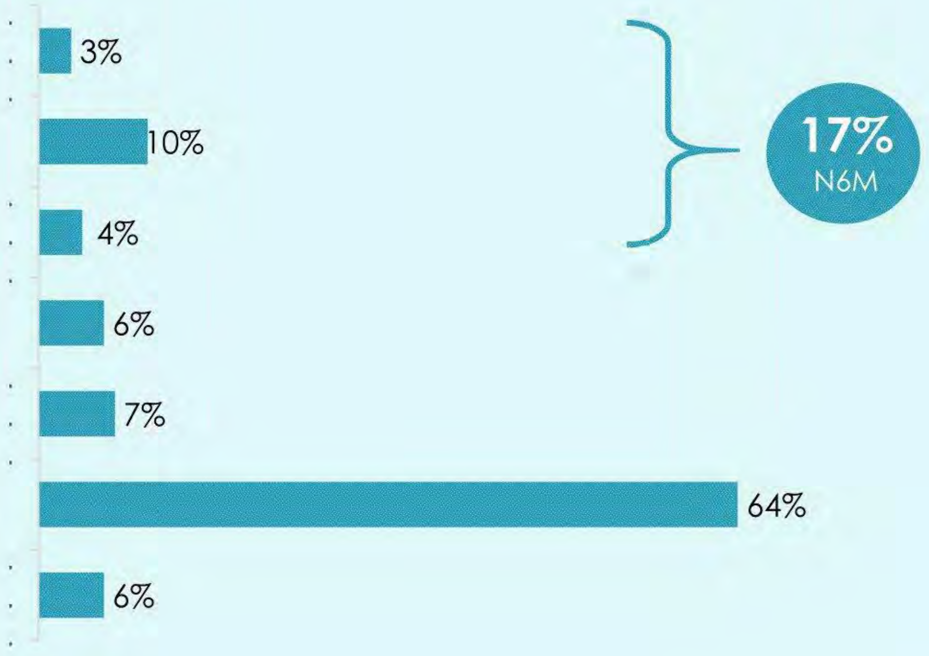
HH3. What does "Holiday Here This Year" mean to you?
Base: Total n=100

Intention to visit Canberra

In general the HHTY campaign didn't make much of a difference as to whether Canberrans were planning a staycation in Canberra. Overall, about a sixth said they are likely to plan a staycation in Canberra in the next 6 months (N6M).

Does HHTY campaign make you more/less likely to book a staycation in Canberra?

When are you likely to plan a staycation in Canberra?



HH5a. Does the "Holiday Here This Year" campaign make you more/less likely to book a staycation in Canberra?
HH6. If you are planning a staycation in Canberra, when are you likely to do so?
Base: HH5a. Total n=100 HH6. Total n=100

What Have We Learned?

High awareness of Enlighten

Overall, 83% of Canberrans are aware of the Enlighten festival with Night Noodle Markets, Balloon Spectacular and Illuminations most well known.

Of those aware, nearly all can correctly associate at least 1 event, with Symphony least well associated (16%) compared to Night Noodle Market (71%).

44% saw Enlighten campaign

Just over two fifths saw an element of the Enlighten campaign, with 30% seeing the specific local static ads.

80% agreed that the static ads work well to communicate that Enlighten is made up of many events, and feels exciting. Nearly two thirds felt that looking at the ads made them proud to be from Canberra.

Those who saw the campaign were a slightly more likely to associate more correct events with Enlighten.

Holiday Here This Year (HHTY)

About a third had heard of HHTY – mainly understood to mean supporting local communities or holidaying in Australia. 18% thought it specifically meant a holiday in Canberra.

26% recalled the national asset, with 8% recognition for the specific CBR assets.

11% thought HHTY encouraged them to book a staycation, while 83% said it made no difference.

Overall, 17% of locals are planning a staycation in the next 6 months.

Thankyou!
How can we help?

Contact: kate.platter@lumaresearch.com

Luma
Insight. Create. Inspire.

CONSUMER DEMAND PROJECT 2019

ACT REPORT

Contents

Introduction

- Background
  - The Consumer Demand Project (CDP) has been run annually by Tourism Australia since 2012
    - All State / Territory Tourism Organisations have partnered with Tourism Australia since 2016
  - The CDP involves a large sample survey conducted in each of Australia's core international markets, focusing on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics
    - The survey also includes original concept / experience testing each year
- Markets
  - Each year, the CDP survey is completed by a large sample across a core group of 11 international markets for Australia
    - These markets are Indonesia, New Zealand, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA & UK
    - This forms a core '11 market aggregate' which is used for all multi-country aggregates throughout the report
    - Hong Kong and Australia have also been included in recent years
    - For VisitCanberra four markets are of particular interest, Singapore, Malaysia, UK and India will be assessed individually through the report
  - All respondents are Out of Region (OOR) travellers meaning that they have travelled or intend to travel beyond neighbouring countries
- Throughout the report key metrics will also be assessed High Value Travellers (HVT)

Definition of a High Value Traveller (HVT)

Travel Long Haul

Travels long haul (out of region) on a regular basis.

Preference for Australia

Consideration or intention to visit Australia.

Key Drivers for Destination Choice

Food and wine, aquatic and coastal, and nature and wildlife experiences are key drivers when choosing a holiday destination.

Represent High Value

Above average trip expenditure. Higher likelihood to stay longer. Higher likelihood to disperse further.

Characteristics of the High Value Traveller (HVT)

High demand for Australian experiences

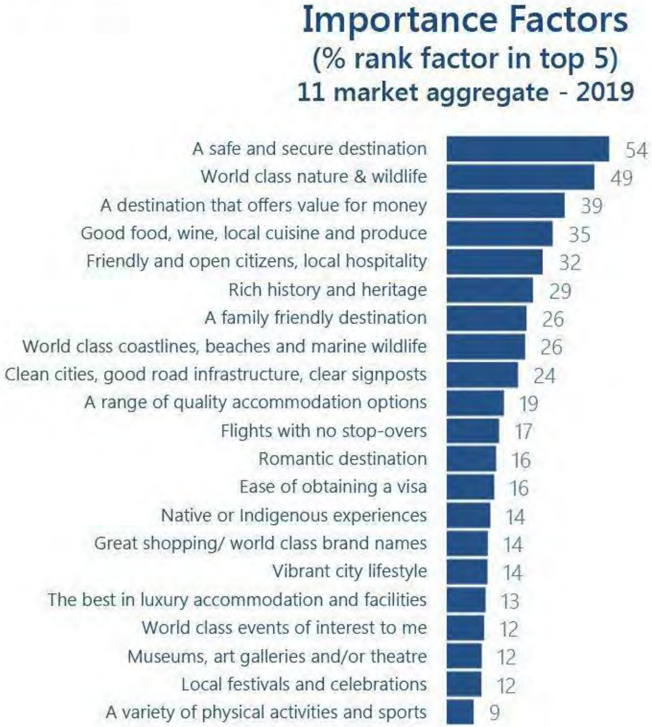
High propensity to explore regional Australia

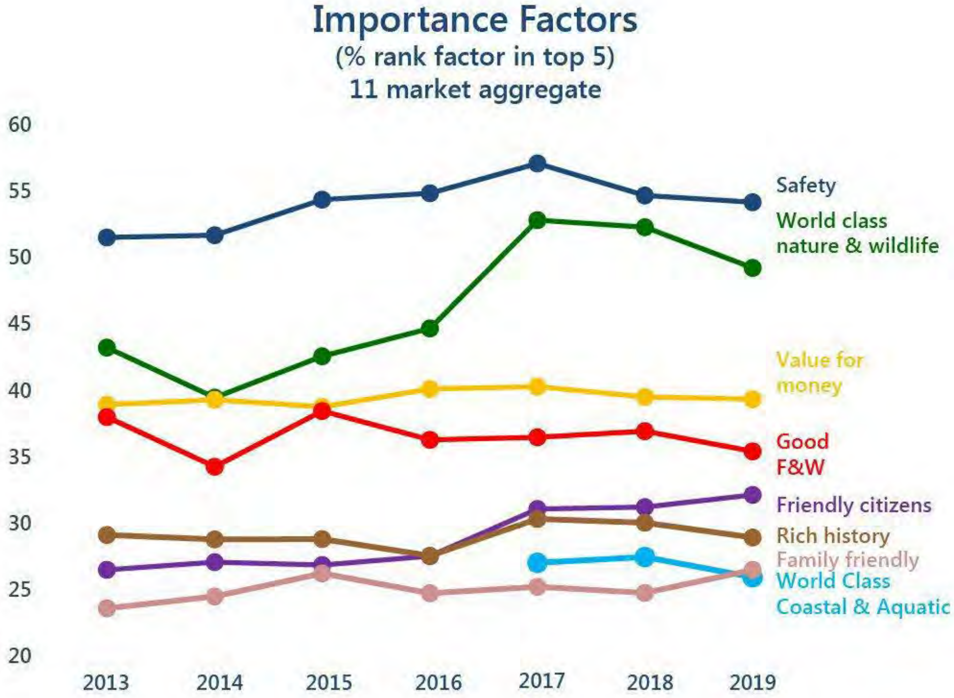
Strong affinity with Brand Australia

Deeper knowledge of Australia's holiday offer

Destination importance factors

Safety continues to be considered the most important factor. Nature/wildlife second but now easing after lifting strongly in recent years. Good F&W and rich history slightly down this year. Friendly citizens increasing in importance, family friendly also makes its way up to just slightly above WC aquatic and coastal.



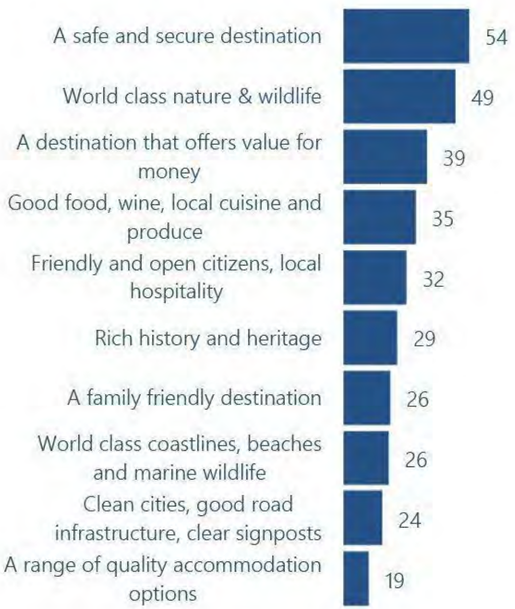


Questions: Thinking about choosing a holiday destination to another region, which of the following factors is most important to you? (please rank up to 5).
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Most important factor by country

Safety continues to be the most important factor across all markets. India however considers Nature & wildlife #1. Value for money & good food and wine also important across many markets. Aquatic & coastal among the top 5 for India.

% of total travellers (11 market agg)



Top 5 importance factors by country (%)

SING	MALAY	INDIA	UK
63	62	43	52
42	46	49	43
43	49	32	41
36	28	25	36
36	37	26	37
30	27	25	31
32	36	32	23
16	20	28	31
31	32	25	16
21	15	21	27

Top 1
Top 5

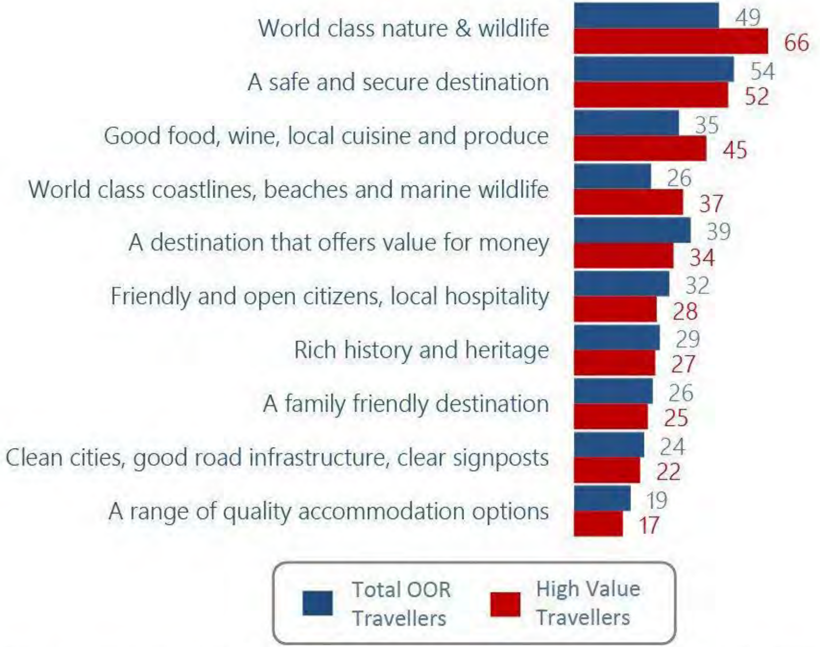
Questions: Thinking about choosing a holiday destination to another region, which of the following factors is most important to you? (please rank up to 5). 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Importance factors - HVTs

World class nature & wildlife clearly the most important factor with HVTs but now easing. Safety second up slightly in importance. Good food & wine also has high importance while aquatic & coastal importance is down slightly though remains prominent with HVTs.

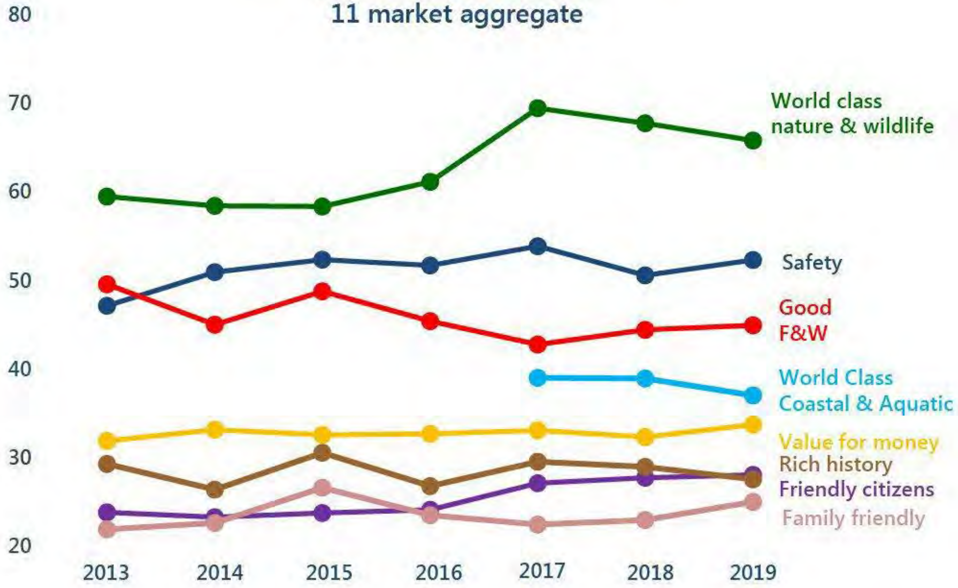
Importance Factors – HVTs vs total travellers

(% rank factor in top 5)
11 market aggregate - 2019



Importance Factors – HVTs

(% rank factor in top 5)
11 market aggregate

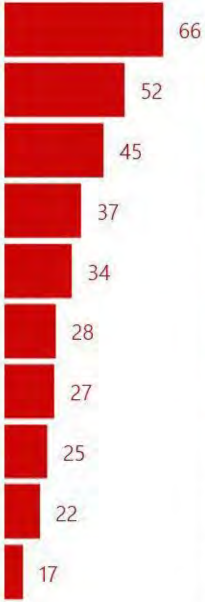


Questions: Thinking about choosing a holiday destination to another region, which of the following factors is most important to you? (please rank up to 5).
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Most important factor by country - HVTs

WC nature & wildlife considered most important for HVTs overall and across all markets except Singapore. Safety just ahead in Singapore. Good F&W in the top 5 for all markets. Aquatic & coastal experiences also have high importance with HVTs from India and UK. Friendly and open citizens in the top 5 for UK.

% of HVTs (11 market agg)



Top 5 importance factors by country (%)

	SING	MALAY	INDIA	UK
World class nature & wildlife	60	66	69	58
A safe and secure destination	61	62	40	50
Good food, wine, local cuisine and produce	50	45	34	48
World class coastlines, beaches and marine wildlife	25	29	42	41
A destination that offers value for money	35	48	27	30
Friendly and open citizens, local hospitality	28	31	16	38
Rich history and heritage	33	23	26	28
A family friendly destination	30	32	25	20
Clean cities, good road infrastructure, clear signposts	30	26	27	19
A range of quality accommodation options	18	12	15	23

Top 1
Top 5

Questions: Thinking about choosing a holiday destination to another region, which of the following factors is most important to you? (please rank up to 5).
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Destinations associated with Safety & Security

Japan is now the top destination associated with Safety & Security. Australia is still highly rated but association is falling and no longer #1. Australia is still top rated with HVTs but easing slightly and gap to Japan is slowing.

Questions: You said [factor] is important to you. Which of these destinations do you associate with [factor]?
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

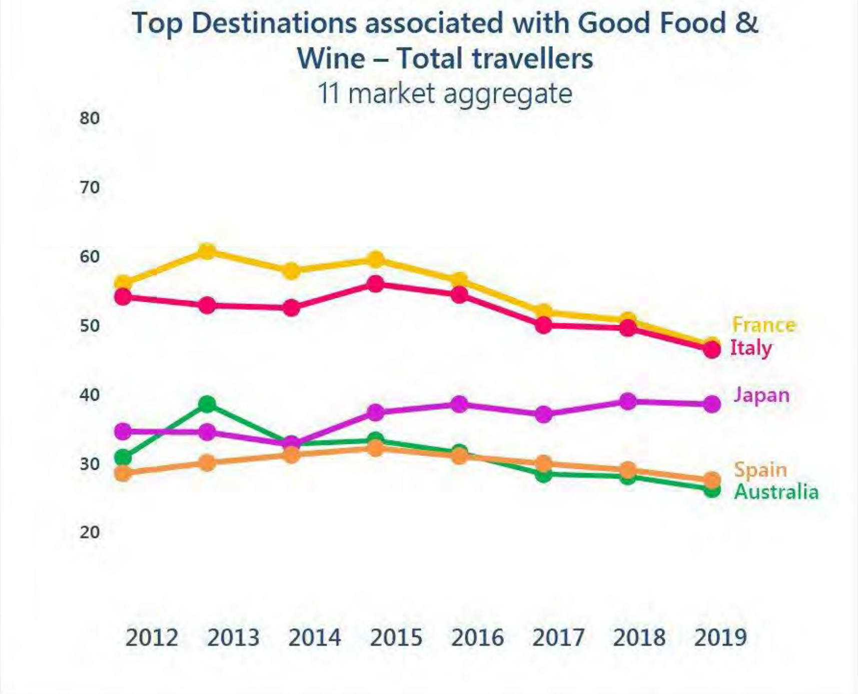
Destinations associated with WC Nature & Wildlife

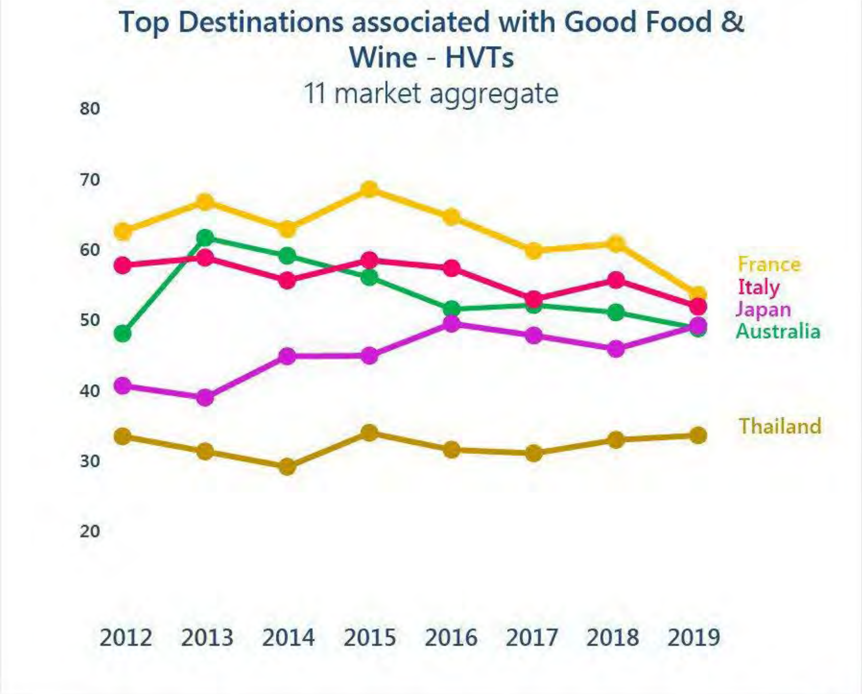
Australia is still clearly most associated with World Class Nature & Wildlife, though association is easing with a number of other destinations. Aus and NZ also easing with HVTs. Switzerland and Japan holding.

Questions: You said [factor] is important to you. Which of these destinations do you associate with [factor]?
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Destinations associated with Good Food & Wine

Australia's association with Good Food & Wine is also easing, along with a number of traditional food and wine destinations. Japan has gained strongly and is holding up. Australia is now 4th with HVTs dipping below growing Japan.





Questions: You said [factor] is important to you. Which of these destinations do you associate with [factor]?
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

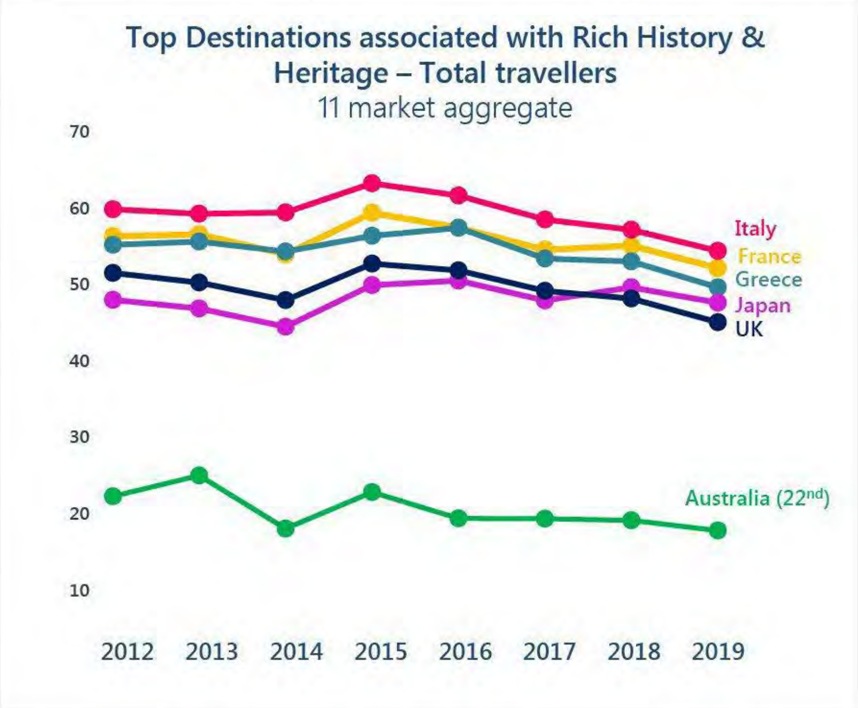
Destinations associated with Aquatic & Coastal

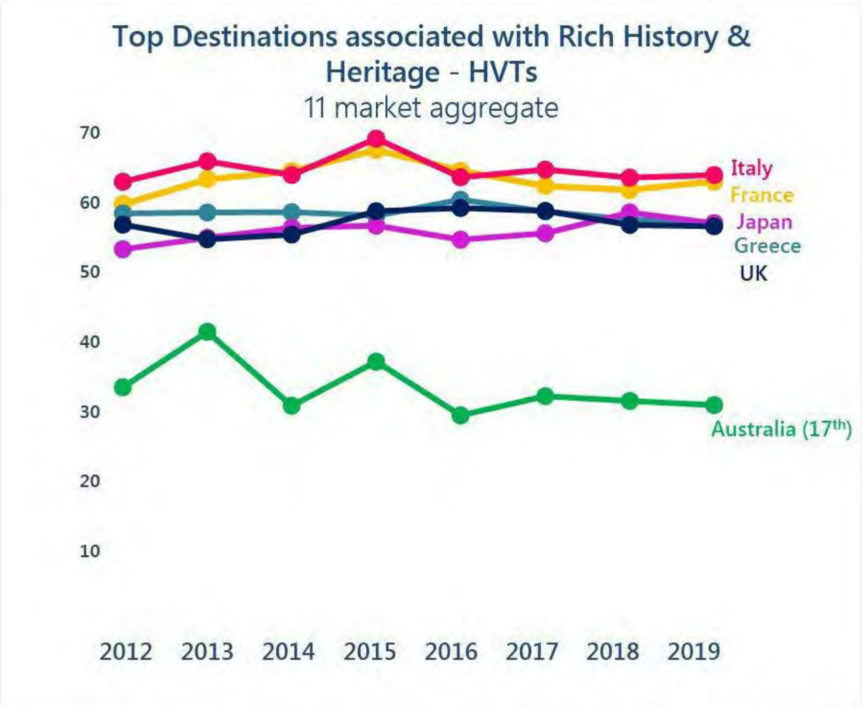
Australia's association with Aquatic and Coastal experiences is also easing now just behind Hawaii. Aus holding largely steady with HVTs, remains clear #1.

Questions: You said [factor] is important to you. Which of these destinations do you associate with [factor]?
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Destinations associated with History & heritage

Association across all markets easing this year European destinations remain strongest Italy, France and Greece lead Japan steady at #4 after lifting last year Australia not highly associated with history & heritage. Japan amongst top 3 with HVTs.

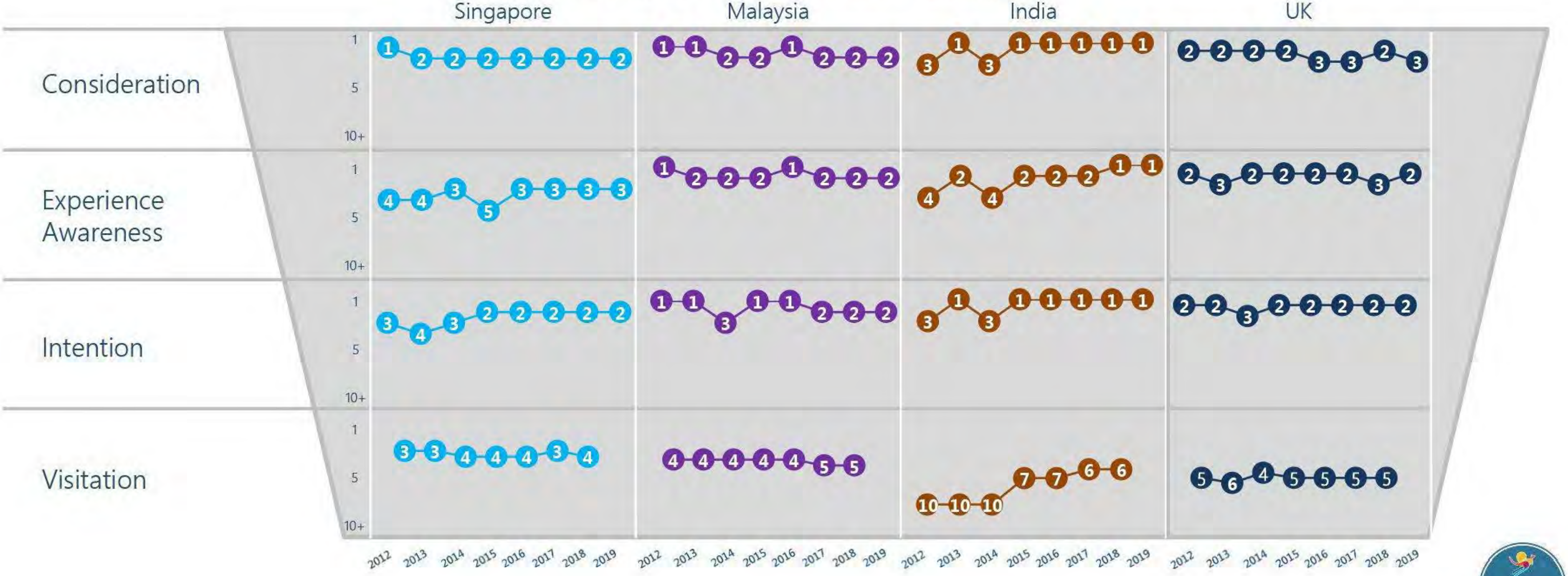




Questions: You said [factor] is important to you. Which of these destinations do you associate with [factor]?
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

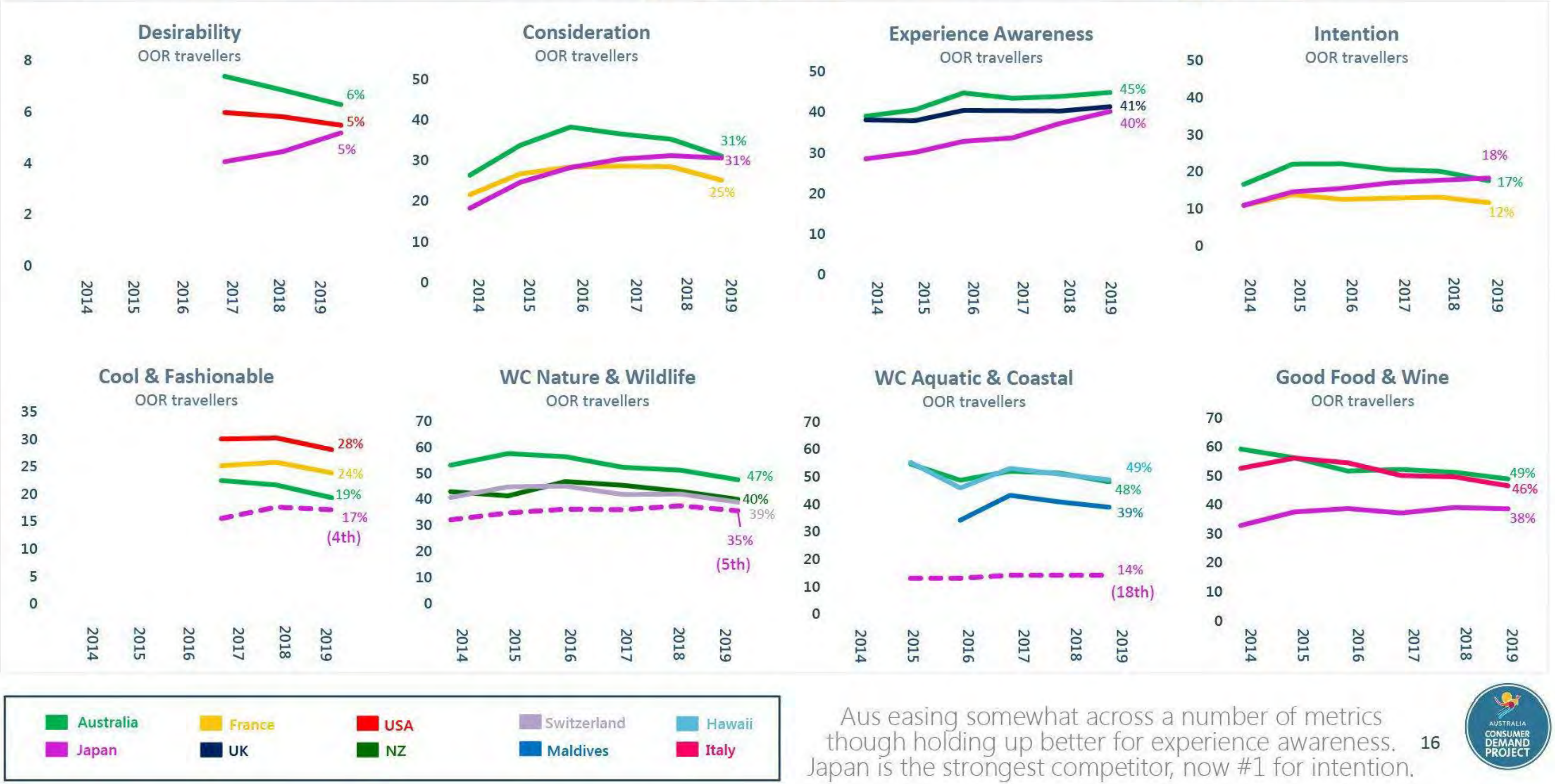
Competitive purchase funnel rankings

Aus steady on purchase funnel metrics for Singapore and Malaysia, Aus visitation down for Singapore. Aus also down for consideration in the UK. Aus holding it's #1 position for India through the funnel, 6th for visitation. Aus 2nd or 3rd through the funnel for UK, 5th for visitation.



Which of the following destinations are you considering travelling to in the next 4 years? How aware would you say you are of the holiday experiences on offer in the following destinations? Which of the following destinations are you actively planning to visit for a holiday in the next 2 years? Visitation derived from Tourism Economics to 2018

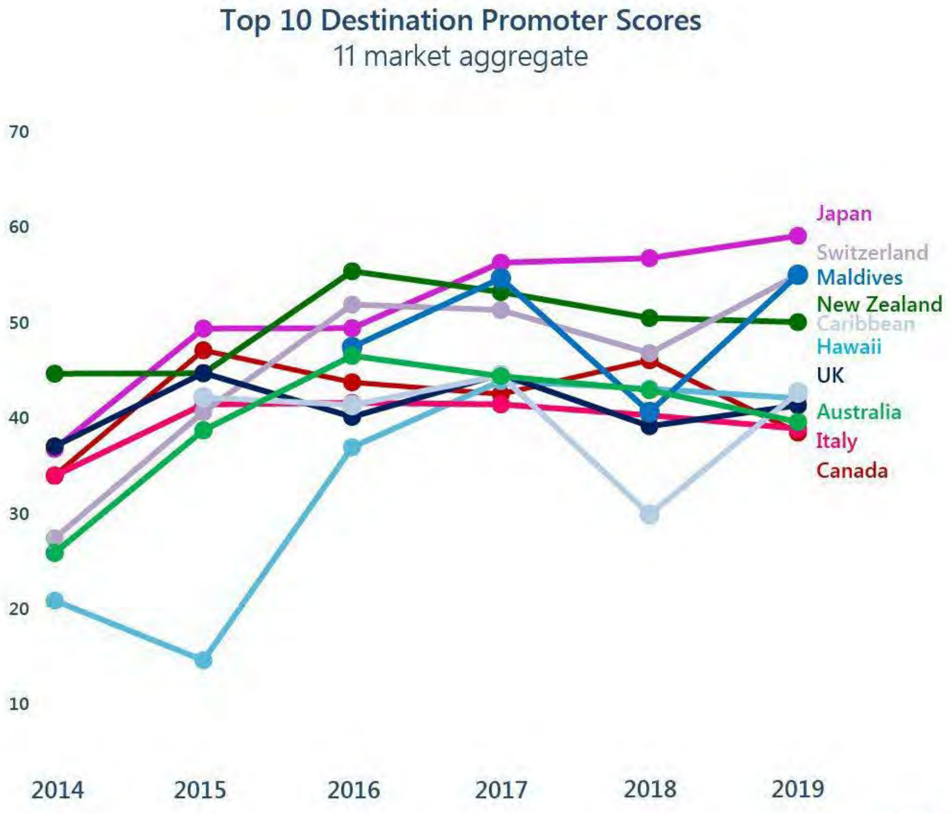
Aus Brand Metrics Summary (Top 3) - 11 Market Aggregate



Aus easing somewhat across a number of metrics though holding up better for experience awareness. Japan is the strongest competitor, now #1 for intention.

Net Promoter Score

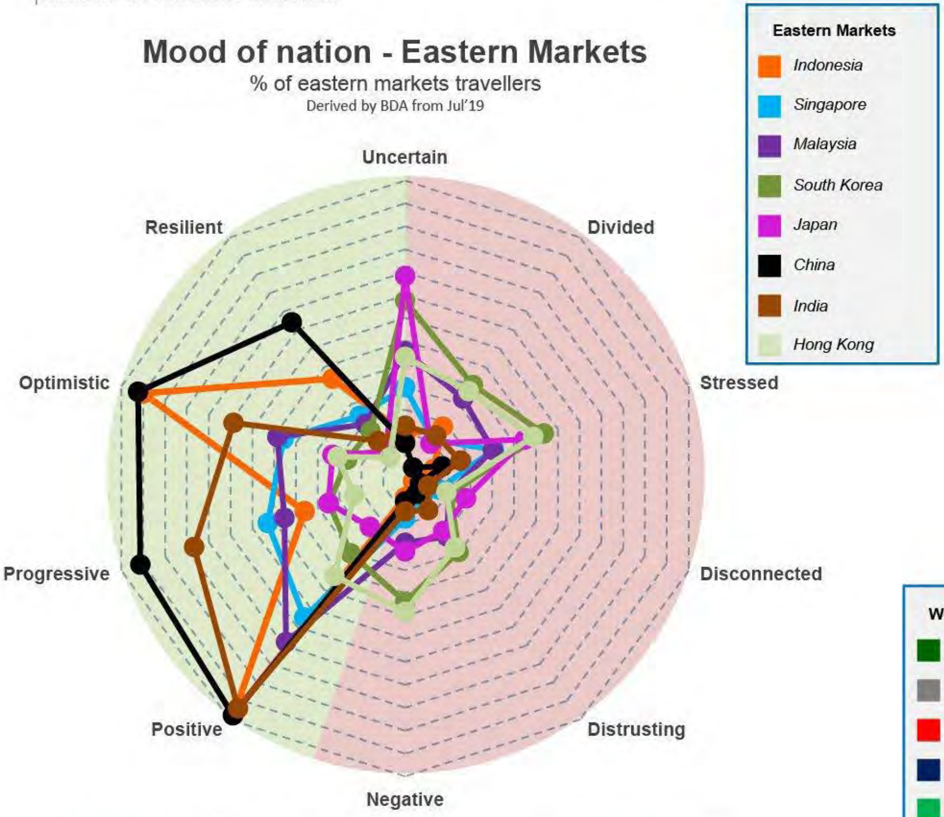
- Aus now 8th for NPS, down compared to previous years
  - Japan holds up and remains highest
  - Maldives up strongly to #3, equal with Switzerland
  - Caribbean has lifted more than other markets making it to the top 5

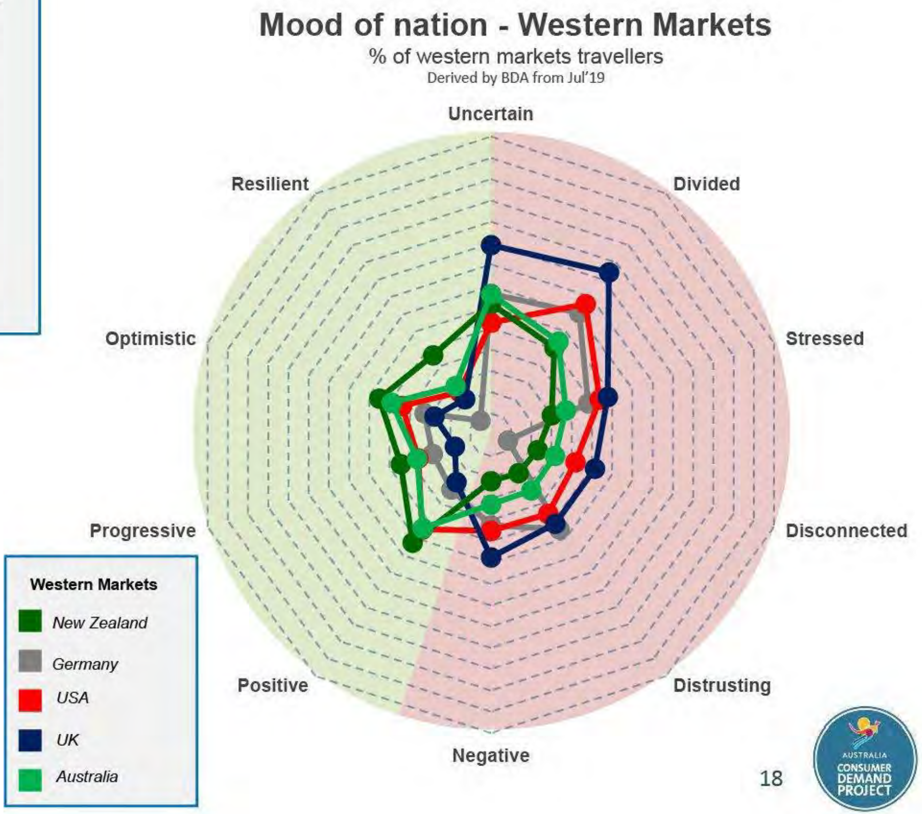


Questions: On a scale of 0 to 10, where 0 is not at all likely and 10 is extremely likely, how likely are you to recommend [destination] as a holiday destination to a family member ...?
'Detractors' are those scoring a destination 0-6. 'Promotors' are those score a destination 9-10. NPS = Promotors – Detractors. 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Mood of the nation

Different patterns observed across markets. China, India and Indonesia are highly associated with positive metrics. UK clearly the most negative with high associations across 'uncertain', 'divided', 'stressed' and 'disconnected'. USA highly associated with 'divided' and negative in mood. NZ most positive of western markets.





Question: Thinking about what you see in the news, which of the following reflect the current mood of your nation?

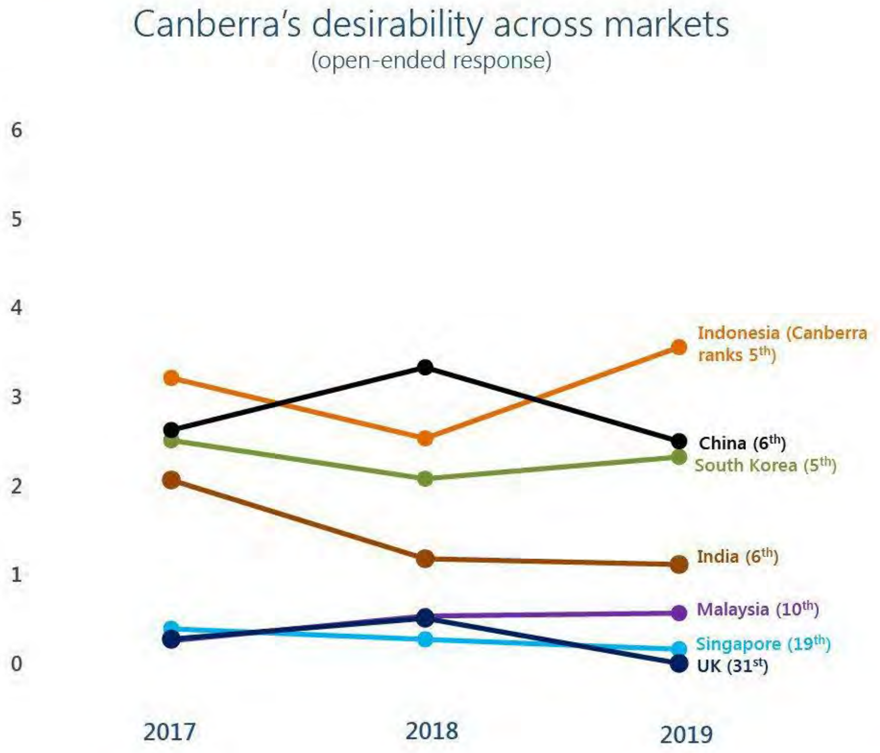
Australia's most desirable destinations

- Sydney clearly the most desirable Australian destination
  - However easing in the last 2 years
- Gold Coast now just ahead of Melbourne for #2
- Canberra steady at 10th with 1%

Question: What do you consider to be the most desirable holiday destination in Australia? (open-ended response). Proportions expressed as a share of those considering visiting Australia.
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK

Where is Canberra most desirable?

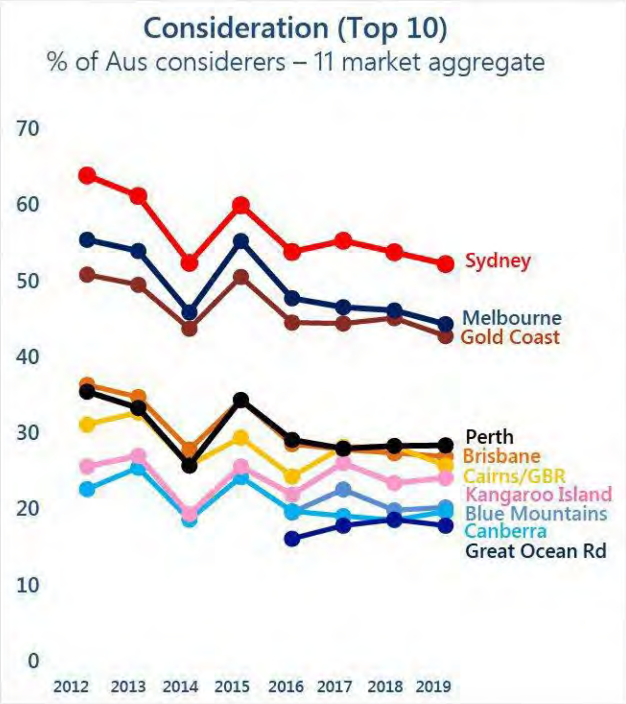
- Canberra most desirable for Indonesian and Chinese travellers
  - Gaining for Indonesia and declining for China however in 2019
  - Korea also prominent
- Canberra also quite prominent for India, somewhat lower for Malaysia, Singapore & UK

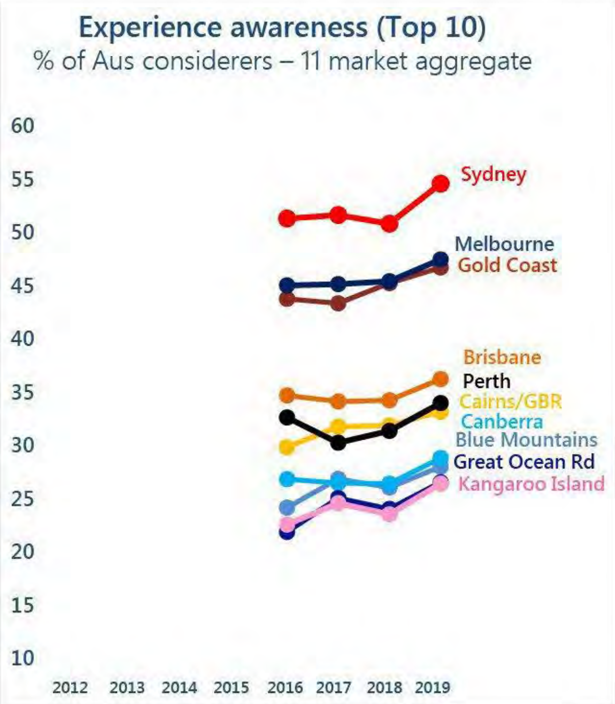


Question: What do you consider to be the most desirable holiday destination in Australia? (open-ended response). Proportions expressed as a share of those considering visiting Australia.

Aus Destination Purchase Funnel

Canberra edging up though the purchase funnel, 9th for consideration and intention. Now at #7 for awareness, just lifted above Blue Mountains this year. Awareness is improving across all destinations but considering & intention easing in many of the bigger destinations.





Questions Which of the following Australian destinations are you considering travelling to in the next 4 years? How aware would you say you are of the holiday experiences on offer in the following Australian destinations? Which of the following Australian destinations are you actively planning to visit for a holiday in the next 2 years? All percentages expressed as % of those considering visiting Australia in the next 4 years 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

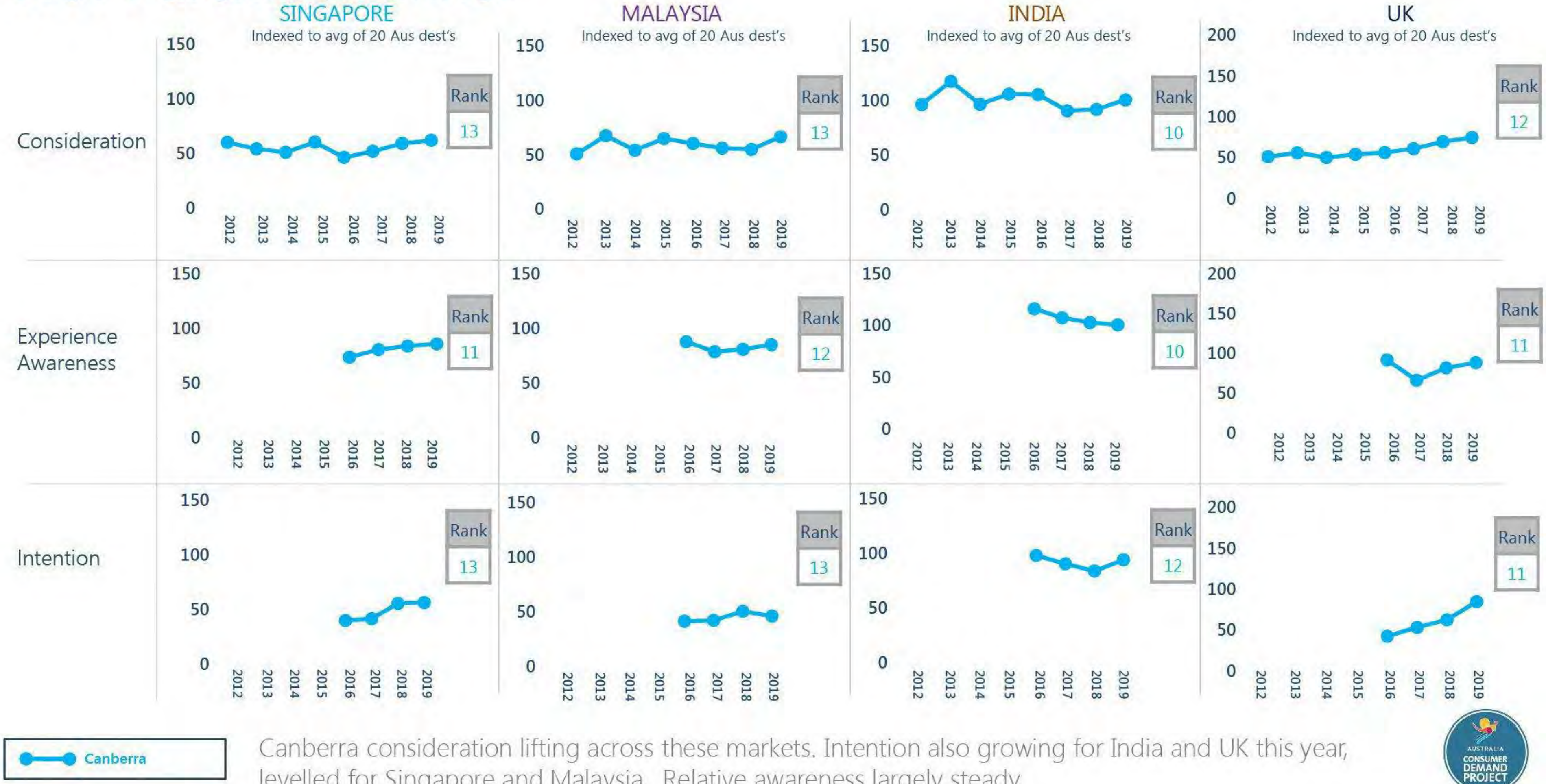
AUSTRALIA CONSUMER DEMAND PROJECT

Purchase Funnel Index – 11 market aggregate

When indexed against all Aus regions, Canberra is up for consideration and intention this year, after a decline in the recent years. Awareness is moving largely in line with other Aus destinations.

Questions Which of the following Australian destinations are you considering travelling to in the next 4 years? How aware would you say you are of the holiday experiences on offer in the following Australian destinations? Which of the following Australian destinations are you actively planning to visit for a holiday in the next 2 years? All percentages expressed as % of those considering visiting Australia in the next 4 years 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

ACT Purchase Funnel



Canberra consideration lifting across these markets. Intention also growing for India and UK this year, levelled for Singapore and Malaysia. Relative awareness largely steady.

ACT Purchase Funnel

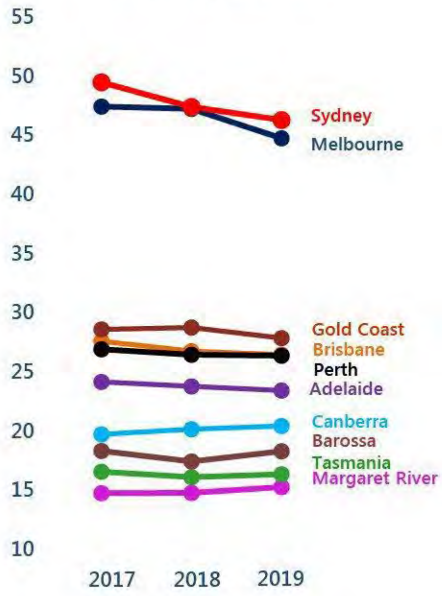
Canberra

Canberra gaining for consideration and intention from China. Largely steady from Korea and Indonesia but Canberra ranks much more highly than average through the purchase funnel for all of these markets.

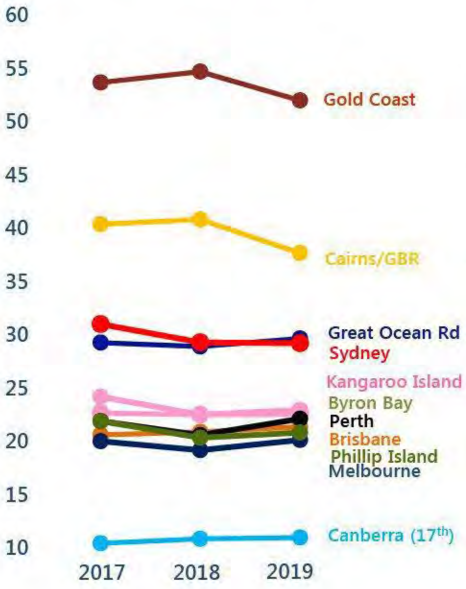
Aus Destination Associations

Association of Aus destinations with key important factors is largely steady. Canberra most highly associated with history and heritage at 5th, ranks 7th for association with good food and wine. Lower ranked on other associations.

Association with Good F&W
% of Aus considerers –
11 market aggregate

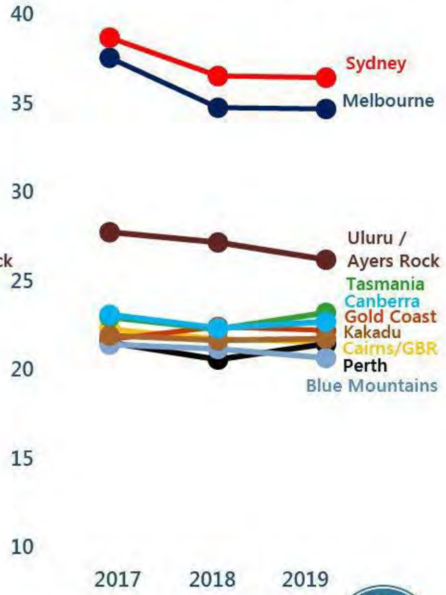


Association with Aquatic & Coastal
% of Aus considerers –
11 market aggregate



Association with Nature & Wildlife
% of Aus considerers –
11 market aggregate

Association with History & Heritage
% of Aus considerers –
11 market aggregate



Questions: Which of these Australian destinations do you associate with [factor]? 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Australian Destination Association: Food & Wine

Sydney and Melbourne clearly ahead for association with Good F&W. Canberra 7th, strongest in India, just outside the top 5.

Top 1
Top 5

Destination	% of Aus considerers in 11 international countries	Association by country (%): SING	MALAY	INDIA	UK
Sydney	46	40	49	47	49
Melbourne	45	45	49	47	39
Gold Coast	28	26	33	34	28
Brisbane	26	22	27	37	27
Perth	26	35	40	30	32
Adelaide	23	17	25	32	28
Canberra	20	14	18	32	20
The Barossa	18	11	14	21	17
Tasmania/Hobart	16	20	16	25	12
Margaret River	15	20	13	21	16
Cairns / Great Barrier Reef	15	12	9	21	17
Blue Mountains	14	14	11	21	16
Great Ocean Road	13	15	12	28	13
Byron Bay	13	10	10	20	20
Darwin	12	8	10	20	17
Kangaroo Island	12	8	11	24	10
Phillip Island	10	8	7	21	10
Broome/Kimberley region	10	8	8	18	10
Kakadu National Park	8	7	6	16	7
Uluru/Ayers Rock	8	5	5	17	13
None of the above	10	9	7	3	19

Questions: Which of these Australian destinations do you associate with [factor]? 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Australian Destination Association: History & Heritage

Sydney leads for association with History & heritage, ahead of Melbourne and Uluru. Canberra is 5th and in the top 5 for India.

Top 1
Top 5

Destination	% of Aus considerers in 11 international countries	SING	MALAY	INDIA	UK
Sydney	36	29	29	45	43
Melbourne	35	31	36	40	35
Uluru/Ayers Rock	26	21	24	22	41
Tasmania/Hobart	23	26	22	23	24
Canberra	23	16	20	31	24
Gold Coast	22	21	25	34	26
Kakadu National Park	22	21	25	25	22
Cairns / Great Barrier Reef	22	22	17	27	28
Perth	21	21	26	30	24
Blue Mountains	21	21	24	28	26
Brisbane	20	17	21	30	22
Kangaroo Island	19	16	20	34	23
Darwin	19	16	17	21	28
Adelaide	18	16	17	28	21
Great Ocean Road	18	18	20	29	20
Phillip Island	14	11	15	26	14
Margaret River	14	16	13	23	15
Broome/Kimberley region	13	10	11	18	17
The Barossa	12	10	12	18	13
Byron Bay	12	9	11	20	19
None of the above	11	11	8	3	13

Association by country (%)

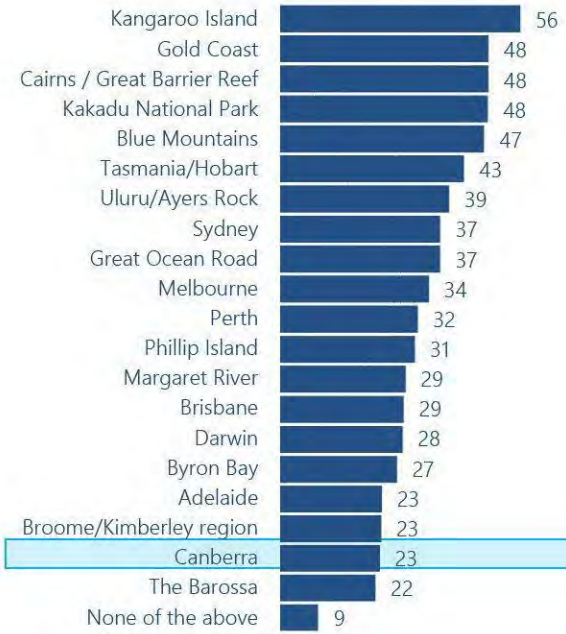
Questions: Which of these Australian destinations do you associate with [factor]? 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Australian Destination Association: Nature & Wildlife

Kangaroo Island leads for association with nature and wildlife. Canberra ranks 19th and behind other capital cities.

Top 1
Top 5

% of Aus considerers in 11 international countries



Association by country (%)

Destination	% of Aus considerers in 11 international countries	SING	MALAY	INDIA	UK
Kangaroo Island	56	50	62	61	57
Gold Coast	48	41	56	54	56
Cairns / Great Barrier Reef	48	48	40	43	62
Kakadu National Park	48	39	52	50	51
Blue Mountains	47	48	46	57	58
Tasmania/Hobart	43	48	47	37	45
Uluru/Ayers Rock	39	32	37	35	57
Sydney	37	26	37	52	39
Great Ocean Road	37	40	38	46	43
Melbourne	34	32	37	47	35
Perth	32	37	42	37	37
Phillip Island	31	35	34	40	32
Margaret River	29	30	30	38	31
Brisbane	29	22	25	45	29
Darwin	28	25	22	35	38
Byron Bay	27	23	23	34	42
Adelaide	23	20	21	35	26
Broome/Kimberley region	23	21	21	31	25
Canberra	23	18	17	39	27
The Barossa	22	17	19	34	26
None of the above	9	9	5	3	13

Questions: Which of these Australian destinations do you associate with [factor]? 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

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Aus Destination NPS: 2017 - 2019

More remote destinations are generally more likely to be recommended. Canberra remains the least advocated Australian destination amongst those who have visited, strongest with Indian travellers.

Top 1
Top 5

NPS for each region for visitors from 11 international countries
Aus destinations ever visited

NPS for each region by country

	11 countries	SING	MALAY	INDIA	UK
Kakadu National Park	49	6	72	65	36
Kangaroo Island	45	21	51	67	25
Uluru/Ayers Rock	43	24	n/a	76	35
Tasmania/Hobart	40	31	60	61	41
Broome/Kimberley region	40	5	44	68	29
Cairns / Great Barrier Reef	39	24	56	71	52
Great Ocean Road	39	30	49	72	39
Margaret River	32	15	39	66	30
Melbourne	32	16	45	63	29
Phillip Island	29	16	40	69	28
The Barossa	28	8	47	69	29
Gold Coast	27	12	42	67	34
Blue Mountains	24	11	37	75	38
Sydney	24	5	37	70	40
Byron Bay	24	29	51	70	27
Perth	21	0	33	64	39
Darwin	20	-21	22	59	17
Adelaide	18	-11	27	60	10
Brisbane	14	-2	33	64	19
Canberra	-1	-22	12	66	-16

NPS not shown where sample < 50

Questions: On a scale of 0 to 10, where 0 is not at all likely and 10 is extremely likely, how likely are you to recommend the following Australian destination(s) as holiday destination(s) to a family member, friend or colleague?
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

International concept test: Sample & Method

- The concept test was completed by 19,200 respondents across 12 key international markets
- 20 Australian experiences and 20 international experiences were tested
- Each respondent viewed 8 randomised experiences in total (4 Australian & 4 international), answering questions on each
  - Note, international respondents did not see experiences in their home country
- After seeing the 8 experiences, respondents were asked several summary metrics

List of experiences

	Australian experiences
TAS	Devils at Cradle
TAS	Shene Estate
ACT	Canberra Exclusive Experiences
ACT	Winter Experience in Canberra
NSW	Spectacular Sydney and Surrounds
NSW	Be Captivated by New South Wales
NT	Nitmiluk Experience
NT	Tropical Light Exhibition in Darwin
QLD	Great Barrier Reef Ecotour
QLD	Spicers Scenic Rim Trail tour
SA	Adelaide Hills Luxury Wildlife & Wellness Retreat
SA	Memory Cove Lodge on the Eyre Peninsula
VIC	The 'Big Five' Australian Animal Experience
VIC	Wilsons Promontory
WA	Koomal Dreaming Day Tour
WA	Shark Bay World Heritage Area Drive
TA	Emirates One&Only Wolgan Valley
TA	Hamilton Island Resort Experience
TA	Peninsula Hot Springs
TA	The Ghan Expedition Rail Journey

International experiences	
Washington Buildings and Monuments Tour	USA
Exploring Arashiyama on the Kyoto Trail	Japan
Walking in Banff National Park	Canada
Amalfi Coast Drive	Italy
Kohala Waterfalls Adventure	Hawaii
Hippo & Croc Boat Safari	S Africa
Baros Reef Experience	Maldives
Whale Watching Tour in Kaikoura	NZ
Château Pape Clément Wine Tasting	France
Day Safari in Kruger National Park	S Africa
Milford Track Guided Walk	NZ
Canyoning in Interlaken	Switz.
Horseback Riding Tour through the Chianti Vineyards	Italy
Grand Canyon Scenic Helicopter Flight	USA
Cycling Day Trip around Koh Tao	Thailand
Sunset Picnic at Coronado Beach	USA
Eiffel Tower Climbing Tour	France
Swimming with Manta Rays in Fiji	Fiji
Baby Panda Experience at Dujiangyan Panda Base	China
Walking Tour of the Pyramids of Giza	Egypt

ACT Experiences

Canberra Exclusive Experiences, Australian Capital Territory, Australia

Discover Australia's most important treasures via a range of exclusive, behind the scenes tours and rare experiences in Canberra's world-class galleries and museums.



Australian Parliament House is the heart of Australian democracy. Join an exclusive tour, where guests can view the Parliamentary Art and Furniture Collections and other off-limits spaces, while your guide unveils stories about the biggest decisions in Australian politics. Afterwards, enjoy a chef-prepared High Tea in the parliamentary tea rooms, an exclusive dining experience usually reserved for visiting dignitaries.

The Australian War Memorial is one of the most significant military museums in the world. Join an experienced guide for a private tour of the Commemorative Courtyard, listening to the stories behind the thousands of names on the Australian Roll of Honour. Next, explore the unique collection of rare and beautiful letters, maps, photographs and diaries— many over 100 years old.



The National Gallery of Australia is the nation's premier art gallery. In an exclusive after-hours tour, an expert guide will reveal the stories behind six renowned artworks. Afterwards, a private dining room overlooking Lake Burley Griffin will be the scene for a specially curated *Feast of Icons* dinner where each course is inspired by an artwork.

Winter Experience in Canberra, Australian Capital Territory, Australia

During winter, bright blue skies provide a vivid backdrop for Australia's capital city, which offers cosy food festivals, art and cultural exhibitions and outdoor activities.



Visit the annual Truffle Festival and discover the delights of the black Périgord truffle, which grows prolifically in the countryside surrounding Canberra from June to August. Join an adventurous truffle hunt, or enjoy a truffle inspired degustation dinner. Indulge at Pialligo Estate, the paddock-to-plate restaurant provides the perfect setting for a long lunch. Taste delicious roasted meats, complemented by boutique cool climate wines from more than 30 local vineyards. For coffee lovers, ONA Coffee is a must-visit. Enjoy a coffee roasting and tasting session, or simply warm up with a cappuccino made by award winning baristas.

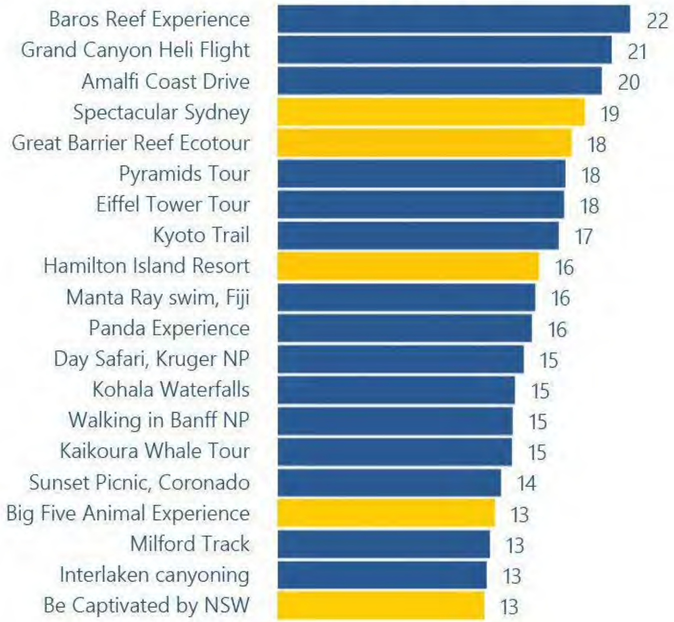


Sunny skies and cool, crisp days are perfect for getting active outdoors. Cycle or walk around Lake Burley Griffin, or visit Tidbinbilla Nature Park just 45 minutes from the city centre to see kangaroos, emus and koalas in their natural setting. There's also plenty to do indoors, with a range of museums and galleries like the National Gallery of Australia showcasing different aspects of Australia's art and history as well as blockbuster art exhibitions such as *Monet: Impression Sunrise*.

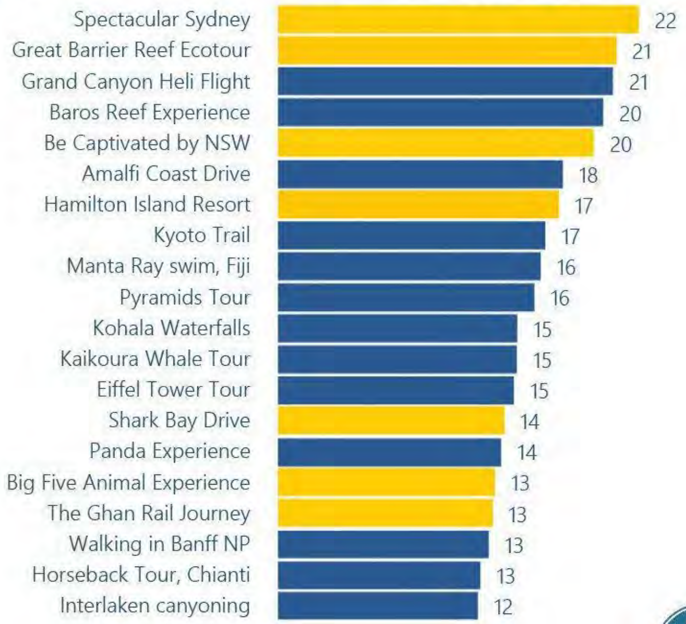
Most preferred experience overall (#1-20)

International experiences generally most preferred by total travellers. Spectacular Sydney the most appealing Aus experience, ranked 4th overall by total travellers and #1 for HVTs, followed by GBR Ecotour.

Experience Preference (#1-20)
Total Travellers – 11 Market Aggregate



Experience Preference (#1-20)
High Value Travellers – 11 Market Aggregate



Questions: After seeing information on these eight holiday experiences, which would you prefer to engage in overall? (Please rank all eight experiences, where 1 = the most preferred and 8 = the least preferred).
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

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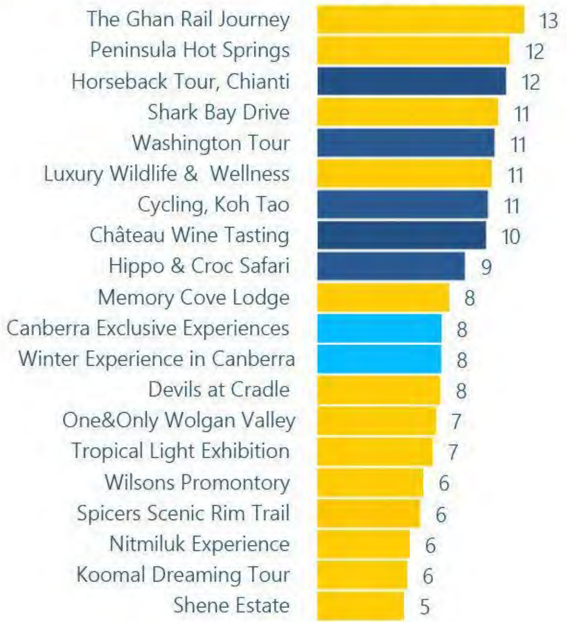
Most preferred experience overall (#21-40)

Most Australian experiences in the bottom 20 overall. Amongst Australian experiences, Exclusive experiences is 11th overall and Winter experiences 12th. Winter experience ranked a little better with HVTs at #10 compared to Canberra Exclusive experiences at #12.

Experience Preference (#21-40)
Total Travellers – 11 Market Aggregate



Experience Preference (#21-40)
High Value Travellers – 11 Market Aggregate

Questions: After seeing information on these eight holiday experiences, which would you prefer to engage in overall? (Please rank all eight experiences, where 1 = the most preferred and 8 = the least preferred).
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Most preferred experience overall (#1-20)

#1 experiences vary widely across markets. Majority of the markets opt for an international experience as their most preferred overall. Spectacular Sydney and GBR Ecotour among the top preferred Aus experiences.

% of total travellers (11 market agg) who saw each experience

Ranked experience #1 (%)

Experience	% saw	INDO	NZ	SING	MALAY	KOR	JAP	CHINA	INDIA	GER	USA	UK	HK	EAST	WEST
Baros Reef Experience	22	26	26	21	23	20	19	27	19	25	16	20	19	22	21
Grand Canyon Heli Flight	21	16	16	23	16	29	25	21	19	20	n/a	23	15	20	19
Amalfi Coast Drive	20	17	27	16	14	22	30	13	13	24	25	19	12	17	24
Spectacular Sydney	19	21	15	17	18	22	18	19	19	16	23	21	17	19	19
Great Barrier Reef Ecotour	18	15	18	17	14	12	20	29	17	16	22	21	23	18	19
Pyramids Tour	18	17	24	22	21	13	22	12	15	14	20	14	18	18	18
Eiffel Tower Tour	18	25	18	16	23	18	15	19	21	15	17	10	17	19	15
Kyoto Trail	17	34	16	25	31	8	n/a	13	12	11	12	13	38	23	13
Hamilton Island Resort	16	13	26	12	14	20	19	11	11	18	14	18	15	14	19
Manta Ray swim, Fiji	16	14	14	16	14	16	20	20	14	14	16	18	13	16	16
Panda Experience	16	17	18	18	17	13	11	n/a	13	13	19	19	17	15	17
Day Safari, Kruger NP	15	11	18	13	14	16	12	11	18	27	16	14	15	14	19
Kohala Waterfalls	15	14	13	10	15	14	13	18	16	18	n/a	17	8	13	16
Walking in Banff NP	15	13	17	14	14	12	14	9	13	18	18	18	12	13	18
Kaikoura Whale Tour	15	12	n/a	15	20	13	14	13	13	13	13	18	21	15	15
Sunset Picnic, Coronado	14	11	14	10	12	19	14	15	13	17	n/a	15	7	13	15
Big Five Animal Experience	13	11	8	18	16	9	13	16	14	16	14	15	17	14	13
Milford Track	13	15	n/a	22	16	13	12	9	10	14	9	13	13	14	12
Interlaken canyoning	13	18	12	16	14	13	13	13	18	9	10	8	13	15	10
Be Captivated by NSW	13	12	11	15	15	15	7	13	12	13	15	14	12	13	13

Top 1
Top 5

Questions: After seeing information on these eight holiday experiences, which would you prefer to engage in overall? (Please rank all eight experiences, where 1 = the most preferred and 8 = the least preferred)
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK. Eastern markets include: Indonesia, Singapore, Malaysia, South Korea, Japan, China, India and Hong Kong. Western Markets include NZ, Germany, UK and USA

Most preferred experience overall (#21-40)

Majority of the Aus experiences in the bottom 20. Canberra Exclusives experiences most likely to be chosen by India and Korea. Winter experience strongest for Indonesia and Singapore.

% of total travellers (11 market agg) who saw each experience

Ranked experience #1 (%)

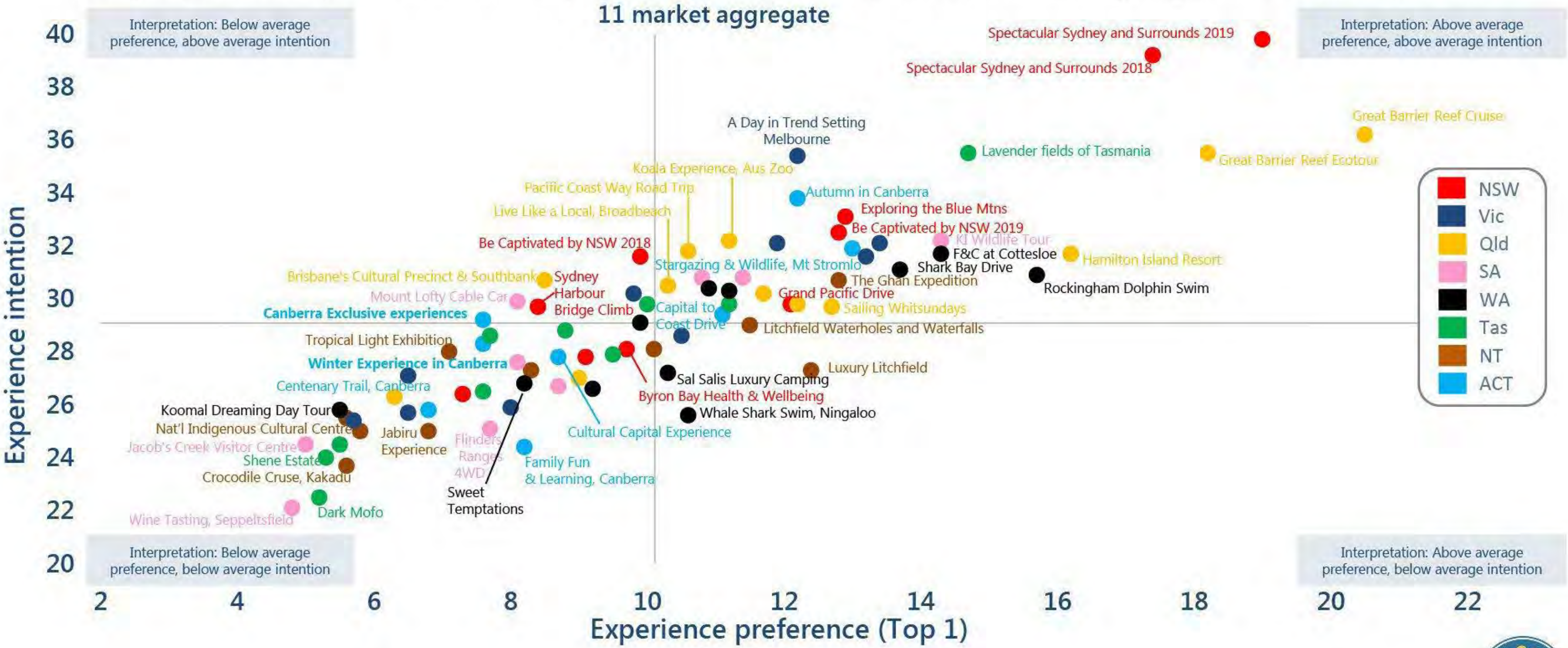
Experience	% saw	INDO	NZ	SING	MALAY	KOR	JAP	CHINA	INDIA	GER	USA	UK	HK	EAST	WEST
The Ghan Rail Journey	13	7	17	8	10	16	14	12	12	18	11	16	12	11	15
Peninsula Hot Springs	12	13	10	13	11	18	12	13	13	6	12	9	16	14	9
Horseback Tour, Chianti	12	17	10	14	7	9	16	7	10	11	16	9	9	11	12
Shark Bay Drive	11	14	8	10	11	14	9	10	12	11	9	14	12	12	11
Washington Tour	11	9	11	8	7	14	16	10	15	8	n/a	14	8	11	11
Luxury Wildlife & Wellness	11	10	10	12	11	11	9	11	12	11	11	12	15	11	11
Cycling, Koh Tao	11	11	10	11	16	8	14	11	13	10	9	4	11	12	8
Château Wine Tasting	10	7	11	8	8	15	10	11	8	13	14	8	11	10	12
Hippo & Croc Safari	9	8	6	8	8	8	11	8	12	11	8	12	7	9	9
Memory Cove Lodge	8	6	9	8	9	5	8	10	4	13	8	9	10	8	10
Canberra Exclusive Experiences	8	7	4	7	4	12	10	9	11	7	6	7	6	8	6
Winter Experience in Canberra	8	12	4	11	9	7	6	8	12	5	7	4	8	9	5
Devils at Cradle	8	6	8	10	7	5	5	11	6	9	8	7	9	7	8
One&Only Wolgan Valley	7	6	10	4	7	8	4	11	13	3	7	6	7	8	6
Tropical Light Exhibition	7	9	5	5	8	6	7	8	9	7	6	8	5	7	6
Wilsons Promontory	7	5	4	6	7	5	6	9	6	7	7	10	7	6	7
Spicers Scenic Rim Trail	6	8	4	7	5	4	4	10	8	6	7	5	6	7	6
Nitmiluk Experience	6	6	6	7	5	5	3	6	8	5	5	6	5	6	6
Koomal Dreaming Tour	6	3	6	5	5	5	3	6	8	4	7	7	8	6	6
Shene Estate	5	4	4	4	4	5	8	6	8	3	6	5	6	6	5

Top 1
Top 5

Questions: After seeing information on these eight holiday experiences, which would you prefer to engage in overall? (Please rank all eight experiences, where 1 = the most preferred and 8 = the least preferred)
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK. Eastern markets include: Indonesia, Singapore, Malaysia, South Korea, Japan, China, India and Hong Kong. Western Markets include NZ, Germany, UK and USA

Aus experiences - preference vs intention: CDP 2016 - 2019

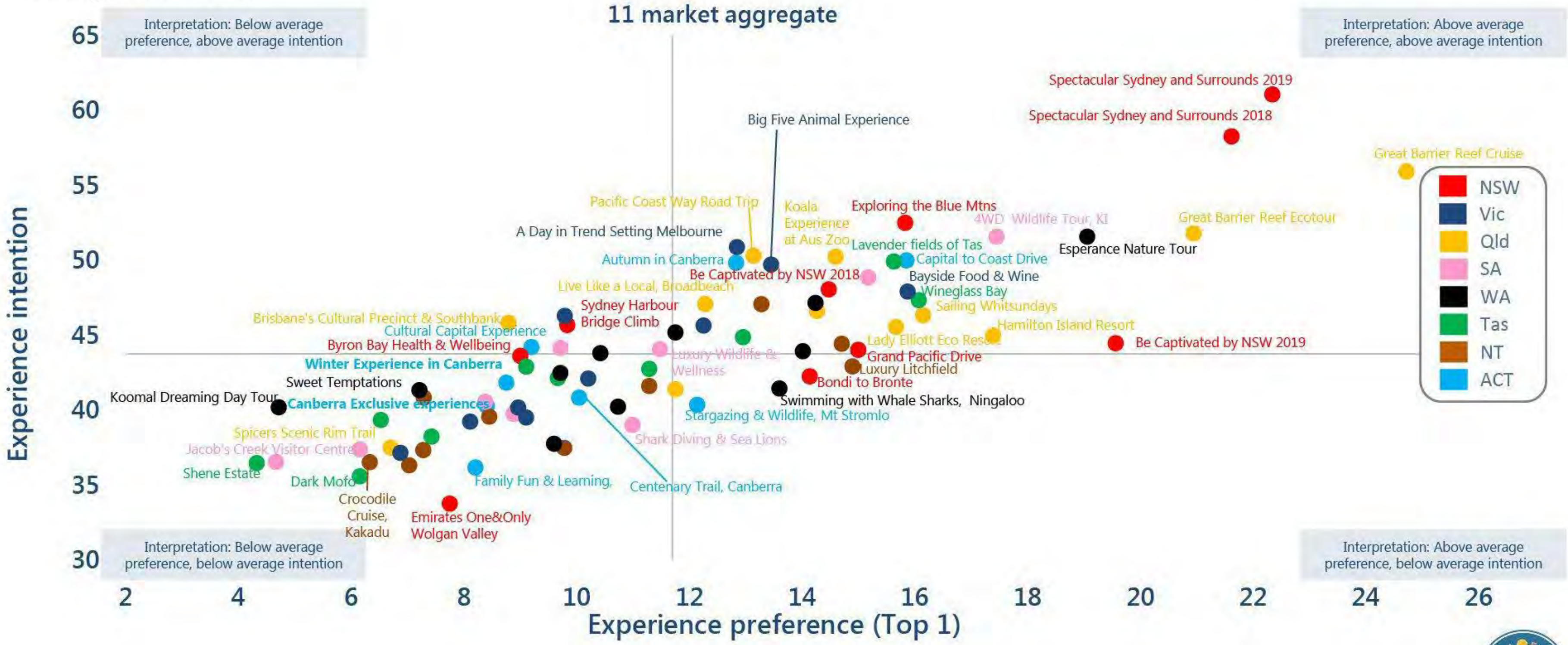
Canberra Exclusive experiences and Winter experience both below average for preference. Exclusive experiences slightly higher intention just near average. Qld & NSW experiences lead with only Autumn in Canberra the top ACT experience. Stargazing at Mt Stromlo also prominent.



Questions: After seeing information on these eight holiday experiences, which would you prefer to engage in overall? Having seen this information, how likely are you to engage in these experiences in the next two years?
Data points represent the aggregate of 11 markets for each experience. 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Experience preference vs intention - HVTs: CDP 2016 - 2019

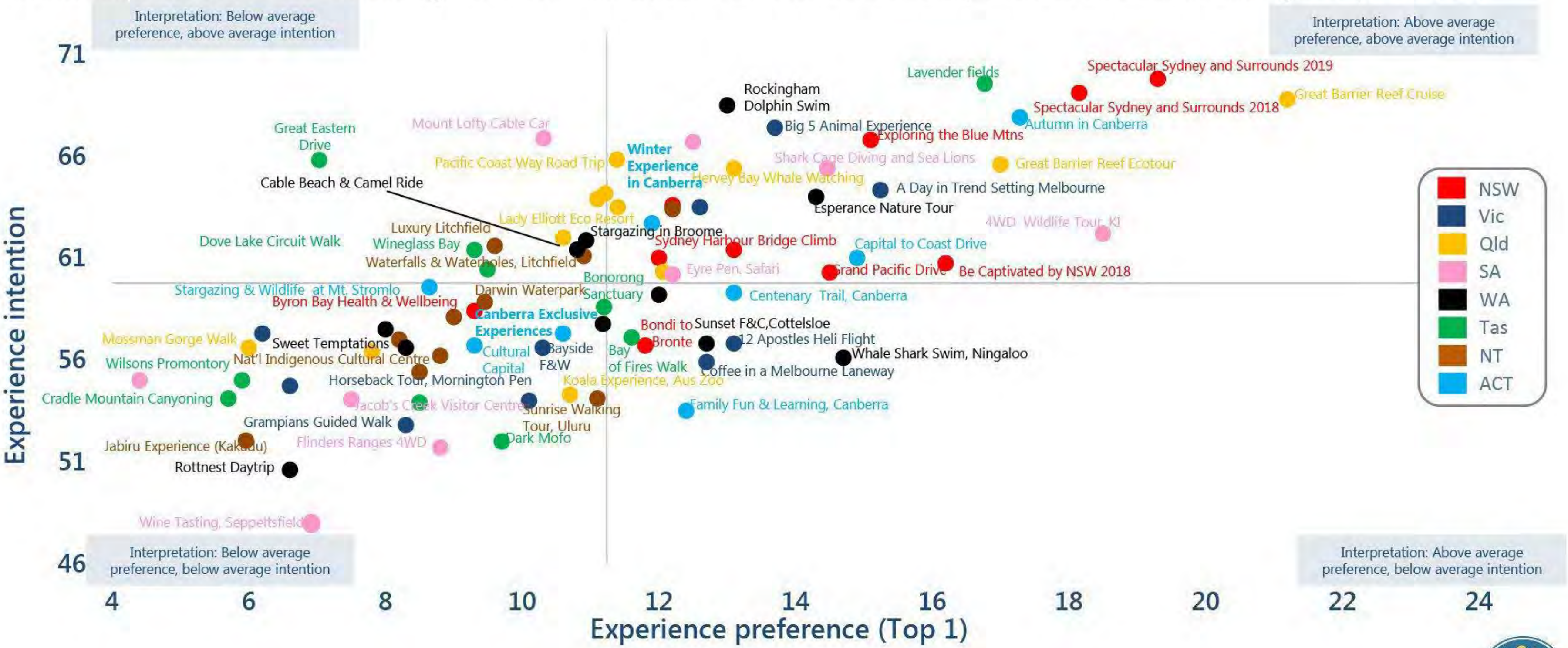
With HVTs, a similar pattern is observed with both 2019 ACT experiences below average for preference. Capital to Coast drive stronger with HVTs.



Questions: After seeing information on these eight holiday experiences, which would you prefer to engage in overall? Having seen this information, how likely are you to engage in these experiences in the next two years?
Data points represent the aggregate of 11 markets for each experience. 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Experience preference vs intention - India: CDP 2016 - 2019

Several ACT experiences preferred and intended by Indian travellers, Autumn in Canberra the most preferred of all while Winter Experience also above average on both metrics. Several other Canberra experiences also above average for preference.



Questions: After seeing information on these eight holiday experiences, which would you prefer to engage in overall? Having seen this information, how likely are you to engage in these experiences in the next two years?

Experience preference vs intention - Singapore: CDP 2016 - 2019

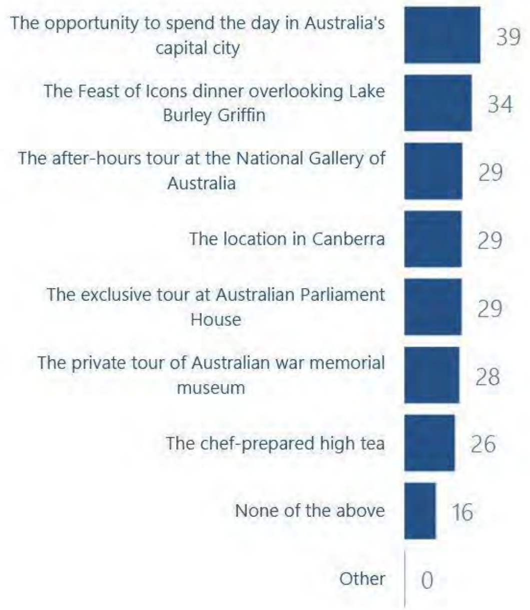
With Singapore, Lavender fields of Tasmania a clear leader in terms of preference and intention. Stargazing & Wildlife at Mt Stromlo the most preferred and intended ACT experience followed by Autumn in Canberra. Canberra Winter Experience of 2019 is also above average for preference.

Questions: After seeing information on these eight holiday experiences, which would you prefer to engage in overall? Having seen this information, how likely are you to engage in these experiences in the next two years?

Canberra Exclusive Experiences – Appealing Elements

The opportunity to spend the day in Australia's capital appeals most across markets. Feat of icons dinner also prominent, though a little lower for India. The national gallery after hours tour also prominent for UK, India and Malaysia. Parliament House and War memorial also appeal across these markets.

11 market aggregate – Total travellers



Appealing elements by country (%)

SING	MALAY	INDIA	UK
34	43	44	38
30	37	34	28
25	30	41	29
22	28	40	33
29	38	38	30
27	33	41	28
27	29	27	24
15	7	10	25
0	0	0	0

Top 1
Top 5

Questions: From the information you've read on [experience], which elements do you find the most appealing? 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Reasons Canberra Exclusive Experiences preferred

<u>The opportunity for exclusive experiences in Australia's capital</u>

- *I really like Australia and Canberra offers really an exclusive and different experience than the rest of the places (India)*
- *A well-planned city with exclusive places to visit and enjoy (India)*
- *Good to explore in Australia's capital (India)*
- *A luxury tour with all the right components for a great experience (UK)*
- *I like the idea of private tours around Canberra and the chance to eat at some high-class restaurants in the Australian capital (UK)*
- *The chance to see aspects not open to everyone (UK)*

<u>A different and new Australian experience</u>

- *I always wanted to see Canberra and didn't have chance to do it during my last holidays in Australia (UK)*
- *It is an experience which would exceed my expectations and contain many an adventure I have dreamed about. (UK)*
- *It's a part of the world that I've never explored (Singapore)*
- *Sounds brilliant and have not been to Canberra (UK)*
- *Very different experience (Singapore)*
- *The experience to be had is nowhere else (Malaysia)*

<u>The historical element attached to the city appeals</u>

- *Love the historical city (Malaysia)*
- *Historical connections to the British empire/ Commonwealth and shared history. (UK)*
- *The history of how Canberra became the capital of Australia and the seat of government (UK)*

Winter Exclusive Experience – Appealing Elements

Experiencing Australian Wildlife at Tidbinbilla NP clearly the top element, followed by outdoor activities. Pialligo Estate also appeals and prominent for UK, Singapore and Malaysia. Coffee experience appeals to India, Malaysia and Singapore.

11 market aggregate – Total travellers

Appealing elements by country (%)

SING	MALAY	INDIA	UK
47	57	52	49
38	41	48	36
30	33	32	27
32	38	40	21
24	27	39	28
29	35	36	21
23	28	45	27
12	4	7	21
0	0	0	0

Top 1
Top 5

Questions: From the information you've read on [experience], which elements do you find the most appealing? 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Reasons Winter Experience in Canberra preferred

<u>The opportunity to see wildlife is a major factor</u>

- *Love to see wildlife (Malaysia)*
- *Would like to see kangaroos (India)*
- *Seeing Kangaroos and koalas in close range is exciting (Malaysia)*
- *To have the outdoor experience of local wildlife and outstanding natural beauty (UK)*

<u>Appeals to outdoors enthusiasts</u>

- *I love the outdoors and the walks etc sound very good (UK)*
- *As I love nature, I also love to appreciate a good coffee. After all the trip horseback riding and all a good coffee with a beautiful backdrop of nature is a pure bliss. (Singapore)*

<u>Eastern countries visitors keen to experience a 'cold' winter</u>

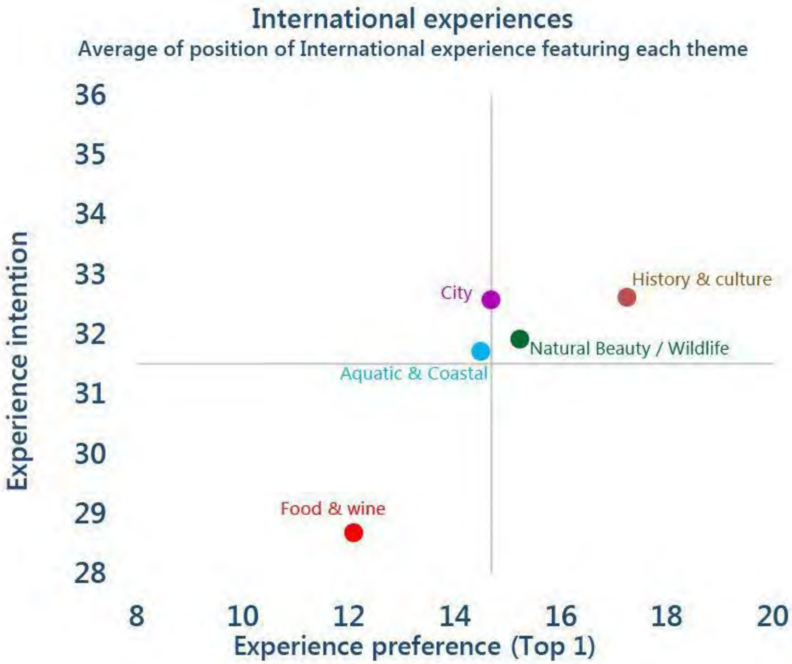
- *It's very hard to experience winter in my country (Malaysia)*
- *Able to enjoy winter since there are no winter in my country (Singapore)*
- *I love winter season (India)*
- *Never experienced winter before so, having the experience catered for winter will give me a memorable time. (Singapore)*

<u>The annual Truffle Festival appeals to some</u>

- *Lover of truffles and sounds like a wholesome experience (Malaysia)*

Themes: Experience preference vs intention – 2016 - 2019

Internationally, experiences centred around history & culture are most preferred. However, travellers are attracted to different experiences in Australia with aquatic & coastal and nature & wildlife most preferred. City experiences have lower preference but higher intention (in line with visitation).



Questions: After seeing information on these eight holiday experiences, which would you prefer to engage in overall? Having seen this information, how likely are you to engage in these experiences in the next two years? Data points represent the average of 11 markets.

Key indications – Core findings

- Safety and nature & wildlife remain the most important holiday importance factors
  - World class nature and wildlife down somewhat in 2019, though still the most important factor in many key markets and clearly most important with High Value Travellers
- Australia's position is easing on most brand and purchase funnel metrics
  - Australia remains most desired but Japan now level for consideration and moved ahead for intention and still gaining competitively
- ACT ranks 9th for consideration and intention and 7th for experience awareness
  - Competitive status is generally improving in 2019 after falling in the last couple of years
  - Improving across a number of markets this year, particularly India, UK and China
    - Most highly ranked through the purchase funnel for China, Korea and Indonesia
- ACT most strongly associated with history and heritage followed by good food and wine
  - Ranks 5th and 7th for these associations among Australian destinations
  - Lower association with nature & wildlife relative to other cities

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Key indications – Concept test

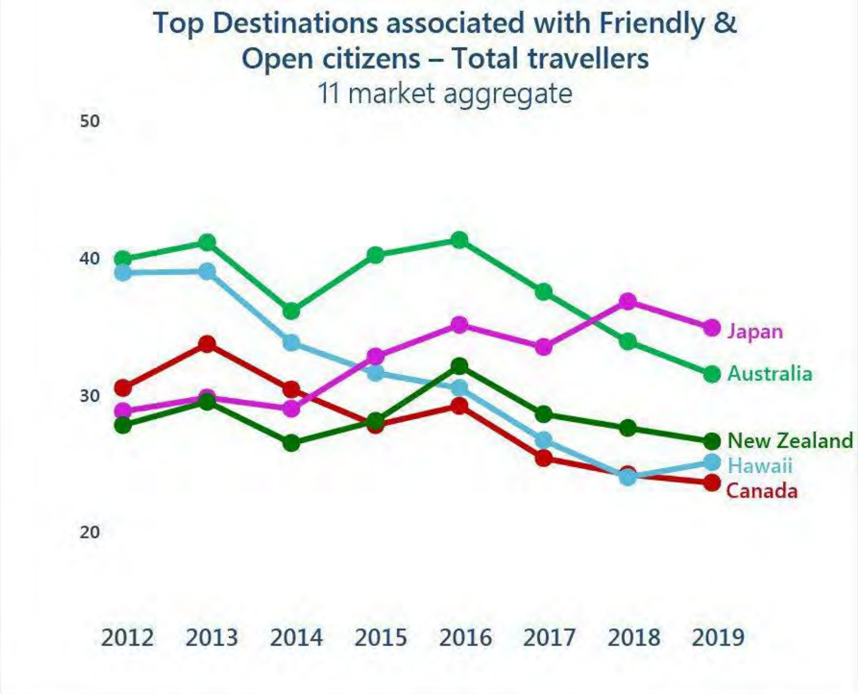
- Australian experiences featuring Aquatic & Coastal and Nature & Wildlife experiences have been most preferred over the four years of testing
  - City experiences generally have higher intention
- By contrast international experiences featuring history and culture are clearly most preferred
- Of the 2019 experiences, Canberra Exclusive Experiences and Winter in Canberra Experience ranked 11th and 12th respectively of the 20 Australian experiences
- Canberra Exclusive Experiences was most likely to be preferred by India and Korea
  - The opportunity to engage with exclusive experiences in Australia's capital appeals most
- The Winter Experience in Canberra was strongest in India, Indonesia and Singapore
  - Wildlife and nature elements appealed most strongly, while the concept of a cold winter was an appealing novelty to a number of Eastern markets
- Over the 4 years of testing, Canberra experiences and elements which feature nature & wildlife have generally appealed most
  - The most successful ACT experiences been Autumn in Canberra, Capital to Coast Drive and Stargazing & Wildlife at Mt Stromlo

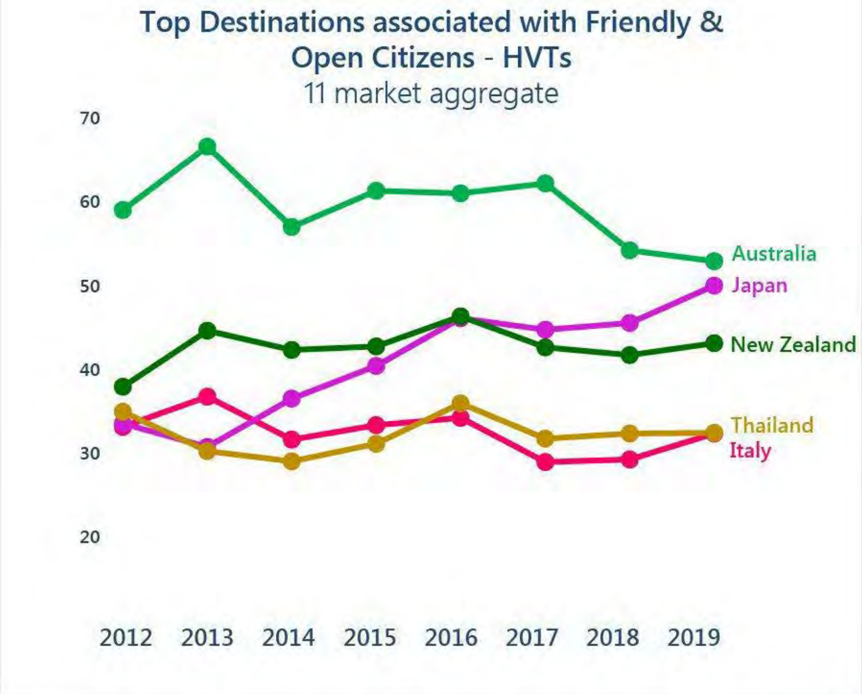
Appendix

- Core findings for international markets
  - Destination associations
  - Australian most desirable destinations
  - Purchase funnel by market
  - Australian destination associations by market
  - Planning and booking
- Concept test
  - Experience summaries

Destinations associated with Friendly & Open Citizens

Australia's association with Friendly & Open Citizens falling over the years, now 2nd dipping below Japan. Hawaii gaining this year. Australia #1 amongst HVTs, however Japan gaining strongly and reducing the gap.





Questions: You said [factor] is important to you. Which of these destinations do you associate with [factor]?
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Australia's most desirable destinations

Sydney clearly the most desirable destination among the 11 market aggregate, Melbourne vying with GC for #2. Canberra amongst the top 10 for Malaysia and at #6 for India.

Singapore

Top 10 destinations (open-ended response)

Destination		2018
Sydney	12	14
Melbourne	12	13
Gold Coast	9	9
Perth	7	7
Tasmania	3	5
Brisbane	2	1
Great Barrier Reef	2	3
Adelaide	1	0
Darwin	1	0
Uluru/Ayers Rock	1	0

Malaysia

Top 10 destinations (open-ended response)

Destination		2018
Sydney	16	17
Perth	12	12
Melbourne	11	15
Gold Coast	11	13
Tasmania	3	3
GBR	2	1
Brisbane	1	2
Queensland	1	1
Adelaide	1	1
Canberra	1	1

India

Top 10 destinations (open-ended response)

Destination		2018
Sydney	26	29
Melbourne	7	6
GBR	5	6
Queensland	2	2
Gold Coast	1	3
Canberra	1	1
Perth	1	1
Adelaide	1	1
Blue Mountains	1	1
Kangaroo Island	1	1

UK

Top 10 destinations (open-ended response)

Destination		2018
Sydney	29	29
Gold Coast	7	10
GBR	7	7
Melbourne	7	5
Perth	4	8
Brisbane	1	3
NT	1	1
Uluru/Ayers Rock	1	3
WA	1	1
NSW	1	1

Question: What do you consider to be the most desirable holiday destination in Australia? (open-ended response). Proportions expressed as a share of those considering visiting Australia.

Purchase funnel – Consideration of Aus destinations

Sydney most considered overall and ranked #1 across most markets followed by Melbourne. Canberra ranked #9 for 11 market aggregate, a little lower with these markets.

Destination	% of Aus considerers in 11 international countries	SING	MALAY	INDIA	UK
Sydney	52	42	53	57	49
Melbourne	44	46	55	37	32
Gold Coast	43	41	52	31	35
Perth	28	41	48	18	26
Brisbane	27	25	24	22	25
Cairns / Great Barrier Reef	26	27	18	33	32
Kangaroo Island	24	17	29	22	12
Blue Mountains	20	24	21	13	20
Canberra	20	13	16	14	15
Great Ocean Road	18	19	20	15	19
Tasmania/Hobart	18	25	24	14	13
Adelaide	18	20	22	13	21
Kakadu National Park	17	10	17	14	13
Uluru/Ayers Rock	14	10	11	15	23
Darwin	12	11	11	10	13
Phillip Island	12	11	13	8	7
Margaret River	12	15	11	7	10
Byron Bay	11	10	8	13	15
The Barossa	9	6	9	6	7
Broome/Kimberley region	8	5	6	6	8
Other	1	1	0	1	2
Not sure	7	6	5	14	14

Consideration by country (%)

Top 1
Top 5

Questions: Which of the following Australian destinations are you considering travelling to in the next 4 years? All percentages expressed as % of those considering visiting Australia in the next 4 years
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Purchase funnel – Aus destination experience awareness

Sydney is also the clear leader in terms of experience awareness and #1 for all markets. Canberra at #7 for 11 market aggregate just after Cairns/ GBR, strongest for India.

Destination	% of Aus considerers in 11 international countries	SING	MALAY	INDIA	UK
Sydney	55	51	55	72	58
Melbourne	47	49	51	68	44
Gold Coast	47	46	54	63	40
Brisbane	36	36	33	59	35
Perth	34	45	51	58	37
Cairns / Great Barrier Reef	33	32	27	55	42
Canberra	29	24	24	54	26
Blue Mountains	28	31	25	53	30
Great Ocean Road	27	31	27	56	24
Kangaroo Island	26	19	27	60	23
Adelaide	26	25	28	56	29
Tasmania/Hobart	24	29	25	47	23
Uluru/Ayers Rock	22	16	17	44	34
Kakadu National Park	21	14	18	50	20
Phillip Island	21	23	19	49	22
Darwin	21	18	18	47	25
Margaret River	20	23	18	50	19
Byron Bay	19	16	14	47	26
The Barossa	17	12	12	43	17
Broome/Kimberley region	16	13	12	43	16

Experience awareness by country (%)

Top 1
Top 5

Questions: How aware would you say you are of the holiday experiences on offer in the following Australian destinations? All percentages expressed as % of those considering visiting Australia in the next 4 years
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Purchase funnel – Intention for Aus destinations

Sydney the most intended Aus destination, #1 for India and UK, Melbourne stronger for Singapore, GC for Malaysia. Canberra amongst the top 10 for intention at #9.

Top 1
Top 5

	% of Aus considerers in 11 international countries	Intention by country (%): SING	MALAY	INDIA	UK
Sydney	31	23	27	44	21
Melbourne	24	25	32	35	15
Gold Coast	24	20	32	33	13
Perth	13	19	25	18	10
Brisbane	12	11	9	20	9
Cairns / Great Barrier Reef	12	9	8	19	12
Kangaroo Island	12	7	11	28	5
Blue Mountains	10	11	9	21	8
Canberra	9	5	5	18	7
Great Ocean Road	8	8	7	18	8
Adelaide	8	8	9	19	8
Tasmania/Hobart	8	11	10	11	4
Kakadu National Park	8	4	7	19	5
Uluru/Ayers Rock	6	3	5	11	8
Darwin	6	5	5	11	5
Phillip Island	5	5	4	12	3
Margaret River	5	7	4	13	6
Byron Bay	5	3	3	10	6
The Barossa	4	3	3	8	4
Broome/Kimberley region	4	3	3	9	4
Other	0	0	0	0	1
Not sure	17	13	9	32	26

Questions: Which of the following Australian destinations are you actively planning to visit for a holiday in the next 2 years? All percentages expressed as % of those considering visiting Australia in the next 4 years
11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

Australian Destination Association: Food & Wine

Sydney the most associated with good food and wine, #1 for Malaysia and UK followed by Melbourne, #1 for Singapore and India. Canberra ranked #7 overall and most likely to be associated by Indian travellers.

Top 1
Top 5

Destination	% of Aus considerers in 11 international countries	SING	MALAY	INDIA	UK
Sydney	46	40	49	47	49
Melbourne	45	45	49	47	39
Gold Coast	28	26	33	34	28
Brisbane	26	22	27	37	27
Perth	26	35	40	30	32
Adelaide	23	17	25	32	28
Canberra	20	14	18	32	20
The Barossa	18	11	14	21	17
Tasmania/Hobart	16	20	16	25	12
Margaret River	15	20	13	21	16
Cairns / Great Barrier Reef	15	12	9	21	17
Blue Mountains	14	14	11	21	16
Great Ocean Road	13	15	12	28	13
Byron Bay	13	10	10	20	20
Darwin	12	8	10	20	17
Kangaroo Island	12	8	11	24	10
Phillip Island	10	8	7	21	10
Broome/Kimberley region	10	8	8	18	10
Kakadu National Park	8	7	6	16	7
Uluru/Ayers Rock	8	5	5	17	13
None of the above	10	9	7	3	19

Association by country (%)

Questions: Which of these Australian destinations do you associate with [factor]? 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

AUSTRALIA CONSUMER DEMAND PROJECT