

# Australian Destination Association: Aquatic & Coastal



Gold Coast clearly #1 overall for association with aquatic & coastal experiences. Canberra ranked lower on this association at #17 overall.



% of Aus considerers in 11 international countries



Association by country (%)

	SING	MALAY	INDIA	UK
Gold Coast	53	61	44	59
Cairns / Great Barrier Reef	39	29	32	50
Great Ocean Road	33	34	35	29
Sydney	21	23	41	38
Kangaroo Island	18	22	30	24
Byron Bay	18	20	22	33
Perth	21	25	29	23
Brisbane	18	18	29	23
Phillip Island	19	25	29	17
Melbourne	17	23	35	21
Tasmania/Hobart	21	20	23	26
Margaret River	14	14	25	13
Blue Mountains	16	16	24	14
Adelaide	8	10	24	17
Kakadu National Park	8	11	24	11
Darwin	10	10	20	15
Canberra	7	11	25	11
Broome/Kimberley region	8	7	21	10
Uluru/Ayers Rock	8	8	17	10
The Barossa	6	6	19	10
None of the above	3	3	2	7

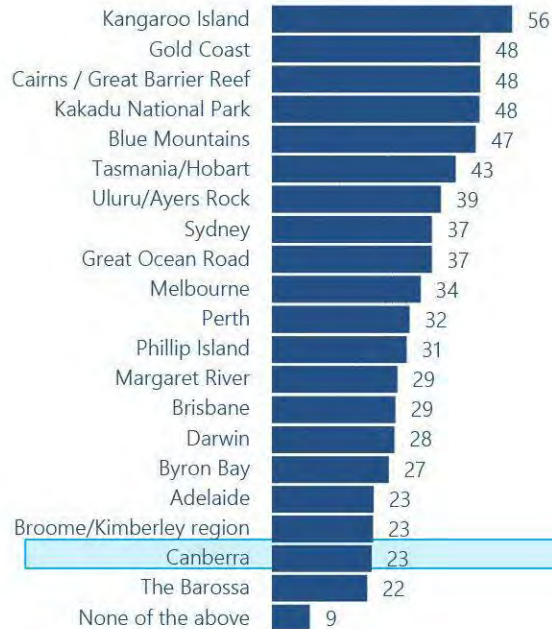


# Australian Destination Association: Nature & Wildlife

KI leads for association with Nature & Wildlife, followed by GC. Cairns, Kakadu and Blue Mountains make up the top 5. Canberra in the bottom 2 for this association, below other capital cities.



% of Aus considerers in 11 international countries



Association by country (%)

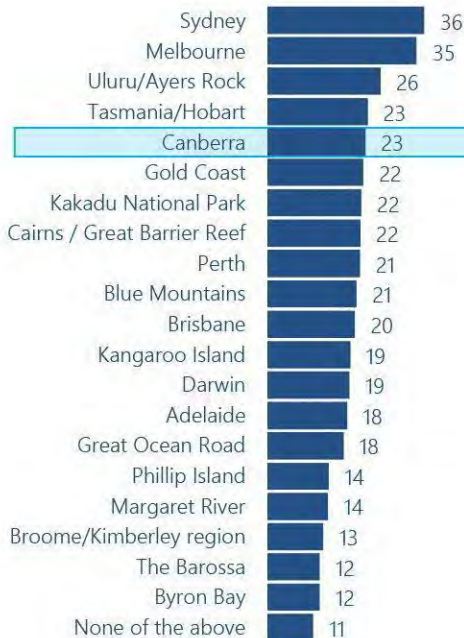
	SING	MALAY	INDIA	UK
	50	62	61	57
	41	56	54	56
	48	40	43	62
	39	52	50	51
	48	46	57	58
	48	47	37	45
	32	37	35	57
	26	37	52	39
	40	38	46	43
	32	37	47	35
	37	42	37	37
	35	34	40	32
	30	30	38	31
	22	25	45	29
	25	22	35	38
	23	23	34	42
	20	21	35	26
	21	21	31	25
	18	17	39	27
	17	19	34	26
	9	5	3	13



# Australian Destination Association: History & Heritage

Sydney leads for association with History & heritage in India and UK, Melbourne higher for Singapore and Malaysia. Canberra strongly associated with history and heritage, ranked #5 overall and in the top 5 for India.

% of Aus considerers in 11 international countries



Association by country (%)

	SING	MALAY	INDIA	UK
	29	29	45	43
	31	36	40	35
	21	24	22	41
	26	22	23	24
	16	20	31	24
	21	25	34	26
	21	25	25	22
	22	17	27	28
	21	26	30	24
	21	24	28	26
	17	21	30	22
	16	20	34	23
	16	17	21	28
	16	17	28	21
	18	20	29	20
	11	15	26	14
	16	13	23	15
	10	11	18	17
	10	12	18	13
	9	11	20	19
	11	8	3	13



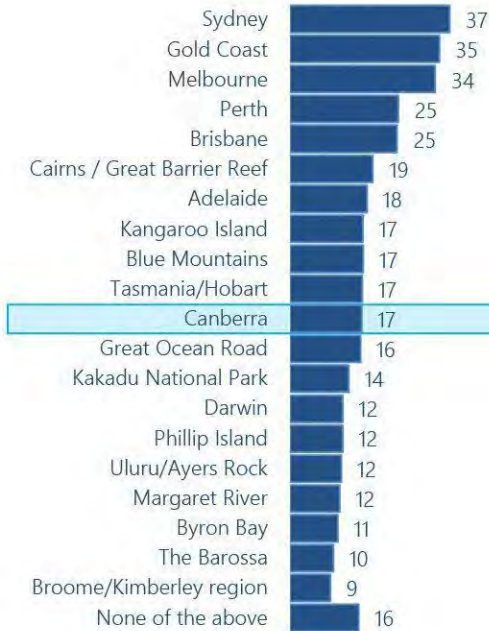


# Australian Destination Association: Value for money \$

Sydney also leads for association with value for money, ranking #1 across several markets. Though SE Asian markets have closer Perth ranked #1. Canberra ranked lower at #11 for association with value for money, most likely to be associated by Indian travellers.



% of Aus considerers in 11 international countries



Association by country (%)

	SING	MALAY	INDIA	UK
	28	36	46	33
	34	42	39	25
	34	40	38	22
	38	45	26	29
	20	24	34	23
	14	16	30	24
	14	20	29	25
	10	19	36	13
	14	17	28	16
	16	18	24	14
	9	12	30	15
	16	16	31	14
	8	14	27	14
	10	11	19	17
	11	11	22	12
	10	12	19	15
	11	11	23	13
	6	8	22	16
	7	8	18	13
	8	8	18	10
	15	9	4	28

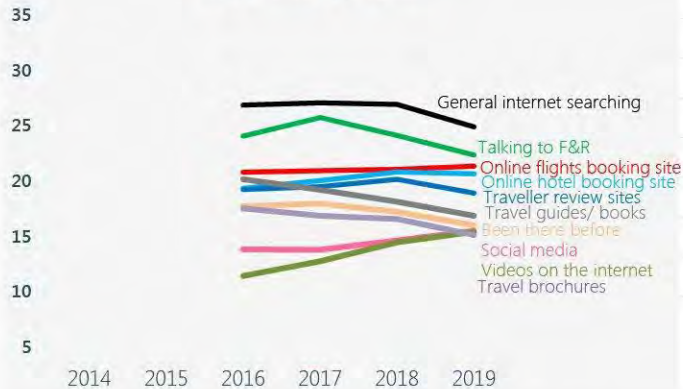




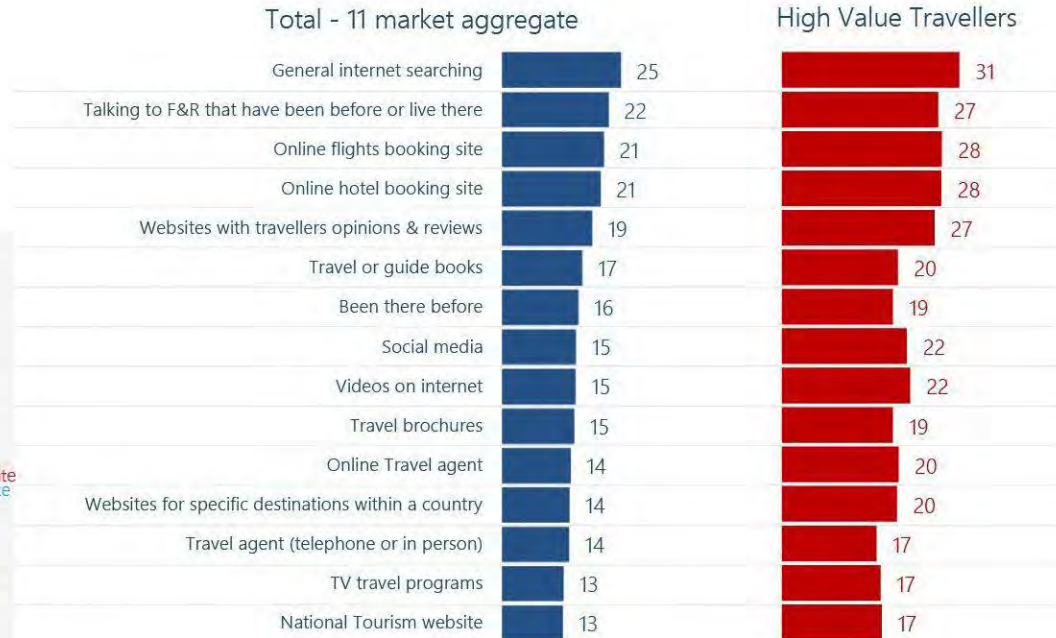
# OOR travel – Sources of inspiration

- General internet searching the top source of information, though easing
  - Talking to F&R next, but down in recent years
  - Online flight & hotel booking sites next and both up since '16
  - Social media and online videos also rising

Top Inspiration sources  
% 11 market aggregate



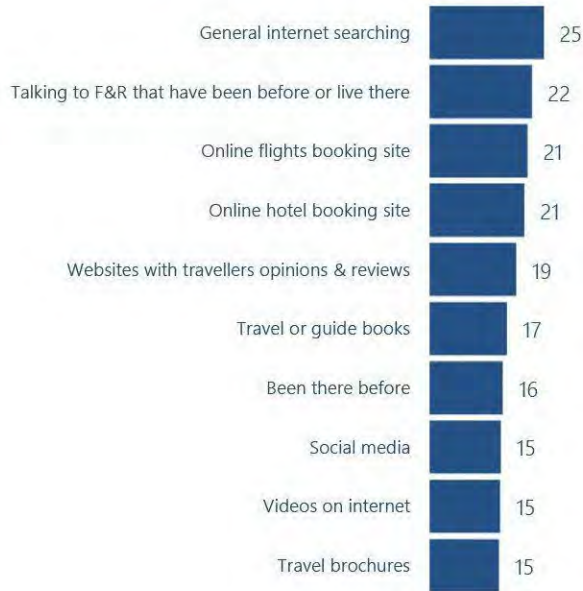
## Sources of inspiration on last OOR trip (Top 15)



# OOR travel – Top sources of inspiration by market

Variance is evident by market for sources of inspiration. General internet search leads for Singapore, Malaysia and the UK, but not in the top 5 for India. Online hotel and flights sites strongest for India.

11 market aggregate –  
Total OOR travellers (top 10)



Sources of inspiration on last trip by country (%)

	SING	MALAY	INDIA	UK
General internet searching	30	33	24	24
Talking to F&R that have been before or live there	22	30	25	22
Online flights booking site	27	27	30	21
Online hotel booking site	26	29	31	17
Websites with travellers opinions & reviews	25	29	25	18
Travel or guide books	14	20	19	15
Been there before	18	13	11	21
Social media	17	31	24	5
Videos on internet	16	25	27	8
Travel brochures	17	20	20	13



# OOR travel – Sources of inspiration by market

HVT sources also vary widely by market. General internet searching leads and is #1 for many markets. Online sources higher with HVT and online accommodation sites #1 for India. Word of mouth #4 overall for HVTs and in the top 5 for all markets except India.

11 market aggregate –  
HVTs



Sources of inspiration on last trip by country (%)

	SING	MALAY	INDIA	UK
General internet searching	38	41	30	28
Online flights booking site	36	33	35	24
Online hotel booking site	35	36	36	17
Talking to F&R that have been before or live there	27	35	28	27
Websites with travellers opinions & reviews	30	36	30	21
Videos on internet	18	27	36	14
Social media	20	36	30	6
Online Travel agent	14	20	34	13
Travel or guide books	19	23	21	22
Websites for specific destinations within a country	21	30	23	15



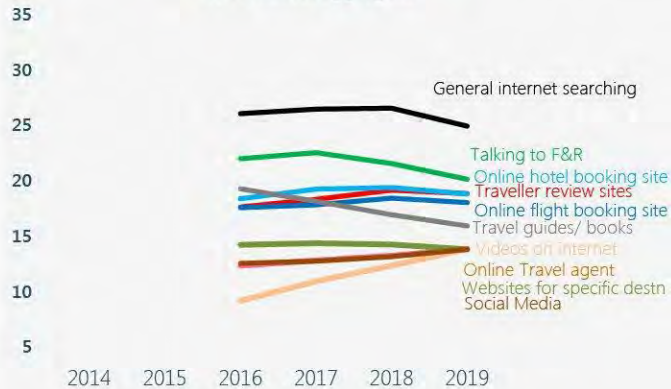


# OOR travel – Sources of info after choosing destination

- General Internet search also leads for planning
  - Ahead of F&R, online hotel sites and review sites
  - Top 2 are easing along with guide books
  - Online videos rising
- Online sources again higher for HVTs

## Top Information sources

% 11 market aggregate



## Sources of information used to plan (Top 15)

Total - 11 market aggregate

High Value Travellers



# OOR travel – Sources of info by market

Internet searching is the top source of information among most markets. For India, online hotel booking sites are the top info source. Traveller review website amongst top 5 for all, online flights booking site also prominent. Videos on internet stronger for Malaysia and India.

11 market aggregate –  
Total OOR travellers



Sources of information used to plan last trip by country (%)

	SING	MALAY	INDIA	UK
General internet searching	32	34	24	21
Talking to F&R that have been before or live there	21	27	23	19
Online hotel booking site	23	24	33	14
Websites with travellers opinions & reviews	25	29	24	16
Online flights booking site	22	22	31	14
Travel or guide books	14	19	18	16
Videos on internet	17	25	25	6
Online Travel agent	8	14	24	13
Websites for specific destinations within a country	17	25	23	13
Social media	16	25	22	6



Questions: Once you had decided to travel to [insert destination], which of the following sources was most important to help you seek out information to plan which regions or cities specifically you wanted to visit? 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK. Results expressed as a % of those nominating at least one source. Top 10 for the 11 market aggregate shown only, therefore not all of the top factors may be shown for each market.

# OOR travel – Sources of info by market

Sources of information are more varied for HVTs from different markets. General internet searching still leads for Singapore and UK. Review sites higher for HVTs and #1 for Malaysia. Online hotel booking sites lead for India and in the top 5 for Malaysia and Singapore. Online methods more prominent with Indian HVTs.

11 market aggregate – HVTs



Sources of information used to plan last trip by country (%)

	SING	MALAY	INDIA	UK
General internet searching	35	37	28	23
Websites with travellers opinions & reviews	31	40	30	19
Online hotel booking site	29	31	45	16
Talking to F&R that have been before or live there	25	33	26	21
Online flights booking site	26	25	40	15
Videos on internet	22	29	35	8
Social media	17	30	30	9
Websites for specific destinations within a country	20	27	33	21
Travel or guide books	19	22	22	20
Online Travel agent	9	16	30	16



Questions: Once you had decided to travel to [insert destination], which of the following sources was most important to help you seek out information to plan which regions or cities specifically you wanted to visit? 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK. Results expressed as a % of those nominating at least one source. Top 10 for the 11 market aggregate shown only, therefore not all of the top factors may be shown for each market.



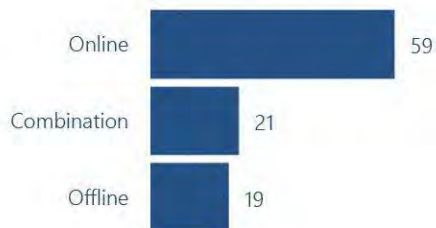
# OOB travel - Booking channels

Booking through online channels now the most prominent, leading across all markets for total travellers and HVTs, followed by a combination of online and offline. Offline only the least used channel. UK the most likely to use offline sources of these markets.

## Booking Channel

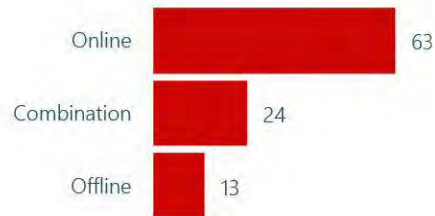
% on last OOB trip – 11 market aggregate

### Total Travellers



	SING	MALAY	INDIA	UK
Online	66	53	66	61
Combination	20	33	21	16
Offline	14	14	13	23

### High Value Travellers



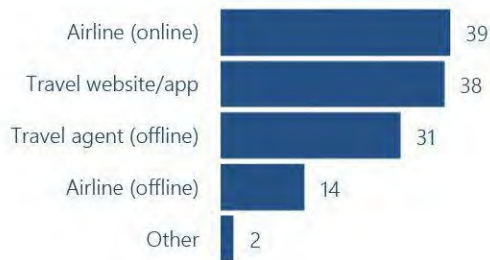
	SING	MALAY	INDIA	UK
Online	66	53	71	66
Combination	23	34	21	14
Offline	11	13	7	20



# OOB travel – Sources used to book: Flights

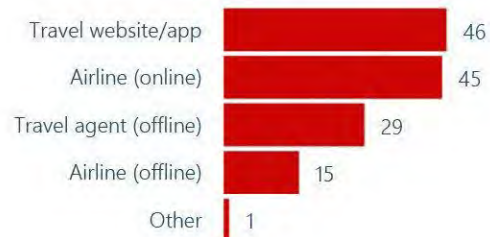
Booking through airline online is now the most used booking source for total travellers. Travel website/app also strong, #1 for India. For HVTs travel website just ahead of direct online booking. HVTs are more likely to book flights via an online sources than total travellers.

% 11 market aggregate  
Total Travellers



	SING	MALAY	INDIA	UK
Top 1	51	54	37	37
Top 3	41	27	57	29
Other	19	31	32	31
Other	12	15	23	11
Other	1	1	1	4

High Value Travellers



	SING	MALAY	INDIA	UK
Top 1	47	29	65	37
Top 3	52	58	45	38
Other	19	32	31	31
Other	15	15	25	13
Other	n/a	0	1	3



Questions: When you booked your flights to [insert destination], which of the following services did you use? 11 market aggregate includes: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.



# OOR travel – Sources used to book: Tours / Activities

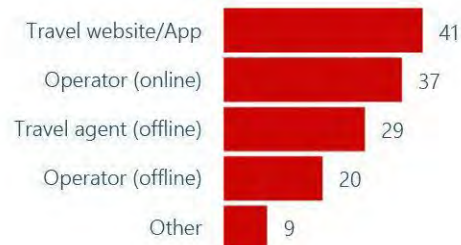
For booking tours or activities, travel website/app leads for both total and HVTs, ranked #1 for Singapore and India. Operator online the next strongest source, #1 for Malaysia and UK.

% 11 market aggregate  
Total Travellers



	SING	MALAY	INDIA	UK
Travel website/App	39	30	50	21
Operator (online)	30	38	37	30
Travel agent (offline)	25	34	33	24
Operator (offline)	15	21	27	18
Other	10	7	3	17

High Value Travellers



	SING	MALAY	INDIA	UK
Travel website/App	46	36	56	31
Operator (online)	36	41	45	31
Travel agent (offline)	23	35	33	27
Operator (offline)	16	19	30	21
Other	7	5	2	11





# OOR travel – Sources used to book: Accommodation

For booking accommodation, travel website/app leading, #1 for HVTs across all markets except Malaysia. Online accommodation provider 2<sup>nd</sup> and #1 for Malaysia. Travel agent offline also prominent, 3<sup>rd</sup> overall. HVTs less likely to use offline sources.

% 11 market aggregate  
Total Travellers



	SING	MALAY	INDIA	UK
Top 1	46	27	51	30
Top 3	29	38	33	24
Other	19	27	26	29
Private accomm. Provider	18	27	27	8
Accomm. Provider (offline)	13	17	24	11
Other	4	5	4	12

High Value Travellers



	SING	MALAY	INDIA	UK
Top 1	55	32	60	39
Top 3	31	40	33	22
Other	17	30	29	32
Private accomm. Provider	19	27	32	10
Accomm. Provider (offline)	15	17	28	20
Other	3	3	2	9



# OOOR travel - Planning lead time

3-6 months the most popular time frame for destination choice to occur. A similar trend observed for HVTs however Indian travellers more inclined towards making a choice 1-2 months ahead.

Destination choice occurs ... before trip (last OOR trip)

11 market aggregate



	SING	MALAY	INDIA	UK
1-2 weeks	7	7	9	6
3-4 weeks	8	7	12	3
1-2 months	27	25	34	16
3-6 months	48	50	38	48
7 months +	10	11	7	27

11 market aggregate - HVTs



	SING	MALAY	INDIA	UK
1-2 weeks	6	5	7	13
3-4 weeks	7	5	12	5
1-2 months	22	26	39	16
3-6 months	54	54	37	38
7 months +	12	10	5	28



# OOR travel - Booking lead time

When it comes to booking, Indian travellers more likely to book 1-2 months ahead of the trip, Malaysia, Singapore and UK more likely to book 3-6 months out, HVTs similar to total travellers.

First booking is made ... before trip (last OOR trip)

11 market aggregate



	SING	MALAY	INDIA	UK
	8	8	10	6
	12	10	15	5
	33	32	40	21
	41	43	30	46
	6	8	6	21

11 market aggregate - HVTs



	SING	MALAY	INDIA	UK
	6	5	8	11
	9	8	13	6
	33	36	47	23
	44	48	28	42
	8	3	3	18



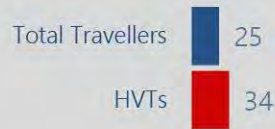


# Canberra Exclusive Experiences Summary

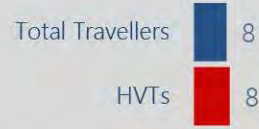
Almost 35% of HVTs aware of the Canberra exclusive experiences, along with nearly quarter of total travellers. Appealing to 64% of HVTs and 55% of total travellers. 8% of HVTs chose this experience as their most preferred and nearly 40% intend, 8% and 29% for these metrics respectively among total travellers. The opportunity to spend a day in the capital city has the most appeal followed by the feast icons dinner overlooking the lake.

## Key Metrics (%)

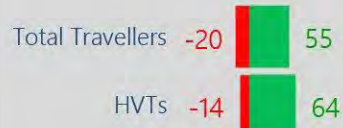
### Awareness (%)



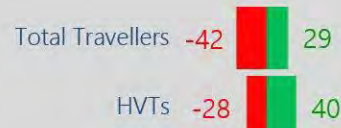
### Preference (%)



### Appeal (%)

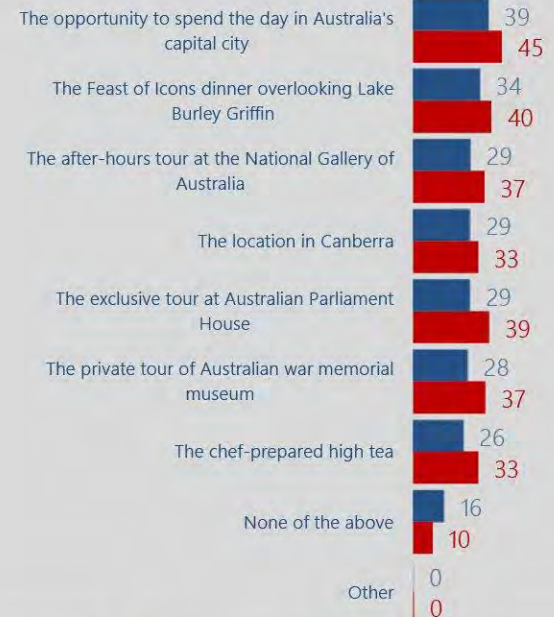


### Intention (%)



■ Negative responses ■ Positive responses

## Appealing elements (%)



■ Total OOR Travellers ■ High Value Travellers



Questions: Had you previously heard of [experience]? Overall, how appealing is [experience]? 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? From the information you've read on [experience], which elements do you find the most appealing? Data points represent the aggregate of 11 markets for each experience. Aggregate includes 11 key markets: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

# Canberra Winter Experience summary

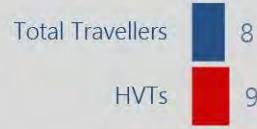
36% of HVTs aware of Winter experience and almost a ¼ total travellers. Good appeal, 70% for HVTs and nearly 59% overall. Only 9% of HVTs elect the winter experience as their most preferred and 42% intend, while 8% overall rank the experience #1 and 28% intend. Seeing the wildlife at the nature park the most appealing element followed by outdoor activities and F&W at Pialligo Estate.

## Key Metrics (%)

### Awareness (%)



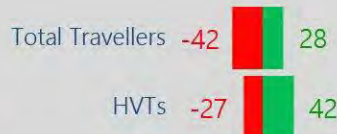
### Preference (%)



### Appeal (%)

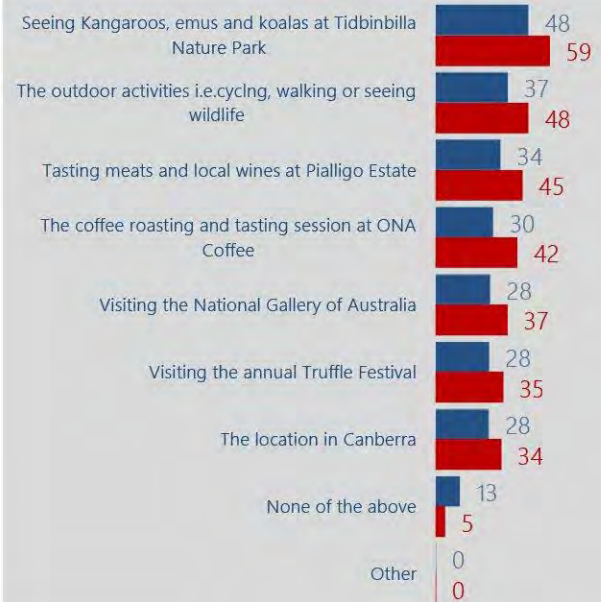


### Intention (%)



■ Negative responses ■ Positive responses

## Appealing elements (%)



■ Total OOR Travellers ■ High Value Travellers



Questions: Had you previously heard of [experience]? Overall, how appealing is [experience]? 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? From the information you've read on [experience], which elements do you find the most appealing? Data points represent the aggregate of 11 markets for each experience. Aggregate includes 11 key markets: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

CONSUMER DEMAND PROJECT  
2019

# ACT REPORT





# Travel Sentiment Tracker



PREPARED BY VISITCANBERRA / POLLINATE

WAVE 3 | JUNE 2020

# Background

## Purpose:

- *Measure local sentiment toward promotion of Canberra as a place to visit*
- *Measure key market intention to travel & Canberra as a short break destination*

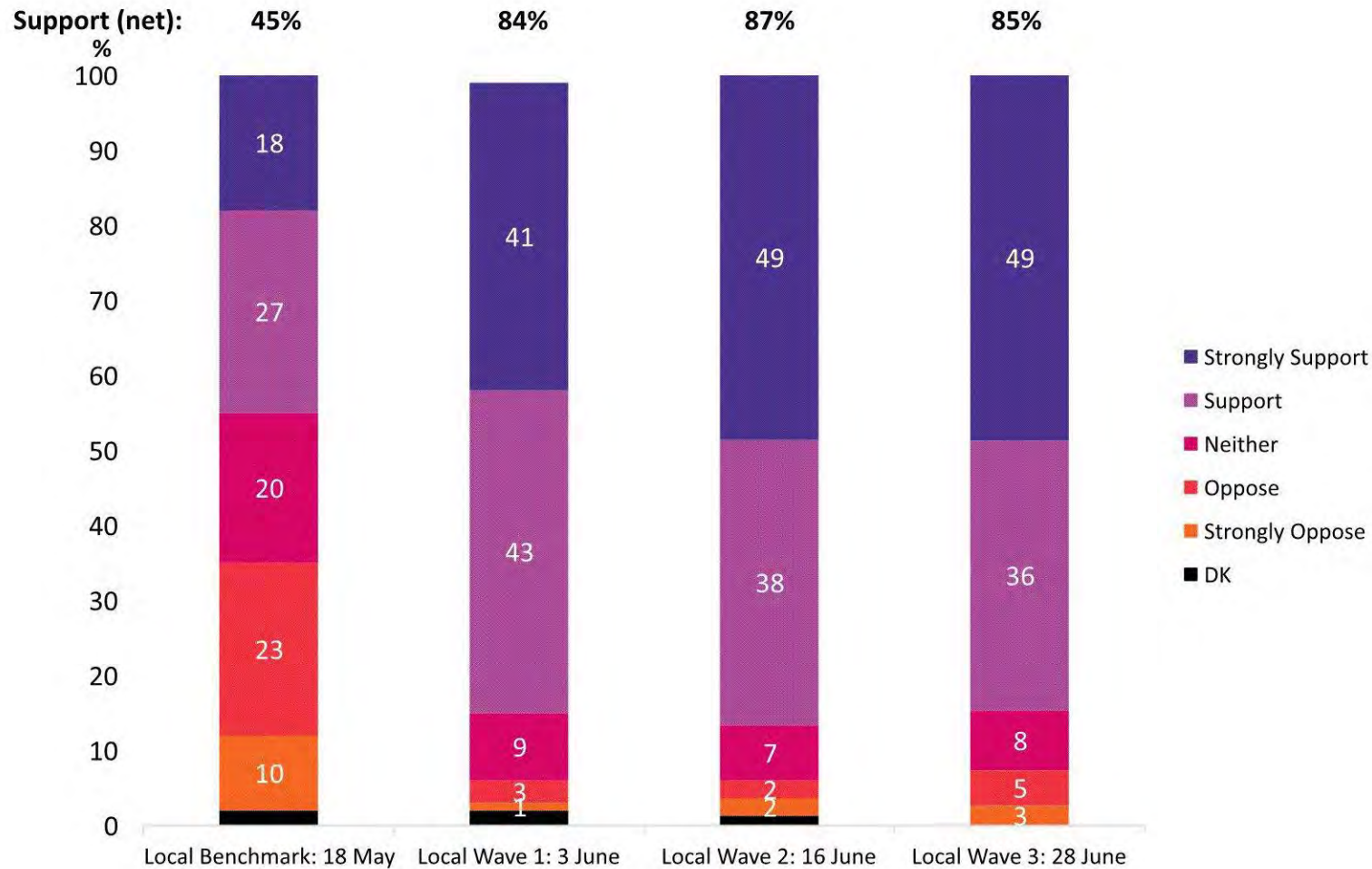
## Method:

- *9 waves. 5 minute online survey*
  - *N=150 Canberrans*
  - *N=250 Key Domestic Markets;*
    - *n=150 Sydney*
    - *n=100 Regional NSW*
    - *n=100 Regional VIC*
- *Research conducted by research agency Pollinate*
  - *Wave 1: 28 May and 3 June 2020*
  - *Wave 2: 9-16 June 2020*
  - *Wave 3: 22-28 June 2020*





# Canberrans remain positive toward the active promotion of Canberra to key interstate markets, however there is a shift in opposition (from 4% to 8%) this wave





# Drivers behind support and opposition to promoting Canberra remain steady:

- Support is driven by desire to boost the economy, support local business, and showcase CBR
- Opposition revolves around COVID-19 (hypothesis: particularly relevant given VIC's new cases spike)

## **Strongly support** 49%

*Because it's a great city and it would be great for our local businesses.*

*Developing every sector for goodness of social welfare*

*Brings money into the ACT economy and encourages investment in infrastructure*

*To promote ACT and to build the economy*

*We need the business*

*Canberra is an amazing and underrated tourist destination, with a variety of interesting locations to visit and explore*

*Great place to visit with heaps to do and see.*

## **Support** 36%

*Revenue from outer state visitors will be a useful boost to the economy*

*It has a bad reputation and it is actually a nice place. You just need to know where to go*

*There are lots of great things Canberra has to offer and I feel it is often overlooked by other states and deemed 'boring'. Interstate travellers also boosts our economy which is a great thing*

*It will be great for the economy BUT it depends on the Covid 19 situation and potential risk to canberrans health.*

## **Neither** 8%

*Not a good idea for now with a potential second waves coming in possible from Victoria.*

*I don't think Victorians should be travelling interstate yet, considering the level of covid19 there is there*

*Covid-19 is still not completely eliminated. At the moment, ACT is free of active cases. If the interstate travel is actively promoted, then the transmission rate may increase leading to second wave of the pandemic.*

*I can't say at this stage because everyone is so unsure*

## **Oppose** 5%

*It is too soon whilst there are so many still with covid and not doing the right thing*

*Because of the coronavirus which is being reported positive in other states*

*It is still too risky from Victoria and NSW*

*Risk of Covid-19 outbreak*

*It may help to increase corona cases*

## **Strongly oppose** 3%

*Well considering what is happening in Victoria, I think we should hold off letting interstate visitors come here, especially from Victoria.*

*Victoria still hasn't got control of its COVID cases and we should protect Canberrans by not promoting tourists to come here.*

*The Government just wants our money*

*Because it introduces covid 19 infected people into the population*



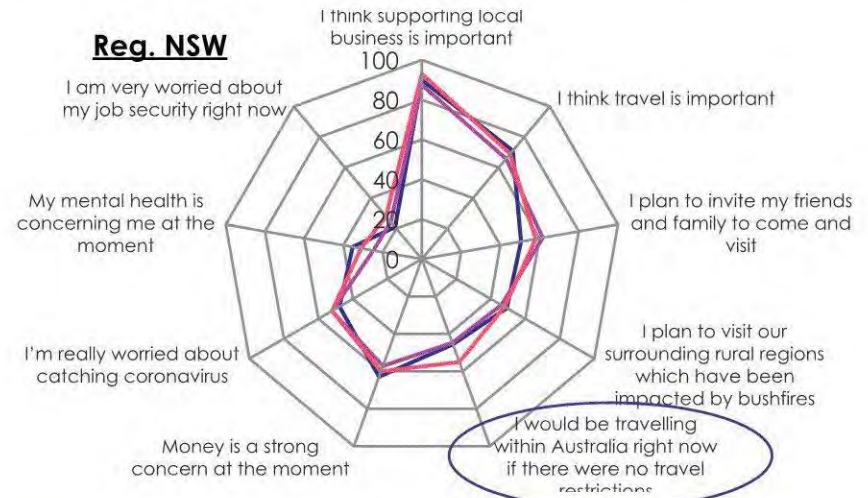
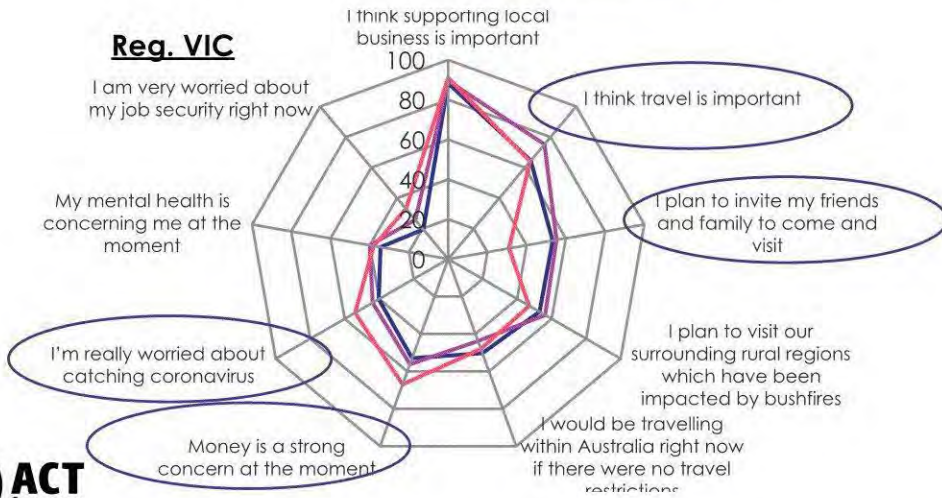
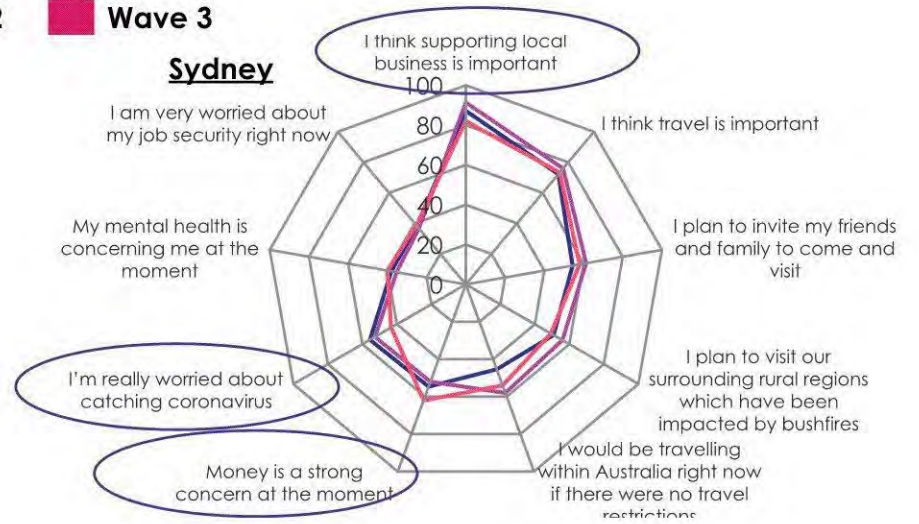
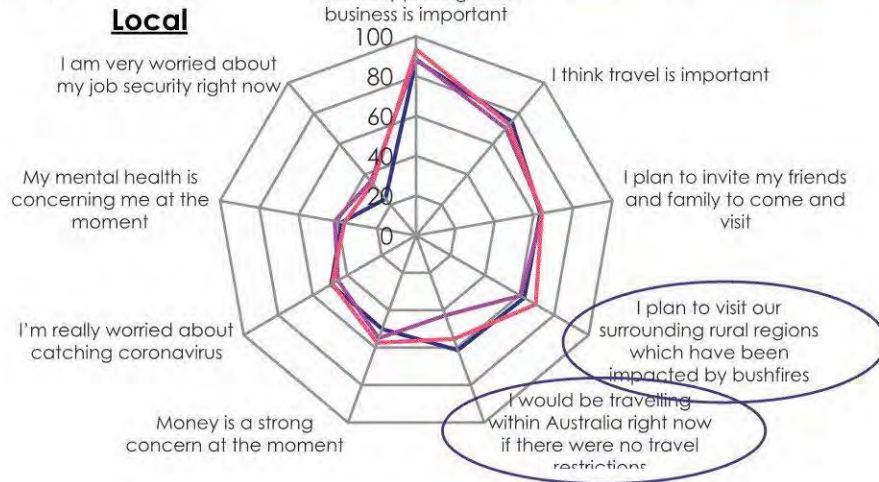


# Supporting local business remains top of mind, though Sydney sees reduced interest (potentially due to increase in financial concerns)

- With a second state lockdown, regional VIC sees an increase in COVID and monetary concerns alongside lowered travel motivation

Agree% (net)

Wave 1 Wave 2 Wave 3

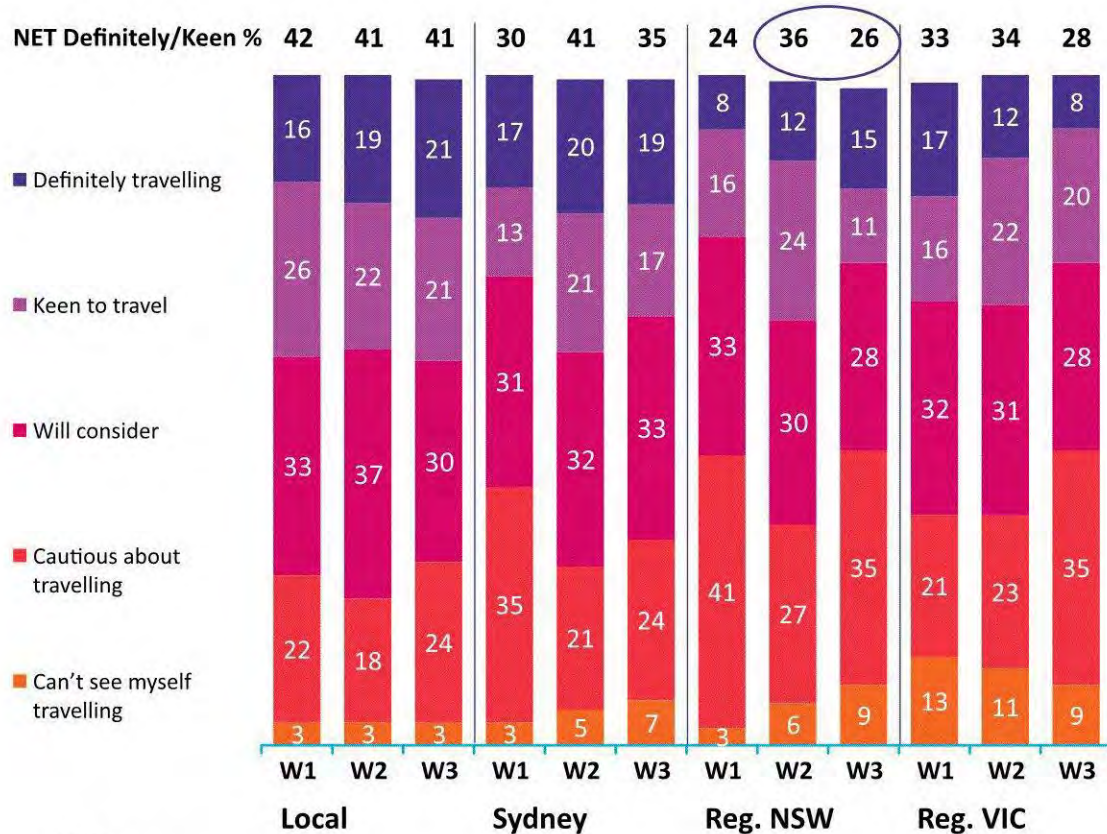




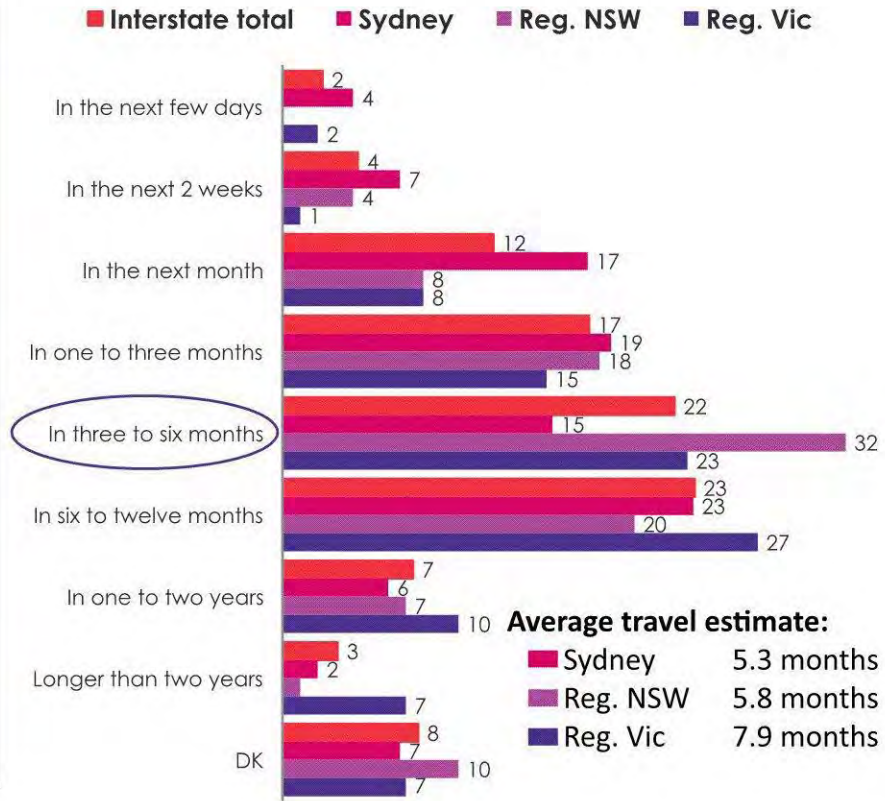
# Enthusiasm for travel has decreased across all interstate markets, and significantly in regional NSW

Average time until next leisure travel for regional VIC is now around 8 months away as the surge of new COVID cases brings back restrictions

## Attitudes to future domestic leisure travel %



## Timing for next domestic leisure travel %





# Leading travel motivations remain varied by location:

- Relax and recharge remains top for Sydney, with increases in VFR and decreases for short breaks and time
- Regional NSW: VFR is now top, replacing short breaks, which have decreased. 'Available time' has also reduced
- Regional VIC: Relax and recharge is now on top, having moved ahead of VFR. Increases are seen for supporting small business, making memories, and experiencing destinations

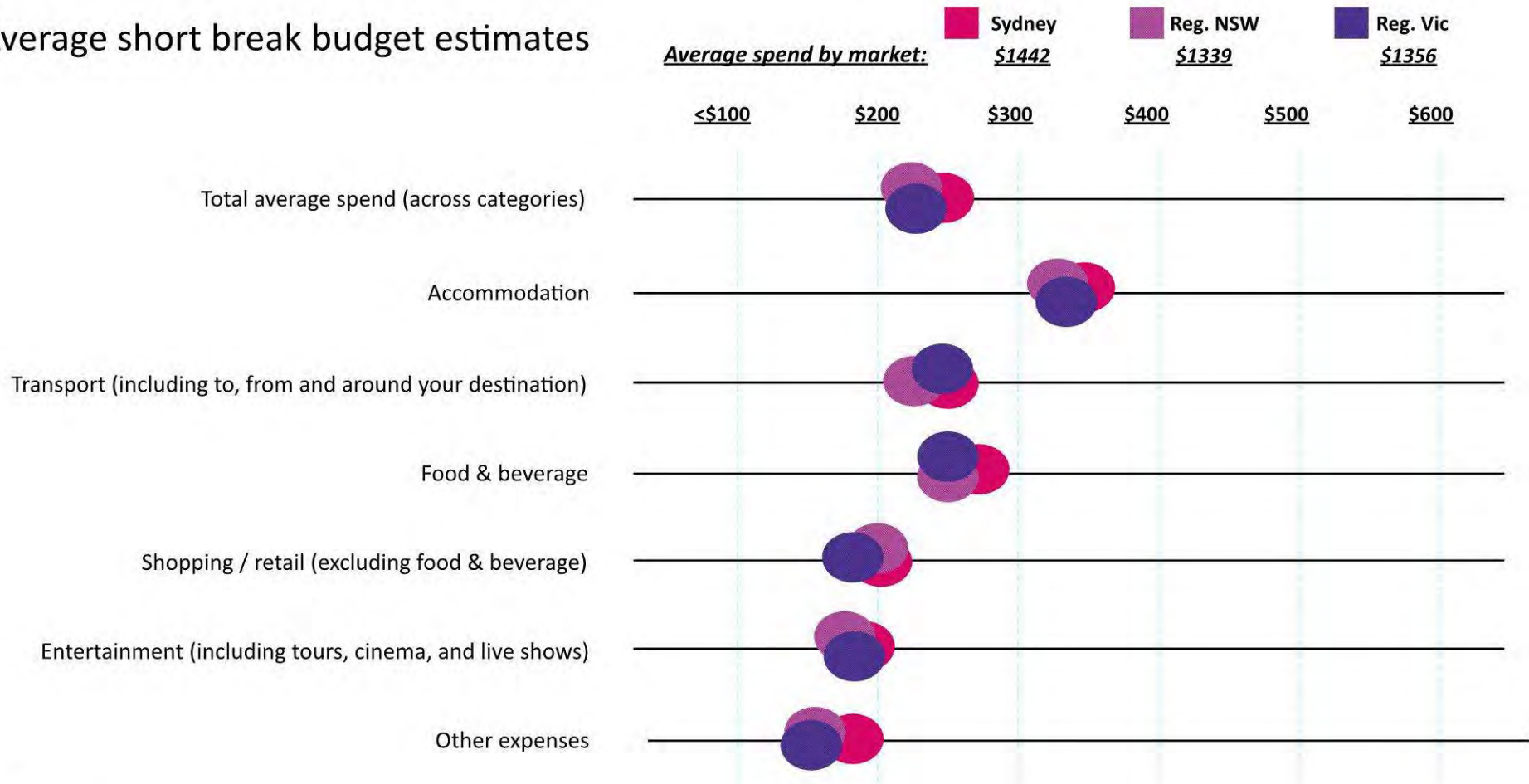
Travel motivation %. Note: question changed from *in the next 3 months* to *in the next 6 months* at Wave 3



# Looking at budget, Sydney remains higher than regional areas across all spend categories, particularly accommodation, food and beverage, and 'other' spend

- Regionally, VIC edges out NSW for higher average spend

## Average short break budget estimates





# Currently CBR has an average 18% travel intention from key markets

- Highest travel intention continues to be from Sydney (25%), with a lack of interest in Canberra continuing to act as a barrier
- Variety seekers are a key target audience, with 34% being likely to travel in N6M

## Likelihood of short break travel to CBR N6M%



### Why are you unlikely to travel to CBR (0-5/10)

- Been there too many times. Not a lot to do there*
- Been there, nothing new to see*
- I have been to it before and it is a long drive from Sydney*
- Not a destination I immediately think of, maybe we'd stay for a night or 2 on way to somewhere else*
- Not that interesting and very cold in winter*
- Have other plans already in place as soon as restrictions*

### What would make you want to come to CBR (6-7/10)

- Something different and yet close to home*
- Just a close place to get out of Sydney.*
- Somewhere different and some national landmarks to see.*
- I've never been there before so I would like to go there*
- More touristy places*
- Winter and snowy mountains*
- The museums and other cultural exhibitions*
- I want to do some bushwalking in some of the national parks there*

### Why are you likely to travel to CBR (8-10/10)

- I haven't been there for a long time*
- Have a family member living there*
- To get away and spend quality time with family enjoying the sites of Canberra*
- Planning to take my adult kids to see their friends there for Xmas in July. I'll take my bike & will visit museums, etc*
- Capital of Australia and is worth visiting*
- To see the capital back to normal and visit some country towns on the way!*
- Close to home, lots of things to do, can go by car.*

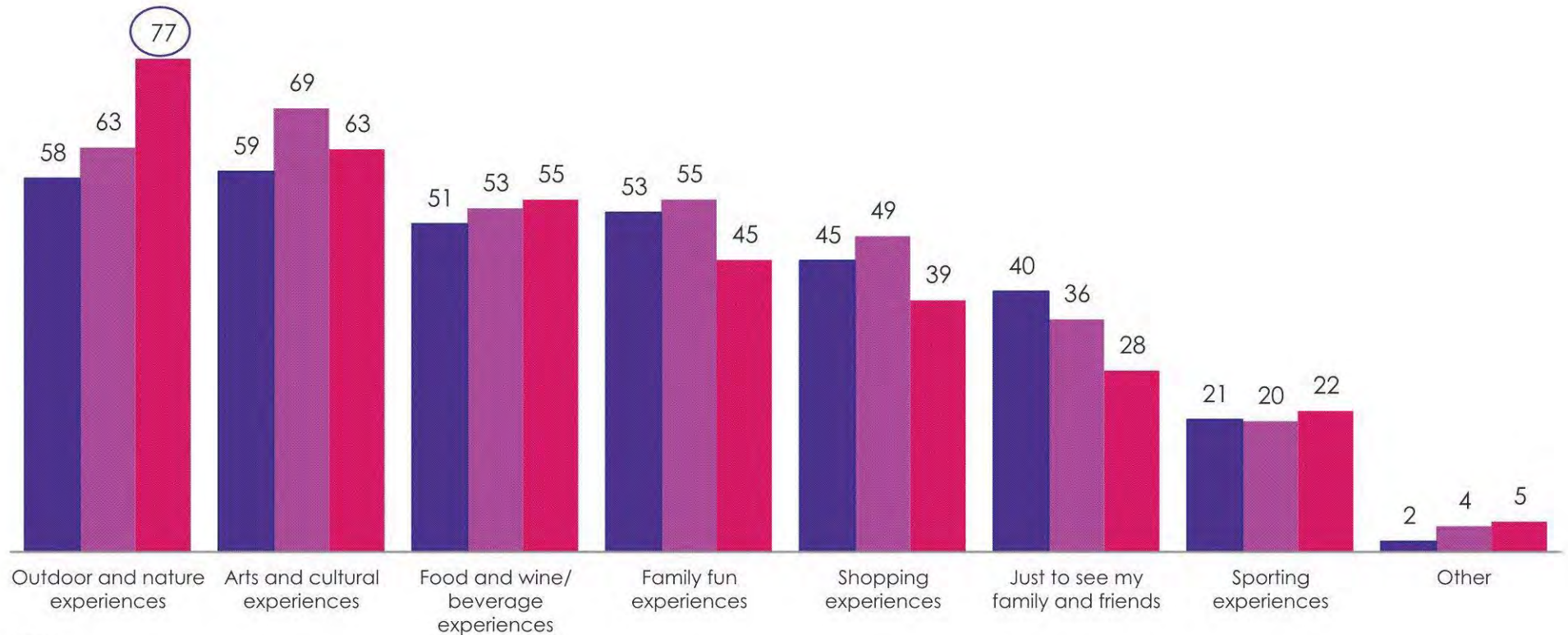




# Significant increase in outdoor and nature experiences in Canberra trip, while arts / culture, family fun, shopping and VFR see reduced interest

Main experiences desired on next Canberra trip (among those Likely to travel to Canberra N6M) %

Wave 1 Wave 2 Wave 3



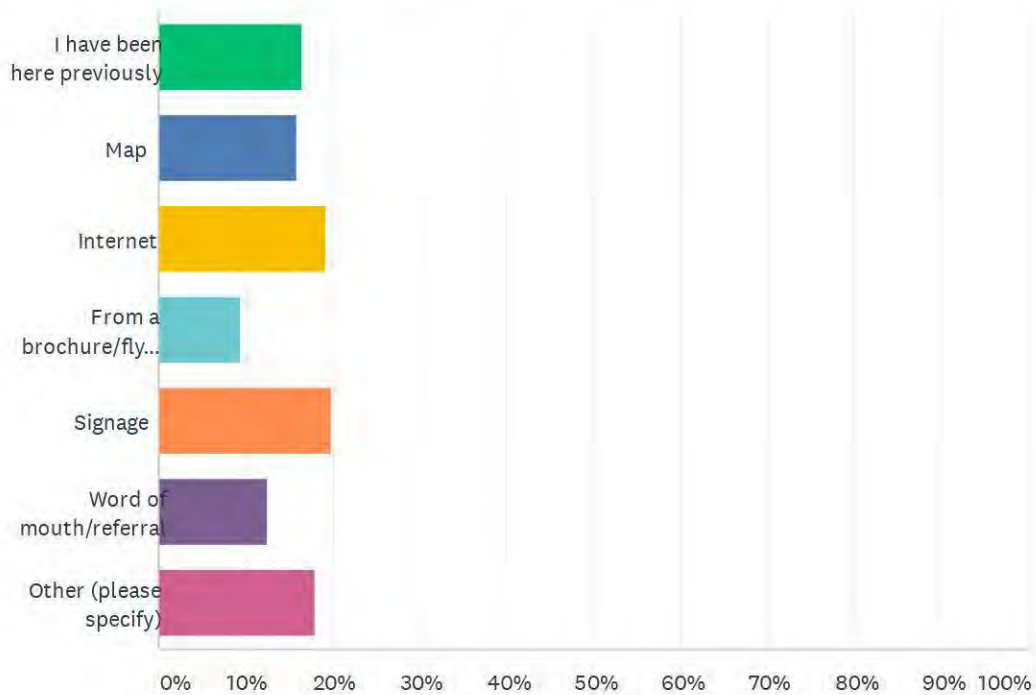


# What's it all saying?

- Local sentiment toward promotion of Canberra as a tourist destination remains positive
  - 85% support promotion activity of Canberra: this is driven by a desire to boost the economy, support local business and showcase Canberra
  - Opposition to promotion has increased from 4% to 8% due to COVID-19 concerns driven by Victoria's recent surge of new COVID cases and resulting second lockdown
- Enthusiasm for leisure travel among interstate markets has been reduced since wave 2 (9-16 June)
  - 35% Sydney residents (down from 41%), 26% of Regional NSW (significantly down from 36%), and 28% of Regional Victorians (down from 34%) are keen or definitely wanting to travel at the moment. Desire to travel among Canberrans remains steady at 41%
    - Around a third of our interstate markets are still considering travel
    - 1 in 4 Sydney residents are cautious about travelling, and this increases to 1 in 3 in regional VIC/NSW
  - Travel intention timeframe remains up to 3-6 months away for our interstate markets, with Regional VIC shifting to be up to 6-12 months into the future
  - Locals and interstate markets continue to agree supporting local business is important, and that travel is also important in general
    - Shift among Sydney residents sees reduced interest in supporting local business, potentially due to an uptick in monetary concerns
    - A positive state outlook for COVID means Sydney residents are less concerned about catching COVID while regional NSW residents are more likely to agree that they would be travelling right now if there were not any restrictions
    - Meanwhile, due to surge of new COVID cases in VIC (and resulting second lockdown), regional VIC residents are now more concerned about COVID and their financial situation. As a result, they are also less likely to agree to travel is important
  - Travel motivations continue to vary by location: main drivers by location are relaxing and recharging in Sydney and regional VIC, and a desire to visit friends and relatives in regional NSW
  - 1 in 5 from nearby markets are likely to visit Canberra in the next 6 months, with Sydney more likely than regional areas
  - Main experiences desired on a Canberra trip are outdoor and nature experiences, followed by arts and culture

## Q1 How did you find out about the centre?

Answered: 373 Skipped: 15



ANSWER CHOICES	RESPONSES	
I have been here previously	16.62%	62
Map	15.82%	59
Internet	19.30%	72
From a brochure/flyer/advertisement/article	9.38%	35
Signage	19.84%	74
Word of mouth/referral	12.60%	47
Other (please specify)	17.96%	67
Total Respondents: 373		



## Canberra and Region Visitor Centre Survey

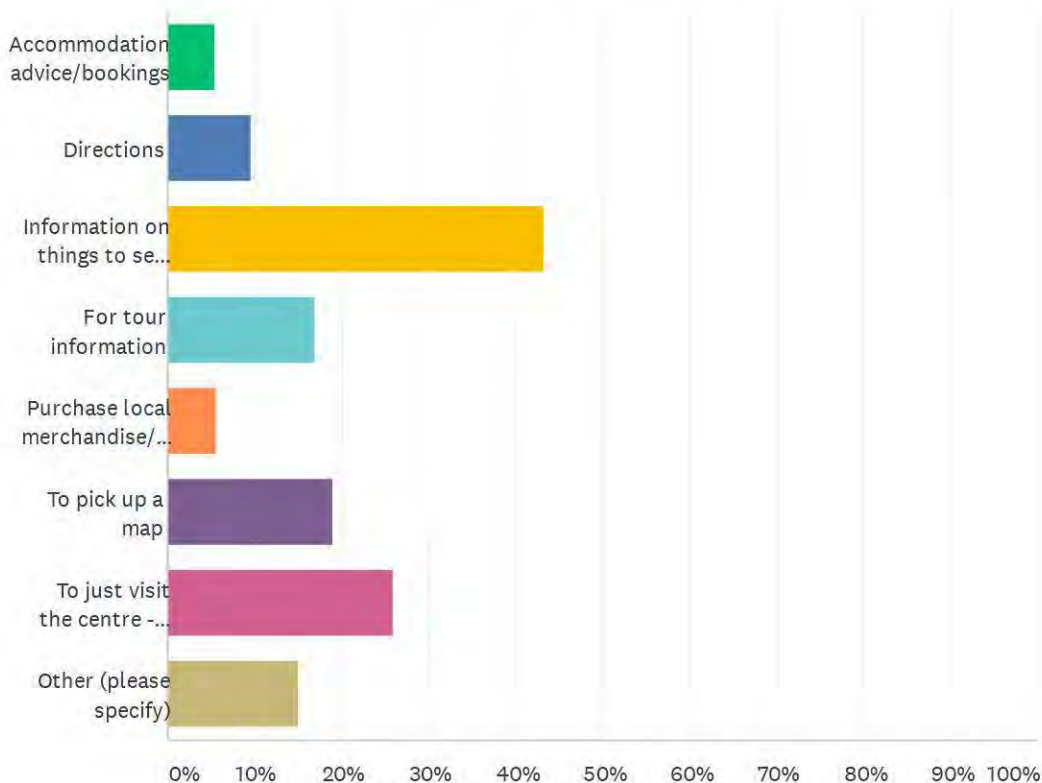
#	OTHER (PLEASE SPECIFY)	DATE
1	Walked in	6/17/2020 1:08 PM
2	God summoned me here	6/6/2020 12:41 PM
3	Test	5/26/2020 12:32 PM
4	Yeeet	3/10/2020 4:53 PM
5	Newsagent	3/6/2020 4:57 PM
6	You	3/4/2020 11:36 AM
7	Culture Loop	2/25/2020 11:14 AM
8	Tour guide	2/18/2020 2:15 PM
9	W	2/16/2020 11:32 AM
10	I live here	2/13/2020 11:22 AM
11	School trip	2/12/2020 12:17 PM
12	Friends	1/27/2020 3:28 PM
13	C. F dv	1/27/2020 2:01 PM
14	Walked up to it	1/26/2020 2:11 PM
15	Walked past	1/26/2020 11:01 AM
16	Driving past	1/20/2020 9:16 AM
17	Family member	1/15/2020 11:19 AM
18	Live here. Bringing overseas visitor from France.	1/14/2020 12:20 PM
19	Came with local	12/31/2019 11:49 AM
20	Pot luck	12/31/2019 10:46 AM
21	I live in Canberra and was bored	12/30/2019 3:56 PM
22	Bus tour	12/28/2019 4:03 PM
23	Needed to use bathroom	12/21/2019 11:51 AM
24	Book	12/20/2019 3:06 PM
25	Borat	12/15/2019 12:10 PM
26	School	12/3/2019 10:01 AM
27	School Trip	12/1/2019 12:00 PM
28	CULTure loop bus map	11/30/2019 4:28 PM
29	Tour group from switzerland	11/29/2019 9:36 AM
30	Needed to go to the toilet	11/24/2019 12:31 PM
31	Trip	11/21/2019 1:06 PM
32	Local resident	11/20/2019 10:20 AM
33	Traveling around australia	11/17/2019 11:06 AM
34	School	11/12/2019 10:06 AM
35	We walked past it	11/10/2019 12:23 PM
36	Driving	11/9/2019 11:44 AM
37	School	11/8/2019 10:02 AM

## Canberra and Region Visitor Centre Survey

38	School	11/5/2019 3:17 PM
39	Just looking around	11/4/2019 1:33 PM
40	School camp	10/31/2019 12:18 PM
41	School camp	10/31/2019 12:00 PM
42	School camp	10/29/2019 8:41 AM
43	School trip	10/17/2019 3:12 PM
44	School camp	10/9/2019 2:16 PM
45	Passing	10/6/2019 11:40 AM
46	A taxi driver recommended me	10/4/2019 10:06 AM
47	Bus tour	10/3/2019 1:42 PM
48	Floriade waiting for the next	9/30/2019 2:00 PM
49	Walking by during Floriade	9/29/2019 1:34 PM
50	School	9/26/2019 12:03 PM
51	See next to floriade	9/25/2019 1:35 PM
52	Tourism australia	9/23/2019 9:35 AM
53	School	9/17/2019 11:28 AM
54	School	8/23/2019 10:07 AM
55	School trip	8/20/2019 4:37 PM
56	Wandered in	8/17/2019 2:16 PM
57	School trip	8/12/2019 12:03 PM
58	Forshore walk	8/8/2019 4:01 PM
59	Guide	8/8/2019 10:05 AM
60	School trip	8/6/2019 11:10 AM
61	Information	8/4/2019 2:48 PM
62	School	7/28/2019 11:08 AM
63	Just drove here	7/27/2019 12:09 PM
64	Canberra secrets book	7/26/2019 11:49 AM
65	School camp	7/22/2019 3:01 PM
66	School	7/5/2019 1:14 PM
67	general knowledge. Finding the place was difficult due to inadequate road signage!	7/2/2019 11:17 AM

## Q2 What was your reason for visiting the centre today?

Answered: 374 Skipped: 14



ANSWER CHOICES	RESPONSES	
Accommodation advice/bookings	5.35%	20
Directions	9.63%	36
Information on things to see and do	43.32%	162
For tour information	16.84%	63
Purchase local merchandise/souvenirs	5.61%	21
To pick up a map	18.98%	71
To just visit the centre - I was passing by	25.94%	97
Other (please specify)	14.97%	56
Total Respondents: 374		



## Canberra and Region Visitor Centre Survey

#	OTHER (PLEASE SPECIFY)	DATE
1	Bikes ☺	6/27/2020 11:51 AM
2	To take a shit	6/6/2020 12:41 PM
3	Test	5/26/2020 12:32 PM
4	Yet	3/10/2020 4:53 PM
5	Travel card	2/22/2020 1:22 PM
6	A friend brought me here	1/21/2020 5:02 PM
7	Paddle boat	1/18/2020 10:50 AM
8	Holiday	1/13/2020 8:32 AM
9	Learn about canberra	1/11/2020 3:53 PM
10	It's got ac	12/31/2019 10:46 AM
11	I was bored	12/30/2019 3:56 PM
12	Myway information	12/30/2019 10:01 AM
13	And to understand canberra from the first beginning	12/29/2019 3:09 PM
14	To come to the national capital exhibition	12/29/2019 12:03 PM
15	To learn about Canberra?	12/27/2019 1:22 PM
16	Get senior bus Passes	12/23/2019 3:05 PM
17	Bike hire	12/23/2019 2:55 PM
18	To see the exhibition	12/19/2019 3:23 PM
19	Borats cultural learnings	12/15/2019 12:10 PM
20	Check out the exhibition	12/10/2019 11:21 AM
21	Learn history of canberra	12/1/2019 12:00 PM
22	Needed to go to the toilet	11/24/2019 12:31 PM
23	National capital exhibition	11/20/2019 9:49 AM
24	National capital exhibition	11/17/2019 4:00 PM
25	Bike hire	11/11/2019 2:11 PM
26	School camp	10/31/2019 12:18 PM
27	To find out info	10/29/2019 8:41 AM
28	Show others	10/26/2019 12:04 PM
29	To thank Chanelle for her help yesterday	10/23/2019 11:40 AM
30	Celebrations	10/19/2019 12:27 PM
31	School trip	10/17/2019 3:12 PM
32	To learn about canberra	10/9/2019 2:16 PM
33	Part of tour (Casey tours WA)	10/3/2019 1:42 PM
34	Suivinere	10/3/2019 9:06 AM
35	Waiting for the next shuttle bus	9/30/2019 2:00 PM
36	History of Canberra	9/27/2019 12:54 PM
37	Gin	9/24/2019 1:22 PM

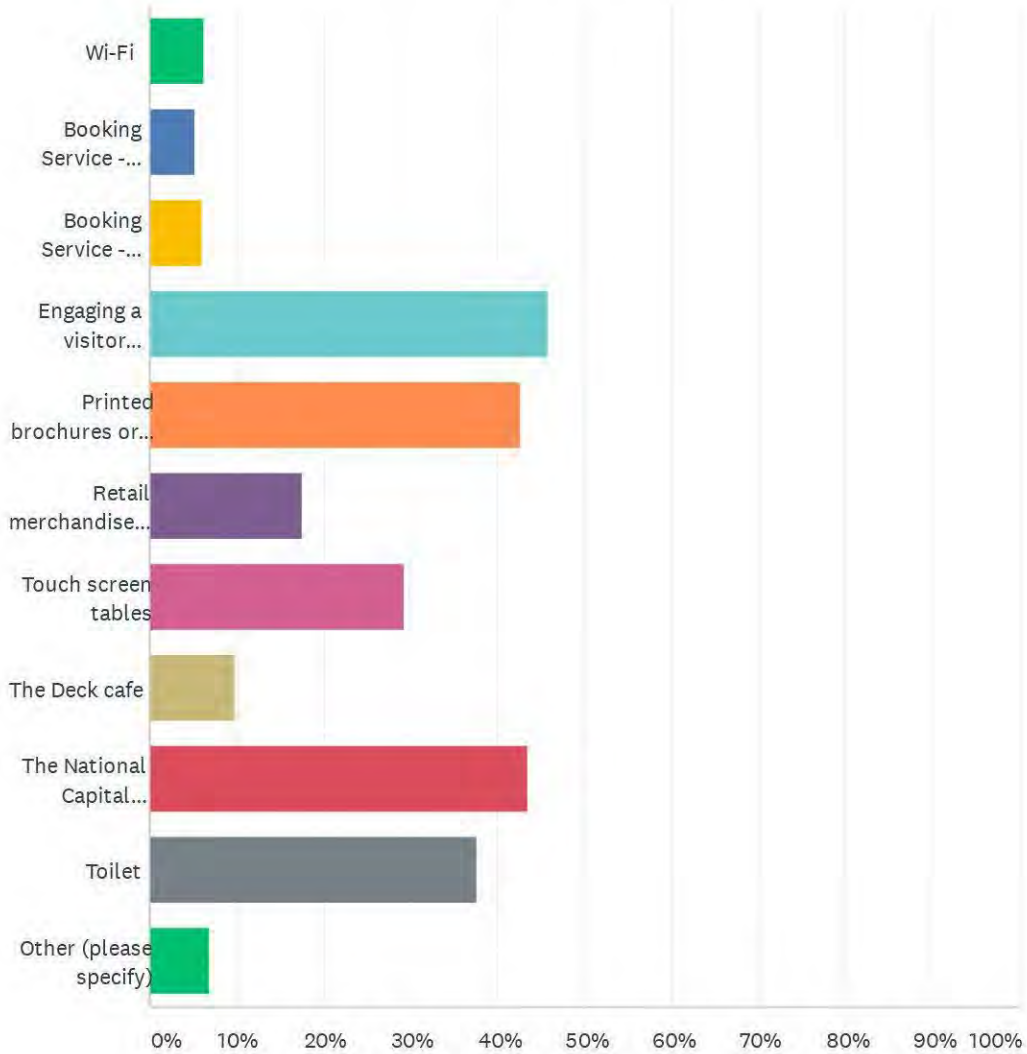
## Canberra and Region Visitor Centre Survey

38	Bus travel information	9/23/2019 4:27 PM
39	To show friends	9/18/2019 1:03 PM
40	Wife made meip	9/16/2019 10:46 AM
41	Showing someone around	9/15/2019 2:18 PM
42	Hire Bike	8/30/2019 1:57 PM
43	To see and learn about the great story how the capitol of Australia was built	8/27/2019 2:54 PM
44	Senior myway tickets	8/23/2019 12:55 PM
45	Work related	8/14/2019 11:01 AM
46	Had toooooo	8/12/2019 12:03 PM
47	Bike Stop	8/8/2019 2:35 PM
48	To hire a bike	8/3/2019 1:54 PM
49	To hire a bicycle	8/3/2019 1:51 PM
50	School trip	7/31/2019 2:12 PM
51	Ticket for nga	7/29/2019 2:53 PM
52	School	7/28/2019 11:08 AM
53	A beautiful place thank you	7/23/2019 1:03 PM
54	Bike hire	7/15/2019 2:34 PM
55	Information about history	7/8/2019 10:51 AM
56	Canada Day. Wanted to see the flag.	7/1/2019 11:36 AM



### Q3 Which of the following facilities / services did you use at the centre today?

Answered: 366 Skipped: 22



## Canberra and Region Visitor Centre Survey

ANSWER CHOICES	RESPONSES	
Wi-Fi	6.28%	23
Booking Service - Accommodation	5.19%	19
Booking Service - Tour/Tickets	6.01%	22
Engaging a visitor information representative	45.90%	168
Printed brochures or maps	42.62%	156
Retail merchandise available for sale	17.49%	64
Touch screen tables	29.23%	107
The Deck cafe	9.84%	36
The National Capital Exhibition display	43.44%	159
Toilet	37.70%	138
Other (please specify)	6.83%	25
Total Respondents: 366		

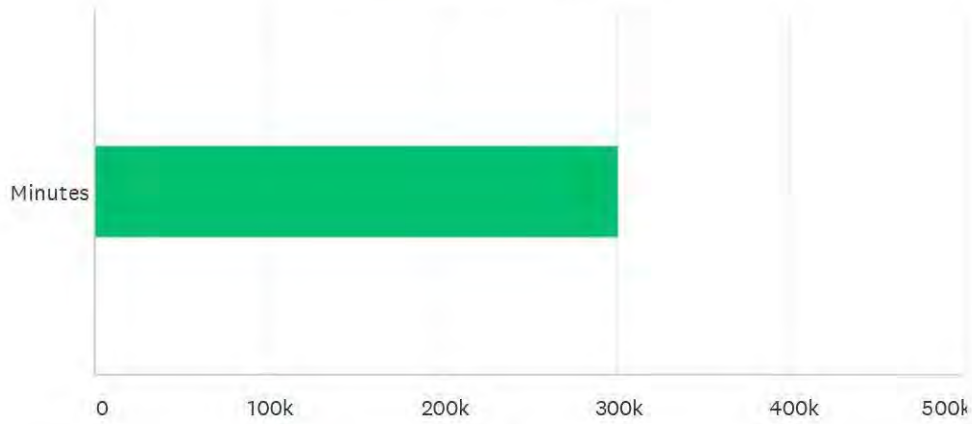


## Canberra and Region Visitor Centre Survey

#	OTHER (PLEASE SPECIFY)	DATE
1	Test	5/26/2020 12:32 PM
2	Touchscreen photo	3/19/2020 12:34 PM
3	Yeet	3/10/2020 4:53 PM
4	Information from a guide	2/21/2020 11:59 AM
5	Kids play	1/20/2020 9:16 AM
6	Great	12/30/2019 3:56 PM
7	Water fill up	12/28/2019 10:50 AM
8	Movie on how canberra was developed	12/24/2019 12:16 PM
9	Get senior bus Passes	12/23/2019 3:05 PM
10	Advice and assistance	12/17/2019 3:39 PM
11	Borat	12/15/2019 12:10 PM
12	Information displays and photos	12/4/2019 3:13 PM
13	Bike hire	11/11/2019 2:11 PM
14	School	11/5/2019 3:17 PM
15	Cup of h2o	10/9/2019 2:29 PM
16	My way seniors card	9/20/2019 12:25 PM
17	Hi	9/18/2019 1:03 PM
18	Bike Hire	8/30/2019 1:57 PM
19	Bike Stop	8/8/2019 2:35 PM
20	Bike hire	8/3/2019 1:51 PM
21	travel tickets	8/1/2019 10:46 AM
22	Bike hire	7/15/2019 2:34 PM
23	Tour	7/8/2019 10:51 AM
24	Which you didn't have!	7/2/2019 11:17 AM
25	Canada Day	7/1/2019 11:36 AM

### Q4 Approximately how long did you/will you stay at the centre today?

Answered: 332 Skipped: 56



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
Minutes	301,546	100,113,259	332
Total Respondents: 332			



## Canberra and Region Visitor Centre Survey

#	MINUTES	DATE
1	60	6/30/2020 4:19 PM
2	60	6/30/2020 11:42 AM
3	20	6/27/2020 11:51 AM
4	10	6/27/2020 8:36 AM
5	10	6/26/2020 11:33 AM
6	30	6/25/2020 3:44 PM
7	10	6/25/2020 2:15 PM
8	15	6/24/2020 2:04 PM
9	5	6/24/2020 10:18 AM
10	15	6/23/2020 9:58 AM
11	10	6/19/2020 1:35 PM
12	5	6/17/2020 1:08 PM
13	30	6/11/2020 9:06 AM
14	30	6/6/2020 12:46 PM
15	340	6/6/2020 12:41 PM
16	15	3/19/2020 12:34 PM
17	60	3/17/2020 11:44 AM
18	21	3/10/2020 4:53 PM
19	90	3/8/2020 12:21 PM
20	30	3/6/2020 4:57 PM
21	30	3/5/2020 9:36 AM
22	30	3/4/2020 11:36 AM
23	15	3/1/2020 1:38 PM
24	30	3/1/2020 1:11 PM
25	15	3/1/2020 8:53 AM
26	15	2/28/2020 2:48 PM
27	15	2/27/2020 1:54 PM
28	65	2/25/2020 11:14 AM
29	30	2/24/2020 12:18 PM
30	75	2/22/2020 3:22 PM
31	5	2/22/2020 1:22 PM
32	10	2/22/2020 1:01 PM
33	35	2/21/2020 4:12 PM
34	45	2/21/2020 1:20 PM
35	15	2/21/2020 11:59 AM
36	50	2/19/2020 3:53 PM
37	15	2/18/2020 2:16 PM

## Canberra and Region Visitor Centre Survey

38	60	2/18/2020 2:15 PM
39	25	2/18/2020 1:10 PM
40	10	2/18/2020 11:46 AM
41	15	2/17/2020 2:48 PM
42	20	2/17/2020 1:19 PM
43	20	2/16/2020 2:56 PM
44	60	2/16/2020 2:36 PM
45	15	2/16/2020 11:32 AM
46	40	2/16/2020 9:47 AM
47	30	2/15/2020 11:38 AM
48	30	2/13/2020 4:38 PM
49	60	2/13/2020 2:55 PM
50	30	2/13/2020 11:22 AM
51	20	2/11/2020 4:29 PM
52	10	2/9/2020 11:14 AM
53	20	2/8/2020 11:05 AM
54	60	2/7/2020 3:12 PM
55	45	2/5/2020 11:05 AM
56	5	2/2/2020 10:31 AM
57	30	2/1/2020 2:15 PM
58	30	1/31/2020 3:52 PM
59	20	1/31/2020 1:06 PM
60	30	1/30/2020 5:03 PM
61	40	1/29/2020 11:59 AM
62	30	1/27/2020 2:01 PM
63	50	1/26/2020 3:14 PM
64	25	1/26/2020 1:57 PM
65	25	1/26/2020 12:56 PM
66	20	1/26/2020 11:01 AM
67	20	1/22/2020 10:37 AM
68	30	1/22/2020 9:55 AM
69	30	1/21/2020 5:02 PM
70	30	1/20/2020 9:16 AM
71	10	1/18/2020 10:50 AM
72	90	1/15/2020 11:19 AM
73	20	1/14/2020 3:27 PM
74	60	1/14/2020 12:20 PM
75	60	1/11/2020 3:53 PM



## Canberra and Region Visitor Centre Survey

76	15	1/11/2020 12:27 PM
77	30	1/7/2020 11:43 AM
78	20	1/6/2020 3:35 PM
79	30	1/6/2020 1:34 PM
80	30	1/4/2020 1:38 PM
81	30	1/1/2020 11:54 AM
82	90	12/31/2019 1:13 PM
83	30	12/31/2019 11:49 AM
84	500	12/30/2019 3:56 PM
85	80	12/30/2019 3:51 PM
86	30	12/30/2019 12:20 PM
87	15	12/30/2019 10:01 AM
88	20	12/29/2019 3:09 PM
89	15	12/29/2019 1:44 PM
90	30	12/29/2019 1:21 PM
91	120	12/29/2019 12:03 PM
92	25	12/28/2019 10:54 AM
93	60	12/28/2019 10:50 AM
94	15	12/27/2019 1:54 PM
95	50	12/27/2019 1:22 PM
96	45	12/27/2019 1:03 PM
97	5	12/27/2019 12:36 PM
98	10	12/27/2019 10:01 AM
99	15	12/26/2019 1:42 PM
100	15	12/24/2019 4:19 PM
101	60	12/24/2019 1:59 PM
102	60	12/24/2019 1:13 PM
103	1	12/24/2019 12:16 PM
104	160	12/23/2019 3:05 PM
105	30	12/23/2019 2:55 PM
106	30	12/22/2019 1:39 PM
107	20	12/21/2019 11:51 AM
108	60	12/20/2019 4:20 PM
109	45	12/20/2019 3:06 PM
110	20	12/20/2019 12:35 PM
111	40	12/20/2019 10:20 AM
112	45	12/19/2019 3:23 PM
113	45	12/17/2019 4:45 PM

## Canberra and Region Visitor Centre Survey

114	30	12/17/2019 3:39 PM
115	60	12/16/2019 3:59 PM
116	30	12/16/2019 3:56 PM
117	45	12/16/2019 1:05 PM
118	10	12/15/2019 1:41 PM
119	5	12/15/2019 12:15 PM
120	999	12/15/2019 12:10 PM
121	10	12/14/2019 1:01 PM
122	15	12/14/2019 11:16 AM
123	60	12/10/2019 11:21 AM
124	30	12/8/2019 3:07 PM
125	45	12/6/2019 12:28 PM
126	50	12/5/2019 12:54 PM
127	40	12/4/2019 3:13 PM
128	10	12/4/2019 3:03 PM
129	60	12/3/2019 10:01 AM
130	60	12/1/2019 12:00 PM
131	60	12/1/2019 10:37 AM
132	10	11/30/2019 6:47 PM
133	60	11/30/2019 4:28 PM
134	30	11/29/2019 9:36 AM
135	20	11/27/2019 10:57 AM
136	25	11/26/2019 1:59 PM
137	25	11/26/2019 12:47 PM
138	20	11/25/2019 11:23 AM
139	10	11/24/2019 12:31 PM
140	20	11/21/2019 3:49 PM
141	60	11/21/2019 1:06 PM
142	30	11/20/2019 10:20 AM
143	60	11/20/2019 9:49 AM
144	60	11/17/2019 4:00 PM
145	40	11/17/2019 11:06 AM
146	60	11/15/2019 4:05 PM
147	20	11/15/2019 11:27 AM
148	30	11/13/2019 11:22 AM
149	20	11/11/2019 2:11 PM
150	40	11/11/2019 9:33 AM
151	20	11/10/2019 2:39 PM



## Canberra and Region Visitor Centre Survey

152	20	11/10/2019 12:23 PM
153	25	11/9/2019 2:48 PM
154	20	11/9/2019 11:44 AM
155	10	11/9/2019 10:29 AM
156	80	11/8/2019 10:02 AM
157	30	11/7/2019 3:05 PM
158	60	11/6/2019 1:23 PM
159	20	11/6/2019 10:04 AM
160	10	11/5/2019 10:21 AM
161	30	11/5/2019 9:42 AM
162	10	11/4/2019 1:33 PM
163	60	11/4/2019 11:52 AM
164	30	11/4/2019 10:10 AM
165	10	11/2/2019 2:22 PM
166	6	11/2/2019 12:16 PM
167	20	11/2/2019 11:57 AM
168	60	10/31/2019 4:09 PM
169	90	10/31/2019 3:09 PM
170	30	10/31/2019 12:18 PM
171	30	10/31/2019 12:00 PM
172	45	10/30/2019 2:03 PM
173	30	10/29/2019 4:15 PM
174	20	10/29/2019 8:41 AM
175	20	10/26/2019 12:58 PM
176	45	10/26/2019 12:04 PM
177	30	10/24/2019 2:10 PM
178	40	10/23/2019 1:12 PM
179	60	10/23/2019 11:40 AM
180	120	10/19/2019 12:27 PM
181	75	10/19/2019 12:16 PM
182	30	10/18/2019 3:30 PM
183	120	10/18/2019 2:33 PM
184	120	10/18/2019 1:38 PM
185	100	10/17/2019 3:12 PM
186	60	10/17/2019 11:20 AM
187	60	10/17/2019 10:22 AM
188	60	10/15/2019 4:33 PM
189	15	10/15/2019 3:52 PM

## Canberra and Region Visitor Centre Survey

190	15	10/15/2019 1:18 PM
191	60	10/15/2019 10:42 AM
192	120	10/12/2019 3:24 PM
193	30	10/12/2019 3:08 PM
194	15	10/12/2019 1:39 PM
195	30	10/11/2019 2:11 PM
196	35	10/11/2019 10:11 AM
197	30	10/10/2019 4:51 PM
198	15	10/10/2019 4:11 PM
199	90	10/9/2019 3:30 PM
200	20	10/9/2019 2:29 PM
201	20	10/9/2019 2:16 PM
202	40	10/8/2019 4:56 PM
203	60	10/8/2019 1:04 PM
204	30	10/6/2019 1:04 PM
205	15	10/6/2019 12:24 PM
206	45	10/6/2019 11:40 AM
207	15	10/5/2019 2:02 PM
208	50	10/5/2019 1:31 PM
209	45	10/5/2019 11:42 AM
210	30	10/5/2019 8:55 AM
211	30	10/4/2019 10:06 AM
212	60	10/3/2019 1:42 PM
213	10	10/3/2019 9:06 AM
214	40	10/2/2019 3:38 PM
215	10	9/30/2019 2:00 PM
216	2	9/30/2019 1:46 PM
217	15	9/29/2019 1:34 PM
218	40	9/29/2019 10:01 AM
219	90	9/28/2019 12:10 PM
220	60	9/27/2019 5:04 PM
221	30	9/27/2019 12:54 PM
222	60	9/26/2019 12:03 PM
223	15	9/25/2019 3:58 PM
224	40	9/25/2019 1:37 PM
225	7	9/25/2019 1:35 PM
226	45	9/25/2019 10:03 AM
227	30	9/24/2019 1:22 PM

## Canberra and Region Visitor Centre Survey

228	30	9/24/2019 12:47 PM
229	30	9/23/2019 4:27 PM
230	10	9/23/2019 3:52 PM
231	120	9/23/2019 1:17 PM
232	30	9/23/2019 9:35 AM
233	10	9/20/2019 1:38 PM
234	10	9/20/2019 12:25 PM
235	37	9/19/2019 5:00 PM
236	20	9/19/2019 3:29 PM
237	99999	9/18/2019 1:03 PM
238	30	9/17/2019 4:00 PM
239	2	9/17/2019 12:09 PM
240	40	9/17/2019 11:28 AM
241	30	9/17/2019 10:05 AM
242	60	9/16/2019 4:45 PM
243	45	9/16/2019 12:42 PM
244	15	9/16/2019 10:46 AM
245	75	9/15/2019 2:18 PM
246	30	9/15/2019 11:38 AM
247	15	9/14/2019 12:38 PM
248	30	9/14/2019 9:09 AM
249	20	9/13/2019 11:25 AM
250	30	9/11/2019 2:38 PM
251	55	9/10/2019 3:19 PM
252	20	9/9/2019 3:44 PM
253	5	9/8/2019 4:02 PM
254	10	9/7/2019 3:57 PM
255	30	9/3/2019 11:35 AM
256	15	9/2/2019 12:42 PM
257	15	9/1/2019 1:27 PM
258	20	8/30/2019 1:57 PM
259	55	8/28/2019 12:02 PM
260	90	8/27/2019 2:54 PM
261	10	8/23/2019 12:55 PM
262	60	8/23/2019 10:07 AM
263	15	8/20/2019 4:37 PM
264	30	8/20/2019 1:30 PM
265	60	8/19/2019 3:18 PM



## Canberra and Region Visitor Centre Survey

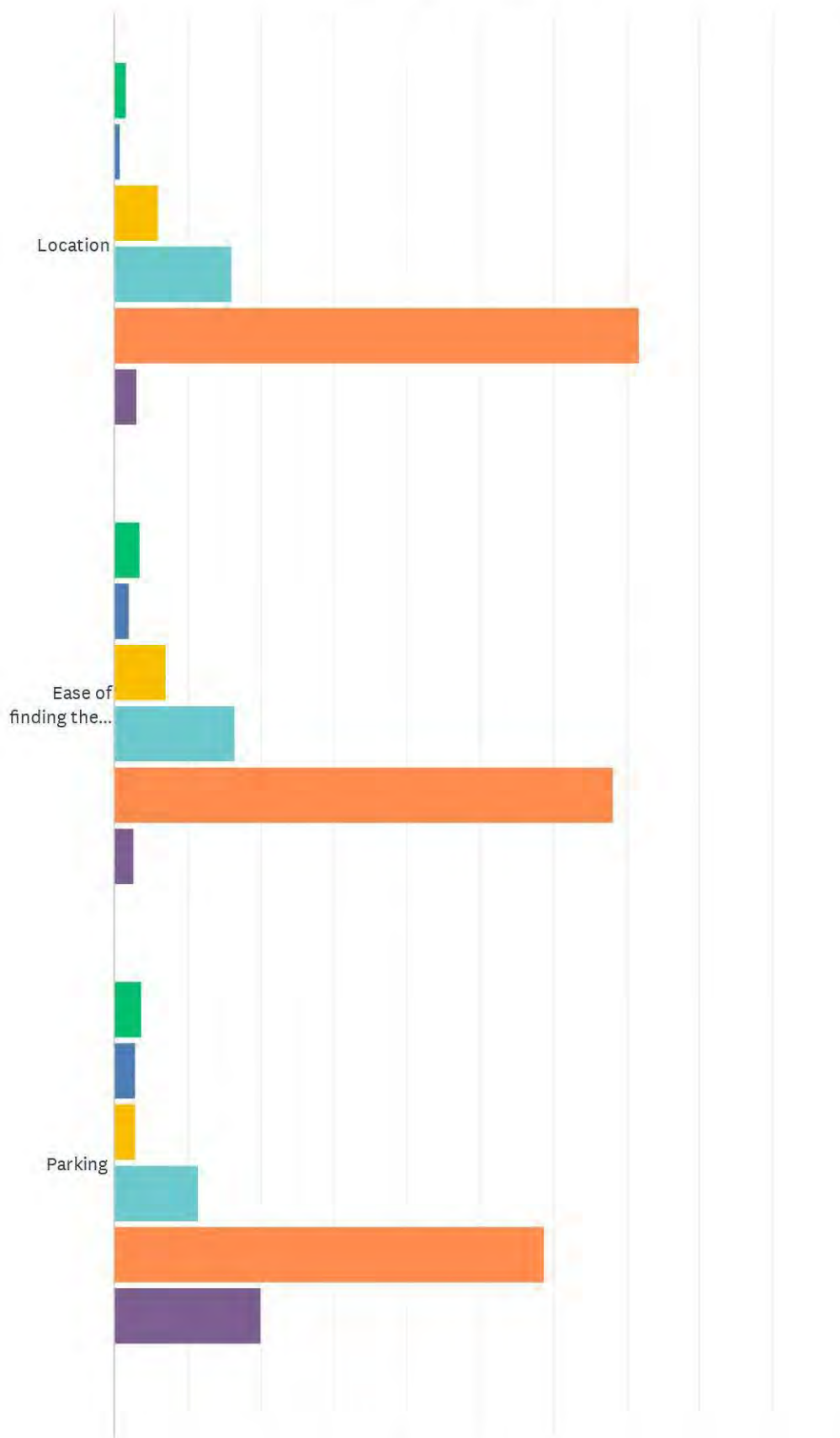
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269	15	8/16/2019 3:53 PM
270	45	8/14/2019 11:01 AM
271	20	8/13/2019 4:57 PM
272	10	8/13/2019 3:51 PM
273	6	8/13/2019 3:35 PM
274	50	8/12/2019 12:03 PM
275	15	8/10/2019 1:57 PM
276	5	8/10/2019 1:46 PM
277	15	8/10/2019 12:03 PM
278	60	8/9/2019 12:17 PM
279	15	8/8/2019 4:09 PM
280	1	8/8/2019 4:01 PM
281	10	8/8/2019 2:35 PM
282	60	8/8/2019 10:05 AM
283	30	8/5/2019 12:11 PM
284	80	8/4/2019 2:48 PM
285	10	8/4/2019 10:18 AM
286	10	8/3/2019 1:54 PM
287	15	8/3/2019 1:51 PM
288	20	8/1/2019 3:53 PM
289	60	8/1/2019 11:17 AM
290	30	8/1/2019 10:46 AM
291	40	8/1/2019 10:21 AM
292	30	7/31/2019 3:26 PM
293	30	7/31/2019 3:20 PM
294	140	7/31/2019 2:12 PM
295	5	7/31/2019 12:24 PM
296	15	7/30/2019 11:51 AM
297	60	7/30/2019 11:38 AM
298	40	7/30/2019 11:28 AM
299	30	7/29/2019 4:07 PM
300	15	7/29/2019 3:14 PM
301	30	7/29/2019 2:53 PM
302	30	7/29/2019 2:40 PM
303	20	7/29/2019 1:29 PM

## Canberra and Region Visitor Centre Survey

304	35	7/29/2019 12:52 PM
305	15	7/28/2019 1:15 PM
306	30	7/28/2019 11:08 AM
307	20	7/27/2019 3:27 PM
308	60	7/27/2019 12:09 PM
309	30	7/26/2019 1:26 PM
310	60	7/26/2019 11:49 AM
311	15	7/26/2019 9:52 AM
312	60	7/22/2019 3:01 PM
313	10	7/20/2019 11:32 AM
314	60	7/19/2019 1:02 PM
315	30	7/15/2019 2:34 PM
316	40	7/11/2019 11:06 AM
317	15	7/10/2019 10:39 AM
318	15	7/9/2019 4:21 PM
319	60	7/8/2019 4:36 PM
320	30	7/8/2019 1:17 PM
321	60	7/8/2019 10:51 AM
322	60	7/5/2019 1:14 PM
323	20	7/4/2019 4:27 PM
324	70	7/4/2019 10:16 AM
325	100000000	7/2/2019 4:10 PM
326	10	7/2/2019 1:44 PM
327	30	7/2/2019 1:01 PM
328	60	7/2/2019 11:37 AM
329	10	7/2/2019 11:17 AM
330	18	7/2/2019 10:34 AM
331	60	7/1/2019 11:36 AM
332	20	7/1/2019 10:15 AM

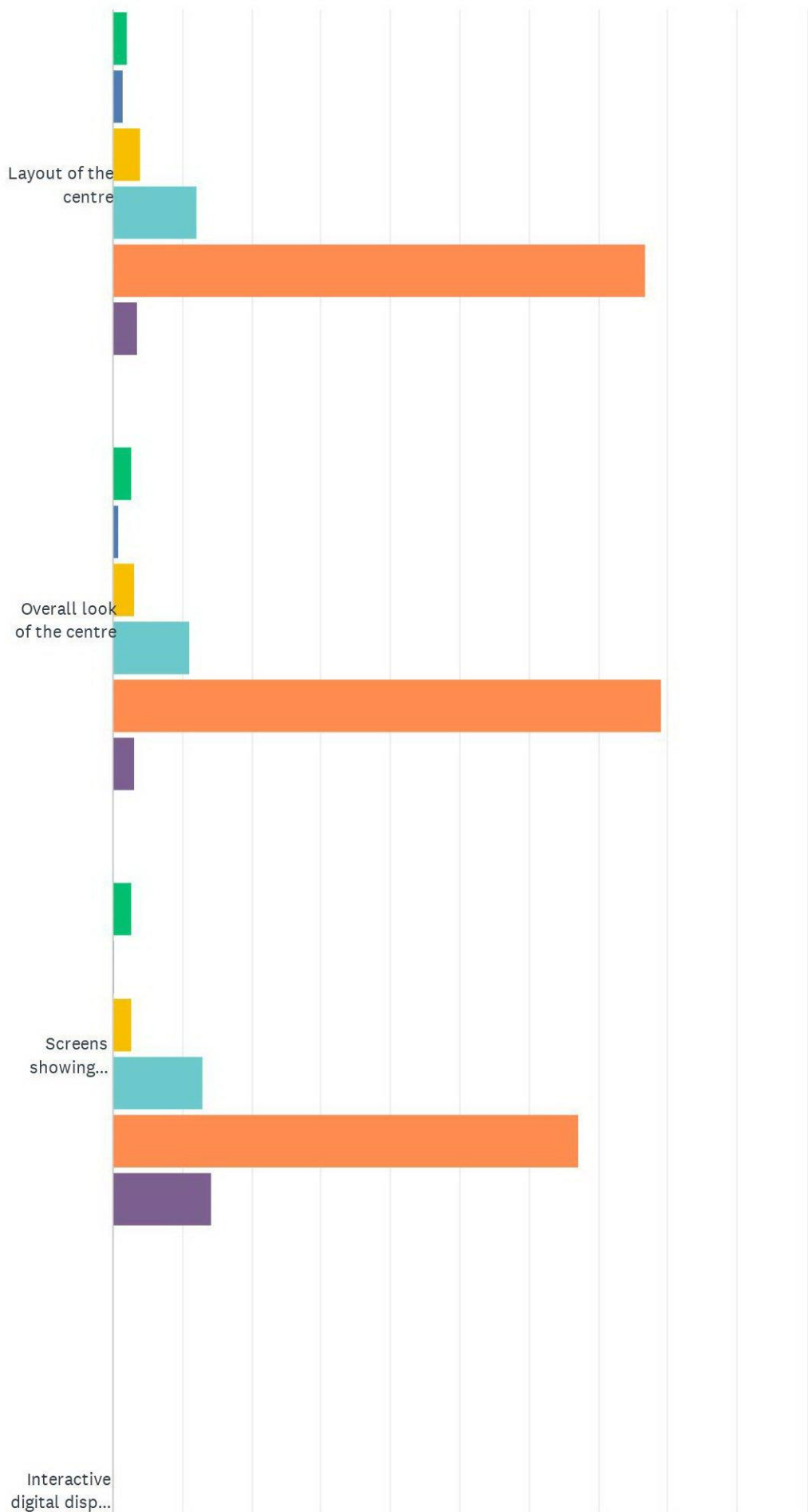
### Q5 How satisfied are you with the following aspects of the centre?

Answered: 364 Skipped: 24

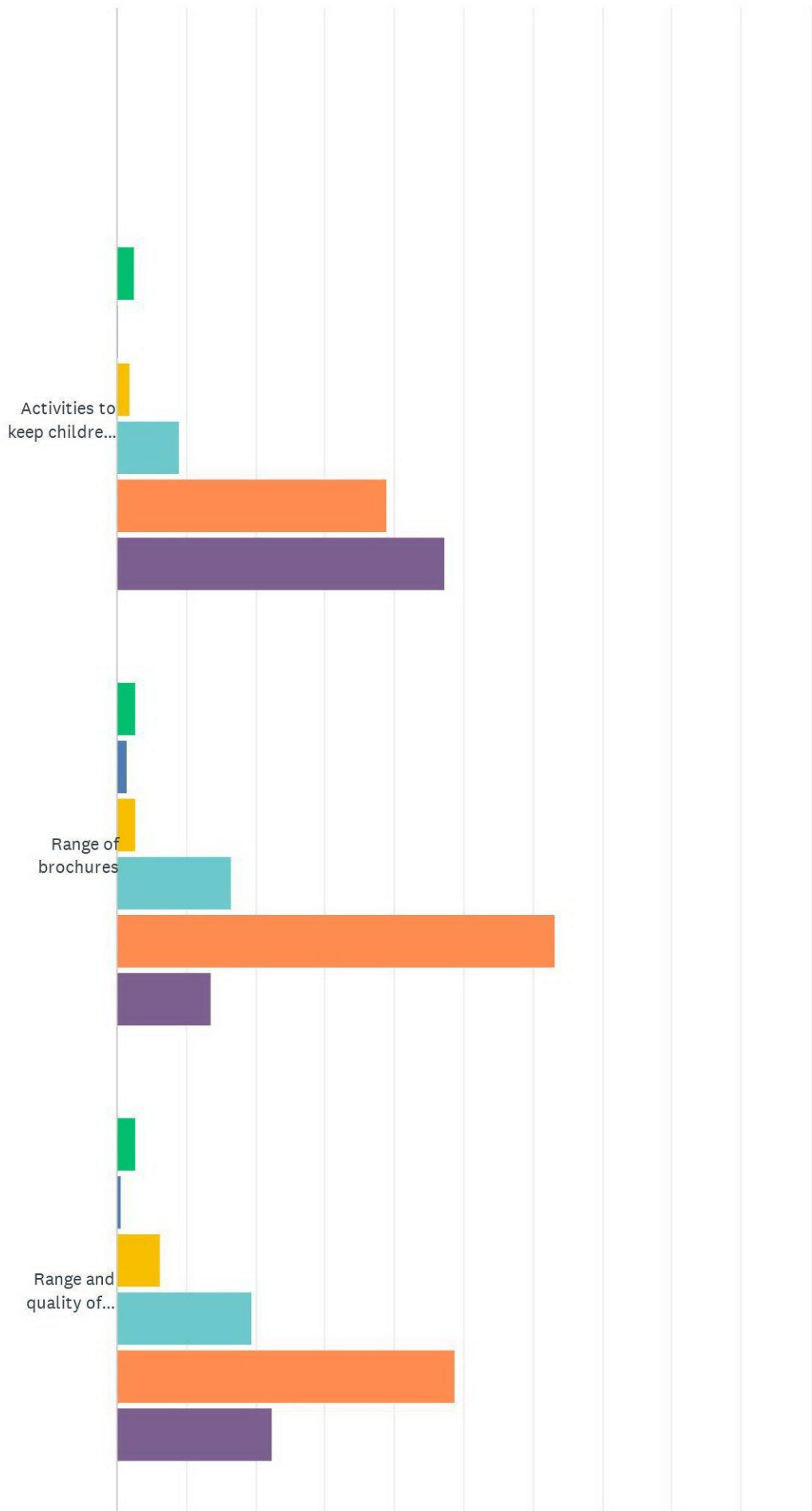




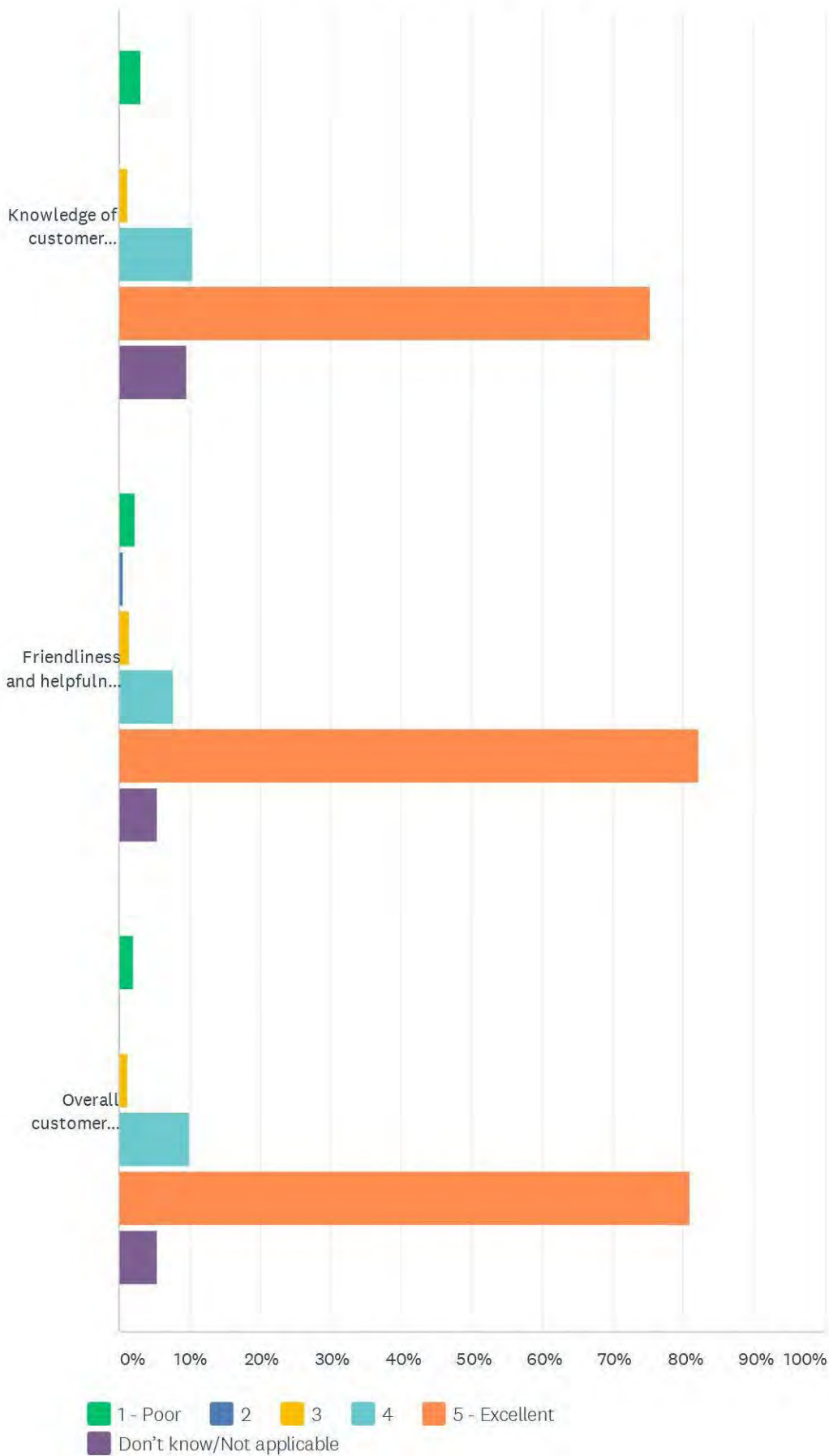
# Canberra and Region Visitor Centre Survey



# Canberra and Region Visitor Centre Survey



# Canberra and Region Visitor Centre Survey



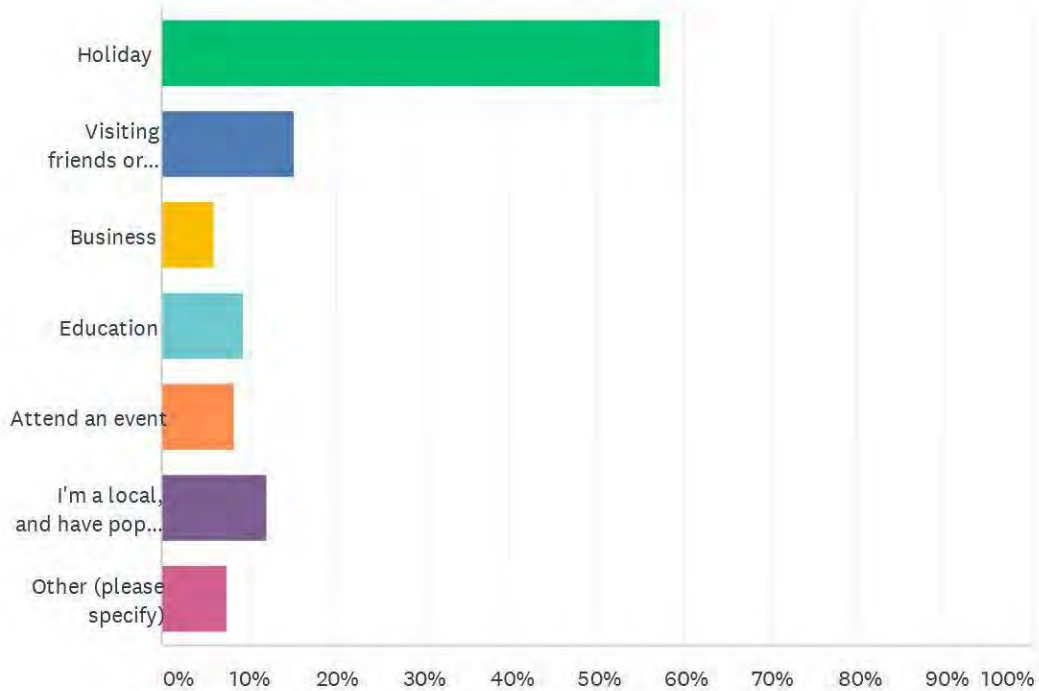


## Canberra and Region Visitor Centre Survey

	1 - POOR	2	3	4	5 - EXCELLENT	DON'T KNOW/NOT APPLICABLE	TOTAL	WEIGHTED AVERAGE
Location	1.76% 6	0.88% 3	6.16% 21	16.13% 55	71.85% 245	3.23% 11	341	4.61
Ease of finding the centre	3.53% 12	2.06% 7	7.06% 24	16.47% 56	68.24% 232	2.65% 9	340	4.48
Parking	3.80% 13	2.92% 10	2.92% 10	11.40% 39	58.77% 201	20.18% 69	342	4.48
Layout of the centre	2.03% 7	1.45% 5	4.07% 14	12.21% 42	76.74% 264	3.49% 12	344	4.66
Overall look of the centre	2.62% 9	0.87% 3	3.21% 11	11.08% 38	79.01% 271	3.21% 11	343	4.68
Screens showing information throughout the centre	2.65% 9	0.29% 1	2.65% 9	12.98% 44	67.26% 228	14.16% 48	339	4.65
Interactive digital display screens / touch screen tables	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0.00% 0	0	0.00
Activities to keep children occupied	2.48% 8	0.31% 1	1.86% 6	8.98% 29	39.01% 126	47.37% 153	323	4.55
Range of brochures	2.65% 9	1.47% 5	2.65% 9	16.52% 56	63.13% 214	13.57% 46	339	4.57
Range and quality of retail merchandise	2.69% 9	0.60% 2	6.27% 21	19.40% 65	48.66% 163	22.39% 75	335	4.43
Knowledge of customer service staff	3.19% 11	0.29% 1	1.16% 4	10.43% 36	75.36% 260	9.57% 33	345	4.71
Friendliness and helpfulness of customer service staff	2.32% 8	0.58% 2	1.45% 5	7.83% 27	82.32% 284	5.51% 19	345	4.77
Overall customer service you received today	2.08% 7	0.30% 1	1.19% 4	10.12% 34	80.95% 272	5.36% 18	336	4.77

## Q6 What is your main reason for visiting the Canberra region?

Answered: 349 Skipped: 39



ANSWER CHOICES	RESPONSES	
Holiday	57.31%	200
Visiting friends or relatives	15.19%	53
Business	6.02%	21
Education	9.46%	33
Attend an event	8.31%	29
I'm a local, and have popped in for information or a browse	12.03%	42
Other (please specify)	7.45%	26
Total Respondents: 349		

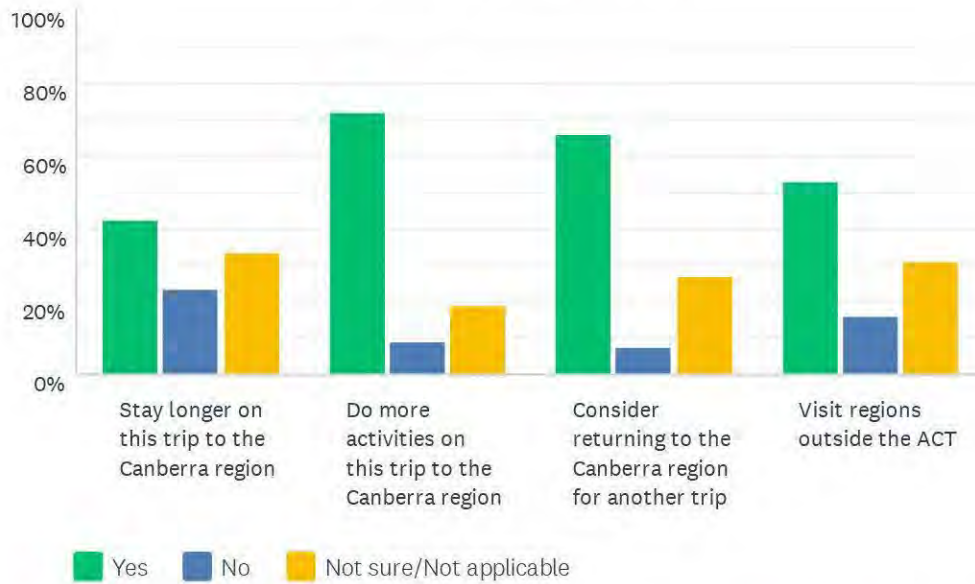
## Canberra and Region Visitor Centre Survey

#	OTHER (PLEASE SPECIFY)	DATE
1	Find food	6/17/2020 1:08 PM
2	To shit	6/6/2020 12:41 PM
3	Yeet	3/10/2020 4:53 PM
4	Relocation for work	2/16/2020 2:36 PM
5	Settling daughter into ANU	2/7/2020 3:12 PM
6	Visit specialist medical services	2/5/2020 11:05 AM
7	Yeet	12/30/2019 3:56 PM
8	Show overseas visitors canberra	12/30/2019 12:20 PM
9	Family visiting	12/15/2019 12:15 PM
10	Educational and interest	12/4/2019 3:13 PM
11	L'Etape	11/27/2019 10:57 AM
12	Info for citing Aussie and New Zealand NHW Visiting executives	11/26/2019 12:47 PM
13	Tour guide	11/7/2019 3:05 PM
14	Passing through	11/4/2019 1:33 PM
15	School camp	10/31/2019 12:00 PM
16	School camp/tour	10/8/2019 1:04 PM
17	Floriade	9/30/2019 2:00 PM
18	Conference	9/23/2019 4:27 PM
19	Floriade	9/19/2019 3:51 PM
20	T	9/18/2019 1:03 PM
21	Passing thru	9/17/2019 11:28 AM
22	Local products	9/2/2019 12:42 PM
23	Exhibitions	7/27/2019 3:27 PM
24	Love it	7/23/2019 1:03 PM
25	Passing through	7/2/2019 11:17 AM
26	Canada Flag	7/1/2019 11:36 AM



## Q7 Did your visit to the centre encourage you to...?

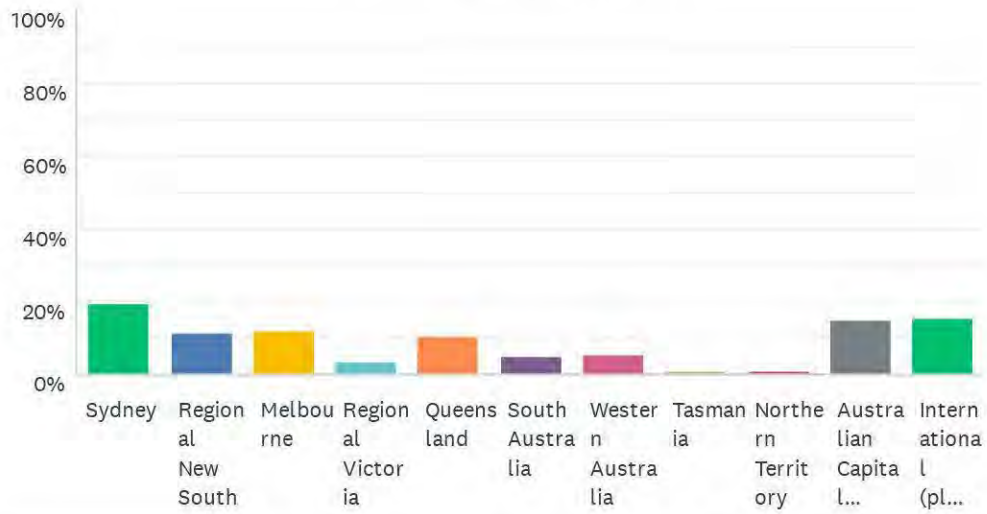
Answered: 333 Skipped: 55



	YES	NO	NOT SURE/NOT APPLICABLE	TOTAL
Stay longer on this trip to the Canberra region	42.72% 132	23.62% 73	33.66% 104	309
Do more activities on this trip to the Canberra region	71.92% 228	9.15% 29	18.93% 60	317
Consider returning to the Canberra region for another trip	65.93% 209	7.26% 23	26.81% 85	317
Visit regions outside the ACT	53.02% 158	15.77% 47	31.21% 93	298

## Q8 Where do you currently live?

Answered: 335 Skipped: 53



ANSWER CHOICES	RESPONSES	
Sydney	19.70%	66
Regional New South Wales	11.64%	39
Melbourne	11.94%	40
Regional Victoria	3.28%	11
Queensland	10.45%	35
South Australia	4.78%	16
Western Australia	5.67%	19
Tasmania	0.90%	3
Northern Territory	0.90%	3
Australian Capital Territory	15.22%	51
International (please specify country)	15.52%	52
<b>TOTAL</b>		<b>335</b>

## Canberra and Region Visitor Centre Survey

#	INTERNATIONAL (PLEASE SPECIFY COUNTRY)	DATE
1	Uk	3/8/2020 12:21 PM
2	United States of America	2/25/2020 11:14 AM
3	Canada	2/21/2020 11:59 AM
4	Usa	2/19/2020 3:53 PM
5	India	2/18/2020 1:10 PM
6	Thailand	2/18/2020 11:46 AM
7	Usa-texas	2/13/2020 4:38 PM
8	Usa	2/2/2020 2:28 PM
9	Usa	2/1/2020 2:15 PM
10	Sweden	1/29/2020 11:59 AM
11	Vietnam	1/27/2020 3:28 PM
12	Uk	1/22/2020 10:37 AM
13	Belgium	1/7/2020 11:43 AM
14	Germany	12/31/2019 1:13 PM
15	Philippines	12/31/2019 11:49 AM
16	Usa	12/30/2019 12:20 PM
17	Switzerland	12/29/2019 3:09 PM
18	New Zealand	12/29/2019 1:44 PM
19	Usa	12/28/2019 10:54 AM
20	Cape Town, South Africa	12/27/2019 1:03 PM
21	Vietnam	12/24/2019 1:13 PM
22	Germany	12/20/2019 3:06 PM
23	Uk	12/20/2019 10:20 AM
24	UK	12/19/2019 3:23 PM
25	NZ	12/17/2019 4:45 PM
26	Austria	12/16/2019 3:56 PM
27	London	12/14/2019 1:01 PM
28	Germany	12/11/2019 2:52 PM
29	Germany	12/10/2019 11:21 AM
30	Auckland	12/5/2019 12:54 PM
31	Switzerland	11/29/2019 9:36 AM
32	UK	11/25/2019 11:23 AM
33	Canada	11/20/2019 10:20 AM
34	Germany	11/4/2019 10:10 AM
35	USA	10/31/2019 3:09 PM
36	Germany	10/26/2019 12:58 PM
37	Uk	10/24/2019 2:10 PM

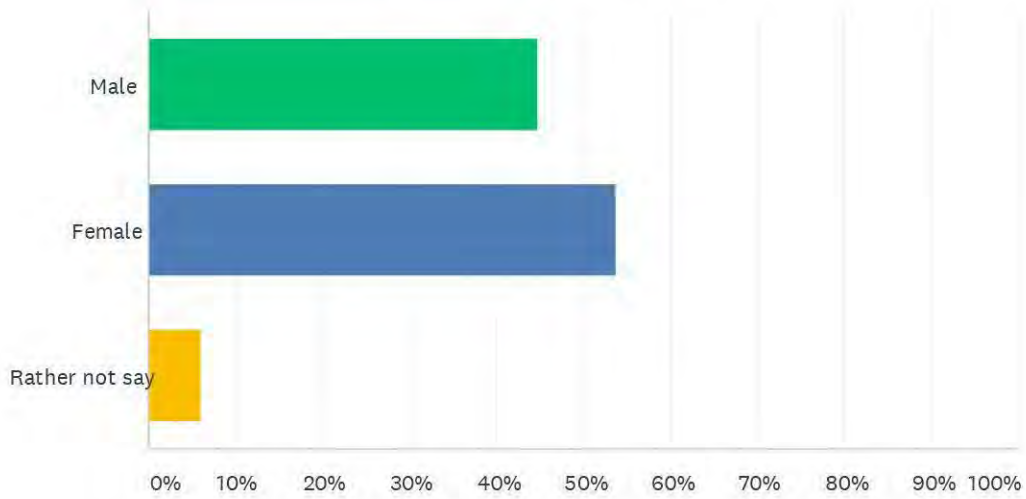


## Canberra and Region Visitor Centre Survey

38	Germany	10/18/2019 2:33 PM
39	UK and USA	10/15/2019 3:52 PM
40	Scotland	10/15/2019 1:18 PM
41	Uk	9/28/2019 12:10 PM
42	India	9/23/2019 9:35 AM
43	Uk	9/10/2019 3:19 PM
44	India	8/27/2019 2:54 PM
45	Philippines	8/19/2019 3:18 PM
46	England	8/9/2019 12:17 PM
47	Kempsey	8/8/2019 10:05 AM
48	New zealand	8/4/2019 10:18 AM
49	Grey nomads	8/1/2019 10:46 AM
50	Japan	7/31/2019 3:20 PM
51	Usa	7/29/2019 3:14 PM
52	Bristol, UK	7/28/2019 1:15 PM

### Q9 What is your gender?

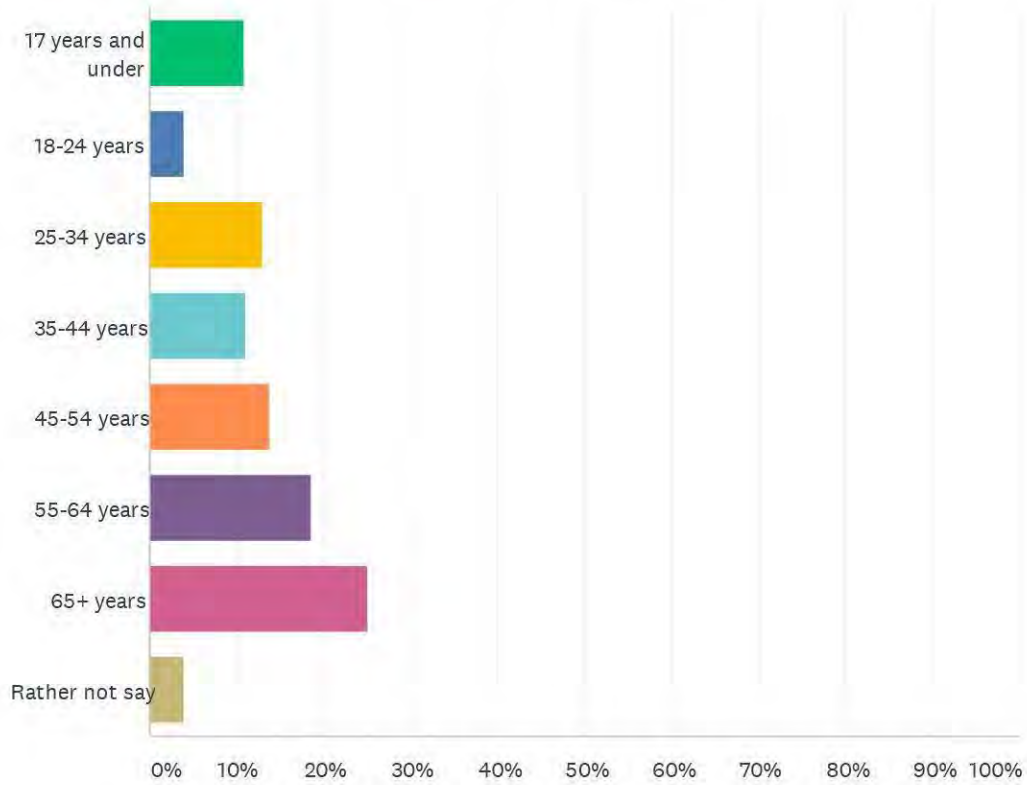
Answered: 335 Skipped: 53



ANSWER CHOICES	RESPONSES	
Male	44.78%	150
Female	53.73%	180
Rather not say	5.97%	20
Total Respondents: 335		

## Q10 Which of the following age groups do you fall into?

Answered: 334 Skipped: 54

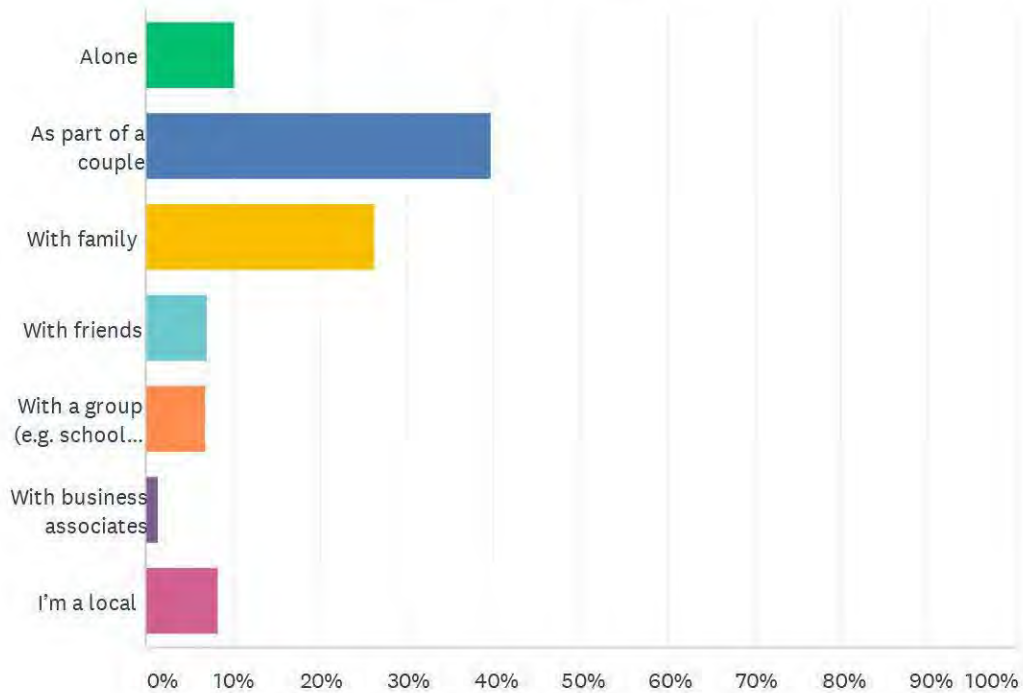


ANSWER CHOICES	RESPONSES	
17 years and under	10.78%	36
18-24 years	3.89%	13
25-34 years	12.87%	43
35-44 years	11.08%	37
45-54 years	13.77%	46
55-64 years	18.56%	62
65+ years	25.15%	84
Rather not say	3.89%	13
<b>TOTAL</b>		<b>334</b>



## Q11 Are you travelling...?

Answered: 335 Skipped: 53



ANSWER CHOICES	RESPONSES	
Alone	10.15%	34
As part of a couple	39.70%	133
With family	26.27%	88
With friends	7.16%	24
With a group (e.g. school, sporting, special interest)	6.87%	23
With business associates	1.49%	5
I'm a local	8.36%	28
<b>TOTAL</b>		<b>335</b>

#	OTHER (PLEASE SPECIFY)	DATE
1	Tour group	10/3/2019 1:42 PM
2	For a conference	8/27/2019 2:54 PM

Q12 As a final question for today, we'd love to hear any further comments or suggestions relating to your experience at the centre today, or if there's anything else you'd like to see here. Please tell us in the space below.

Answered: 111 Skipped: 277

## Canberra and Region Visitor Centre Survey

#	RESPONSES	DATE
1	Brilliant overview of Canberra and it's history!	6/30/2020 4:19 PM
2	Just came in for lost and found item	6/25/2020 2:15 PM
3	Robert was delightful.	6/24/2020 2:04 PM
4	More signage in civic	6/24/2020 10:18 AM
5	Such friendly staff	6/19/2020 1:35 PM
6	I forgot to flush	6/6/2020 12:41 PM
7	Bikes with trailers or tricycles	3/19/2020 12:34 PM
8	Yeeet	3/10/2020 4:53 PM
9	Better signage on the sign near the bridge. This is not obvious on the tourist maps for each circuit. The circuit maps are also hard to read	2/27/2020 1:54 PM
10	Excellent	2/25/2020 11:14 AM
11	Was beautiful view and friendly Staff	2/24/2020 12:18 PM
12	Less shopping, more about the history of Canberra e.g. Indigenous history and views on Canberra	2/22/2020 3:22 PM
13	Angela is terrific, lots of fun regional knowledge! Thank you!	2/19/2020 3:53 PM
14	Yvonne was fabulous	2/18/2020 2:16 PM
15	Such a shame no bus to Botanic Gardens	2/18/2020 2:15 PM
16	Lovely staff and friendly I got everything important from them	2/18/2020 11:46 AM
17	All good	2/17/2020 2:48 PM
18	We have used greeters overseas. What a pity you don't offer the same service.	2/16/2020 11:32 AM
19	Loved the history of Canberra displays and exhibits. Engaging and informative.	2/15/2020 11:38 AM
20	Surprised and delighted with visit!	2/13/2020 4:38 PM
21	Staff very helpful and friendly	2/9/2020 11:14 AM
22	Get a bigger screen, the frame around the keyboard was uncomfortable to type	1/26/2020 2:11 PM
23	Appreciated the excellent service provided. Thank you	1/22/2020 10:37 AM
24	Excellent	1/14/2020 12:20 PM
25	It was beautiful place	1/6/2020 3:35 PM
26	Map showing more of the suburbs	1/6/2020 1:34 PM
27	I didn't enjoy the new-to-me layout requiring you to walk through retail to get to brochures/information. Not visitor friendly as the brochures don't start until you've progressed past two retail sections with no indication there actually is a treasure trove of information hidden around the final corner.	1/1/2020 11:54 AM
28	Louise was exceptionally helpful	12/29/2019 1:44 PM
29	.	12/29/2019 1:21 PM
30	Had a good experience. The tour with Peter for the exhibition was really wonderful	12/29/2019 12:03 PM
31	Thank you it was excellent. We will recommend the centre	12/28/2019 4:03 PM
32	Good techy way of presentation, very helpful staff	12/24/2019 12:16 PM
33	Keisha was very helpful. She is very bright and bubbly.	12/22/2019 1:39 PM
34	Fabulous service and information. Very helpful glad we visited this centre early in our holiday	12/20/2019 12:35 PM



## Canberra and Region Visitor Centre Survey

35	Helpful friendly staff	12/17/2019 4:45 PM
36	You have very friendly staff!!!! Perfect	12/11/2019 2:52 PM
37	Very helpful stuff	12/5/2019 12:54 PM
38	Wow it was very interesting	12/1/2019 12:00 PM
39	Thank you for the great show	11/29/2019 9:36 AM
40	Volunteer Sandy was very helpful.	11/26/2019 12:47 PM
41	Super friendly staff. Love the pride gear	11/21/2019 3:49 PM
42	Ccccc	11/10/2019 2:39 PM
43	It was great	11/10/2019 12:23 PM
44	No paper towels in male toilets Why not electrical hand dryers like the rest of Australia	11/9/2019 10:29 AM
45	Staff very friendly & engaging thank you,	11/6/2019 10:04 AM
46	Angela with the big smile was great	11/4/2019 1:33 PM
47	Would like to see the cafe open FOR EVER	11/2/2019 2:22 PM
48	Excellent servic	11/2/2019 12:16 PM
49	All the Visitor Centers I have visited in Australia have been excellent, but this one stands out!	10/31/2019 3:09 PM
50	Dhchcncn	10/31/2019 12:00 PM
51	Keep the cafe open	10/30/2019 2:03 PM
52	Really helps give an overview of Canberra	10/26/2019 12:04 PM
53	Excellent	10/24/2019 2:10 PM
54	We are extremely thankful to Chanelle who helped us with accomodation booking yesterday. She took a very professional and proactive approach to help us with a stressful situation. Thank you so much.	10/23/2019 11:40 AM
55	Coffee should be stronger, less milk please.	10/19/2019 12:27 PM
56	Cafe very expensive	10/18/2019 1:38 PM
57	It is rl bad	10/17/2019 3:12 PM
58	Ladies and gentleman who work at the visitors centre were so friendly and kinds	10/17/2019 10:22 AM
59	First time here. We'll certainly use the centre again rather than waste time doing things diy	10/15/2019 3:52 PM
60	Excellent service & space	10/15/2019 10:42 AM
61	Thanks	10/12/2019 1:39 PM
62	Get more cups	10/9/2019 2:29 PM
63	I found this place rather fascinating and educational for all ages. I would definatly rate this a 5 out of 5 star. Loved it!	10/9/2019 2:16 PM
64	Need Public transport to Arboretum!!!!	10/8/2019 9:33 AM
65	Excellent	10/6/2019 1:04 PM
66	Cool thing	10/5/2019 2:02 PM
67	More displays likes houses designs and how ppl lived in old days in Canberra	10/4/2019 10:06 AM
68	Very well designed. An informative and interesting exhibition which Cleary provides a complete history of Canberra.	10/3/2019 1:42 PM
69	Excellent facility	10/2/2019 3:38 PM
70	Need more free shuttle buses. 1 bus every hour is not good enough,,,,	9/30/2019 2:00 PM

## Canberra and Region Visitor Centre Survey

71	Maddy was wonderful help	9/27/2019 1:26 PM
72	Thanks. Excellent	9/27/2019 12:54 PM
73	Is nice place and peaceful	9/27/2019 9:27 AM
74	No further comment	9/25/2019 3:58 PM
75	Lovely space and very informative. Beautifully designed.	9/25/2019 1:35 PM
76	Everything here is fabulous,	9/24/2019 1:22 PM
77	Tourist information needs to be at the city end of light rail. And directions to nearest information centre.	9/24/2019 12:49 PM
78	Excellent customer service	9/24/2019 12:47 PM
79	This centre is so good and helpful. A pity there's not more information at the airport for tourists.	9/23/2019 4:27 PM
80	Cheers	9/23/2019 9:35 AM
81	Keep up the good work	9/17/2019 4:00 PM
82	Just really good	9/17/2019 12:09 PM
83	Awesome	9/17/2019 11:28 AM
84	Lou was extremely helpful and knowledgable 😊	9/17/2019 10:05 AM
85	Very disappointed we could not order any food at the cafe after 2pm. Particularly when it was the first weekend of Floriade.	9/14/2019 2:42 PM
86	Very poor signage to the info centre destination. Signage on the building not clearly visible from the car park in a multi function area.	9/11/2019 2:38 PM
87	Tremendous vista	9/10/2019 3:19 PM
88	Fantastic, Amazing!	9/8/2019 4:02 PM
89	Website noted centenary map. Wasn't available, but staff very helpful and me some print outs.	9/7/2019 3:57 PM
90	Add more pictures of Canberra. It is a disgrace to only put photos from before 2000s.	9/3/2019 11:35 AM
91	Excellent display. Inspirational. Learned a lot. Thank you very much canberra	8/27/2019 2:54 PM
92	Time to go into the café!	8/23/2019 10:07 AM
93	Jenny was a wonderful help great volunteer!	8/13/2019 4:57 PM
94	Jenny was wonderful	8/13/2019 3:35 PM
95	You guys are pretty cool! Keep up the good work. 😊😊	8/12/2019 12:03 PM
96	Keep up the good work	8/10/2019 1:57 PM
97	The bike stop facilities need to reflect what is promised on the ACT Transport site. Better signposted and more easily accessible. Took too long to figure out how and where to pump my tyres	8/8/2019 2:35 PM
98	Really liked the quality of the hire bikes, we had a great ride	8/3/2019 1:54 PM
99	Wonderful assistance with bike hire and cycling route information. Friendly, informative staff.	8/3/2019 1:51 PM
100	Very informative	8/1/2019 10:46 AM
101	Excellent centre, but very hard to locate. Total lack of directional signs from the city centre and even within the park, especially for pedestrians, eg using light rail.	7/31/2019 3:26 PM
102	Chantelle was lovely	7/30/2019 11:51 AM
103	Very friendly n helpful personal.	7/30/2019 11:28 AM
104	Better facility than the old one	7/29/2019 2:40 PM
105	Had a lovely chat with an customer service rep, very helpful!	7/28/2019 1:15 PM

## Canberra and Region Visitor Centre Survey

106	Preferred the old location	7/27/2019 3:27 PM
107	It was awesome😊	7/27/2019 12:09 PM
108	My tour guide Izzy was excellent.	7/19/2019 1:02 PM
109	Thanks Michael for your help and suggestions	7/11/2019 11:06 AM
110	Books on how Canberra was made the capital and how it was built.	7/2/2019 11:37 AM
111	I'm concerned that the display screen tables have been raised in height. I have a long-standing interest in disability access as a right of all. These tables cannot be viewed by restricted mobility visitors or children.	7/2/2019 10:34 AM

Q13 If you would like to receive our VisitCanberra eNewsletter please enter your email below.

Answered: 21 Skipped: 367

#	RESPONSES	DATE
1		2/16/2020 2:36 PM
2		1/26/2020 2:11 PM
3		1/22/2020 9:55 AM
4		12/24/2019 12:28 PM
5		12/5/2019 12:54 PM
6		11/29/2019 9:36 AM
7		10/5/2019 2:02 PM
8		10/4/2019 10:06 AM
9		10/3/2019 1:42 PM
10		9/30/2019 2:00 PM
11		9/27/2019 5:04 PM
12		9/25/2019 10:03 AM
13		9/24/2019 1:22 PM
14		9/23/2019 9:35 AM
15		9/7/2019 3:57 PM
16		8/27/2019 2:54 PM
17		8/23/2019 10:07 AM
18		8/3/2019 1:51 PM
19		7/31/2019 3:26 PM
20		7/29/2019 2:53 PM
21		7/27/2019 12:09 PM

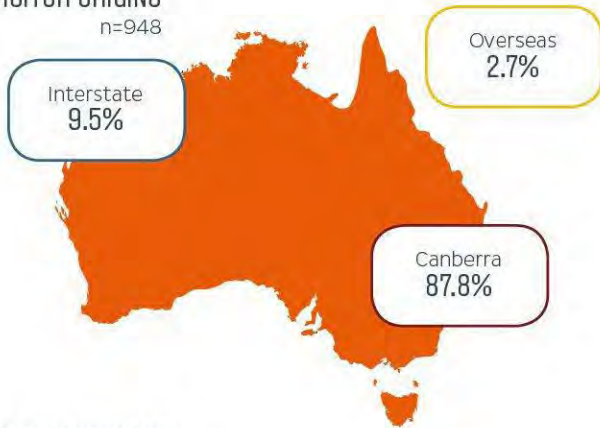


# Windows to the World

5 - 20 October 2019



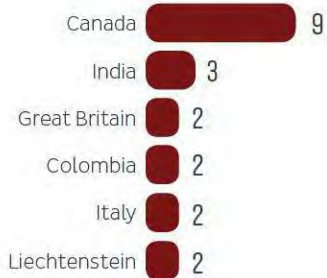
## VISITOR ORIGINS n=948



## STATES OF ORIGIN n=90



## COUNTRY OF ORIGIN\* n=26



\*Displaying sample counts due to small total sample

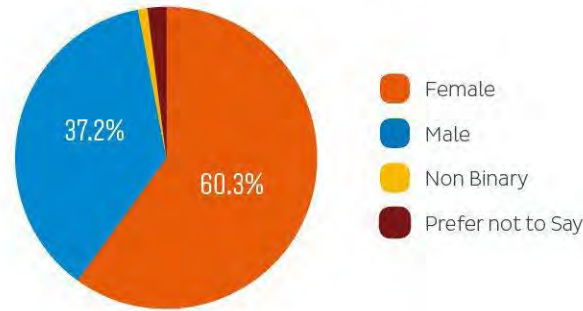
## DAYS ATTENDED (SAMPLE COMPOSITION) n=289



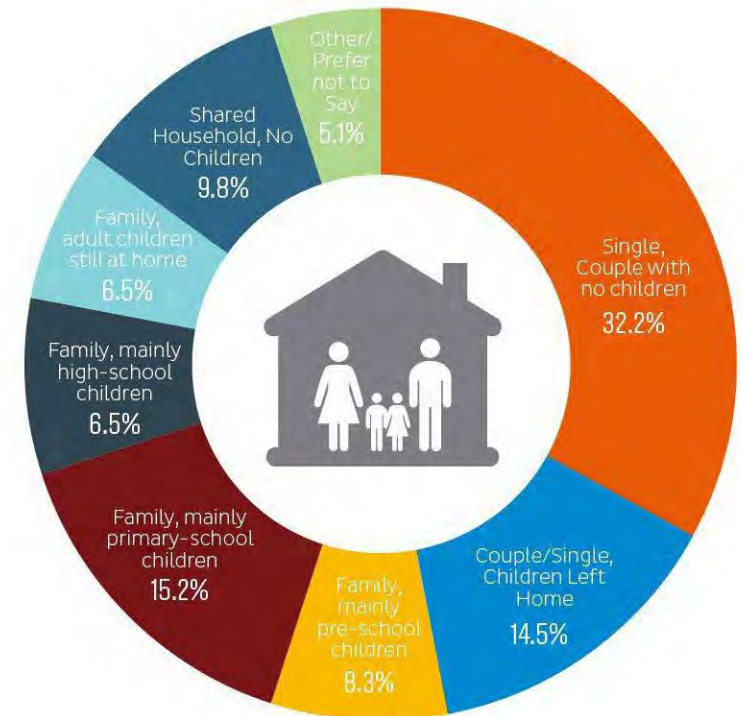
## NUMBER OF DAYS ATTENDED n=289



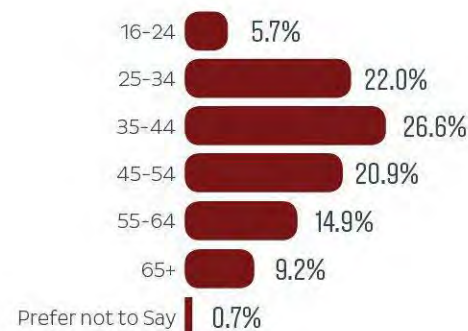
## DEMOGRAPHIC PROFILE OF ATTENDEES n=282



## HOUSEHOLD COMPOSITION OF ATTENDEES n=276



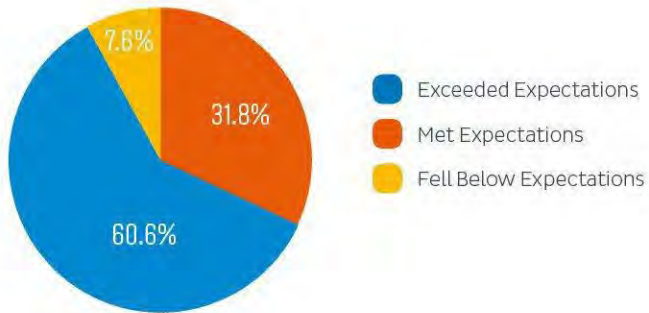
## AGE OF ATTENDEE n=282



# Windows to the World

## ATTENDEE EXPECTATIONS

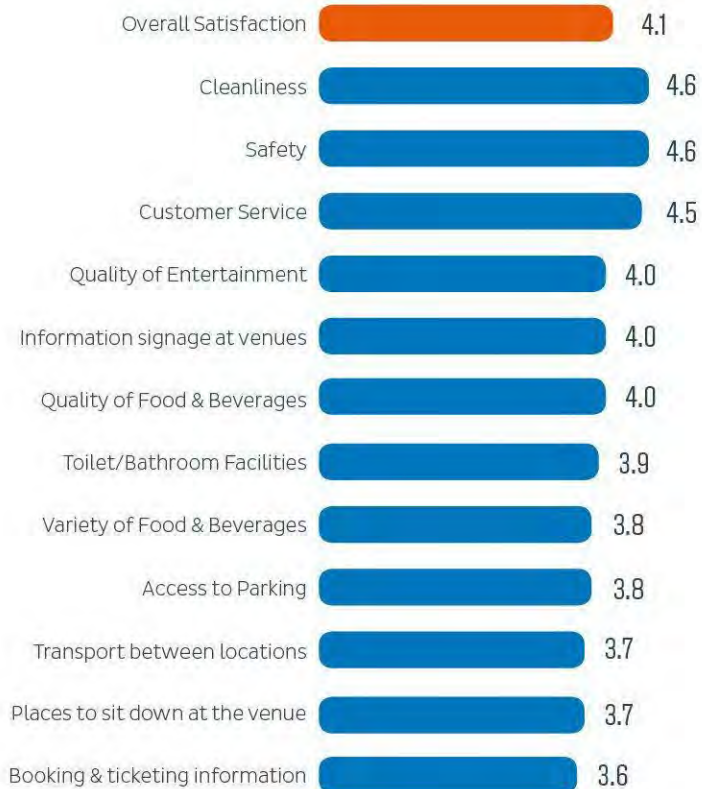
n=289



## ATTENDEE SATISFACTION

AVERAGE SCORE (1/5)

n=289



## NET PROMOTER SCORE

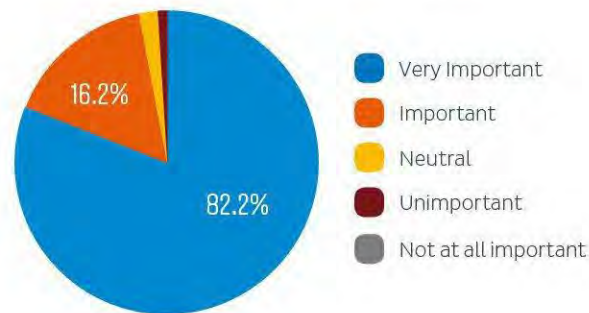
n=285

The Net Promoter Score measures the level of positive/negative advocacy that Windows to the World generated amongst attendees. Detractors (0-6) are likely to talk negatively about the event and their experience. Passives (7-8) are likely to be neutral whilst Promoters (9-10) are likely to positively advocate their experience to others



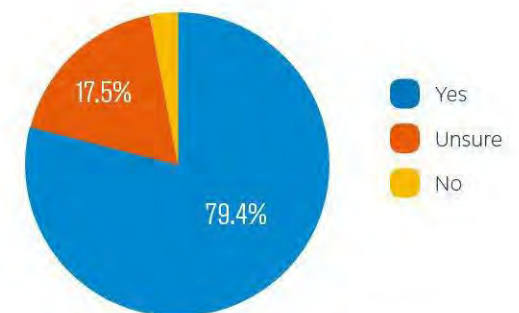
## IMPORTANCE OF HOSTING COMMUNITY EVENTS

n=289



## USE OF TAXPAYER FUNDS TO STAGE COMMUNITY EVENTS

n=289



## COMMUNITY IMPACT

RATED 'AGREE OR STRONGLY AGREE'

n=251



## ENHANCING PERCEPTIONS OF CANBERRA

RESPONDED 'YES'

n=283





# Floriade 2019

## Economic Impact & Research Report



FOCUSED EVENT THINKING

Floriade  
**NightFest**

# SUMMARY OF KEY FINDINGS



## ATTENDANCES

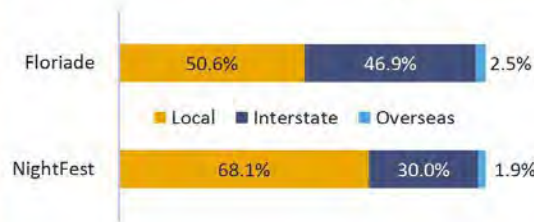
Floriade/NightFest attracted total attendances of **507,550** (+5.6%)

	Turnstile	Non Turnstile	Total
Floriade	472,248	9,435	481,683
NightFest	24,451	1,416	25,867
<b>Total</b>	<b>496,699</b>	<b>10,851</b>	<b>507,550</b>



## ATTENDEE ORIGINS

Attendee Origin	Floriade	NightFest	Total
Local	243,675	17,620	261,294
Interstate	225,893	7,748	233,640
Overseas	12,115	500	12,615
<b>Total</b>	<b>481,683</b>	<b>25,867</b>	<b>507,550</b>



Visitors to Canberra made up more than **246,250 (49%)** of the total attendances at Floriade/NightFest

## ATTENDANCES BY VISITOR ORIGINS

### FLORIADE

State	No.
NSW	175,411
VIC	18,857
QLD	14,732
SA	7,661
WA	4,911
TAS	3,929
NT	393

Country	No.
USA	1,610
NZ	1,449
Philippines	966
England	966
Vietnam	966
China	805
Indonesia	805

### NIGHTFEST

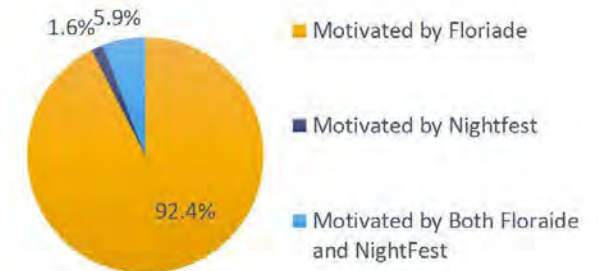
State	No.
NSW	5,623
QLD	625
VIC	500
WA	500
SA	375
TAS	125
NT	

Country	No.
England	375
Wales	125



## TOURISM GENERATION

**104,062 (+9.8%)** unique visitors encouraged to come to Canberra because of Floriade/NightFest.





# SUMMARY OF KEY FINDINGS

## VISITOR NIGHTS GENERATED IN THE ACT



Floriade/NightFest was responsible for generating **205,737 (+27.9%)** visitor nights in the ACT.

### AVERAGE LENGTH OF STAY (FLORIADIE)

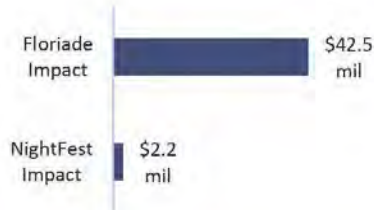


### AVERAGE LENGTH OF STAY (NIGHTFEST)



## ECONOMIC IMPACT

Floriade/NightFest generated in-scope expenditure of **\$44.7 million (+16.0%)** for the ACT.



## ATTENDEE SATISFACTION



Overall, attendees recorded a moderate to high level of satisfaction (**3.9**▲). Floriade rated higher (**3.9**▲) compared to NightFest (**3.6**→).

## NET PROMOTER SCORE (ADVOCACY)



Attendees recorded a Net Promoter Score of **+6.3**▲. Floriade recorded a higher NPS (**+7.5**▲) compared to NightFest (**-14.5**▲).

## FIRST TIME ATTENDANCE

**34.0%** of attendees at Floriade were **first time attendees** compared to **57.8%** of NightFest attendees



## LIKELY RETURN ATTENDANCE

**59.5%**▲ of attendees at Floriade said they would be likely to return next year compared to **32.0%**▲ of NightFest attendees



## ATTENDEE EXPECTATIONS

**18.8%**▲ of attendees said that the festival **exceeded their expectations**. Floriade (**19.5%**▲) recorded an improvement in this area as did NightFest (**20.2%**▲).

# BACKGROUND & RESEARCH APPROACH

## BACKGROUND

Floriade 2019 was held from 14<sup>th</sup> September to 13<sup>th</sup> October at Commonwealth Park, Canberra.

## PURPOSE OF THE RESEARCH

IER was engaged by Events ACT to undertake a research study for Floriade and NightFest in 2019. This represented the third consecutive year in which IER was commissioned to undertake this study.

The research study contained a number of elements as outlined below: -

- Quantitative attendee research study
- Quality standards assessment
- Economic impact assessment

IER, in consultation with Events ACT, developed the quantitative and qualitative research tools to undertake this study.

## RESEARCH OBJECTIVES

The research study aimed to achieve the following key objectives: -

1. Develop a demographic profile of attendees at both Floriade and NightFest
2. To provide an estimate of the economic impact generated by Floriade and NightFest both individually and as a whole event
3. To measure attendee experience and likely advocacy and return attendance

4. To develop an understanding of key attendee behaviours both prior to and post attendance
5. To gather insights from attendees that can be used to help shape the event for future years
6. To measure the use and usefulness of a number of marketing and communication aspects of the event
7. To measure sponsorship outcomes generated by the event
8. To conduct a quality standards assessment of the event

## RESEARCH METHODS

IER utilised a number of different research methods to deliver this study. They are outlined below:-

1. **Incidence Survey** – IER conducted an incidence survey on various days across the event period. The purpose of this survey was to develop a detailed and robust assessment of visitor origins (for the purpose of accurate audience estimation) as well as recruiting participants to complete the post-event online survey
2. **Online Survey** – An online survey was built and disseminated to those who provided their email details during the incidence survey process. Furthermore, social media and ticketing databases were used to extend the footprint of the survey.



# BACKGROUND & RESEARCH APPROACH

- Economic Impact** – IER conducted a detailed economic impact analysis of both Floriade and NightFest individually and combined. For the purpose of this study, the assessment provides outputs at a direct spending perspective, and from both out-of-state and intrastate sources
- Quality Standards** – The quality standards assessment provides for a first-person visual assessment of various customer touchpoints at Floriade. It aims to complement the customer research by providing a visual report on where there may be opportunities to improve the customer experience

Throughout the research report, IER has reported findings in aggregate format and/or split by NightFest and Floriade, as the base analysis. Further to this, detailed cross-analysis was undertaken to uncover where any deeper insights may exist. IER also weighted the Floriade and NightFest data to ensure that when analysed at an aggregate level, it was representative of the mix of attendance at each event.

## SURVEY DEVELOPMENT

IER liaised with Events ACT to develop an attendee survey aimed at meeting the objectives of the study. The survey was developed with specific pathways and skip logic to allow for different respondents to see specific sets of questions that were relevant to them.

The survey was built and hosted within IER's proprietary research system, [www.customerdirect.com.au](http://www.customerdirect.com.au). Invitations were branded with Floriade creative and were sent by IER to those who opted in to participate in the research.

## SAMPLE SIZES

IER undertook two sampling methodologies at Floriade/NightFest. The first was a face-to-face incidence survey of attendees at the event primarily to collect visitor origin and primary purpose visitor data to inform the economic impact study. Secondly, the incidence survey was used to recruit attendees in order to undertake an on-line survey.

The incidence survey yielded a total sample of 2,689. The table below illustrates the samples for the on-line survey: -

Respondent Type	Sample Size
Floriade	N = 529
NightFest	N = 489
Total	N = 1,019

Both of these samples are statistically significant in their own right (at an aggregate level) and then were combined to provide an overall Floriade/NightFest data set that was weighted in line with known attendance numbers provided by Events ACT.



**ECONOMIC IMPACT  
FLORIADE & NIGHTFEST**

## BACKGROUND

In order to undertake the economic impact assessment for Floriade and NightFest, IER gathered data through the following sources: -

- **Incidence survey** – provided data on visitor origins and whether the visitor had travelled to Canberra primarily for the purpose of attending Floriade/NightFest or for another reason
- **Post-event attendee survey** – used to gather data on whether visitors stayed overnight in Canberra, length of stay, accompanying persons and level of daily expenditure
- **Data from Events ACT** – provided IER with data on attendances and event organiser financials

All of this data was then fed into IER's economic analysis model.

## DEVELOPING SEPARATE ANALYSIS FOR FLORIADE AND NIGHTFEST

Events ACT requested that IER prepare an assessment that values the Floriade and NightFest events separately and together. In order to do this, IER had to ensure that visitors were profiled as to whether Floriade, NightFest or both events were the driver to their trip to Canberra. Where both events were determined to be the driver, visitor impact have been split 50/50 to each event.

## DEVELOPING VISITOR PROFILES

In order to develop this assessment, attendee data was analysed to develop mutually exclusive visitor profile based on whether the respondent was event motivated or extended stay, a day trip or an overnight visitor.

A combination of incidence survey and post event survey data was used to develop these profiles.

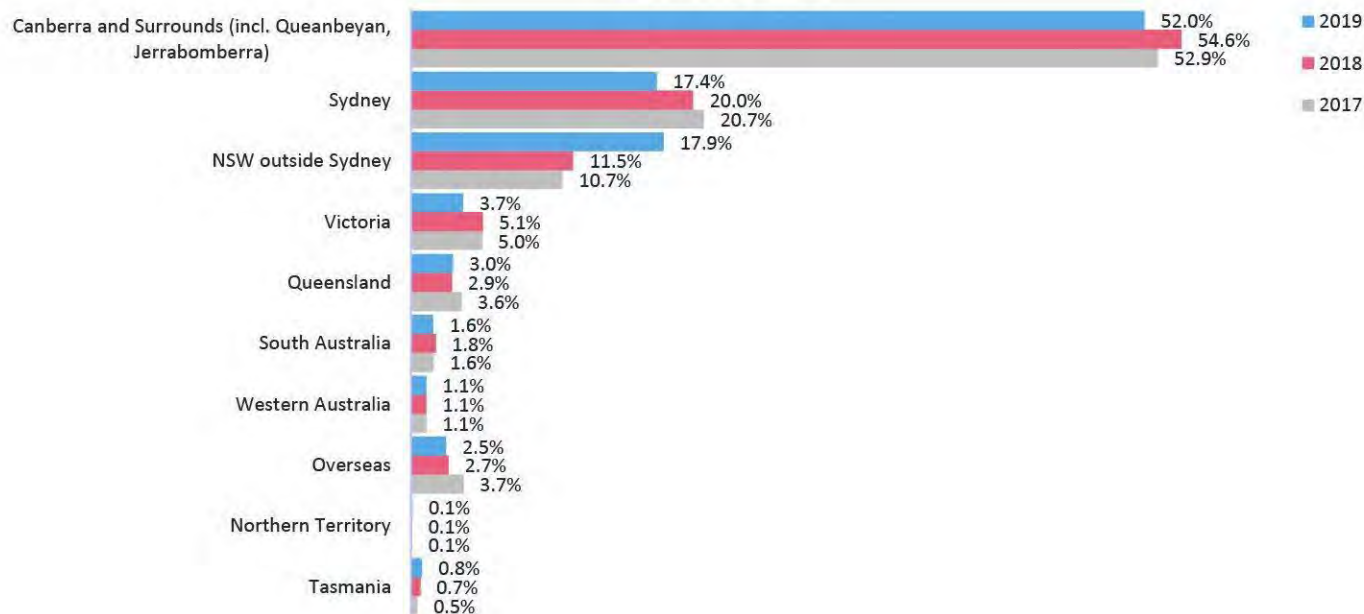
## CALCULATING THE ECONOMIC IMPACT

The economic impact was calculated based on the number of event motivated and extended stay visitors x the length of their stay x their average daily spend. In addition to this, event attendances have been grossed up with accompanying people – who represent individuals who travelled to Canberra with a visitor but did not attend Floriade or NightFest.

The economic impact was reported at a direct spending level only and no additional modelling was undertaken.

# DEMOGRAPHIC PROFILE OF ATTENDEES

## ATTENDEE ORIGIN



## KEY FINDINGS

In 2019, both Floriade and NightFest increase the proportion of attendees from outside Canberra. Visitors from NSW (outside of the Sydney metropolitan area) represented the largest growth areas geographically.

## ATTENDEE ORIGIN - FLORIADE

	2019	2018	2017
Canberra and Surrounds	50.6%	50.9%	51.7%
Sydney	18.3%	21.7%	21.6%
NSW outside Sydney	18.1%	12.1%	11.0%
Victoria	3.9%	5.5%	5.1%
Queensland	3.0%	2.9%	3.5%
South Australia	1.6%	2.0%	1.7%
Western Australia	1.0%	1.1%	1.2%
Northern Territory	0.1%	0.1%	0.1%
Tasmania	0.8%	0.7%	0.5%
Overseas	2.5%	3.0%	3.7%

## ATTENDEE ORIGIN - NIGHTFEST

	2019	2018	2017
Canberra and Surrounds	68.1%	73.4%	66.2%
Sydney	6.3%	10.2%	10.9%
NSW outside Sydney	15.5%	8.3%	8.2%
Victoria	1.9%	2.5%	4.4%
Queensland	2.4%	2.9%	4.8%
South Australia	1.5%	0.6%	0.7%
Western Australia	1.9%	0.8%	0.3%
Northern Territory	-	-	-
Tasmania	0.5%	0.4%	-
Overseas	1.9%	0.8%	4.4%



# TARGET AUDIENCE PROFILE

## ACT VISITOR SEGMENTATION

	Floriade/ NightFest 2018	Floriade/ NightFest 2019	Canberra Short Break Segments (OVERALL)
Discoverers & Learners	15%	17%	14%
Event Seekers	9%	7%	8%
Family Memory Makers	20%	23%	17%
Family Visitors	12%	10%	14%
Rechargers	12%	16%	19%
Variety Seekers	31%	27%	29%

	Floriade 2018	Floriade 2019
Discoverers & Learners	14.6%	17.2%
Event Seekers	9.0%	7.0%
Family Memory Makers	20.2%	23.0%
Family Visitors	12.5%	10.2%
Rechargers	12.1%	15.6%
Variety Seekers	31.5%	27.0%

	NightFest 2018	NightFest 2019
Discoverers & Learners	19.1%	20.1%
Event Seekers	10.5%	10.0%
Family Memory Makers	17.2%	20.1%
Family Visitors	5.7%	9.6%
Rechargers	16.6%	14.2%
Variety Seekers	31.0%	26.0%

## KEY FINDINGS

Of those who fell within a segment, Variety Seekers remained the largest proportion (despite reducing in size). The largest increase was in the 'Family Memory Makers' and 'Rechargers' who both increased significantly on last year.

Floriade, comprising the large majority of the audience, follows pretty closely to the aggregate view. However, NightFest does show a different, more evenly dispersed audience.

Variety Seekers also remain the largest part of the NightFest audience, however Discoverers & Learners and Event Seekers are also significantly more likely when compared to the Floriade audience.

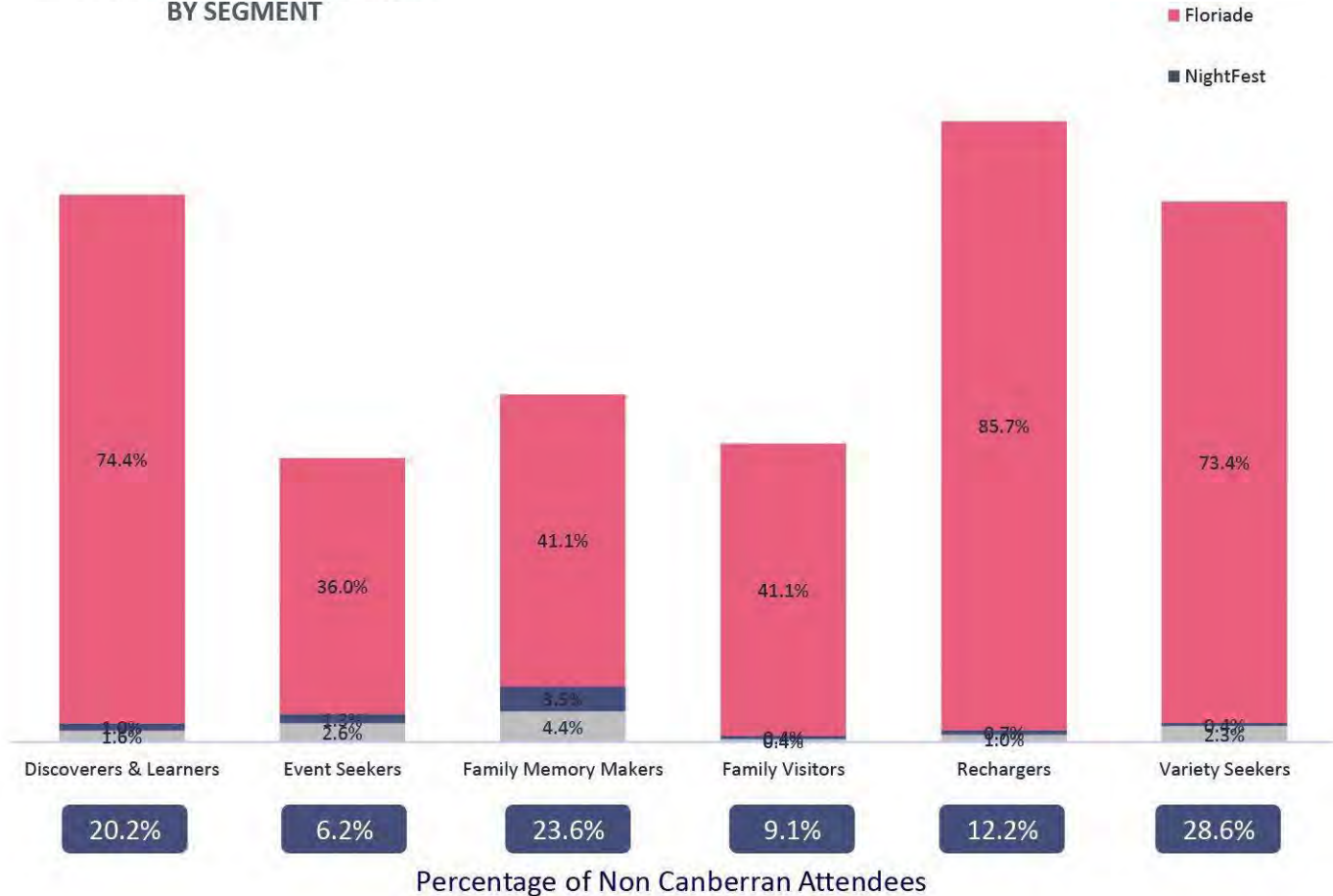
When assessed against the overall Canberra Short Break framework developed for the ACT, Floriade/NightFest shows a significant under indexation on 'Family Visitors' and 'Rechargers' and a larger representation of 'Family Memory Makers' and 'Discoverers & Learners'.

Aggregate (n=798)  
Floriade (n=321)  
NightFest (n=477)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups

# TARGET AUDIENCE PROFILE

## EVENT MOTIVATED VISITORS BY SEGMENT



## KEY FINDINGS

The chart opposite illustrates the non-Canberran visitor audience at Floriade NightFest broken down by segment. IT shows that Variety Seekers make up 28% of the non-local audience and that Family Memory Makers make up 23%.

It is interesting to note that despite making up just 12%, Rechargers have the highest likelihood of being an in-scope visitor (in other words, the highest likelihood of travelling to Canberra specifically to attend Floriade NightFest). On the contrary, despite being the second largest segment (23.6%) in the audience, Family Memory Makers have a low likelihood of being an in-scope visitor.

Aggregate (n=798)  
 Floriade (n=321)  
 NightFest (n=477)



▲ Significantly higher than other groups  
 ▼ Significantly lower than other groups



# ECONOMIC IMPACT

**Total Attendance**  
507,550

**Average Times Attended**  
1.7

**Unique Individuals**  
298,858

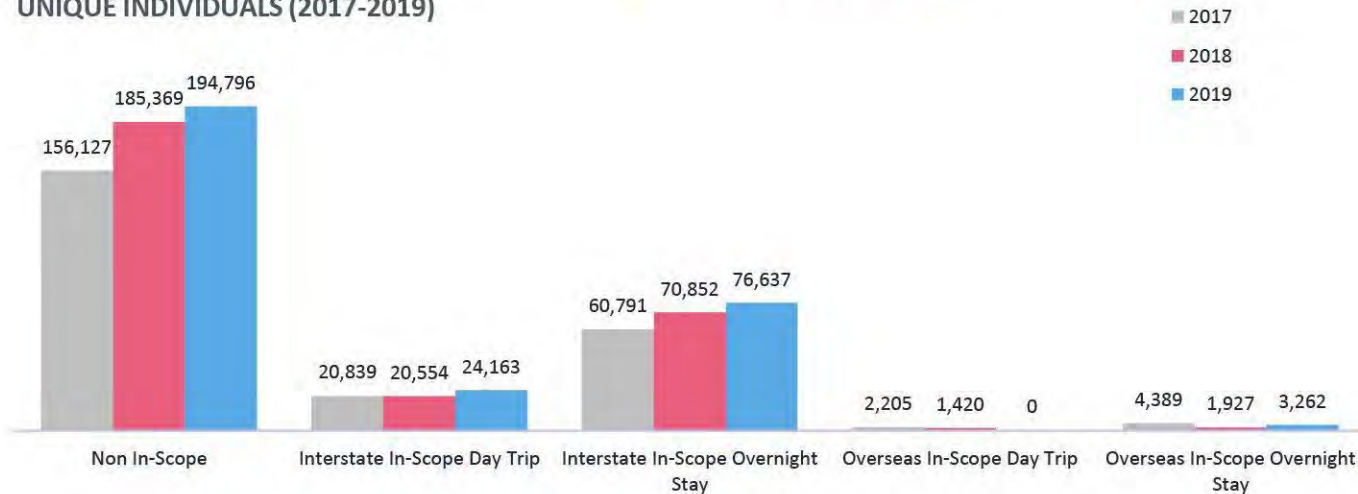
## UNIQUE INDIVIDUALS

Visitor Origin	Not In Scope	In-Scope Overnight	In-Scope Day Trip	Total
Canberra Residents – Not In Scope	154,754			154,754
Interstate – Not In-Scope	36,127			36,127
Overseas – Not In-Scope	3,915			3,915
<b>Total Not In-Scope</b>	<b>194,796</b>	<b>0</b>	<b>0</b>	<b>194,796</b>
Interstate – In Scope		76,637	24,163	100,799
Overseas – In Scope		3,262	0	3,262
<b>Total In-Scope</b>	<b>0</b>	<b>79,899</b>	<b>24,163</b>	<b>104,062</b>
<b>Total Individuals</b>	<b>194,796</b>	<b>79,899</b>	<b>24,163</b>	<b>298,858</b>

Note: Some totals may not add due to rounding

**In-Scope Visitors**  
**104,062 (+9.8%)**

## UNIQUE INDIVIDUALS (2017-2019)



## KEY FINDINGS

Overall, Floriade/NightFest recorded total attendances of 507,550 in 2019. This was comprised of the following:

- 472,248 for Floriade
- 24,451 for NightFest
- 10,851 which were non-turnstile

These attendance figures include multiple visits by individuals across the event period. It is estimated that the average person attended Floriade/NightFest on 1.7 occasions. When these multiple visits are considered, it is estimated that the event attracted attendance by just under 299,000 unique visitors (up 8% on last year).

The growth was spread across locals and visitors, however in-scope visitors (those non-locals who travelled to Canberra to attend Floriade/NightFest) increased by 9.8% to just over 104,000.



# ECONOMIC IMPACT

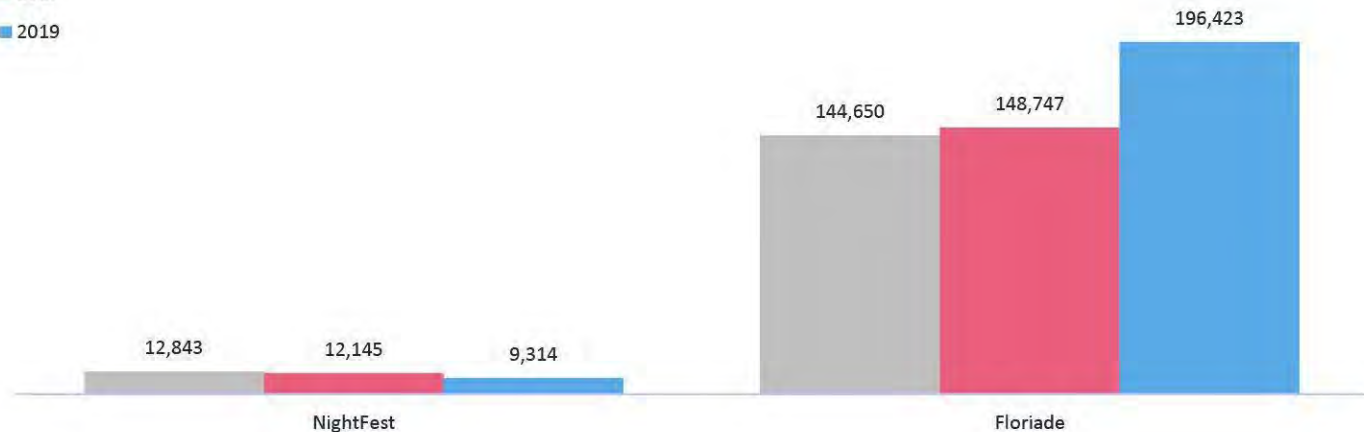
## TOTAL VISITOR NIGHTS IN THE ACT

Visitor Origin	Number of Overnight Visitors	Avg nights in ACT	Total Nights
Interstate – Event Motivated	68,123	2.65	180,816
Overseas – Event Motivated	2,284	3.84	8,778
<b>Total Event Motivated</b>	<b>70,407</b>	<b>2.69</b>	<b>189,594</b>
Interstate – Extended Stay	8,513	1.78	15,164
Overseas – Extended Stay	979	1.00	979
<b>Total Extended Stay</b>	<b>9,492</b>	<b>1.70</b>	<b>16,143</b>
<b>Total Visitor Nights</b>	<b>79,899</b>	<b>2.57</b>	<b>205,737</b>

Note: Some totals may not add due to rounding

## VISITOR NIGHTS GENERATED BY EACH EVENT

- 2017
- 2018
- 2019



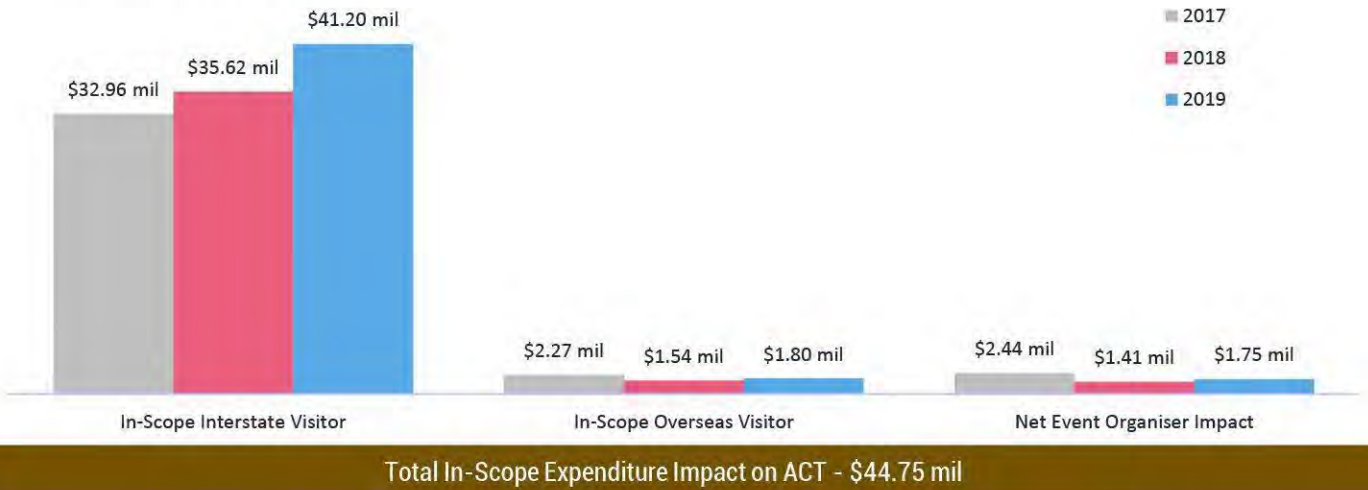
## KEY FINDINGS

Floriade/NightFest was responsible for generating more than 205,700 visitor nights in Canberra. This represents an increase of 27.9% compared to last year.

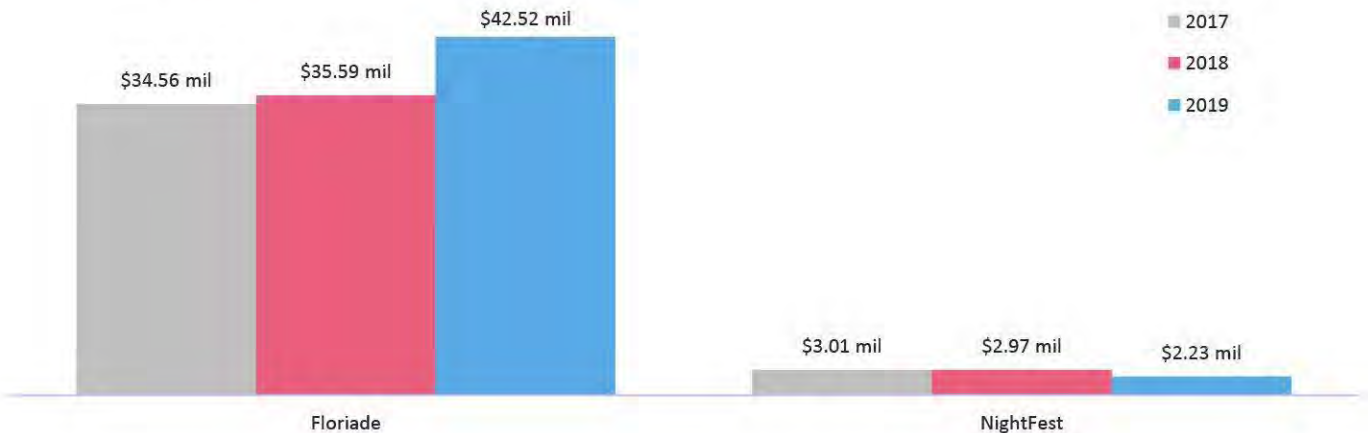
A 15% increase in overnight interstate visitors and an increase in the average length of stay (from 2.2 to 2.7 nights) were behind this increase.

# ECONOMIC IMPACT

## TOTAL IN-SCOPE EXPENDITURE IMPACT ON THE ACT IN 2018



## TOTAL IN-SCOPE EXPENDITURE IMPACT BY EVENT



### KEY FINDINGS

Overall, Floriade/NightFest was responsible for generating an in-scope expenditure impact of \$44.75 million in 2019. This represented an increase of 16.0%.

This increase was generated by a 6% increase in total attendances, a 9.8% increase in in-scope visitors and a 27% increase in visitor nights in Canberra.

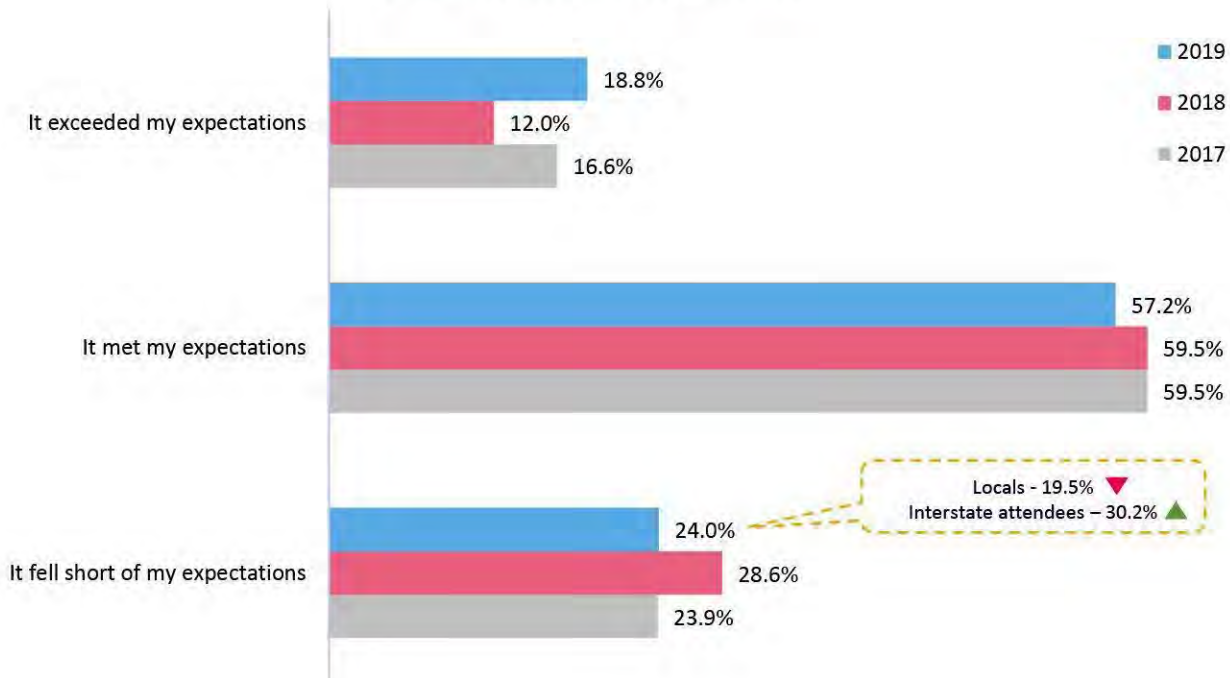
It should be noted that the fall in expenditure impact recorded for NightFest came despite an overall increase in attendances. The main reason that this didn't translate to economic impact was that in-scope visitors fell from 5,317 to 4,245. In other words, in 2018, in-scope visitors to Canberra (because of NightFest) made up 24.7% of the NightFest audience whereas this year they made up 16.4%. This growth in NightFest attendances was driven by a combination of local attendances and tourists already in Canberra (not in-scope).

## **EVENT PERFORMANCE METRICS**



# CUSTOMER EXPERIENCE

## CUSTOMER EXPECTATIONS - OVERALL



### KEY FINDINGS

Similar to the 2018 findings, 57.2% of attendees at Floriade/NightFest had their expectations met this year. Those who indicated that the event exceeded their expectations increased by 6.8% (the highest result in three years), whilst the proportion of attendees who felt that the event fell short of their expectations was down 4.6%.

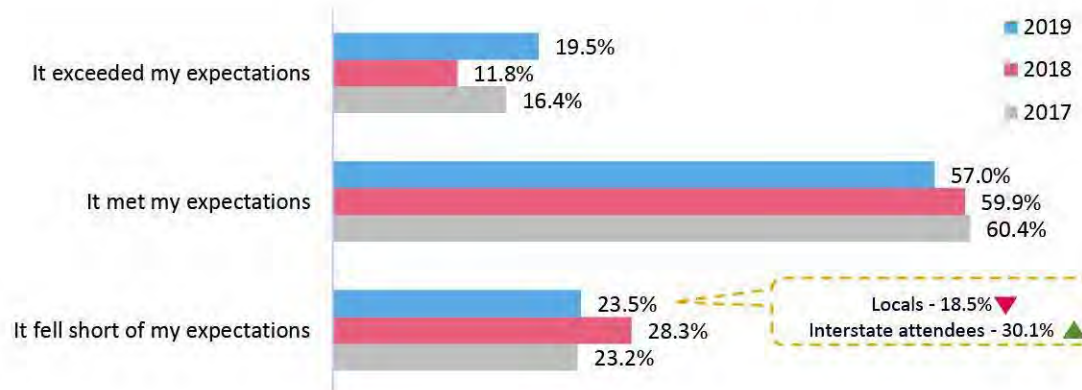
Comparing across visitor origins, more than 30% of interstate attendees said that their expectations were not met, which was significantly higher than other groups. Meanwhile, Canberra locals were significantly less likely to have indicated that their experience fell short of their expectations (19.5%).

Q17. Having attended {answer from QA}, did the experience exceed, meet or fall below your expectations? (n= 803)

▲ Significantly higher than other groups  
 ▼ Significantly lower than other groups

# CUSTOMER EXPERIENCE

## CUSTOMER EXPECTATIONS - FLORIADE



## CUSTOMER EXPECTATIONS - NIGHTFEST



## KEY FINDINGS

For those who attended Floriade there was a 7.7% increase in expectations being exceeded this year (19.5%). Additionally, there was also a decline in those who said that their experience fell short of their expectation (down 4.8%).

This year, NightFest saw an increase in those who said that their experience exceeded expectations (up 6.0%). However, the proportion of the audience who felt that the experience fell short of their expectations remained relatively stable at around one-third.

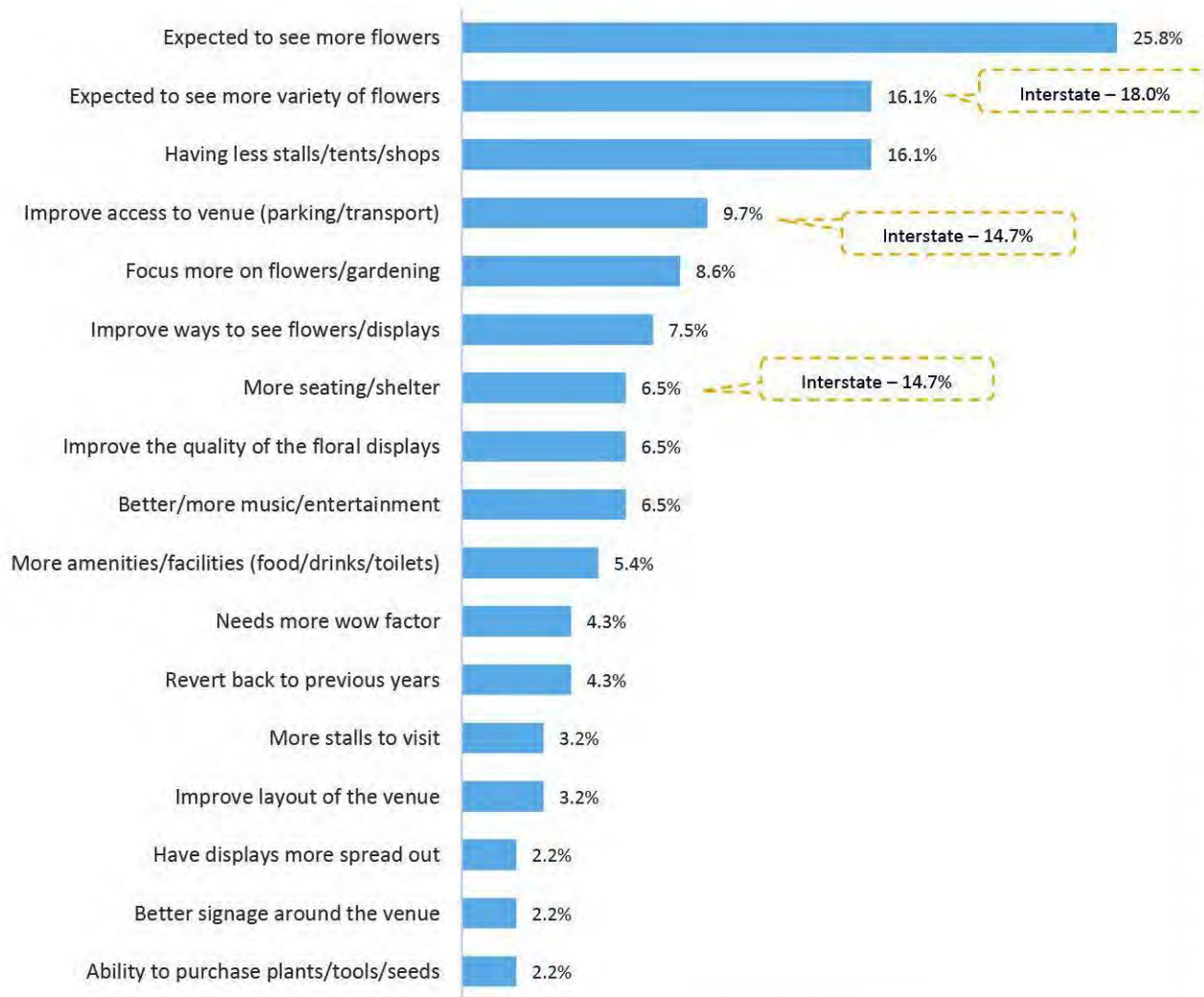
When assessed by visitor origin, interstate attendees at Floriade had a significantly higher likelihood of having their expectations not met compared to local resident attendees. When these interstate visitors were probed, the most common drivers to this was a 'lack of variety of flowers'.

Q17. Having attended {answer from QA}, did the experience exceed, meet or fall below your expectations? (n= 803)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups

# CUSTOMER EXPERIENCE - FLORIADE

## AREAS FOR IMPROVEMENT BY THOSE WHO FELT THEIR EXPERIENCE FELL SHORT OF THEIR EXPECTATIONS AT FLORIADE (23.5% of Floriade Attendees)



### KEY FINDINGS

This chart demonstrates the suggestions for future improvements made by those attendees who indicated that their experience at Floriade fell short of their expectations (23.5% of all Floriade attendees).

The two most significant themes that emerged related to the core aspect of the event – the flowers. Nearly 26% of comments related to a desire to see ‘more flowers. (note: - these comments did not provide context – i.e. more variety, larger quantity etc.). A further 16% of comments related specifically about ‘variety’ which suggests that there is more work to do to drive awareness of the event being a tulip festival.

Other key themes related to a view that perhaps the event was too commercial ‘they wanted less ‘stalls/shops’ (16.1%) with many comments suggesting that the space could be better used for more flowers and gardens instead.

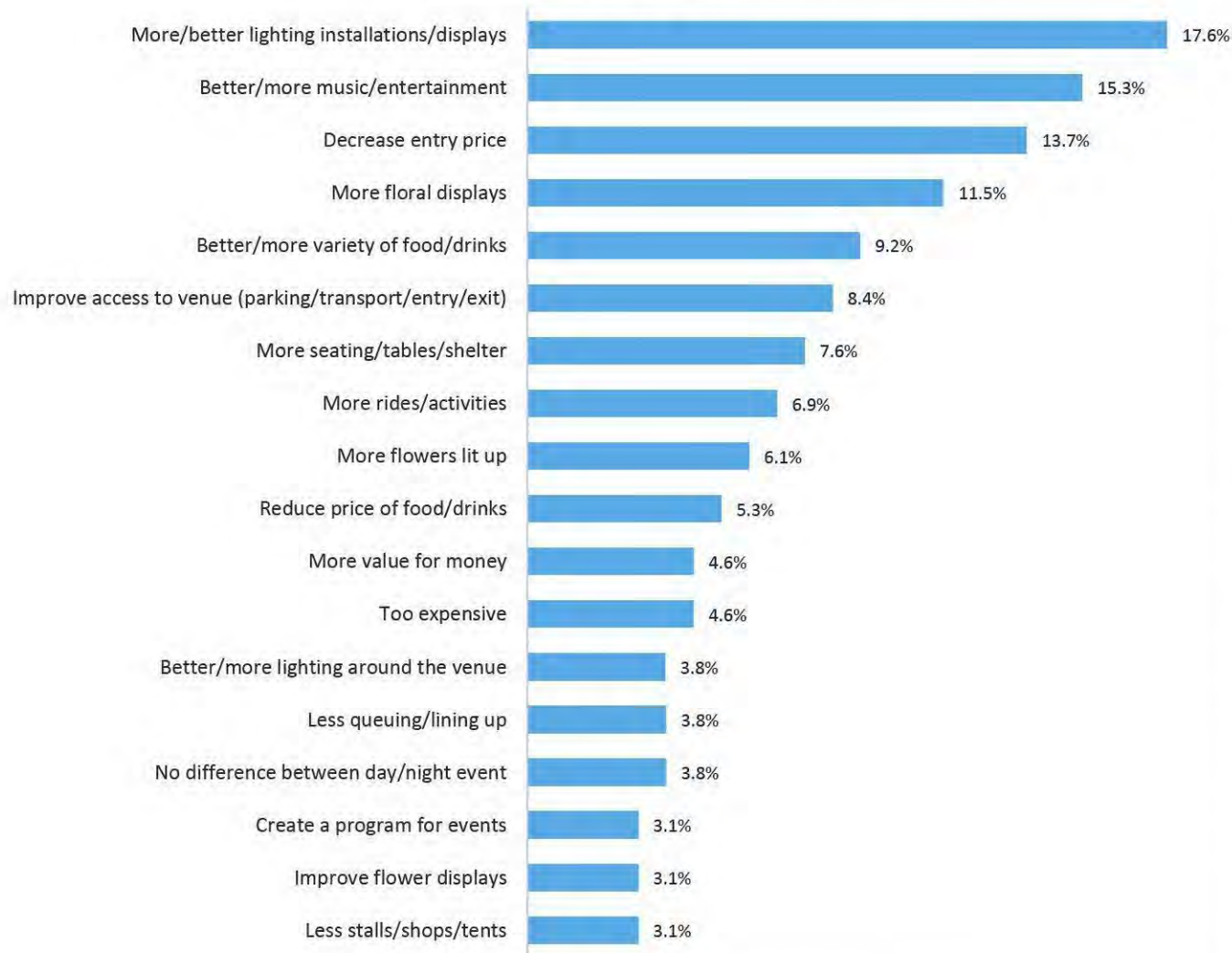
Q14. What one improvement would you suggest that could have the greatest impact on improving the festival experience in the future? (n=93)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups



# CUSTOMER EXPERIENCE - NIGHTFEST

## AREAS REQUIRING IMPROVEMENT BY THOSE WHO FELT THEIR EXPERIENCE FELL SHORT OF THEIR EXPECTATIONS AT NIGHTFEST (34.5% of NightFest Attendees)



### KEY FINDINGS

This chart demonstrates the suggestions for future improvements made by those attendees who indicated that their experience at NightFest fell short of their expectations (34.5% of all NightFest attendees).

It is important to note that around 17.6% of attendees appear to attend NightFest with the expectation of viewing large amounts of lighting displays/installations around the venue. This appears to be a major driver in failing to meet expectations. Additionally, around 6.1% also commented on having more floral displays under lights.

Around 15% of comments related to the entertainment program. Key themes within this category related to: -

- Appropriateness of comedy acts
- More local acts
- Inclusion of kid/family friendly entertainment
- More entertainment in general

Q14. What one improvement would you suggest that could have the greatest impact on improving the festival experience in the future? (n=131)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups

# CUSTOMER EXPERIENCE



## KEY FINDINGS

The overall satisfaction provided by attendees at Floriade/NightFest this year was 3.9 (out of 5.0). This represents an increase on the satisfaction scores over the last two years.

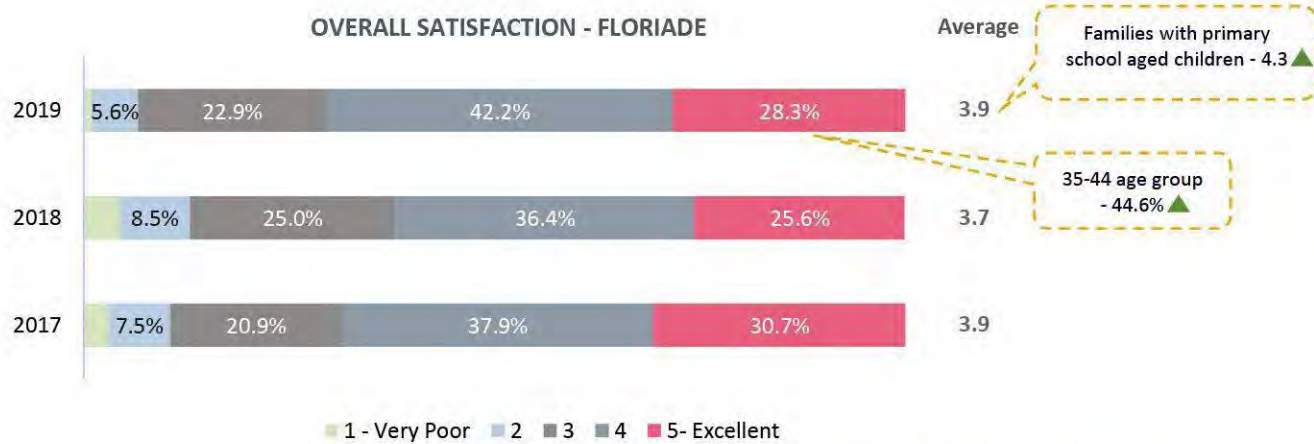
When assessed by age group, the segment had a significantly higher proportion with an 'excellent' satisfaction rating (43.8%) compared to other groups..

Q12. Overall, how satisfied were you with the experience that you had whilst attending {answer from QA} this year? (where 1 = Very poor and 5 = Excellent) (n=916)

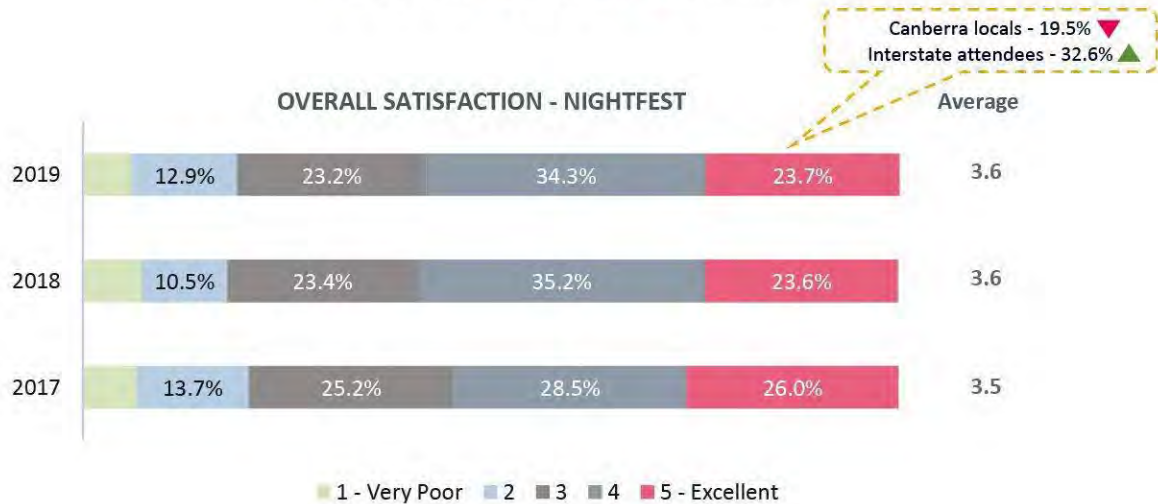
▲ Significantly higher than other groups  
▼ Significantly lower than other groups

# CUSTOMER EXPERIENCE

## OVERALL SATISFACTION - FLORIADE



## OVERALL SATISFACTION - NIGHTFEST



## KEY FINDINGS

When analysing the events individually, Floriade (3.9) recorded a higher satisfaction score than NightFest (3.6) this year. Compared to 2018, Floriade experienced an increase which saw the event equal its 2017 high. NightFest remained the same in 2019.

First-time attendees at Floriade scored significantly higher on average (4.1) compared to previous attendees (3.8).

Looking at the age demographics, the 35-44 group provided a significantly higher excellent rating for Floriade (44.6%) compared to other age groups 4.1/5. This was due to the fact that 44.6% rated their experience as 5/5. Lastly, attendees of Floriade who were families with mainly primary school aged children had a significantly higher satisfaction average (4.3) than other demographic groups.

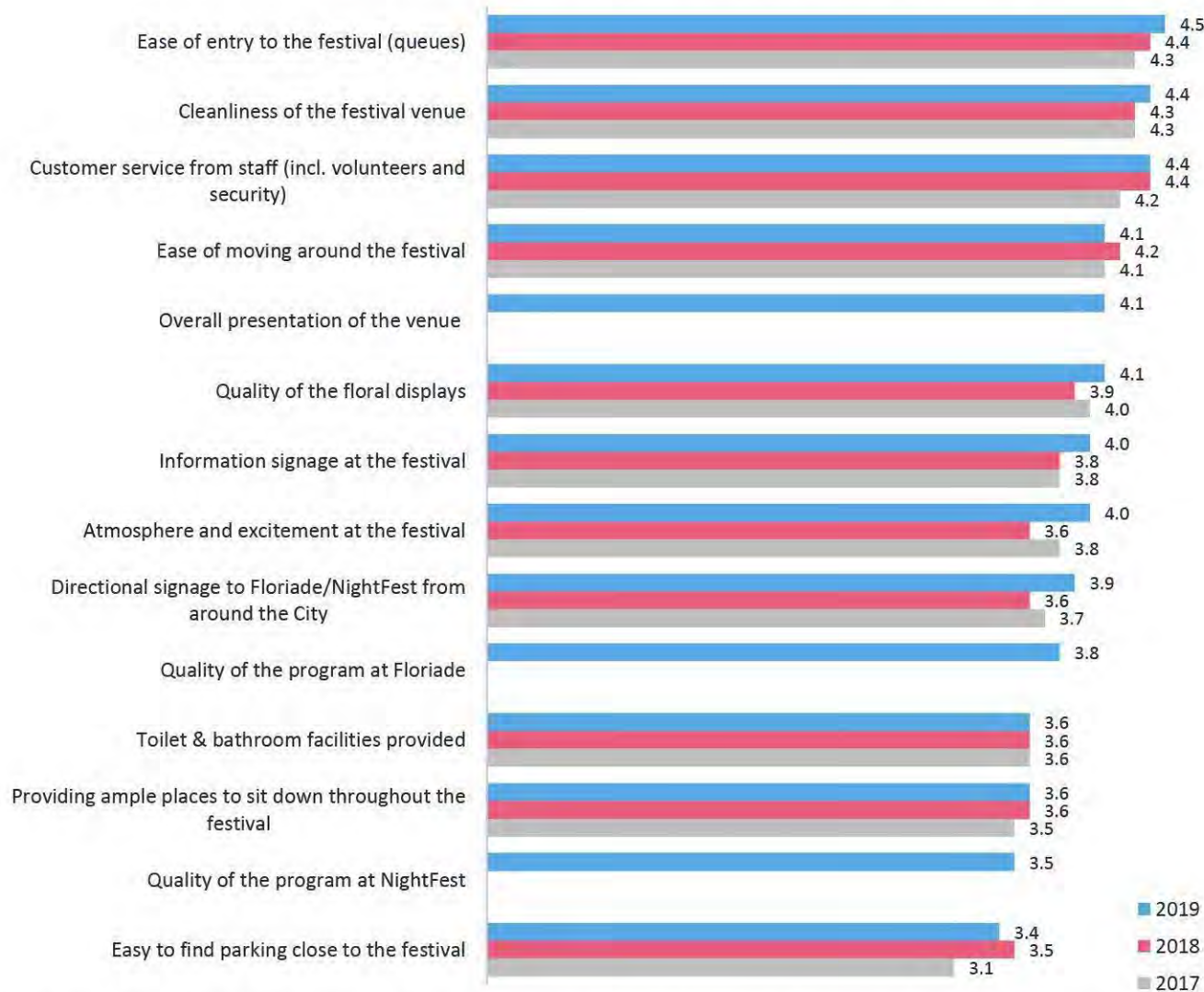
Q12. Overall, how satisfied were you with the experience that you had whilst attending {answer from QA} this year? (where 1 = Very poor and 5 = Excellent) (n=916)

▲ Significantly higher than other groups  
 ▼ Significantly lower than other groups



# CUSTOMER EXPERIENCE

## SATISFACTION WITH SPECIFIC ELEMENTS OF THE FESTIVAL EXPERIENCE



## KEY FINDINGS

When assessing specific elements of attendee experience:

- six recorded an increase,
- two declined, and
- three remained the same.

The largest increase was in the 'atmosphere and excitement at the festival' (4.0) - this was up 0.4 points from 2018. 'Directional signage around the city' had the second largest increase (0.3 points) from last year.

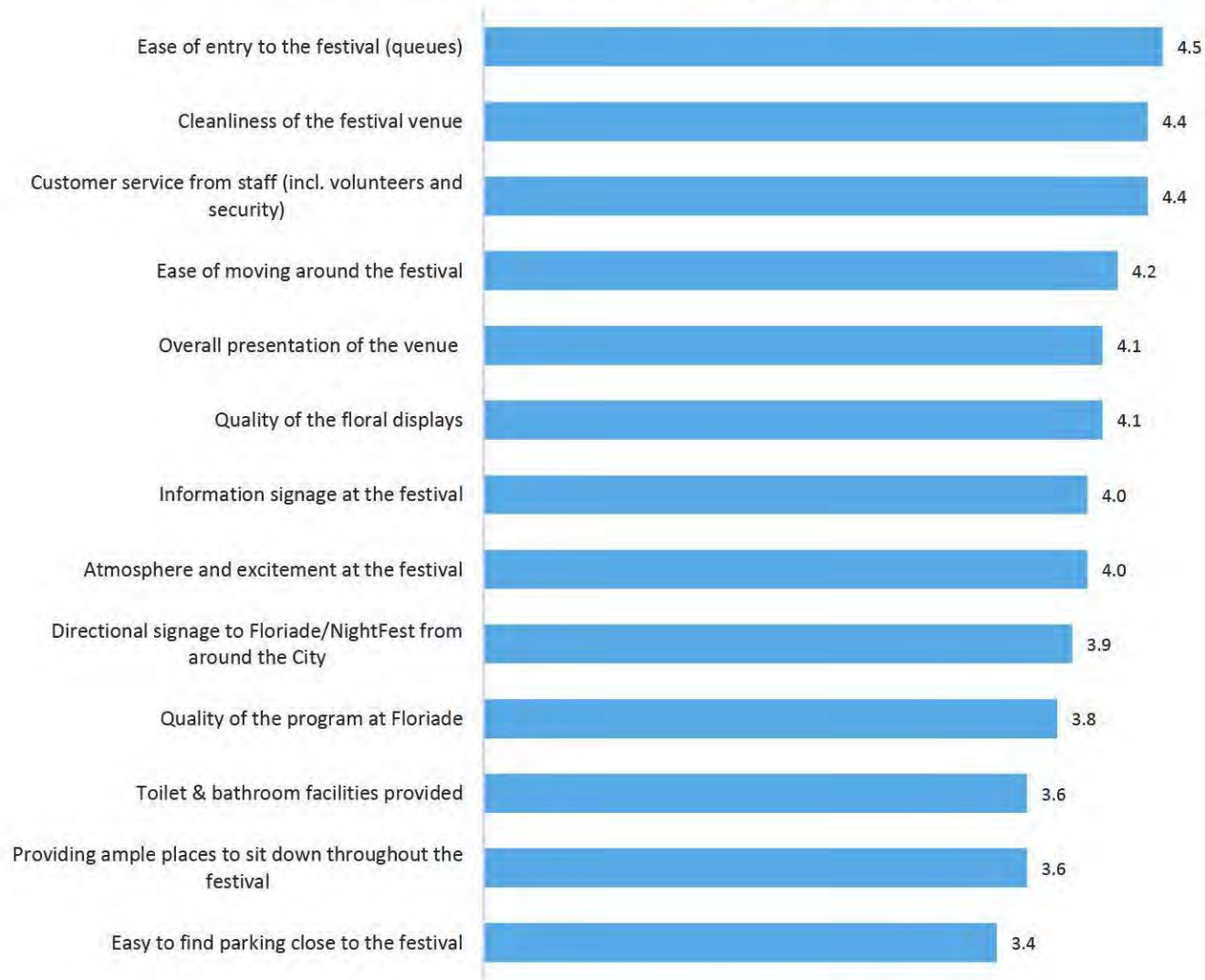
It should be noted that often an overall improvement in customer experience flows is either driven by, or flows through to, subset elements of experience. For instance, sometimes an element improves from last year, despite no meaningful change being made to that aspect. This is often the result of an overall improved perception driven by other aspects of the customer experience.

Q13. Now thinking about specific elements of your experience, how would you rate (answer from QA) in terms of the following? (n= from 398-861)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups

# CUSTOMER EXPERIENCE

## SATISFACTION WITH SPECIFIC ELEMENTS OF THE FESTIVAL EXPERIENCE AT FLORIADÉ



Q13. Now thinking about specific elements of your experience, how would you rate (answer from QA) in terms of the following? (n= from 0-456)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups

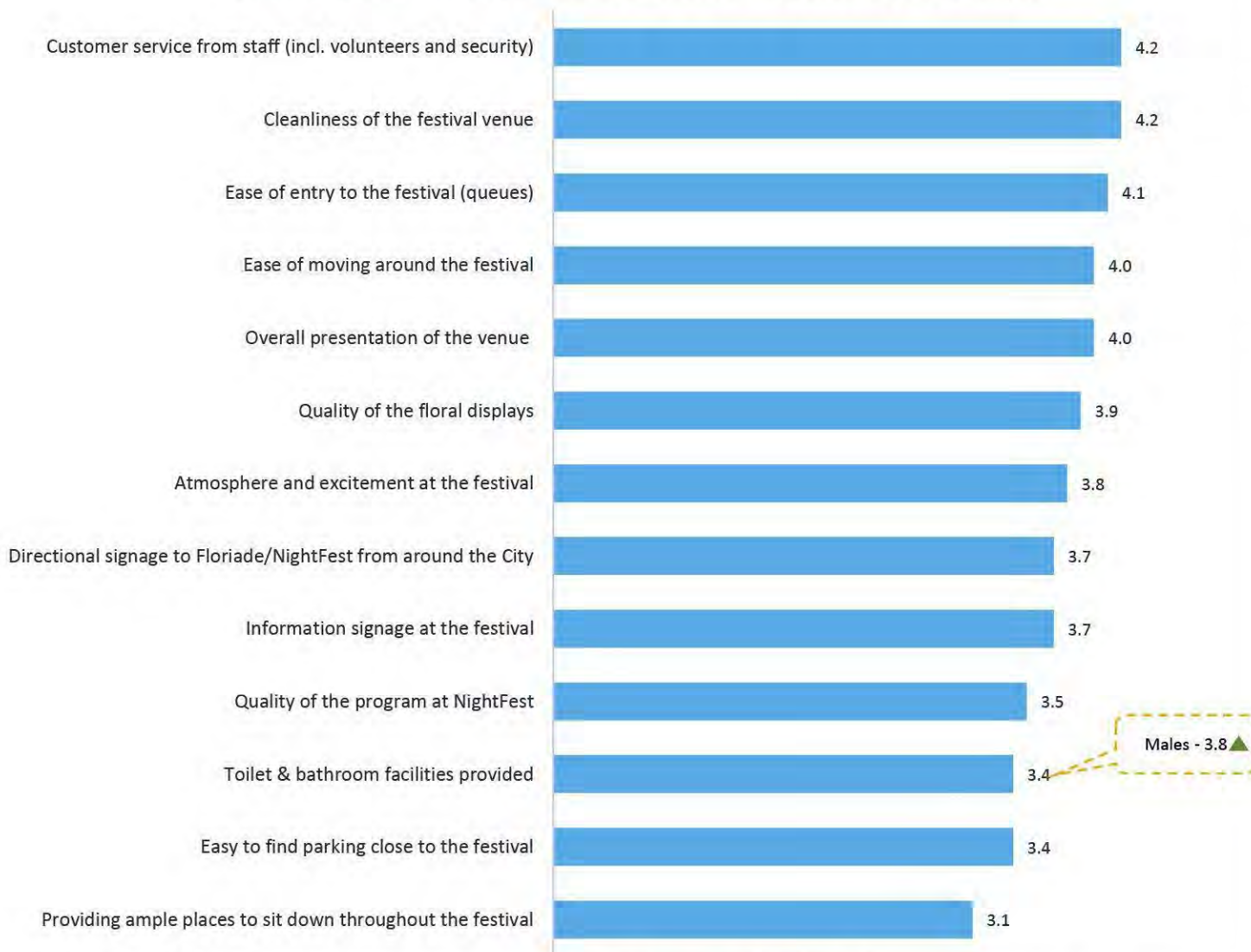
## KEY FINDINGS

When breaking down the satisfaction into specific events, Floriade's elements rank in the same order as the aggregate, with scores remaining very similar as well.

The 'ease of moving around the festival' was rated significantly higher again by first-time attendees (4.3) compared to returning attendees. It may be that the first-time attendee approach to Floriade may have been more serendipitous, with a less structured mindset about how to tackle the event.

# CUSTOMER EXPERIENCE

## SATISFACTION WITH SPECIFIC ELEMENTS OF THE FESTIVAL EXPERIENCE AT NIGHTFEST



## KEY FINDINGS

Attendees at NightFest provided high satisfaction ratings for both the 'customer service from staff' (4.2) as well as the 'cleanliness of the festival venue' (4.2).

There still appears to be some confusion (as illustrated in a few places within this analysis) amongst the NightFest audience as to whether the event is a 'night-time opportunity to see Floriade'

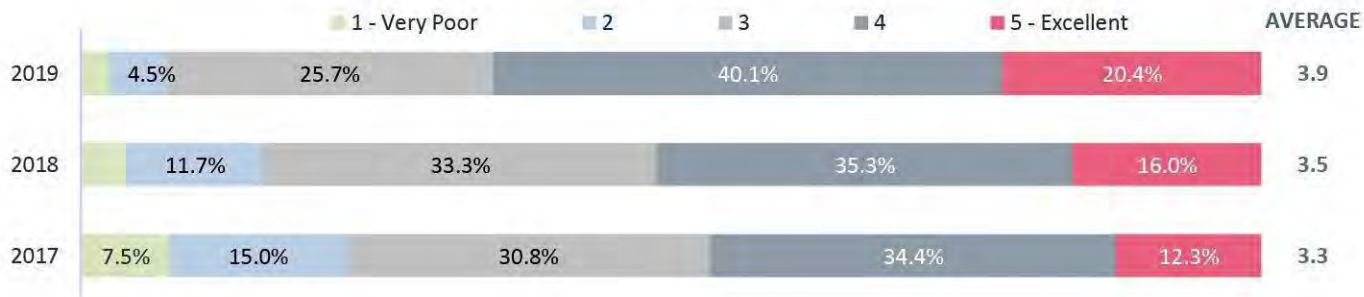
Q13. Now thinking about specific elements of your experience, how would you rate (answer from QA) in terms of the following? (n= from 0-405)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups



# SATISFACTION WITH FOOD & BEVERAGES

## OVERALL SATISFACTION WITH THE FOOD AND BEVERAGE OFFERING



## FOOD & BEVERAGES COMMENTS

*"More food options"*

*"More food and wine utilising location so close to lake. Plus more stall would be good. The stalls seem to be the same every year"*

*"Broader range of food and snack options"*

*"If the management could look at the prices of the food... some didn't stand to its standards with the prices"*

*"More affordable food"*

*"More cafe style food options, new or different vendors"*

*"The food, rides etc are very pricey which makes it a very expensive day out for a family with children"*

*"Offering healthier food options in food trucks"*

## KEY FINDINGS

There was an overall increase in the satisfaction rating provided for the food and beverage experience this year. The 2019 score increased 0.4 points from 2018. This continues a trending improvement over the last two years.

Included on this slide are some of the comments that were made regarding the food and beverages at Floriade/NightFest – providing some guidance on potential areas of improvement. Note that these comments do not reflect the view of all attendees.

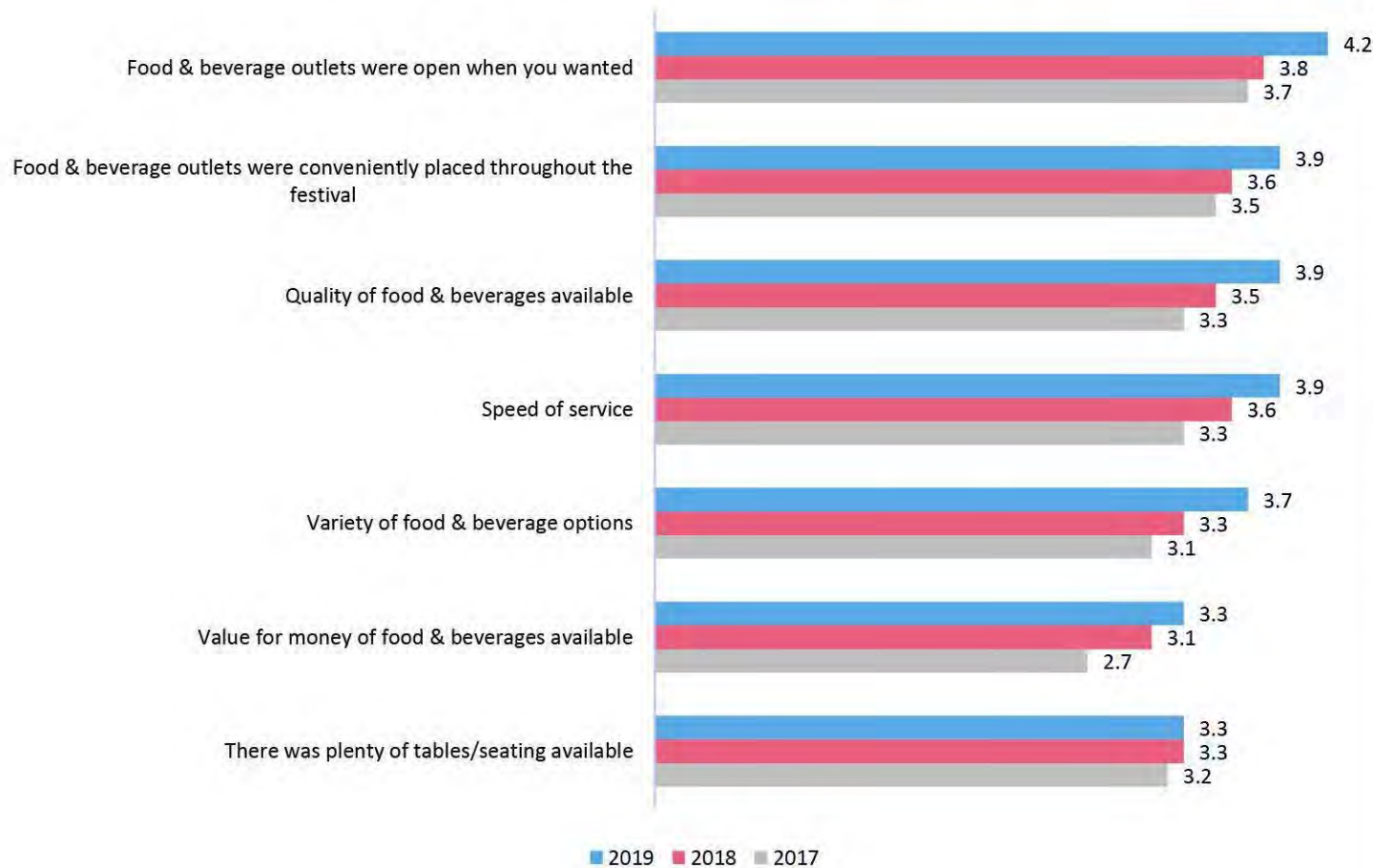
When breaking this down by event, Floriade scored a 3.9 and NightFest scored 3.7.

Q15. Overall, how satisfied were you with the food & beverage offering at {answer from QA} this year? (where 1 = Very poor and 5 = Excellent. Please select NA if you do not have an opinion) (n=851)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups

# SATISFACTION WITH FOOD & BEVERAGES - FLORIADE

## SATISFACTION WITH THE FOOD AND BEVERAGE OFFERING FLORIADE



### KEY FINDINGS

When breaking down the satisfaction for the food and beverage offerings at Floriade, 6 out of the 7 elements increased in 2019. Overall, the ranking order remained fairly similar to 2018.

'Food & beverage outlets were open when you wanted' was again the top-rated element (4.2) – increasing 0.4 points from 2018. Also scoring an increase of 0.4 points was the 'quality of food & beverages available' (3.9) and 'variety of food & beverage options' (3.7).

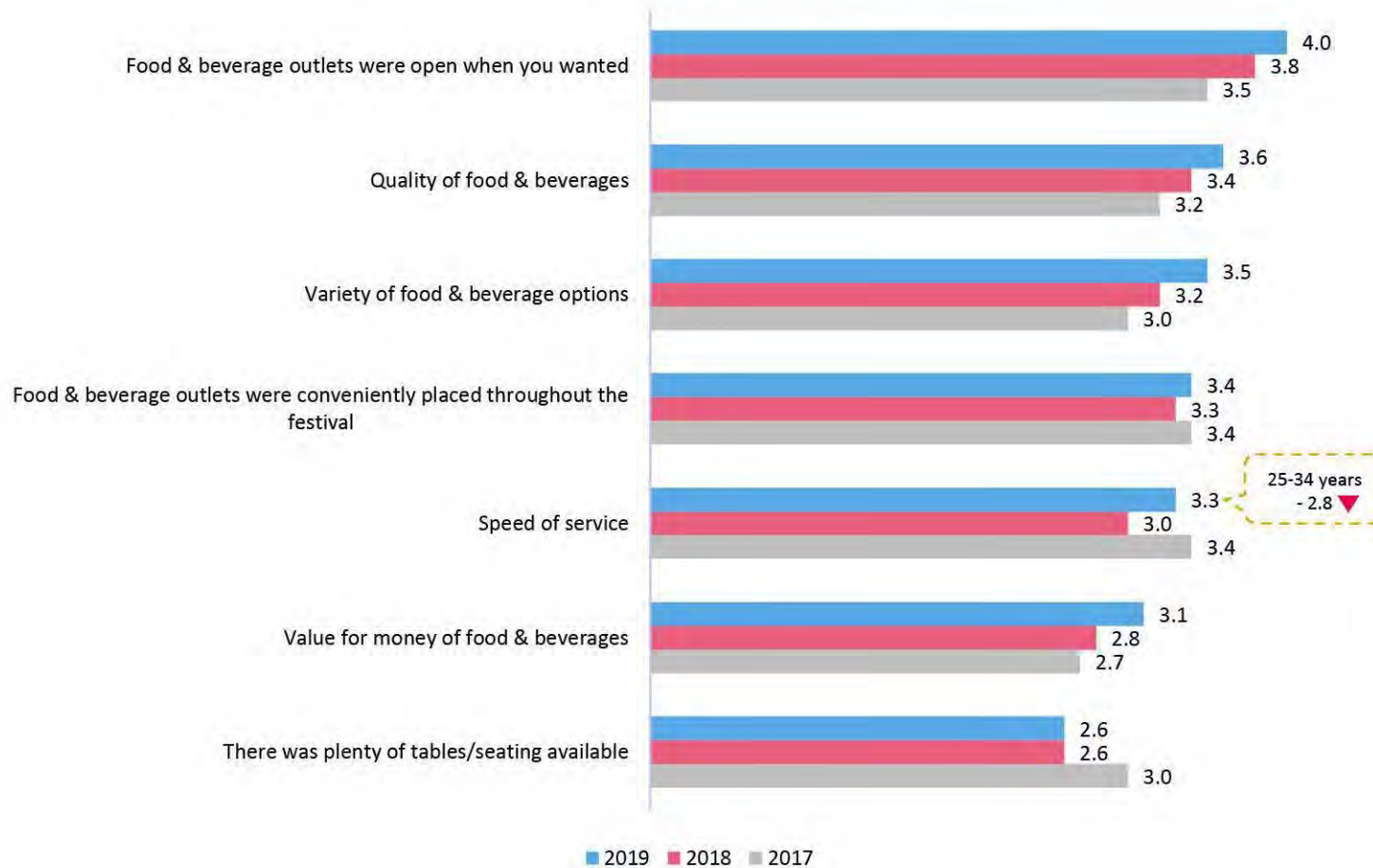
'Food & beverage outlets were conveniently placed throughout the festival' (3.9) and 'speed of service' (3.9) had the next highest increase with 0.3 points.

Q16. Now thinking about specific elements of the food and beverage offering, how would you rate (answer from QA) in terms of the following? (n=385)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups

# SATISFACTION WITH FOOD & BEVERAGES - NIGHTFEST

SATISFACTION WITH THE FOOD AND BEVERAGE OFFERING NIGHTFEST



## KEY FINDINGS

NightFest also saw an increase in 6 out of the 7 elements of food & beverage this year.

'Food & beverage outlets were open when you wanted' was again the highest scoring element (4.0) and increased 0.2 points from last year.

The 'variety of food & beverage options' (3.5), 'speed of service' (3.3) and 'value for money of food & beverages' (3.1) all recorded the largest scale increases on last year.

Meanwhile, those aged 25-34 years were significantly less satisfied on average with the 'speed of service' provided compared to other age groups.

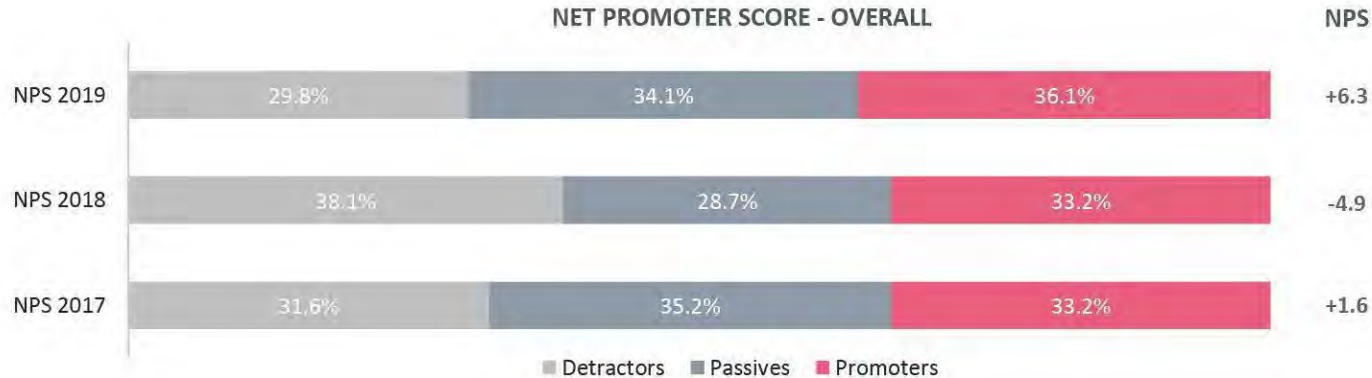
'Food & beverage outlets being open when you wanted' was the highest-ranking element, illustrating the importance of that convenience in the food & beverage offering.

Q16. Now thinking about specific elements of the food and beverage offering, how would you rate {answer from QA} in terms of the following? (n=357)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups



## NET PROMOTER SCORE - OVERALL



## KEY FINDINGS

The overall Net Promoter Score for Floriade/NightFest this year was +6.3, an increase of 9.4 points from 2018. The proportion of detractors decreased 8.3% which has then led to passives increasing 5.4% and promoters 2.9%. This 2019 NPS is the highest of the three years of research.

It was found that first-time attendees had the highest percentage of passives, with 39.5% scoring either 7 or 8. Repeat attendees had a higher proportion of promoters with 38.8% scoring a 9 or 10 and those aged 35-44 also had the highest percentage of promoters with 46.3%.

This large shift in NPS is likely to also reflect the increases in satisfaction across a number of metrics this year.

IER measures advocacy through the use of a methodology termed 'Net Promoter Score' (NPS). The NPS allows for the measurement of an event's performance through the eyes of its attendees. It is based on the view that all attendees can be segmented into one of three categories:

- **Promoters** (rating score 9-10) are classified as loyal enthusiasts who will keep attending and refer others, fueling growth.
- **Passives** (score 7-8) are often satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- **Detractors** (score 0-6) are unhappy consumers who can damage the Floriade/NightFest brand and hinder growth through negative word-of-mouth.

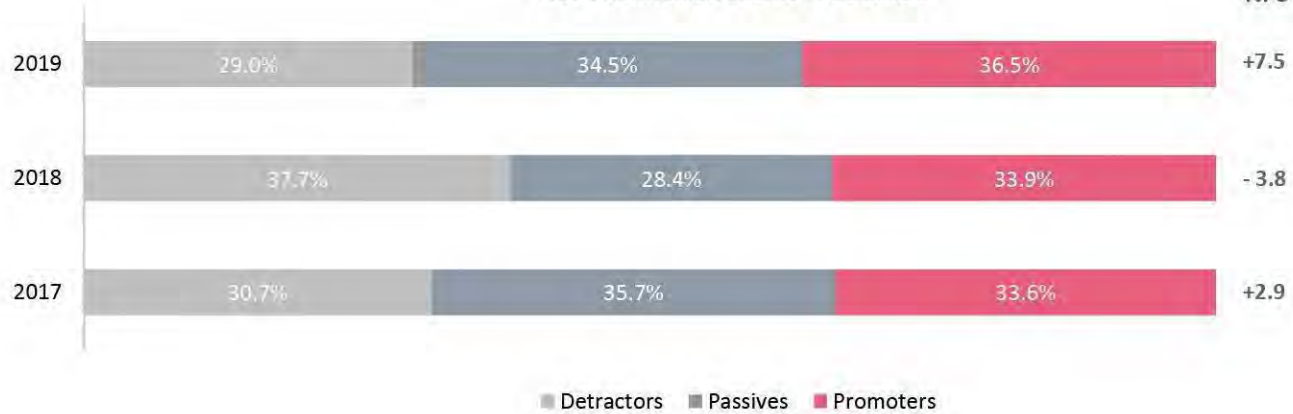
The NPS is calculated by subtracting the percentage of Detractors from the percentage of Promoters. The difference between the two is the NPS.

Q18. How likely is it that you would recommend attending (answer from QA) to family, friends or colleagues? (where 0 = Not at all likely and 10 = Extremely likely) (n=803)

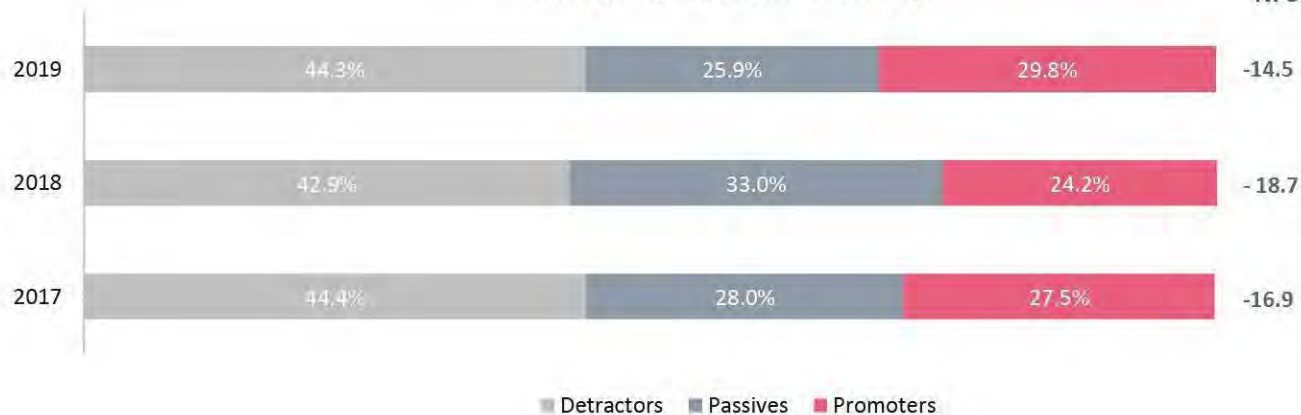
▲ Significantly higher than other groups  
▼ Significantly lower than other groups

# ADVOCACY

## NET PROMOTER SCORE - FLORIADE



## NET PROMOTER SCORE - NIGHTFEST



### KEY FINDINGS

Floriade saw a large increase in its NPS score with a change of 9.7 points from 2018. NightFest still remains in the negatives but it also recorded an improvement (up 4.2 points)

For Floriade those aged 35-44 appear to be the strongest advocates with 47.0% being a promoter. First-timers had a higher percentage of passives with 40.7% scoring a 7 or 8 compared to repeat attendees who had the highest percentage of promoters with 39.0% scoring 9 or 10.

The increases for each event link back to attendees' expectations being met or exceeded as well as a higher satisfaction with elements regarding food & beverages. Factors such as these can increase the willingness of attendees to become advocates of the event.

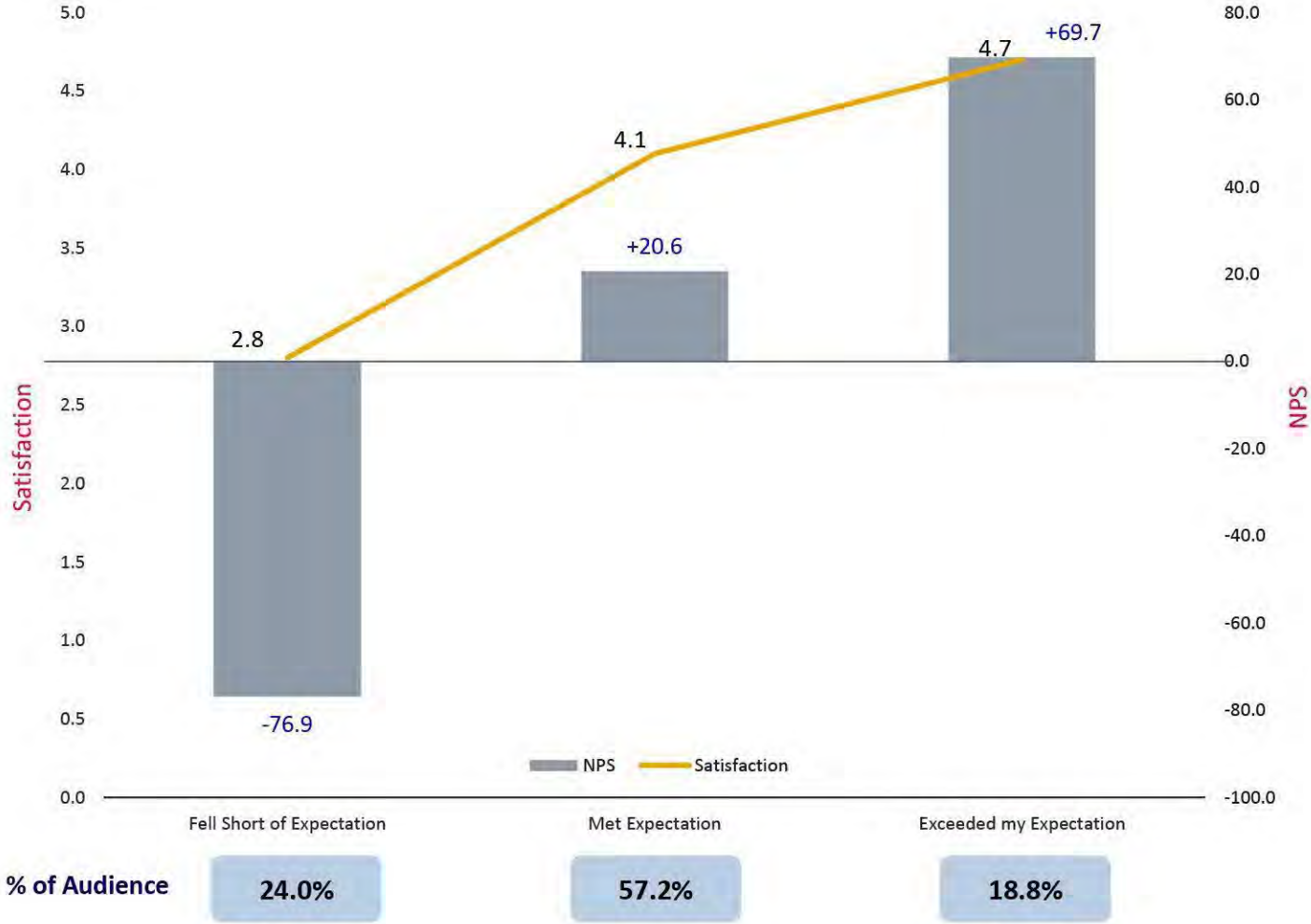
Entertainment can also record lower NPS scores generally because of the highly subjective nature of 'entertainment' – making it difficult to meet everyone's needs.

Q18. How likely is it that you would recommend attending (answer from QA) to family, friends or colleagues? (where 0 = Not at all likely and 10 = Extremely likely) (n=803)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups

# CUSTOMER EXPERIENCE

CUSTOMER EXPECTATION VS OVERALL SATISFACTION VS NPS



## KEY FINDINGS

The chart adjacent illustrates the relationship between expectations, customer satisfaction and advocacy. It shows the vast difference in likely advocacy that results from delivering an experience that is below customer expectations.

Those who felt that their experience exceeded their expectation rated their satisfaction a 4.7/5 (4.8 in 2018) and their NPS was +69.7 (+67.4 in 2018) – which is an extremely positive result.

Amongst those whose expectations are met the satisfaction and NPS results are quite strong. However amongst those whose expectations were not met, NPS and satisfaction falls significantly.

**Meeting expectations is not a bad result. It yields good levels of satisfaction and advocacy. Exceeding expectations however explodes the advocacy impact two-fold. This is why it is important to be continually thinking about ways to subtly innovate the event offering.**

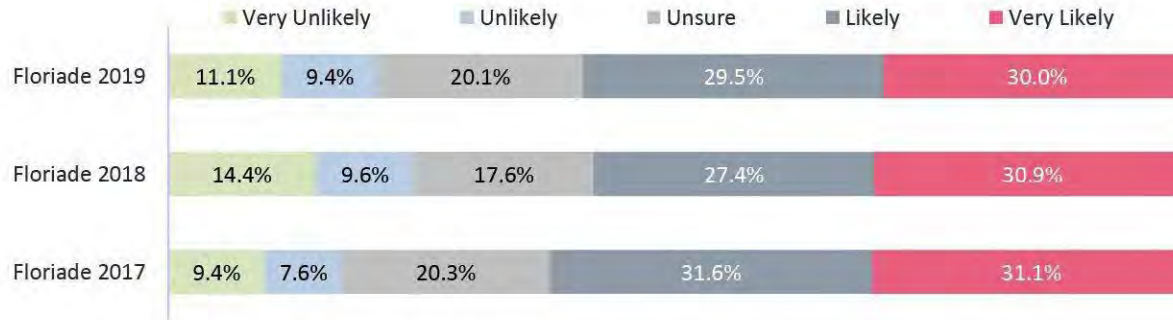
Q18. How likely is it that you would recommend attending {answer from QA} to family, friends or colleagues? (where 0 = Not at all likely and 10 = Extremely likely) (n=803)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups

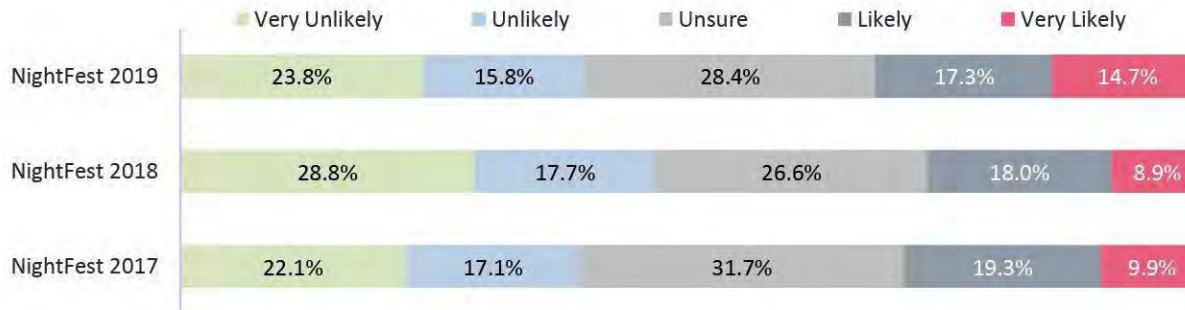


# LIKELY FUTURE ATTENDANCE

## LIKELY ATTENDANCE AT FLORIADE



## LIKELY ATTENDANCE AT NIGHTFEST



### KEY FINDINGS

The likelihood of attending Floriade in the following year has remained relatively stable over the last three years. This is likely a reflection of an event with a relatively stable following and position in the psyche of the local population.

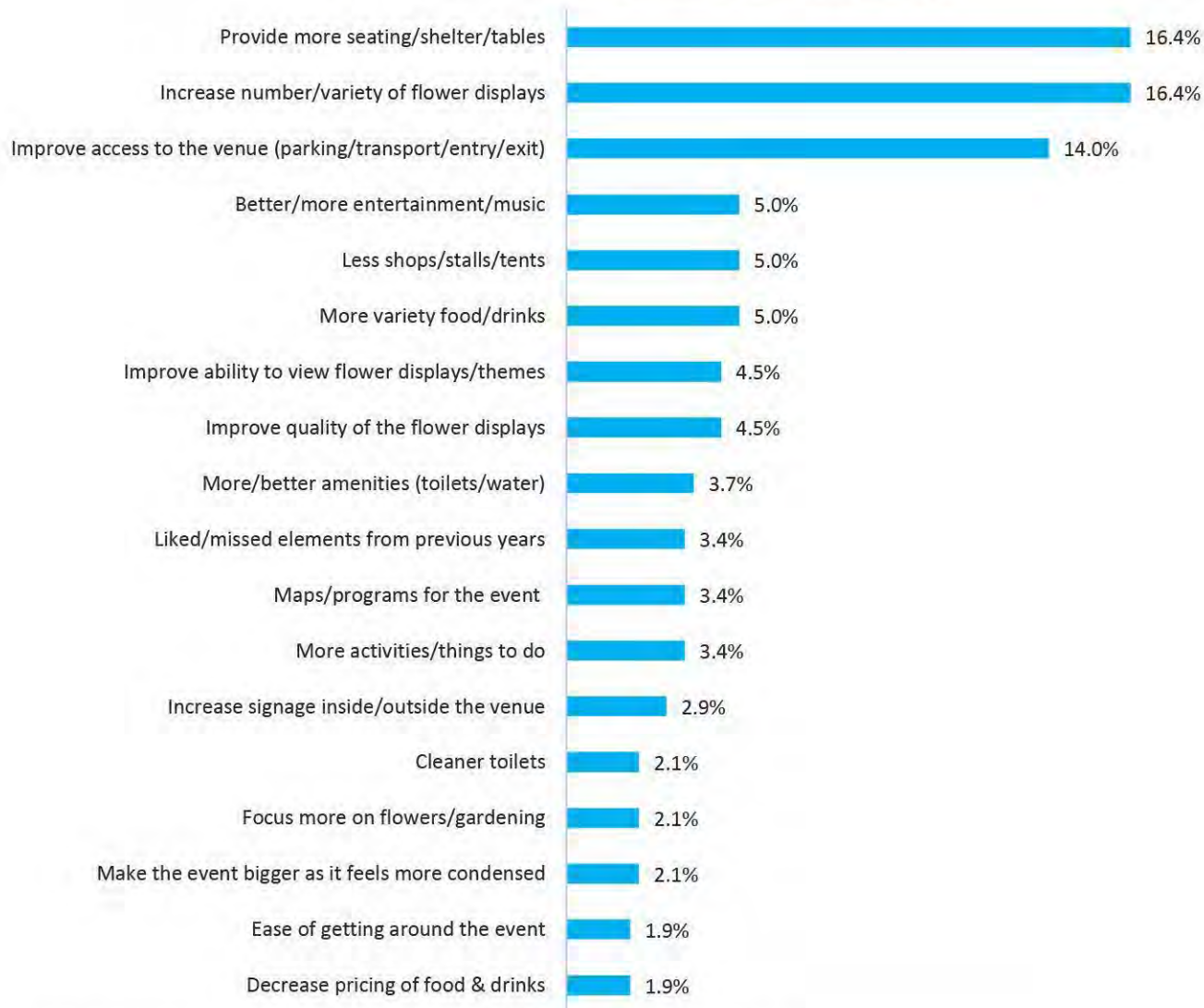
NightFest continues to record a wide level of polarity amongst its audience – albeit moreso aligned with an unlikely attendance. It should be noted though that this year saw an increase in those likely to attend again next year – the highest result in three years.

Q19. How likely are you to attend the following festivals next year? (n=791)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups

# KEY IMPROVEMENTS – FLORIADE

## TOP SUGGESTIONS FOR IMPROVING THE FLORIADE EXPERIENCE



Q14. What one improvement would you suggest that could have the greatest impact on improving the festival experience in future? (n=378)

## KEY FINDINGS

When asked for one suggestion for improving Floriade, 16.4% identified having 'more seating/shelter/tables'. The demographic of this event also is likely to keep this issue forefront of mind.

Attendees wanted less gaps around the venues and less of the same type of flowers displayed so it can make their experience more enjoyable. Suggestions to have a broader variety of flowers perhaps comes from a portion of attendees not realising that Floriade is a tulip festival.

Next highest was 'improving access to the venue' (14.0%). Attendees were frustrated with the lack of parking, the cost of parking and frequency of transport to the venue. Attendees perceptions of the event can begin before even entering the venue. If attendees have endured a hard time to park or get transport into the venue they have already started off with a negative mindset. Improvements to these can allow attendees to have a more positive initial interaction with the event.

# KEY IMPROVEMENTS – FLORIADE

## PROVIDE MORE SEATING/SHELTER/TABLES

*"More tables & chairs in front music shell....don't like sitting on the ground!"*

*"More casual seats/sitting area in shady spots"*

*"More seating and umbrellas in the food and entertainment area"*

*"More seating - particularly around food trucks/stage"*

*"More chairs available for seating. Not all people were able to sit on the grass, due to mobility/age issues"*

*"More tables and chairs in the food stall area"*

*"More picnic tables or seats around where you can sit down and look at the flowers for a while"*

*"More tables and shade in front of the big stage"*

## INCREASE NUMBER/VARIETY OF FLOWER DISPLAYS

*"More variety in the floral displays. Too many of the same flowers"*

*"More variety of flowers I thought the displays were a bit repetitive"*

*"I expected to see a broader range of floral displays. Although there were quite a few, all contained the same flowers, repeated over & over again"*

*"Less mass displays of the same type of flowers e.g. tulips and daffodils and more creative garden layout designs"*

*"More variety in terms of the types of flowers and how they were arranged/displayed"*

*"A lot of empty space where flower beds used to be years ago"*

*"More flowers like the way it use to be 1 year ago"*

*"A lot of empty space where flower beds used to be years ago"*

## IMPROVE ACCESS TO THE VENUE

*"Directions to car parking"*

*"Free and plenty of parking"*

*"More frequent shuttle buses  
Improve access to venue"*

*"Somehow provide more parking"*

*"Shuttle buses every half hour, not just every hour. People queuing for the bus missed out!"*

*"More parking facilities closer to Floriade"*

*"Parking cost"*

*"Better entry and exit points - separate people coming in and out of the venue"*

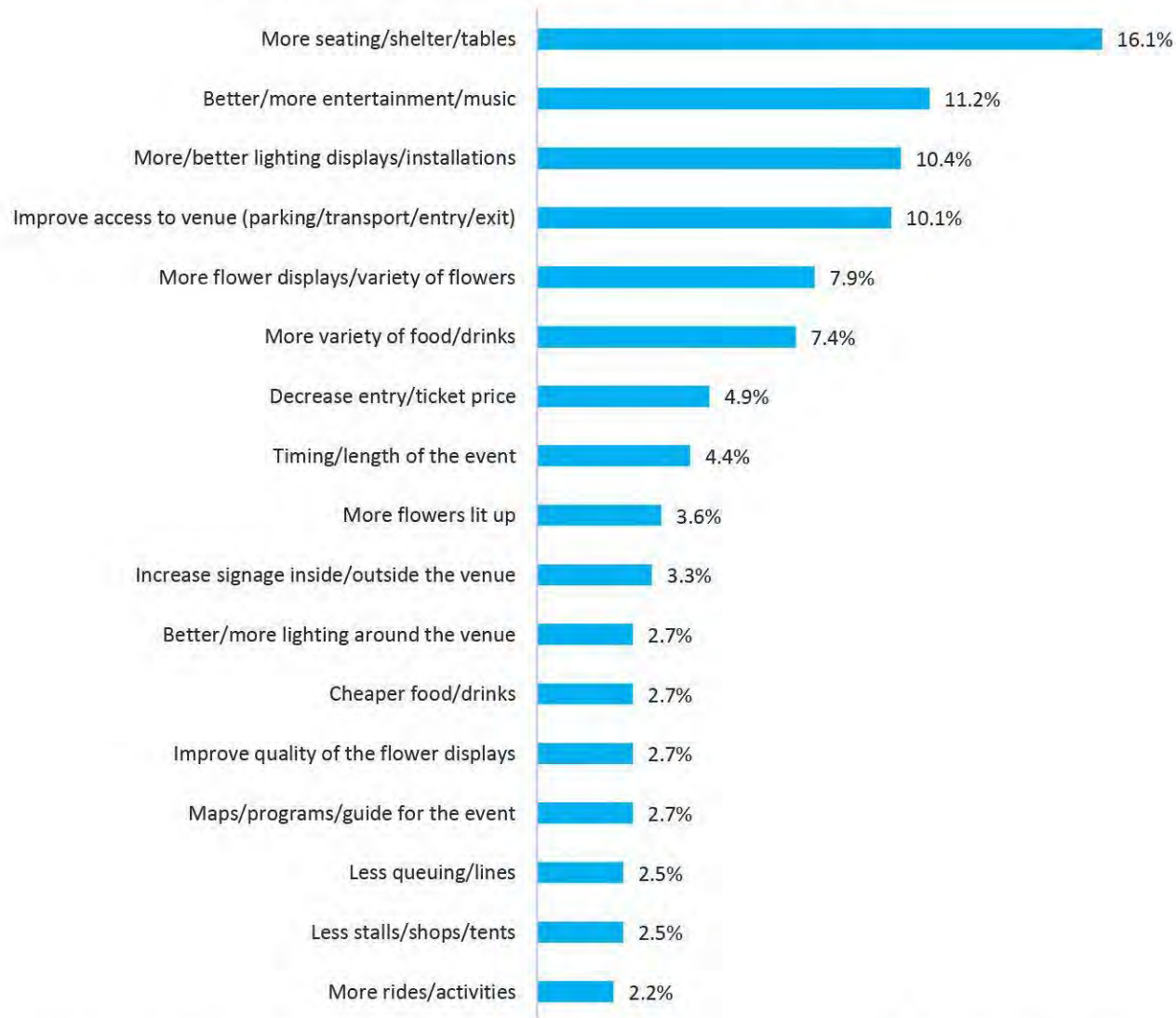
*"Better parking especially for the older people"*

Q14. What one improvement would you suggest that could have the greatest impact on improving the festival experience in future? (n=378)



# KEY IMPROVEMENTS – NIGHTFEST

## TOP SUGGESTIONS FOR IMPROVING THE NIGHTFEST EXPERIENCE



## KEY FINDINGS

In 2019, the most common theme suggested to improve NightFest was to have 'more seating/shelter/tables' (16.1%). This was followed by the want for 'better/more entertainment/music' (11.2%),

Those who commented on seating and shelter, wanted more available around the food and general areas rather than having to stand and eat. Comments regarding entertainment included improvements to the quality of the acts whether it was musical or comedic and to have more that are kid/family friendly.

Another common topic included 'better/more lighting displays/installations' (10.4%), Those who commented wanted to see more lighting spread throughout the venue because for them it was an integral part of why they visited NightFest and what creates that atmosphere. There appears to still be a view or expectation that attending NightFest is also about seeing the floral displays in a different light.

Q14. What one improvement would you suggest that could have the greatest impact on improving the festival experience in future? (n=366)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups

# KEY IMPROVEMENTS – NIGHTFEST

## MORE SEATING/SHELTER/TABLES

## BETTER/MORE LIGHTS AROUND VENUE/FLOWERS

## BETTER/MORE ENTERTAINMENT/MUSIC

*“More seating around the Floriade displays”*

*“More seating near the stage area and live music”*

*“More places to sit and enjoy the flower displays. It would be lovely to be able to sit in amongst the flowers”*

*“Perhaps some more stand up tables and seating near concert venue?”*

*“More covered seating/ areas in the event of rain”*

*“More seating options across the whole of the festival space not just near food vendors”*

*“More seating around the Floriade displays”*

*“Seating at the Nighttime arena was fairly sparse. People raced to get seating /tables. Those who missed out had to sit on the wet/damp ground. They also wandered in and out of those seated causing obstruction. In short more seating is required”*

*“Laser work over flowers and improved lighting to highlight the plants”*

*“Better lighting throughout the venue but especially the floral displays”*

*“Better lighting around NightFest, some parts were very dark and if you are old it can be quite a dangerous hazard”*

*“Better use of lighting for the flower displays”*

*“More lighting in darker areas”*

*“Lacking a bit of light displays for night fest compared to previous years. I think there were only 2 specific installations. Previous years had up to 5 installations not including illuminating the flower beds”*

*“More lights on the lake”*

*“A lot of unused dark patches around the area with no lights in the flower beds”*

*“Better comedians”*

*“Prefer music and dance performance rather than talk shows during the NightFest”*

*“Entertainments options for families (music/comedy adults only)”*

*“Improve the quality of the language used by the comedians. We did not attend the NightFest to be exposed to the foul language used by them”*

*“More local bands in the evening, put on star attraction earlier”*

*“I loved the entertainment the night I was there, but I stopped going to the Comedy Night because in two previous years I did not think it reflected the family atmosphere. Much of the humour was too crude for children who were in attendance”*

*“Continue to schedule acts such as the Veronicas to draw more younger people to these events”*

*“More roving entertainment like the light train and dancers”*

*“More entertainment than just the stage music”*

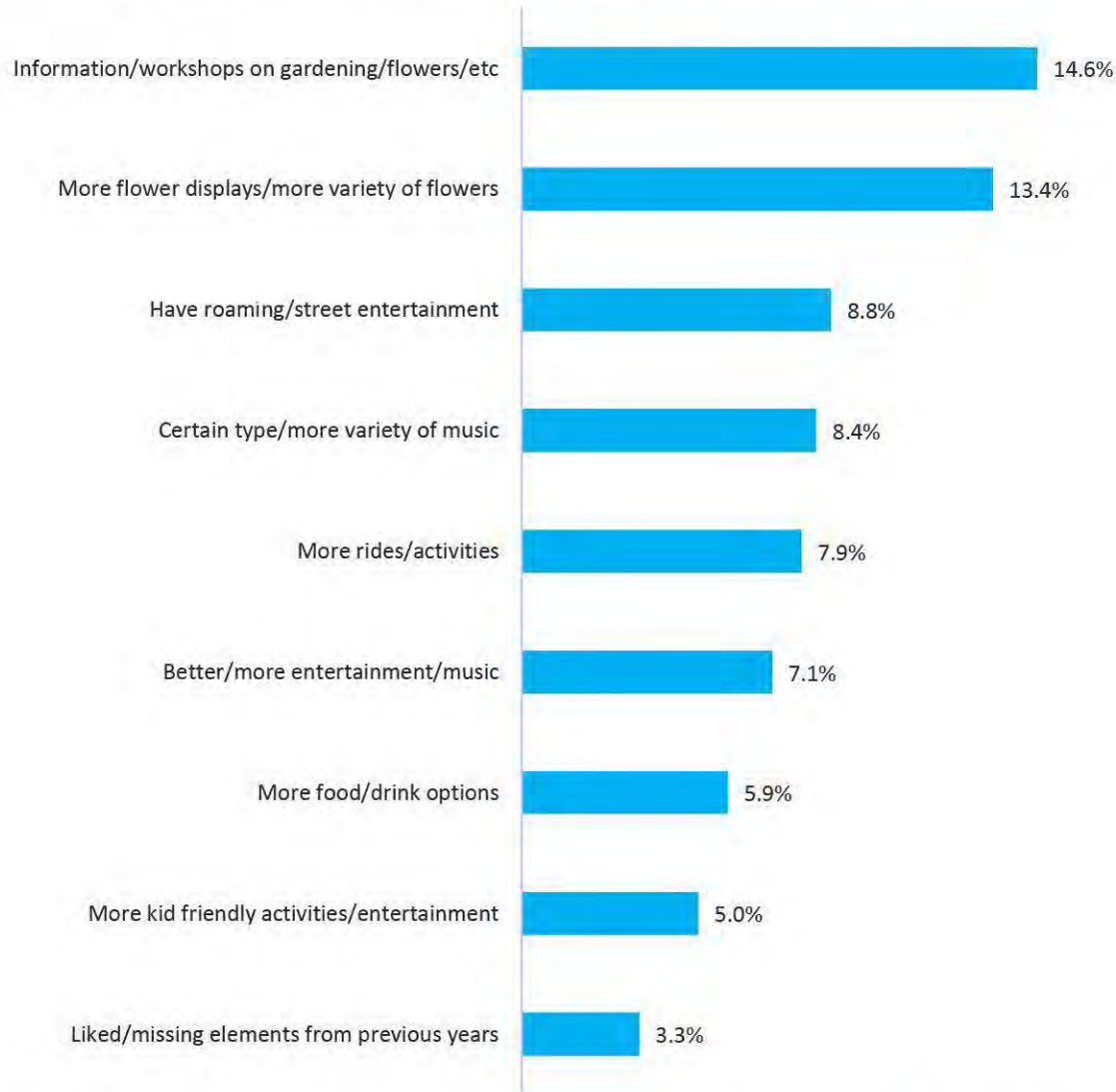
Q14. What one improvement would you suggest that could have the greatest impact on improving the festival experience in future? (n=366)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups



# ACTIVITIES/ENTERTAINMENT/PROGRAMMING - FLORIADE

## DESIRED ACTIVITIES, ENTERTAINMENT OR PROGRAMMING AT FLORIADE



## KEY FINDINGS

When asked types of activities, entertainment or programming attendees would like to see at Floriade in future years, the most suggested was 'information/workshops regarding gardening/flowers/etc.' (14.6%). This was closely followed by 'more flower displays/more variety of flowers' (13.6%).

Those who wanted more workshops seemed very passionate and were looking for tips to learn and takeaway to apply to their own gardens. For this portion of attendees it makes the event more interactive as they can learn straight from experts. For those who wanted more flowers/variety of flowers, this goes back to perhaps not a high percentage of attendees being aware that Floriade is a tulip festival.

Following the previous suggestions, 'have roaming/street entertainment' was next (8.8%). This was regarding having more performers like buskers/clowns/magicians around the venue to keep attendees entertained as they walk around the event.

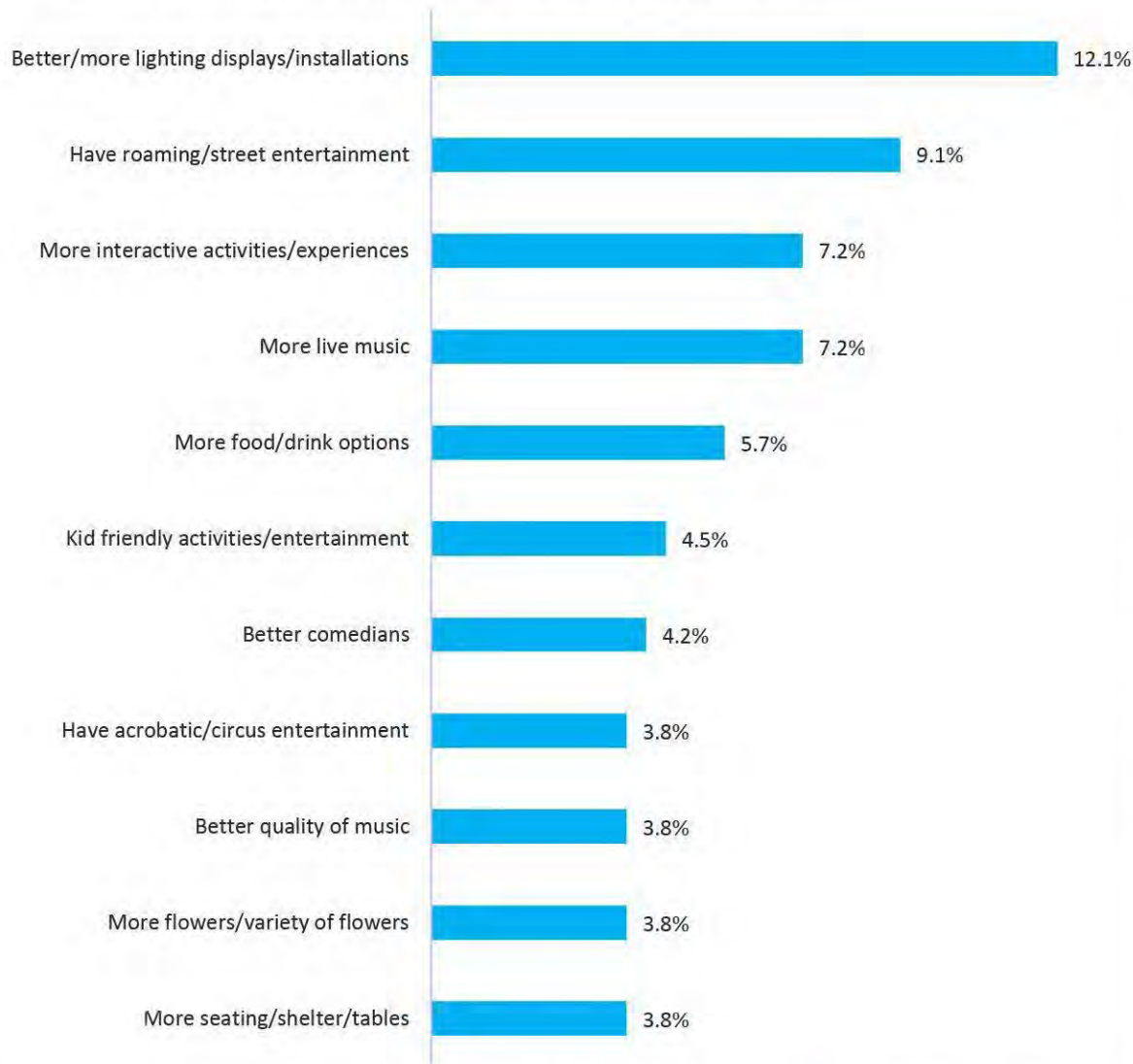
Q27. What types of activities, entertainment or programming would you like to see more of, or introduced at Floriade/NightFest? (n=239)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups



# ACTIVITIES/ENTERTAINMENT/PROGRAMMING - NIGHTFEST

## DESIRED ACTIVITIES, ENTERTAINMENT OR PROGRAMMING AT NIGHTFEST



## KEY FINDINGS

The key suggestions to improve experience regarding activities, entertainment or programming at NightFest were 'better/more lighting displays/installations' (12.1%) and 'roaming/street entertainment' (9.1%).

Comments about the 'light displays/installations' were regarding there be more installations throughout the venue such as more lantern displays. There was the sense that attendees wanted NightFest to have a special aura about it with the 'light displays/installations' provide the opportunity to experience Floriade in a different way.

The suggestion to 'have roaming/street entertainment' (like Floriade) included suggestions such as dancers, characters, magicians, musicians and fire people.

Q27. What types of activities, entertainment or programming would you like to see more of, or introduced at Floriade/NightFest? (n=264)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups

# APPENDIX 1

# KEY PERFORMANCE MEASURES BY SEGMENT

## CUSTOMER EXPECTATIONS BY SEGMENT

	Discoverers & Learners	Event Seekers	Family Memory Makers	Family Visitors	Rechargers	Variety Seekers
Exceeded my expectations	13.9%	23.1%	20.4%	30.3%	17.7%	23.1%
Met my expectations	54.4%	59.8%	61.9%	57.1%	62.2%	43.3%
Fell below my expectations	31.7%	17.0%	17.7%	12.7%	20.1%	33.6%

## OVERALL SATISFACTION BY SEGMENT

	Discoverers & Learners	Event Seekers	Family Memory Makers	Family Visitors	Rechargers	Variety Seekers
1 – Very Poor	0.2%	0.0%	3.3%	0.2%	0.4%	0.4%
2	6.9%	6.1%	4.1%	0.6% ▼	7.5%	7.3%
3	20.7%	15.9%	15.6%	12.5%	22.2%	33.0%
4	49.2%	44.5%	48.3%	53.0%	40.2%	33.6%
5 – Excellent	23.0%	33.5%	28.8%	33.8%	29.7%	25.7%
<b>Average score /5</b>	<b>3.9</b>	<b>4.1</b>	<b>4.0</b>	<b>4.2 ▲</b>	<b>3.9</b>	<b>3.8 ▼</b>

Q17. Having attended {answer from QA}, did the experience exceed, meet or fall below your expectations? (n=803)

Q12. Overall, how satisfied were you with the experience you had whilst attending {answer from QA} this year? (Where 1 = Very Poor and 5 = Excellent) (n=916)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups



# KEY PERFORMANCE MEASURES BY SEGMENT

## LIKELY FUTURE ATTENDANCE

	Discoverers & Learners	Event Seekers	Family Memory Makers	Family Visitors	Rechargers	Variety Seekers
NightFest	2.6	2.5	2.5	2.4	2.9	2.6
Floriade	3.2	3.8	3.7	4.1	3.9	3.3

## NPS BY SEGMENT

	Discoverers & Learners	Event Seekers	Family Memory Makers	Family Visitors	Rechargers	Variety Seekers
Detractors	29.9%	11.8%	22.9%	24.5%	30.1%	36.7%
Passives	31.8%	33.0%	36.8%	37.8%	35.0%	35.7%
Promoters	38.3%	55.2%	40.2%	37.6%	34.9%	27.6%
<b>NPS</b>	<b>+8.4</b>	<b>+43.4</b>	<b>+17.3</b>	<b>+13.1</b>	<b>+4.8</b>	<b>-9.2</b>

Q19. How likely are you to attend the following festivals next year? (n= 790-791)

Q18. How likely is it that you would recommend attending {answer from QA} to family, friends or colleagues (Where 0 = Not at all likely and 10 = Extremely likely) (n= 803)

## APPENDIX 2

## OTHER DATA TABLES

### AGE GROUP

Age	2019	2018	2017
Under 25	9.3%	8.0%	8.7%
25 to 34	19.3%	17.9%	17.1%
35 to 44	21.2%	18.1%	24.3%
45 to 54	20.0%	19.0%	17.1%
55 to 64	15.7%	20.6%	19.4%
65+	14.3%	15.6%	13.0%

### EMPLOYMENT STATUS

Employment Status	2019	2018	2017
Employed full time	39.1%	8.5%	8.9%
Employed part time	17.7%	7.4%	7.2%
Retired	17.6%	17.3%	18.4%
Student	6.6%	14.3%	11.6%
Home duties	3.4%	9.0%	8.7%
Unemployed	2.0%	7.6%	7.9%
Other	3.9%	3.9%	4.7%
Prefer not to say	9.8%	4.0%	2.7%

### HOUSEHOLD INCOME (BEFORE TAX)

Household Income	2019	2018	2017
Under \$40,000	6.0%	8.5%	8.9%
\$40,000 - \$59,999	8.2%	7.4%	7.2%
\$60,000 - \$79,999	5.3%	7.6%	7.9%
\$80,000 - \$99,999	9.6%	9.0%	8.7%
\$100,000 - \$149,999	17.2%	17.3%	18.4%
\$150,000 - \$199,999	12.2%	14.3%	11.6%
\$200,000 - \$249,000	5.7%	3.9%	4.7%
\$250,000+	3.9%	4.0%	2.7%
I'd rather not say	32.0%	28.0%	30.0%

### GENDER

Gender	2019	2018	2017
Male	26.1%	26.7%	25.5%
Female	71.7%	71.7%	73.8%

Q28. Which of the following age groups do you belong to? (n=745)

Q34. Which of the following best describes your current employment situation? (n=739)

Q33. Approximately what would be your total HOUSEHOLD income per annum before tax, including any payments from superannuation, pensions or other government payments (e.g. Centrelink)? (n=741)

Q29. Are you...? (n=745)



# OTHER DATA TABLES

## HOUSEHOLD COMPOSITION

Household Composition	2019	2018	2017
Couple/Single, all children left home	20.4%	21.6%	20.9%
Family with mainly primary school aged children	15.4%	11.4%	15.9%
Couple, never had children	13.0%	14.1%	11.0%
Family with adult children still at home	10.5%	15.9%	14.1%
Family with mainly young children yet to attend school	9.6%	11.5%	11.3%
Family with high school aged children	9.4%	7.7%	8.3%
Solo household, never had children	7.0%	7.3%	6.4%
Shared household	5.4%	5.3%	6.1%
Other/I'd rather not say	9.4%	5.3%	5.9%

## IMPACT ON PERCEPTION OF CANBERRA

	2019	2018	2017
Yes, for the better	40.7%	36.6%	37.2%
No, it has remained unchanged	57.6%	61.1%	60.8%
Yes, for the worse	1.7%	2.4%	2.0%

## FIRST TIME ATTENDANCE

	2019	2018	2017
Floriade	34.0%	30.3%	28.0%
NightFest	57.8%	48.9%	60.9%

## LOCAL RESIDENT AGREEMENT STATEMENTS

	2019	2018	2017
These festivals signal the start of Spring for Canberra	4.3	4.3	4.2
These festivals are well-liked and positively embraced by the people of Canberra/ACT	4.3	4.2	4.2
They help enhance community spirit, pride and enjoyment	4.3	4.2	4.1
They make Canberra a more enjoyable place to live	4.2	4.1	4.1
Holding these festivals in Canberra creates a real buzz in the city	4.1	4.1	4.0
Having these festivals run each year is worth any inconvenience caused by staging them	4.1	4.0	4.0
Attending these festivals is a way of life for local Canberrans	4.1	4.1	4.1
I look forward to these festivals every year	4.0	4.0	4.0
These festivals make me proud to be from Canberra	4.0	4.0	3.9

Q30. Which of the following best describes your household? (n=744)

Q2. Was this the first time you have attended (answer from QD)? (n= 1,014)

Q21. Has the overall experience of your visit to Canberra, to attend Floriade/NightFest, changed your perception of Canberra (n=305)

Q24. Please indicate your agreement with the following statements regarding Floriade/NightFest? (n=449-450)

## OTHER DATA TABLES

### USE OF TAXPAYER FUNDS

	2019	2018	2017
Yes	74.1%	75.7%	74.5%
No	6.5%	5.8%	6.5%
Unsure	19.4%	18.5%	19.1%

### IMPORTANCE OF HOSTING FLORIADE/NIGHTFEST

	2019	2018	2017
Very Important	61.8%	65.9%	69.5%
Important	29.3%	26.5%	24.8%
Neither	8.0%	6.1%	5.0%
Unimportant	0.5%	1.1%	0.4%
Not at all important	0.5%	0.4%	0.3%

### ABORIGINAL OR TORRES STRAIT ISLANDER

	2019
Yes, Aboriginal	1.3%
No	96.1%
Prefer not to say	2.6%

### MADE YOU WANT TO SEE MORE OF CANBERRA

	2019	2018	2017
Definitely	39.6%	36.9%	41.5%
Probably	37.2%	31.5%	34.8%
Unsure	11.6%	11.7%	13.1%
Probably not	10.9%	15.9%	9.5%
Definitely not	0.6%	4.0%	1.0%

### ENGLISH IS FIRST LANGUAGE

	2019
Yes	85.1%
No	13.3%
Prefer not to say	1.6%

Q20. Has your experience of visiting Canberra and attending Floriade/NightFest made you want to come back to see more of Canberra? (n=305)

Q22. To what extent do you believe it is important for Canberra to host Floriade/NightFest each year? (n=481)

Q23. Do you think using taxpayer money to stage Floriade/NightFest in Canberra is reasonable? (n=481)

Q31. Do you identify as Aboriginal or Torres Strait Islander? (n=743)

Q32. Is English your first language? (n=743)



# DETAILED ECONOMIC IMPACT

## DIRECT IN-SCOPE EXPENDITURE

FLORIADE	Number of Individuals	Average Daily Spend	Average Length of Stay	Total Expenditure
Interstate, EM Floriade , Day Trip	23,640	\$69.29		\$1,637,976
Interstate, EM Floriade , Overnight	64,532	\$192.66	2.67	\$33,255,199
Interstate, ES Floriade , Overnight	8,186	292.68	1.81	\$4,342,538
<b>Total Interstate</b>	<b>96,358</b>	<b>\$185.87</b>	<b>2.58</b>	<b>\$39,235,713</b>
Overseas, EM Floriade , Day Trip	0	0.00		\$0
Overseas, EM Floriade , Overnight	2,012	\$170.00	4.00	\$1,368,005
Overseas, ES Floriade , Overnight	924	\$270.00	1.00	\$249,569
<b>Total Overseas</b>	<b>2,936</b>	<b>\$180.30</b>	<b>3.06</b>	<b>\$1,617,574</b>
Net Event Operations Expenditure				\$1,663,264
<b>TOTAL FOR FLORIADE</b>	<b>99,294</b>	<b>\$185.64</b>	<b>2.60</b>	<b>\$42,516,551</b>

NIGHTFEST	Number of Individuals	Average Daily Spend	Average Length of Stay	Total Expenditure
Interstate, EM NightFest, Day Trip	523	66.10		\$34,572
Interstate, EM NightFest, Overnight	3,591	225.13	2.28	\$1,846,397
Interstate, ES NightFest, Overnight	327	267.56	1.00	\$87,608
<b>Total Interstate</b>	<b>4,441</b>	<b>\$217.48</b>	<b>2.18</b>	<b>\$1,968,577</b>
Overseas, EM NightFest, Day Trip	0			\$0
Overseas, EM NightFest, Overnight	272	225.13	2.69	\$164,642
Overseas, ES NightFest, Overnight	54	270.16	1.00	\$14,689
<b>Total Overseas</b>	<b>326</b>	<b>\$228.25</b>	<b>2.41</b>	<b>\$179,331</b>
Net Event Operations Expenditure				\$86,956
<b>TOTAL FOR NIGHFEST</b>	<b>4,768</b>	<b>\$218.34</b>	<b>2.19</b>	<b>\$2,234,864</b>

<b>TOTAL FOR FLORIADE/NIGHTFEST</b>	<b>104,062</b>	<b>\$187.04</b>	<b>2.57</b>	<b>\$44,751,415</b>
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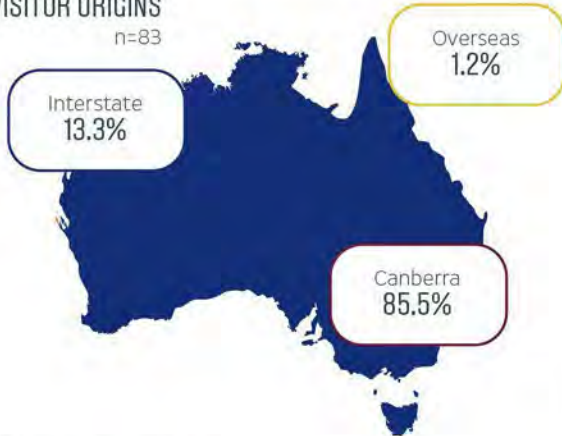
# Canberra Day

9 March 2020



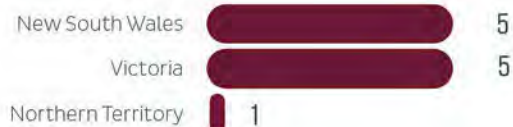
## VISITOR ORIGINS

n=83



## STATES OF ORIGIN\*

n=12



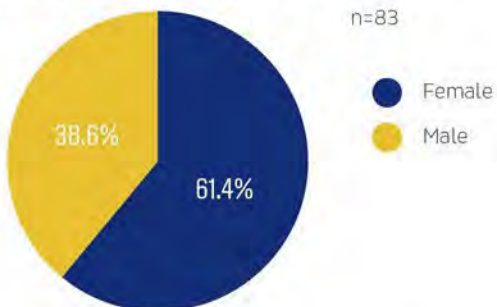
## COUNTRY OF ORIGIN\*

n=1



## DEMOGRAPHIC PROFILE OF ATTENDEES

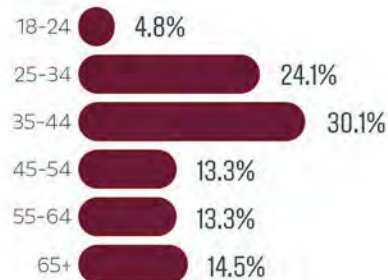
n=83



\*Displaying sample counts due to small total sample

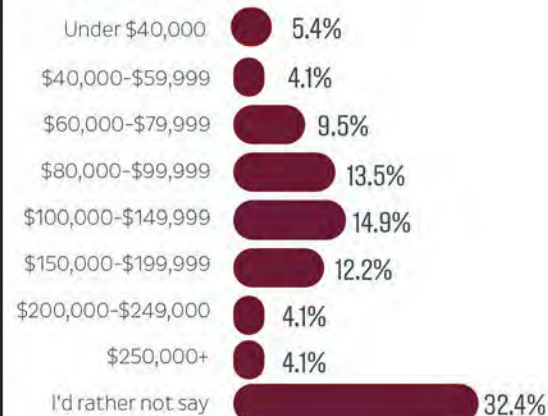
## AGE OF ATTENDEE

n=83



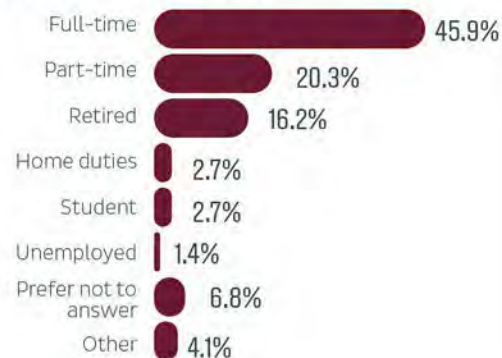
## HOUSEHOLD INCOME

n=74



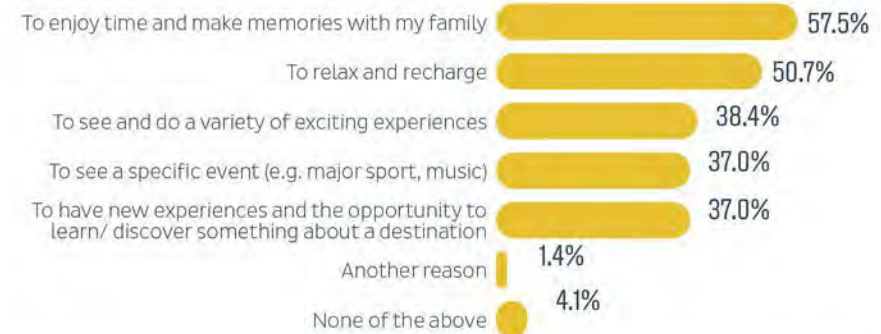
## CURRENT EMPLOYMENT STATUS

n=74



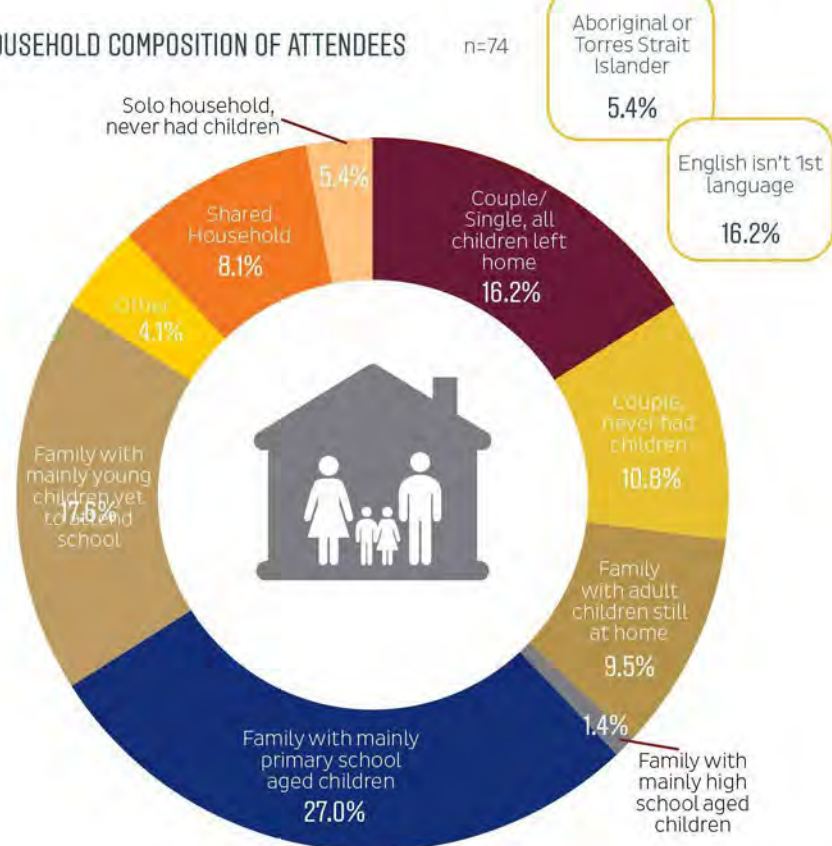
## SHORT STAY SEGMENT

n=73



## HOUSEHOLD COMPOSITION OF ATTENDEES

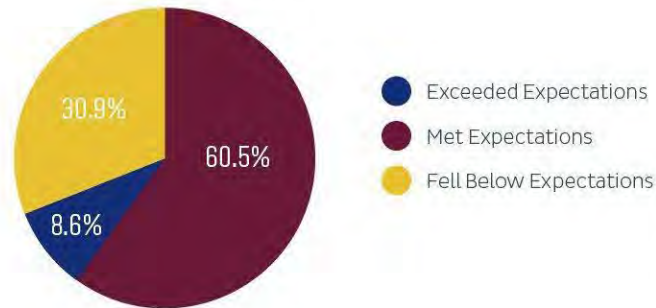
n=74



# Canberra Day

## ATTENDEE EXPECTATIONS

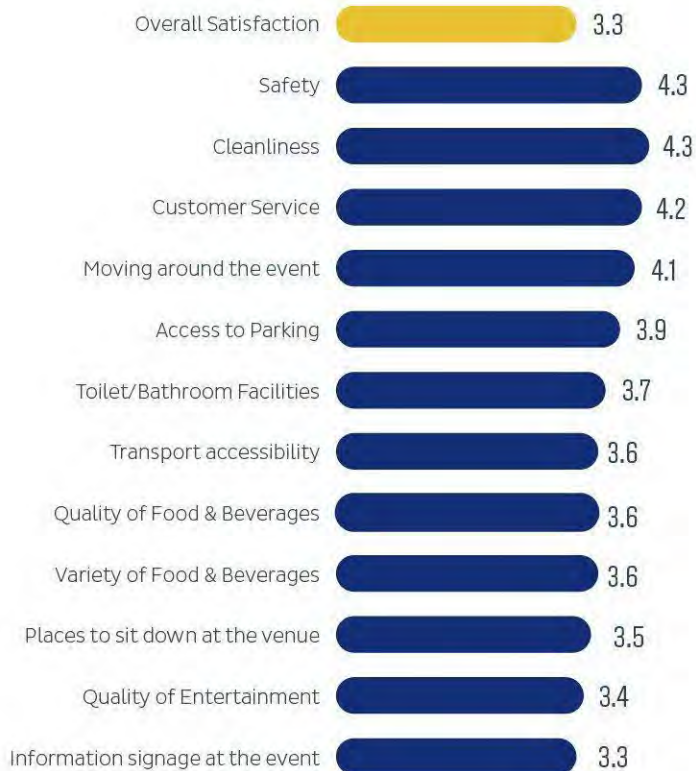
n=81



## ATTENDEE SATISFACTION

AVERAGE SCORE (/5)

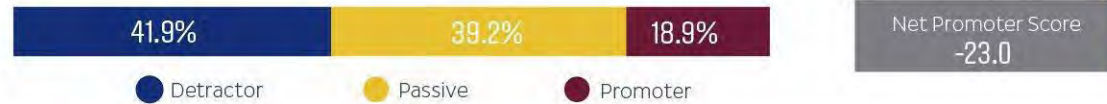
n=79



## NET PROMOTER SCORE

n=74

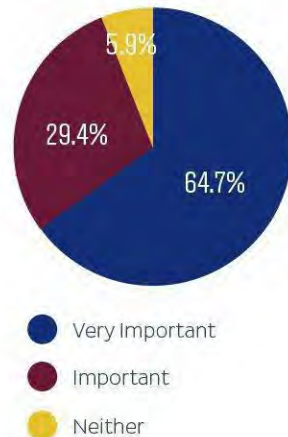
The Net Promoter Score measures the level of positive/negative advocacy that Canberra Day generated amongst attendees. Detractors (0-6) are likely to talk negatively about the event and their experience. Passives (7-8) are likely to be neutral whilst Promoters (9-10) are likely to positively advocate their experience to others.



Net Promoter Score  
-23.0

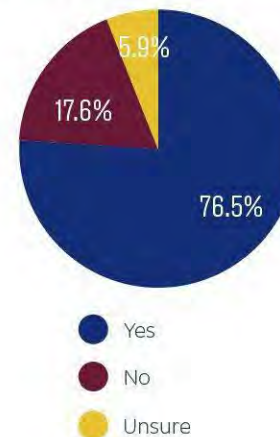
## IMPORTANCE OF HOSTING COMMUNITY EVENTS

n=74



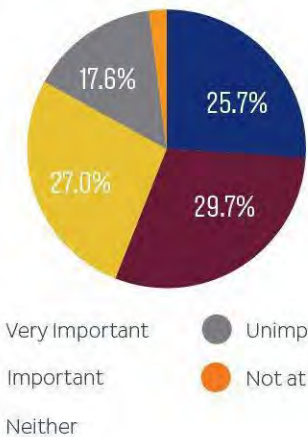
## USE OF TAXPAYER FUNDS TO STAGE COMMUNITY EVENTS

n=74



## IMPORTANCE OF HOLDING CANBERRA DAY IN THE SUBURBS

n=74



## COMMUNITY IMPACT

RATED 'AGREE OR STRONGLY AGREE'

n=74



## AWARENESS OF CANBERRA DAY IN THE SUBURBS

AWARENESS BY LOCATION

n=74





# Enlighten 2020

## Economic Impact & Research Report

ENLIGHTEN FESTIVAL

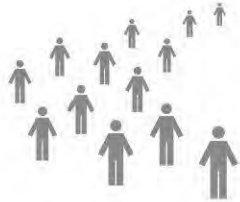
28 FEBRUARY TO 15 MARCH



FOCUSED EVENT THINKING



# SUMMARY OF KEY FINDINGS



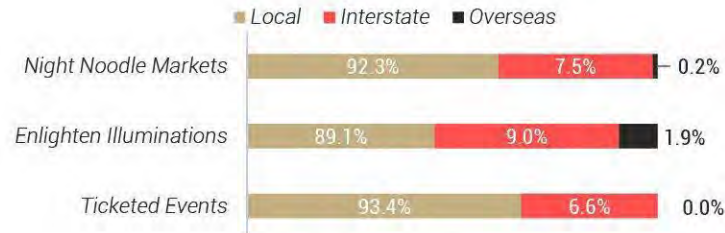
## ATTENDANCES

Enlighten attracted total attendances of **239,183**



## ATTENDEE ORIGINS

Attendee Origin	Night Noodle Markets	Enlighten Illuminations	Ticketed Events	Total
Local	81,778	133,274	944	215,996
Interstate	6,659	13,467	67	20,192
Overseas	208	2,786	0	2,994
<b>Total</b>	<b>88,645</b>	<b>149,527</b>	<b>1,011</b>	<b>239,183</b>



Visitors to Canberra made up more than **23,194 (10%)** of the total attendances at Enlighten

## ATTENDANCES BY VISITOR ORIGINS

### ENLIGHTEN ILLUMINATIONS

State	No.	Country	No.
NSW	8,435	United Kingdom	774
VIC	2,960	United States	619
QLD	888	Canada	464
SA	592	Philippines	155
TAS	296	France	155
NT	296	Netherlands	155
WA	0	India	155

### NIGHT NOODLE MARKETS

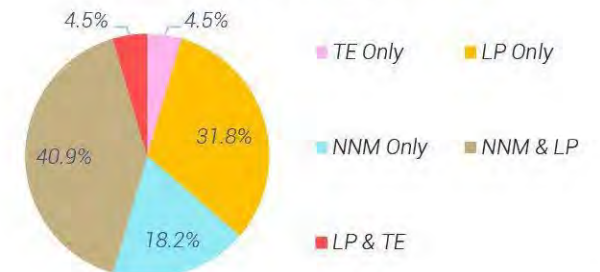
State	No.	Country	No.
NSW	3,759	United Kingdom	59
VIC	1,288	United States	30
QLD	967	Canada	30
SA	322	Other	30
WA	215	New Zealand	30
TAS	107	Germany	30
NT	0		

## TOURISM GENERATION

**9,620** unique visitors encouraged to come to Canberra because of the Enlighten Festival



### MOTIVATIONS FOR VISIT TO CANBERRA



# SUMMARY OF KEY FINDINGS

## VISITOR NIGHTS GENERATED IN THE ACT



Enlighten was responsible for generating **124,161** visitor nights in the ACT.

### AVERAGE LENGTH OF STAY (ENLIGHTEN ILLUMINATIONS AND TICKETED EVENTS)

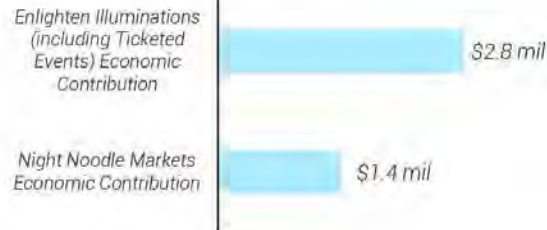


### AVERAGE LENGTH OF STAY (NIGHT NOODLE MARKETS)



## ECONOMIC IMPACT

Enlighten generated in-scope expenditure of **\$4.2 million** for the ACT.



## ATTENDEE SATISFACTION



Overall, attendees recorded a moderate to high level of satisfaction (**4.0**).

## NET PROMOTER SCORE (ADVOCACY)



Attendees recorded a positive Net Promoter Score of **+19.6**. Ticket Events received a higher NPS (+35.4) than the Night Noodle Markets (+16.9) and the Light Illuminations (+18.4).

## LIKELY RETURN ATTENDANCE



**77.0%** of attendees at the **Enlighten Illuminations** said they would be likely to return next year, compared to **69.9%** of **Night Noodle Market** attendees and **15.9%** of **Ticketed Event** attendees.

## ATTENDEE EXPECTATIONS



**19.9%** of attendees said that the festival **exceeded** their expectations.



## BACKGROUND

Enlighten 2020 was held between 28 February and 15 March. This year, the event incorporated a range of free (incl. national attractions) and ticketed events including the Enlighten Illuminations, Night Noodle Markets, Canberra Balloon Spectacular, Symphony in the Park, Lights! Canberra! Action! Canberra Day and Hit 104.7 Skyfire. This report covers the Enlighten Illuminations (incl. national attractions), Night Noodle Markets and Ticketed events.

## PURPOSE OF THE RESEARCH

IER was engaged by Events ACT to undertake a research study for Enlighten in 2020, following on from the assessment undertaken last year.

The research study contained a number of elements as outlined below: -

- Quantitative attendee research study
- Quality standards assessment
- Economic impact assessment

IER, in consultation with Events ACT, developed the quantitative and qualitative research tools to undertake this study.

## RESEARCH OBJECTIVES

The research study aimed to achieve the following key objectives: -

1. Develop a demographic profile of attendees at Enlighten
2. To provide an estimate of the economic impact generated by

Enlighten (as an umbrella event) as well as apportioning it to the motivation for attendance driven by the Enlighten Illuminations program and Night Noodle Market

3. To measure attendee experience and likely advocacy and return attendance
4. To develop an understanding of key attendee behaviours both prior to and post attendance
5. To gather insights from attendees that can be used to help shape the event for future years
6. To measure the use and usefulness of a number of marketing and communication aspects of the event
7. To measure sponsorship outcomes generated by the event
8. To conduct a quality standards assessment of the event

## RESEARCH METHODS

IER utilised a number of different research methods to deliver this study. They are outlined below:-

1. **Incidence Survey** – IER conducted an incidence survey on various days across the event period. The purpose of this survey was to develop a detailed and robust assessment of visitor origins (for the purpose of accurate audience estimation) as well as recruiting participants to complete the post-event online survey
2. **Online Survey** – An online survey was built and disseminated to those who provided their email details during the incidence survey process. Furthermore, social media and ticketing databases were used to extend the footprint of the survey.



## BACKGROUND & RESEARCH APPROACH

- 3. Economic Impact** – IER conducted a detailed economic impact analysis of Enlighten (as an umbrella brand) as well as for the Enlighten Illuminations (including Ticketed Events) and Night Noodle Markets events separately. For the purpose of this study, the assessment provides outputs at a direct spending perspective, and from both out-of-state and intrastate sources. Please note that for ticketed events the economic impact has not been reported separately due to its small overall contribution.
- 4. Quality Standards** – The quality standards assessment provides for a first-person visual assessment of various customer touchpoints at Enlighten. It aims to complement the customer research by providing a visual report on where there may be opportunities to improve the customer experience



Throughout the research report, IER has reported findings in aggregate format and/or split by Enlighten Illuminations, Night Noodle Markets and Ticketed Events as the base analysis. Further to this, detailed cross-analysis was undertaken to uncover where any deeper insights may exist.

### SURVEY DEVELOPMENT

IER liaised with Events ACT to develop an attendee survey aimed at meeting the objectives of the study. The survey was developed with specific pathways and skip logic to allow for different respondents to see specific sets of questions that were relevant to them.

The survey was built and hosted within IER's proprietary research system, [www.customerdirect.com.au](http://www.customerdirect.com.au). Invitations were branded with Enlighten creative and were sent by IER to those who opted in to participate in the research.

### REPORTING

Throughout the report, the symbols  and  have been used in various charts and tables. The red arrow means that the variable is significantly lower than other variables in that analysis. The green arrow means the opposite. Significant results are the function of both a significant difference in the data points as well as sample sizes that are large enough to be statistically confident in the data (this is why in some instance, two variables may appear significantly apart but may not be marked as such).

### SAMPLE SIZES

IER undertook a face-to-face survey at events to capture visitor origins, primary purpose and extended stay visitation as well as recruiting attendees to complete the on-line survey. The face-to-face survey yielded a sample of 2,888.

Through the online research process, IER yielded the following samples for use in this study

Respondent Type	Sample Size
Enlighten Illuminations	259
Night Noodle Markets	222
Enlighten Ticketed Events	61
Total	542

These samples are statistically significant in their own right (at an aggregate level) and then were combined to provide an overall Enlighten data set. Please note that the research was affected significantly by poor weather and event cancellations (weather related) which caused a number of days lost to the research process.

# **ECONOMIC IMPACT OF ENLIGHTEN**



## BACKGROUND

*In order to determine the economic impact of Enlighten, a model for the entire Enlighten event was developed and then impacts were apportioned to the Night Noodle Markets, Ticketed Events and the Light Projections depending on which (individual or combination) events drove the decision to visit Canberra. Where a visitor identified more than one of these events, impacts for that visitor have been split equally between the events.*

*In order to undertake the economic impact assessment for Enlighten, IER gathered data through the following sources: -*

- **Incidence survey** – provided data on visitor origins and whether the visitor had travelled to Canberra primarily for the purpose of attending one or more events under the Enlighten banner, or for another reason
- **Post-event attendee survey** – used to gather data on whether visitors stayed overnight in Canberra, length of stay, accompanying persons and level of daily expenditure
- **Data from Events ACT** – provided IER with data on attendances and event organiser financials

*All of this data was then fed into IER's economic analysis model.*

## DEVELOPING SEPARATE ANALYSIS FOR EACH EVENT

*This report constitutes the impacts associated with the Enlighten program and the events that have been included under this banner.*

*The apportionment of impacts to various events is a difficult task. The approach undertaken, for this study, relied upon the consumer providing guidance on what exactly motivated their decision to visit Canberra on this trip. If the decision to attend was jointly driven by two or more of these events, then impacts were apportioned between them. This is a method used to ensure that credit for driving visitation can be allocated appropriately.*

## DEVELOPING VISITOR PROFILES

*In order to develop this assessment, attendee data was analysed to develop mutually exclusive visitor profile based on whether the respondent was event motivated or extended stay, a day trip or an overnight visitor.*

*A combination of incidence survey and post event survey data was used to develop these profiles.*

## CALCULATING THE ECONOMIC IMPACT

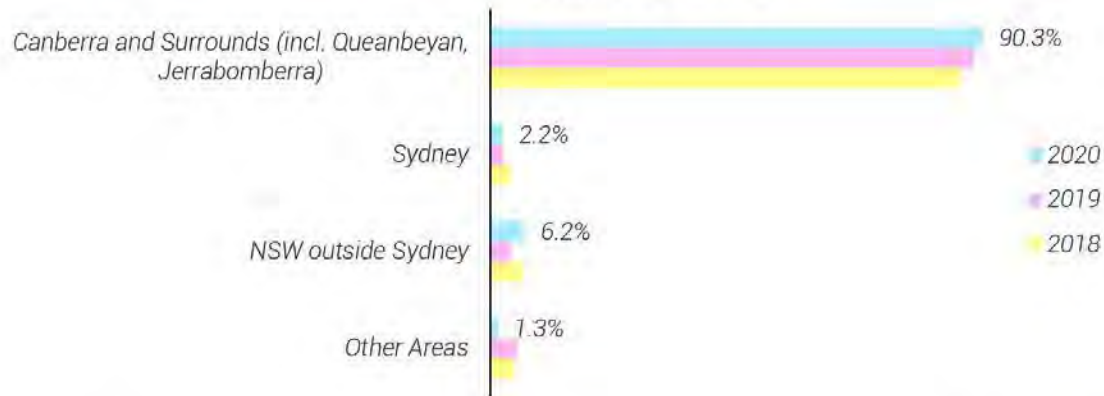
*The economic impact was calculated based on the number of event motivated and extended stay visitors x the length of their stay x their average daily spend. In addition to this, event attendances have been grossed up with accompanying people – who represent individuals who travelled to Canberra with a visitor but did not, themselves, attend Enlighten.*

*The economic impact was reported at a direct spending level only and no additional modelling was undertaken.*



# ECONOMIC IMPACT

## ATTENDEE ORIGIN



## ATTENDEE ORIGIN BY EVENT

	Canberra & Surrounds (incl. Queanbeyan, Jerrabomberra)	Outside Canberra
Enlighten NNM	92.3%	7.7%
Enlighten Illuminations	89.1%	10.9%
Enlighten Ticketed Event	93.4%	6.6%

## ATTENDEE ORIGIN BY AGE GROUP

	Canberra & Surrounds (incl. Queanbeyan, Jerrabomberra)	Outside Canberra
Under 25	94.2%	5.8%
25 to 34	88.1%	11.9%
35 to 44	88.2%	11.8%
45 to 54	81.6%	19.4%
55 to 64	79.8%	20.2%
65+	85.9%	14.1%

In 2020, Enlighten attracted total attendances of 239,183. Research data revealed that on average, an individual attended 1.7 times across the festival. Please note: - this estimate spans the entire Enlighten program as it is not possible to undertake separate assessments under the methodology employed for this study.

Therefore, it is estimated that the total number of unique individuals in attendance at the Enlighten was 143,859. Just over 90.0% were from Canberra whilst 8.4% were from interstate and 1.3% from overseas.

# TARGET AUDIENCE PROFILE

## ACT VISITOR SEGMENTATION

	Enlighten	Canberra Short Break Segments (Overall)	Enlighten Indexation
Variety Seekers	49% (-8%)	14%	+36% ▲
Family Memory Makers	14% (+7%)	8%	+6% ▲
Discoverers & Learners	8% (-2%)	17%	-9% ▼
Event Seekers	9% (+1%)	14%	-5% ▼
Family Visitors	9% (+3%)	19%	-13% ▼
Rechargers	7% (+2%)	29%	-22% ▼

Of those who fell within a segment, nearly half were considered Variety Seekers (49%) although this was lower than last year (57%). This was followed by Family Memory Makers (14.0%).

Overall, the Enlighten events attracted similar audiences in terms of segments. There were some slight variations, however.

- Discoverers & Learners are significantly more likely to be attending Ticketed Events whilst Family Memory Makers are less likely
- Variety Seekers are the largest audience across all three aspects of Enlighten

When assessed against the overall Canberra Short Break framework developed for the ACT, Enlighten shows a significant under indexation on all segments, with the exception of Family Memory Makers and Variety Seekers.

	Light Illuminations	NNM	Ticketed Events
Variety Seekers	49.0%	53.2%	63.9%
Family Memory Makers	15.8%	14.0%	6.6%
Discoverers & Learners	10.4%	8.1%	16.4%
Event Seekers	8.1%	9.0%	4.9%
Family Visitors	7.7%	8.6%	4.9%
Rechargers	8.9%	7.2%	3.3%

Aggregate (n=542)  
 Light Illuminations (n=259)  
 NNM (n=222)  
 Ticketed Events (n=61)

▲ Significantly higher than other groups  
 ▼ Significantly lower than other groups

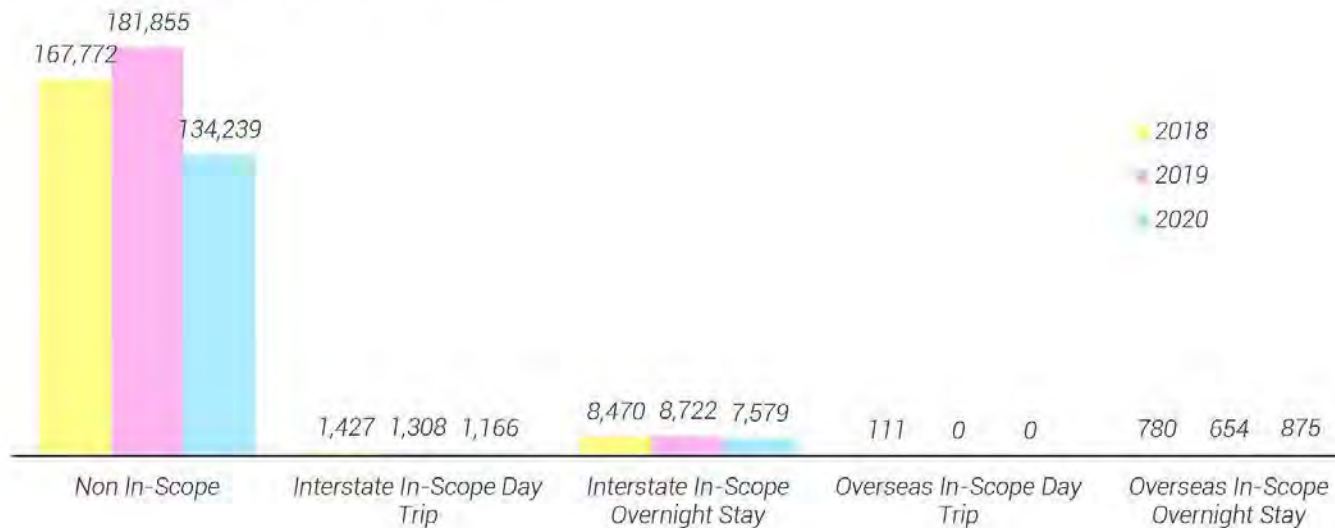
# ECONOMIC IMPACT

## UNIQUE INDIVIDUALS

Visitor Origin	Not In Scope	In-Scope Overnight	In-Scope Day Trip	Total
Canberra Residents – Not In Scope	127,680			127,680
Interstate – Not In-Scope	4,373			4,373
Overseas – Not In-Scope	2,186			2,186
<b>Total Not In-Scope</b>	<b>134,239</b>	<b>0</b>	<b>0</b>	<b>134,239</b>
Interstate – In Scope		7,579	1,166	8,745
Overseas – In Scope		875	0	875
<b>Total In-Scope</b>	<b>0</b>	<b>8,454</b>	<b>1,166</b>	<b>9,620</b>
<b>Total Individuals</b>	<b>134,239</b>	<b>8,454</b>	<b>1,166</b>	<b>143,859</b>

Note: Some totals may not add due to rounding

## UNIQUE ATTENDEES (2018 - 2020)



Enlighten was responsible for bringing to 9,620 visitors to Canberra (who attended the event). The majority of these (8,745) were from interstate whilst a further 875 came from overseas. In-scope visitors declined by of 10% compared to last year.

The majority of visitors (8,454) stayed overnight in Canberra during their visit.

It is important to note that poor weather affected Enlighten on a number of nights this year.



# ECONOMIC IMPACT

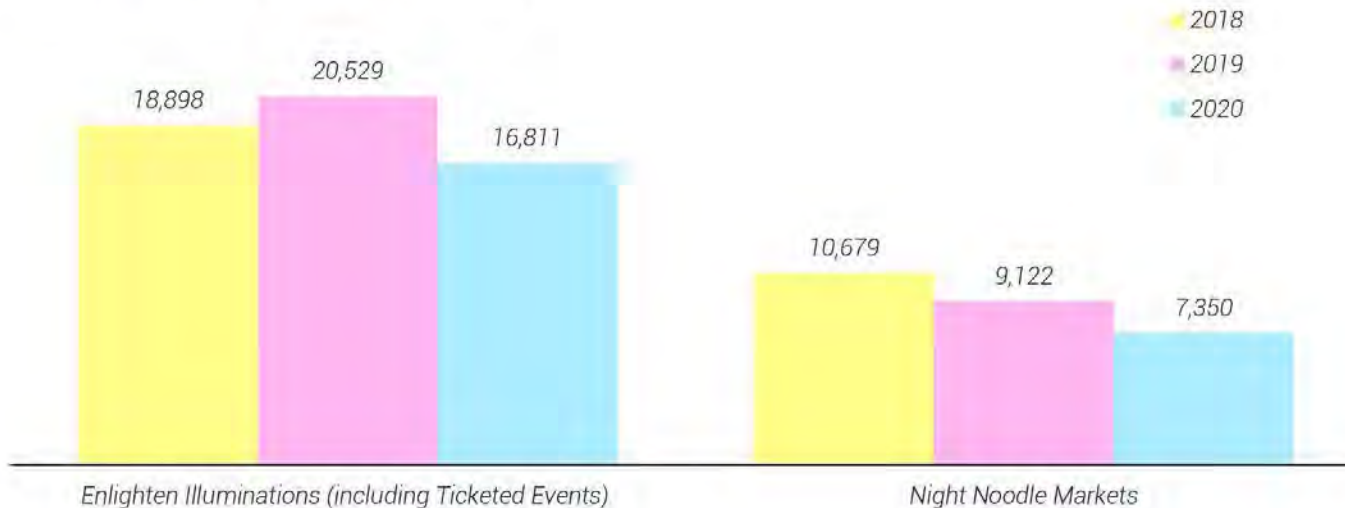
## TOTAL VISITOR NIGHTS IN THE ACT

Visitor Origin	Number of Overnight Visitors	Avg nights in ACT	Total Nights
Interstate – Event Motivated	6,267	2.89	18,087
Overseas – Event Motivated	875	4.00	3,498
<b>Total Event Motivated</b>	<b>7,142</b>	<b>3.02</b>	<b>21,585</b>
Interstate – Extended Stay	1,312	1.96	2,576
Overseas – Extended Stay	0		
<b>Total Extended Stay</b>	<b>1,312</b>	<b>1.96</b>	<b>2,576</b>
<b>Total Visitor Nights</b>	<b>8,454</b>	<b>2.86</b>	<b>24,161</b>

Note: Some totals may not add due to rounding

Enlighten was responsible for generating more than 24,000 visitor nights in Canberra. This represents an 18.5% decline on last year.

## VISITOR NIGHTS GENERATED BY EACH EVENT



## ECONOMIC IMPACT

### EXPENDITURE GENERATED BY THE ENLIGHTEN FESTIVAL

Visitor Group	Unique Individuals	Average Spend Per Day	Average Nights	Total Spend
<i>Interstate – Event Motivated (Day Trip)</i>	1,166	\$63.93		\$74,548
<i>Interstate – Event Motivated (Overnight)</i>	6,267	\$176.09	2.89	\$3,184,895
<i>Interstate – Extended Stay (Overnight)</i>	1,312	\$171.39	1.96	\$441,478
<b>Total Interstate</b>	<b>8,745</b>	<b>\$175.50</b>	<b>2.72</b>	<b>\$3,700,921</b>
<i>Overseas – Event Motivated (Day Trip)</i>				
<i>Overseas – Event Motivated (Overnight)</i>	875	\$140.21	4.00	\$490,461
<i>Overseas – Extended Stay (Overnight)</i>				
<b>Total Overseas</b>	<b>875</b>	<b>\$140.21</b>	<b>4.00</b>	<b>\$490,461</b>
<i>Net Event Organiser Expenditure</i>				\$27,223
<b>Total Direct Expenditure</b>	<b>9,620</b>	<b>\$161.98</b>	<b>2.86</b>	<b>\$4,218,604</b>

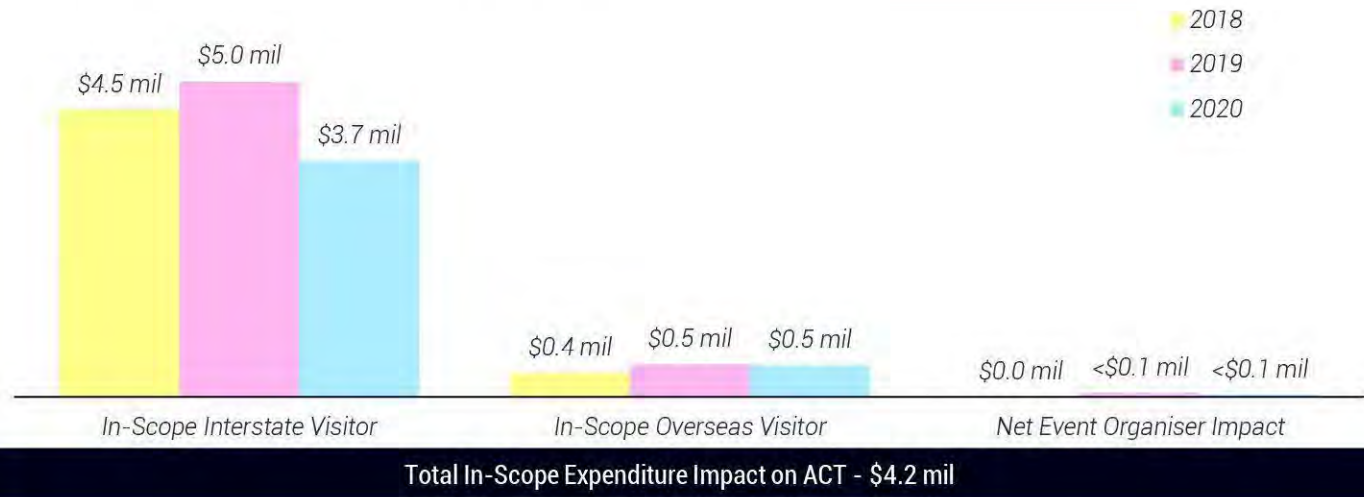
Enlighten was responsible for bringing 9,620 visitors to Canberra. These visitors spent an average of \$161.98 per person per day. Overnight visitors spent an average of 2.86 nights in Canberra on their visit.

The net event organiser impact of \$53,211 represents the extent to which event related expenditure was made in Canberra using revenue sourced from outside Canberra.

In 2020, the Enlighten Festival was responsible for generating an economic impact of \$4.2 million.

# ECONOMIC IMPACT

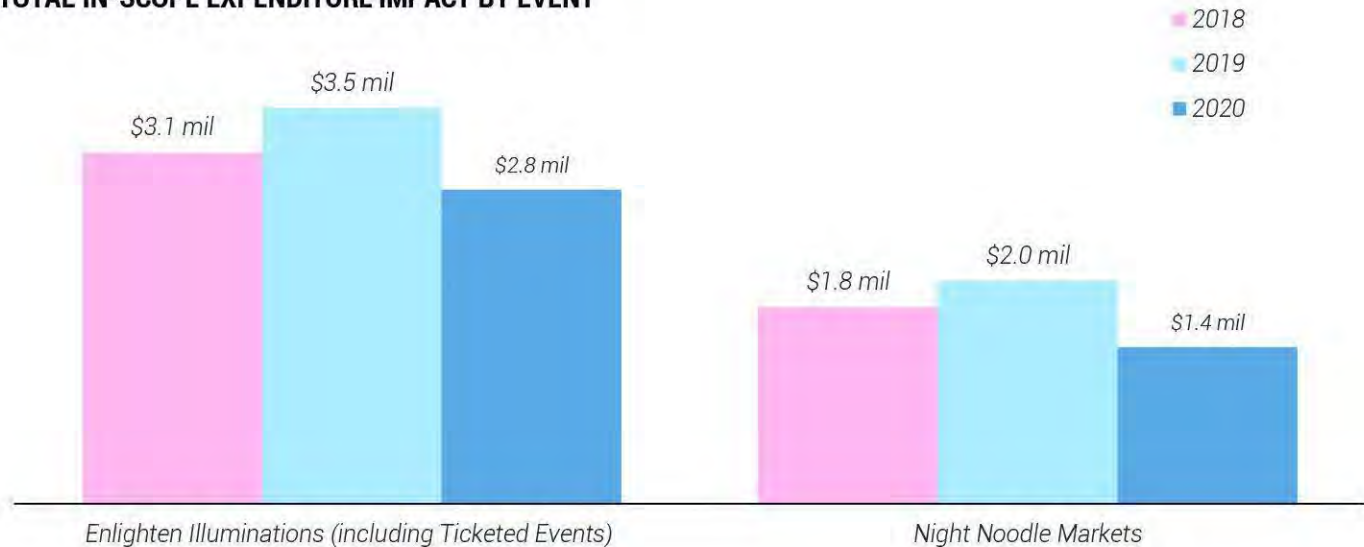
## TOTAL IN-SCOPE EXPENDITURE IMPACT ON THE ACT



Overall, Enlighten was responsible for generating an in-scope expenditure impact of \$4.2 million in 2019. This represented a decrease of 23.4%. The decline was driven by a combination of a drop in in-scope visitors as well as a fall in overnight visitors (who generally have a larger economic impact than day trippers) as well as a lower level of daily spend compared to last year.

The decline in economic impact was felt across both the Enlighten and Night Noodle Market events.

## TOTAL IN-SCOPE EXPENDITURE IMPACT BY EVENT

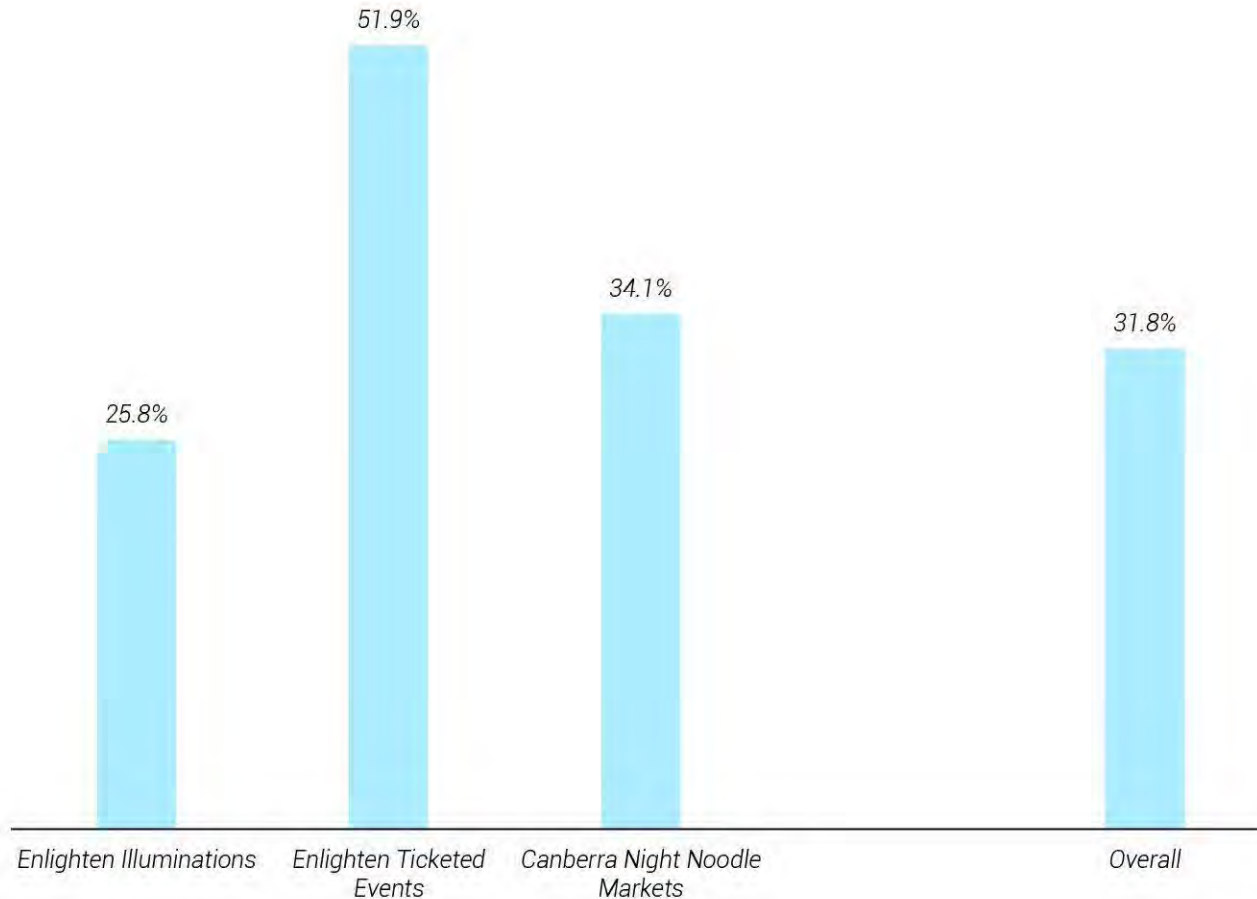




# **EVENT PERFORMANCE METRICS**

# PREVIOUS ATTENDANCE

## FIRST TIME ATTENDANCE AT ENLIGHTEN

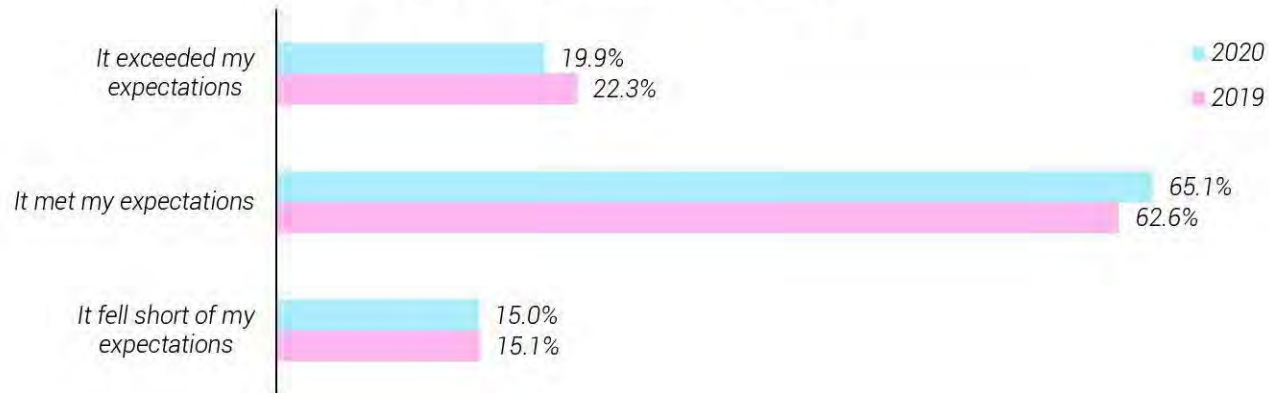


Nearly one-third of attendees (31.8%) at Enlighten 2020 were attending the event for the first-time.

More than half of those attending an Enlighten Ticketed Event were doing so for the first time..

# CUSTOMER EXPERIENCE

## ATTENDEE EXPECTATIONS OF ENLIGHTEN



Overall, 19.9% of attendees had their expectations exceeded when attending Enlighten. This was down from the 22.3% from 2019. However, over 65% had their expectations met in some way which was an increase from 62.6% the previous year.

When assessed by event, Ticketed events recorded the highest increase in 'expectations being met' while also recording the highest decline of those whose experience 'fell below their expectations' this year.

The Enlighten Illuminations saw the level of 'expectations being exceeded' decrease and 'falling below expectations' increase. It was also the part of Enlighten that was most likely to have been affected by wet weather.

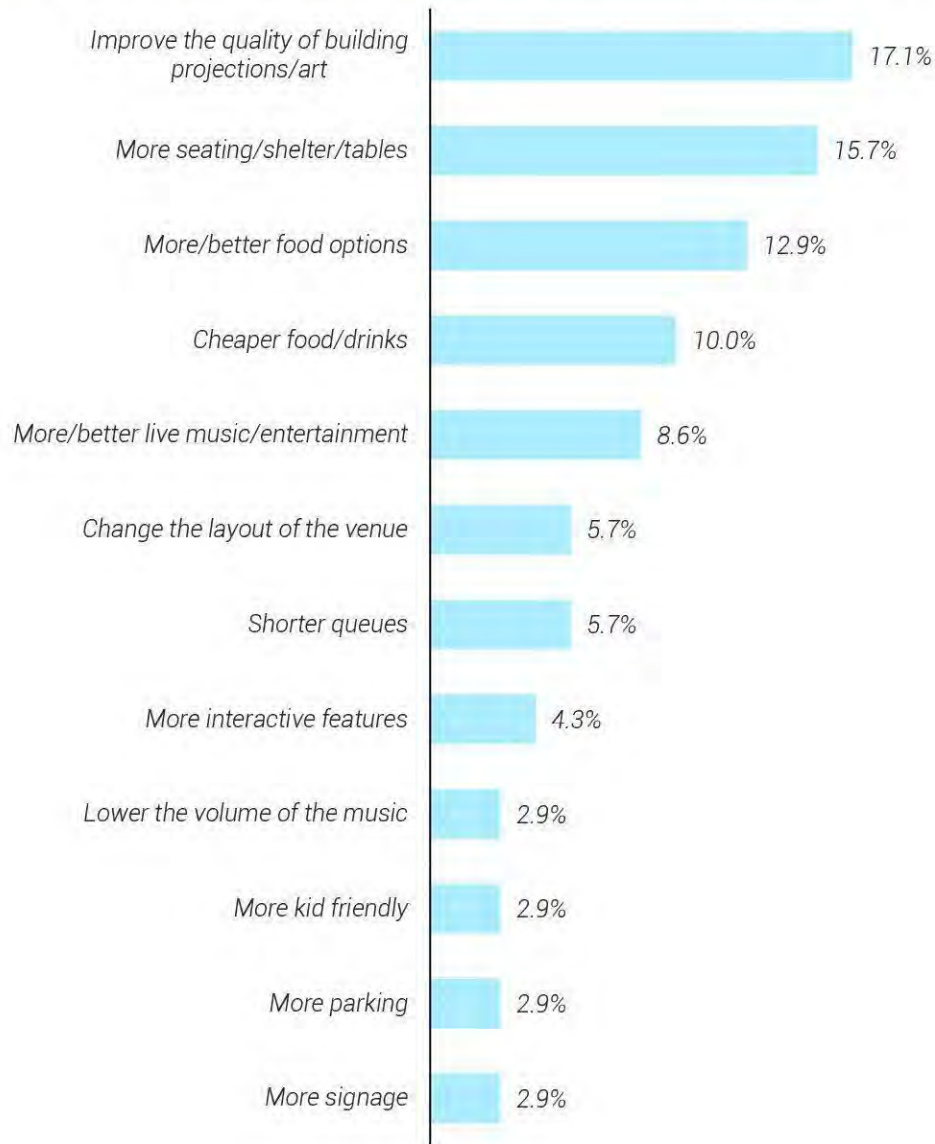
## ATTENDEE EXPECTATIONS BY EVENT ATTENDED

	Enlighten NNM			Enlighten Illuminations			Enlighten Ticketed Events		
	2018	2019	2020	2018	2019	2020	2018	2019	2020
Exceeded your expectations	13.8%	16.4%	18.8%	15.9%	25.8%	17.6%	23.9%	34.0%	35.4%
Met your expectations	65.3%	67.1%	66.5%	66.4%	64.9%	65.8%	60.4%	46.0%	56.3%
Fell below your expectations	20.9%	16.4%	14.7%	17.7%	9.3%	16.7%	15.8%	20.0%	8.3%



# CUSTOMER EXPERIENCE

## AREAS REQUIRING IMPROVEMENT BY THOSE WHO FELT THEIR EXPERIENCE FELL SHORT OF THEIR EXPECTATIONS



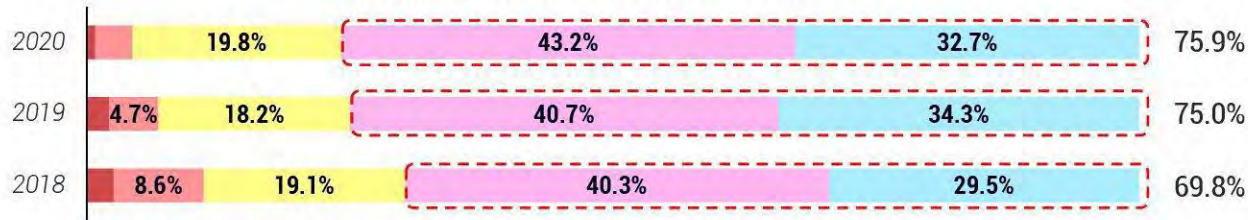
This chart summarises the key improvements suggested by respondents who indicated that their event experience fell below their expectations.

The most common theme to come out of this was to 'improve the quality of the building projections' (17.1%). These included comments about the projections being not as 'inspiring' or 'imaginative' this year compared to the previous.

The comment which followed this was 'more seating/shelter/tables' (15.7%) at the event, particularly at the Night Noodle Markets.

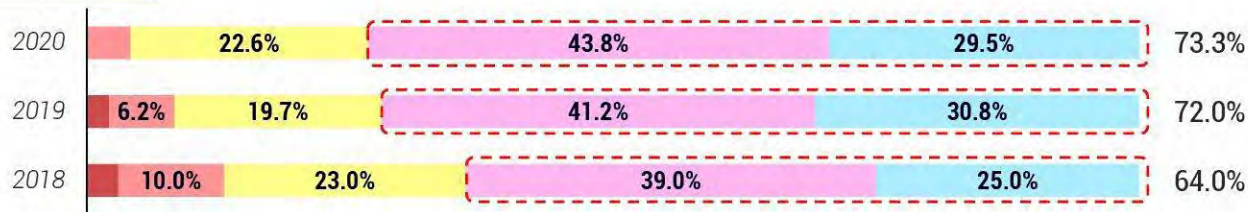
# CUSTOMER EXPERIENCE

## OVERALL SATISFACTION WITH ENLIGHTEN

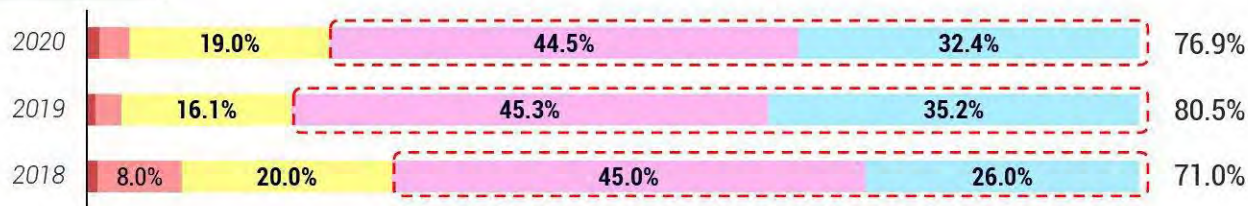


## OVERALL SATISFACTION WITH ENLIGHTEN EVENTS

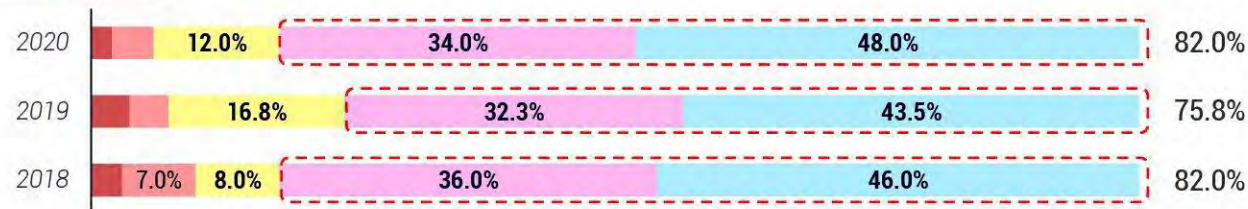
### NIGHT NOODLE MARKETS



### ILLUMINATIONS



### TICKETED EVENTS



■ 1 - Very Poor    ■ 2    ■ 3    ■ 4    ■ 5 - Excellent

Attendees at Enlighten recorded an overall event experience rating of 75.9% (good or excellent). This was an increase from 75.0% in 2019.

Attendees at the Ticketed Events had the highest level of satisfaction amongst the Enlighten Events with 82.0%, improving on the 75.8% from 2019.

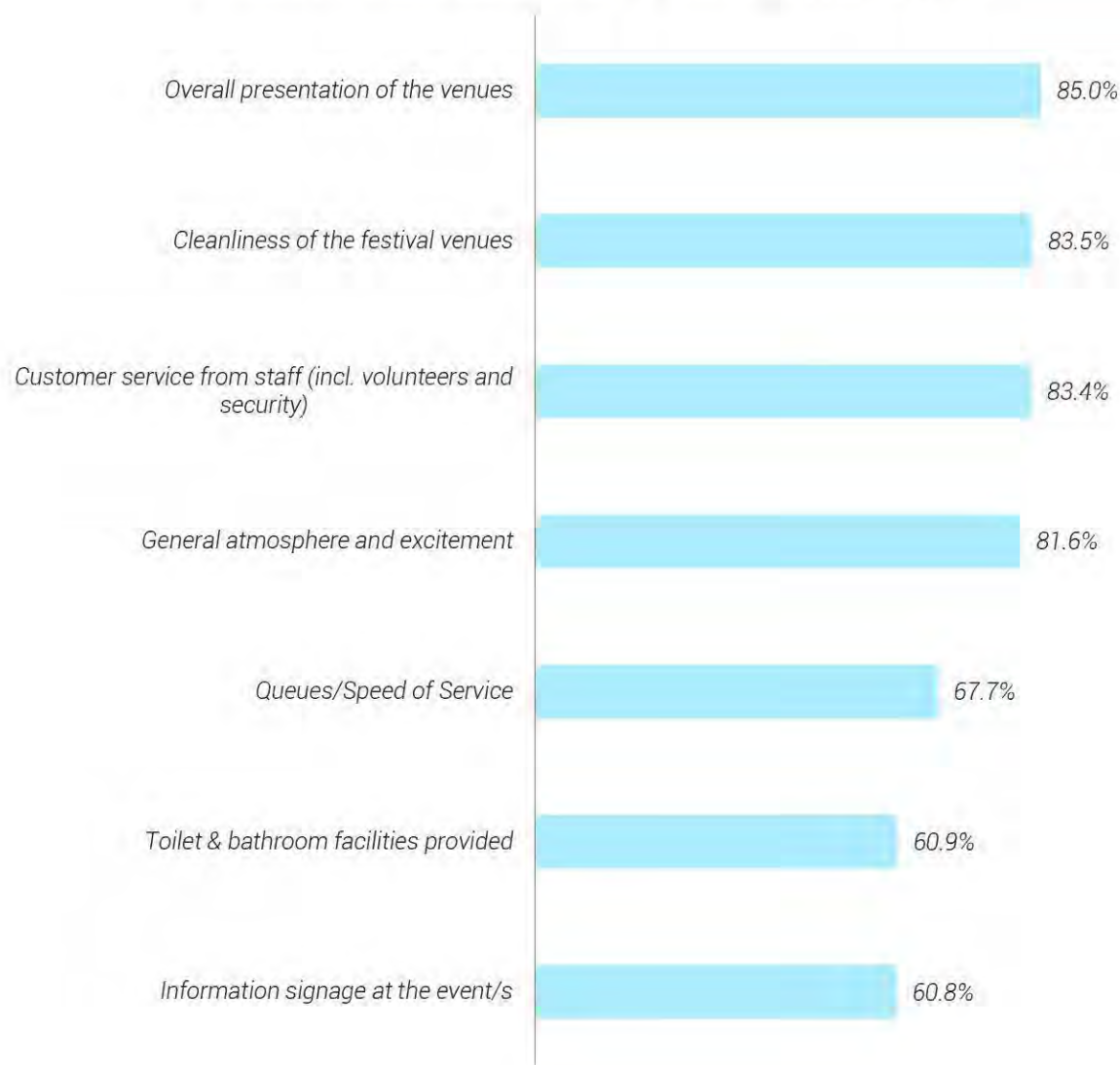
The Night Noodle Markets increased slightly to 73.3%, whilst Enlighten Illuminations was down from 80.5% to 76.9%.

An increase in the satisfaction level of Ticketed Events can be linked back to the large increase of attendee's expectations being met. Whilst the decline in the Illuminations can be linked to the rise in the number of those who felt it fell below their expectations.



# CUSTOMER EXPERIENCE

## SATISFACTION WITH ELEMENTS OF ENLIGHTEN – GOOD/EXCELLENT



Around 85% of attendees rated the 'overall presentation of the venues' as being 'good' or 'excellent'. The 'cleanliness of the festival venues' (83.5%) and 'customer service from the staff' (83.4%) also recorded strong levels of satisfaction.

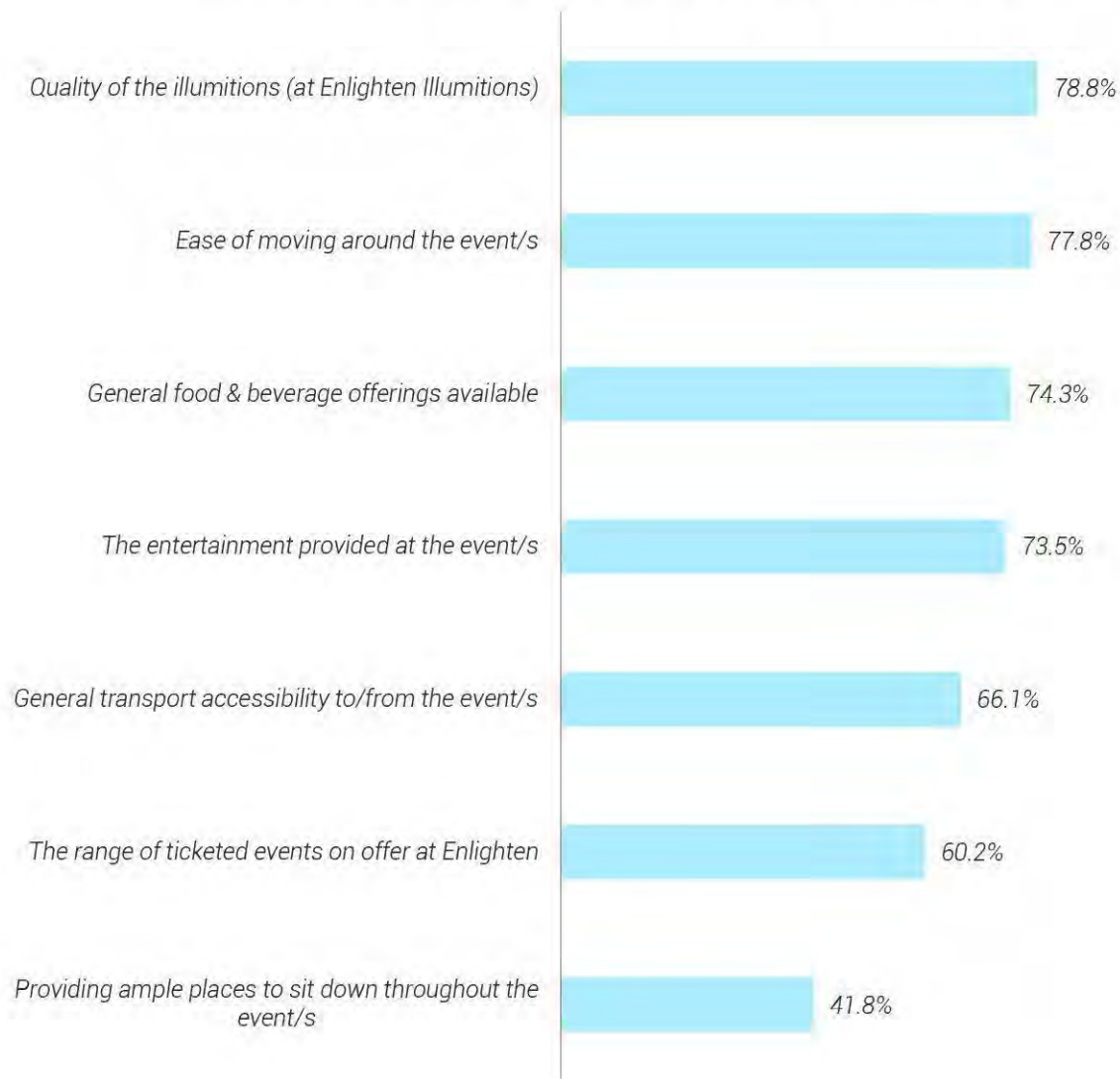
Satisfaction ratings were lower for the 'information signage' (60.8%) and 'toilet & bathroom facilities' (60.9%).

Some of the reasons provided by those who rated 'information signage' and 'toilet & bathroom facilities' lower were:

- "More toilets spaced around the event"
- "More and cleaner toilets"
- "Bring back the information boards for each building"
- "More direction to find specific areas (venue maps)"
- "Signage – what and where things are"
- "Better signage regarding parking"
- "On the map, put which illumination is where"



## SATISFACTION WITH OTHER ELEMENTS OF ENLIGHTEN – GOOD/EXCELLENT



More than 78% of Enlighten attendees rated the quality of the illuminations as being 'good' or 'excellent'. The ease of moving around the event/s also recorded a strong level of satisfaction (77.8%).

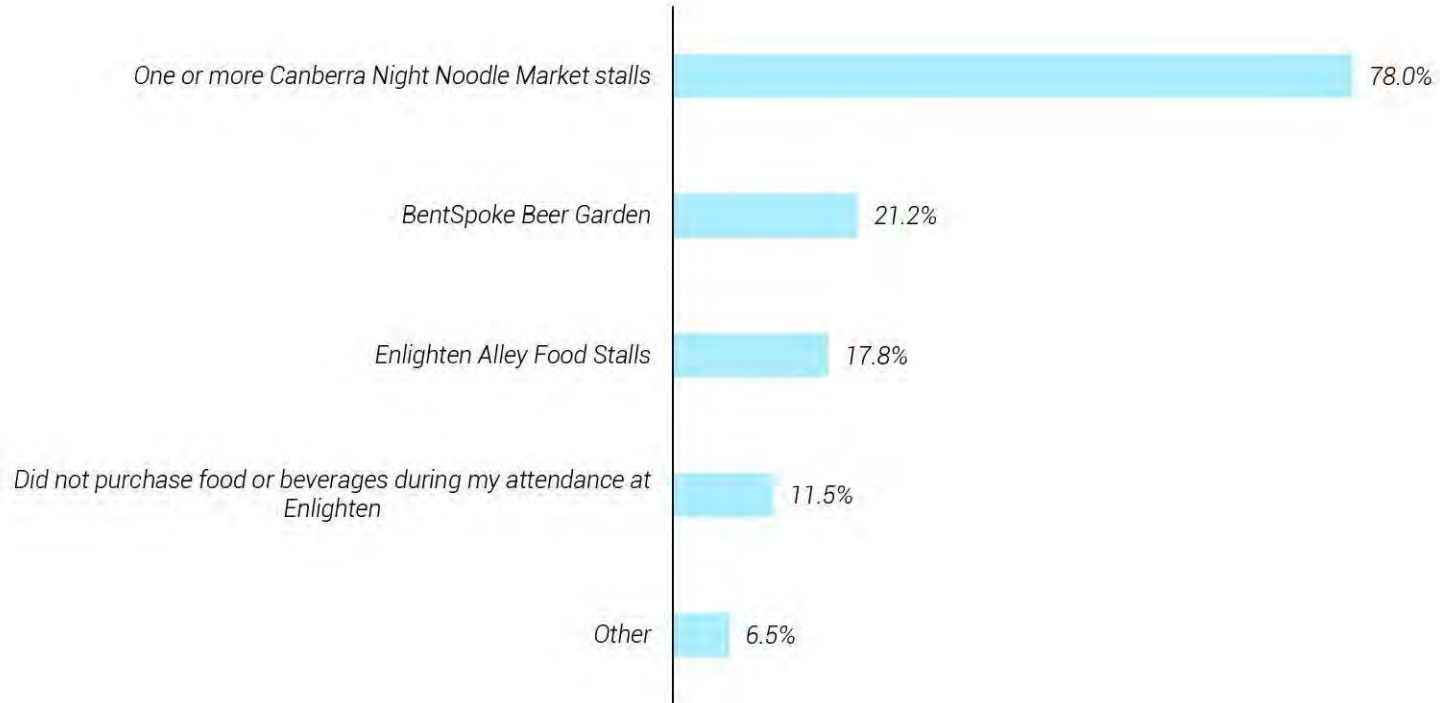
The satisfaction rating was lower for 'ample places to sit down throughout the event' (41.8%).

Some of the reasons provided by those who rated this lower were:

- "More seating near food"
- "Places to sit and eat maybe picnic rugs, cushions, low communal tables made from pallets"
- "More sit-down tables and chairs at the night noodle markets"
- "Seating for those unable to sit on the ground"

# WHERE FOOD & BEVERAGES WERE PURCHASED

## WHERE FOOD & BEVERAGES WERE PURCHASED FROM

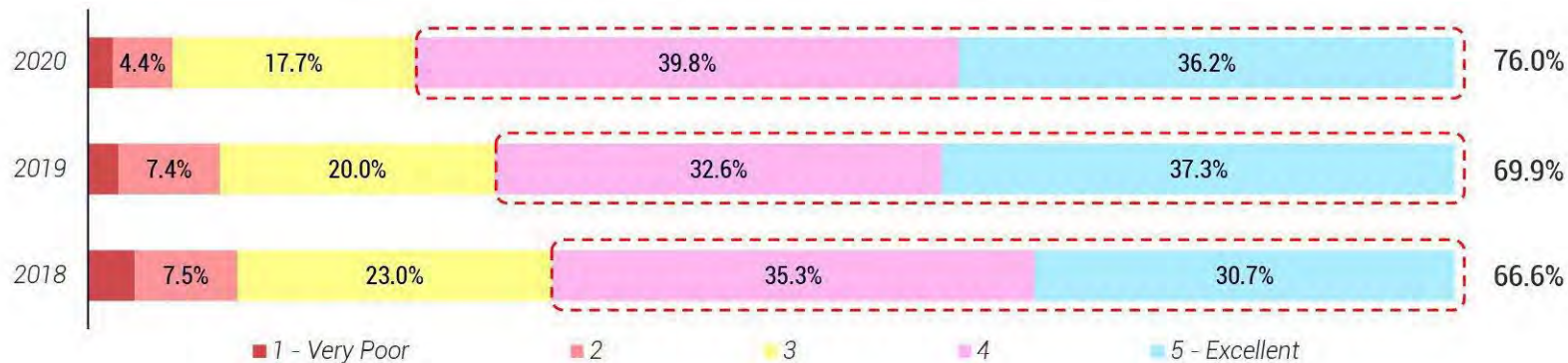


Over three-quarters of respondents (78.0%) made the decision to purchase food and beverages from one or more Night Noodle Market stalls.

A further 21.2% purchased food and beverages from BentSpoke Beer Garden, while 11.5% made the decision to not purchase any food or beverage during their attendance at Enlighten.

# SATISFACTION WITH FOOD

## OVERALL SATISFACTION WITH THE FOOD OFFERING AT ENLIGHTEN



## ATTENDEE EXPECTATIONS BY EVENT ATTENDED

	Very Good/Excellent
Purchased food from NNM only	73.0%
Purchased from Enlighten Alley only	61.6%

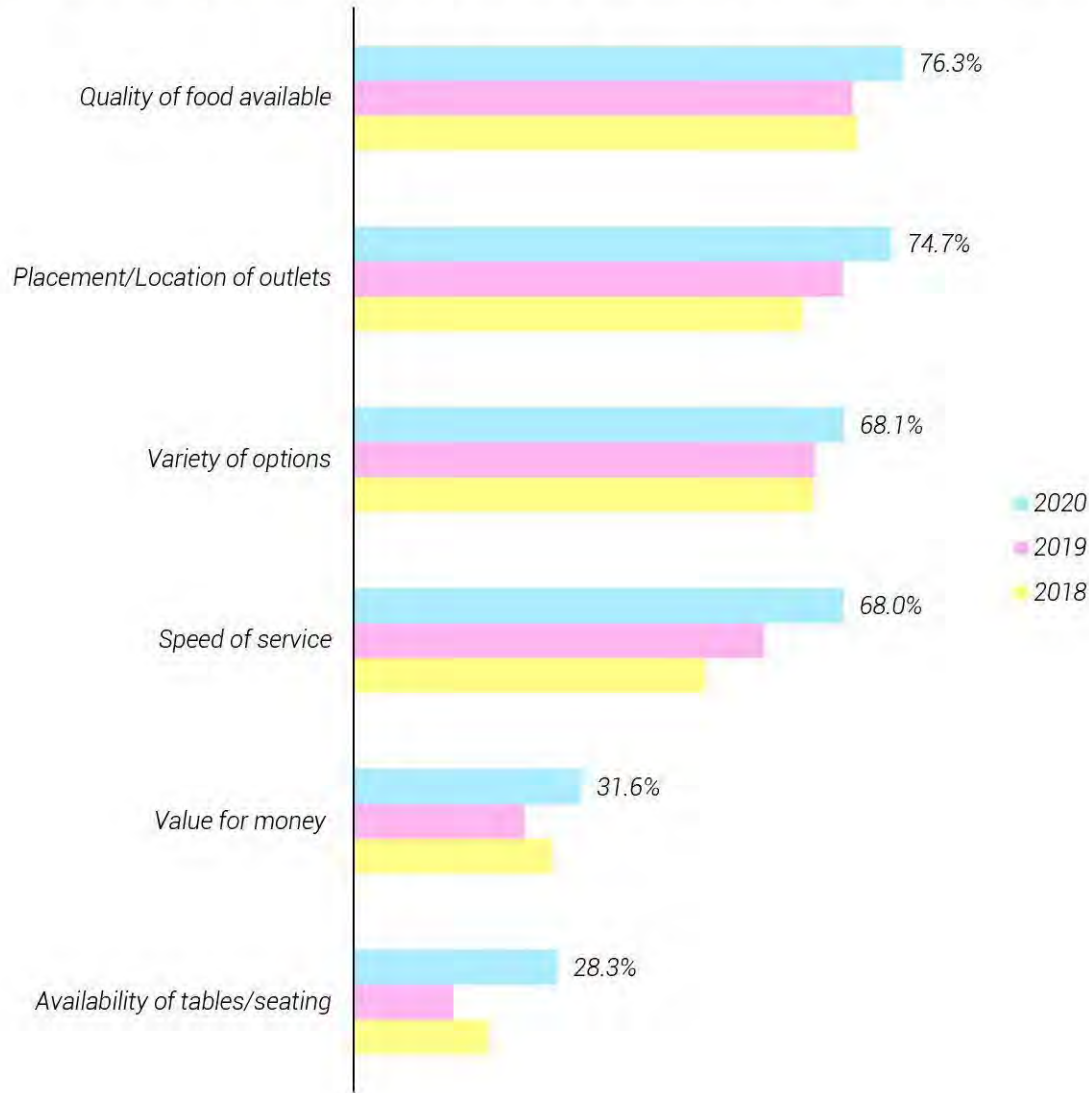
Over three-quarters of attendees indicated a high level of satisfaction with the food offering at Enlighten this year (76.0%). This is an increase from 69.9% in 2019.

Amongst those who purchased food from the Night Noodle Markets only, satisfaction rating was 73%. This compared to 61.6% amongst those who purchased from Enlighten Alley only.



# SATISFACTION WITH FOOD

## OVERALL SATISFACTION WITH THE FOOD OFFERING AT ENLIGHTEN –VERY GOOD/EXCELLENT



Attendees were asked to rate their satisfaction with a number of different elements of the food offering.

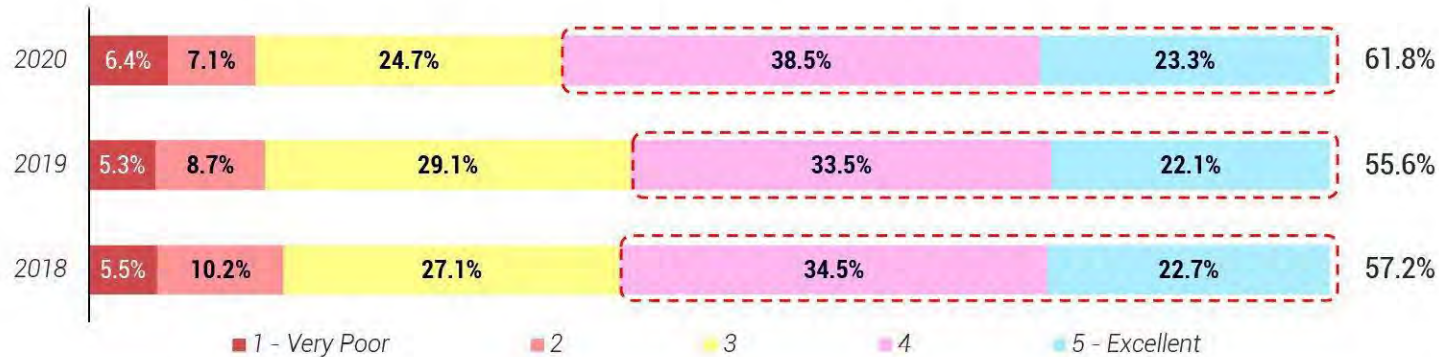
Attendees provided their highest rating for the 'quality of food available' with 76.3% rating it good or very good, an increase from 69.4% last year.

Each of the elements experienced an increase from 2019, with the largest increase being for the 'availability of tables/seating' which was up 14.4 percentage points.

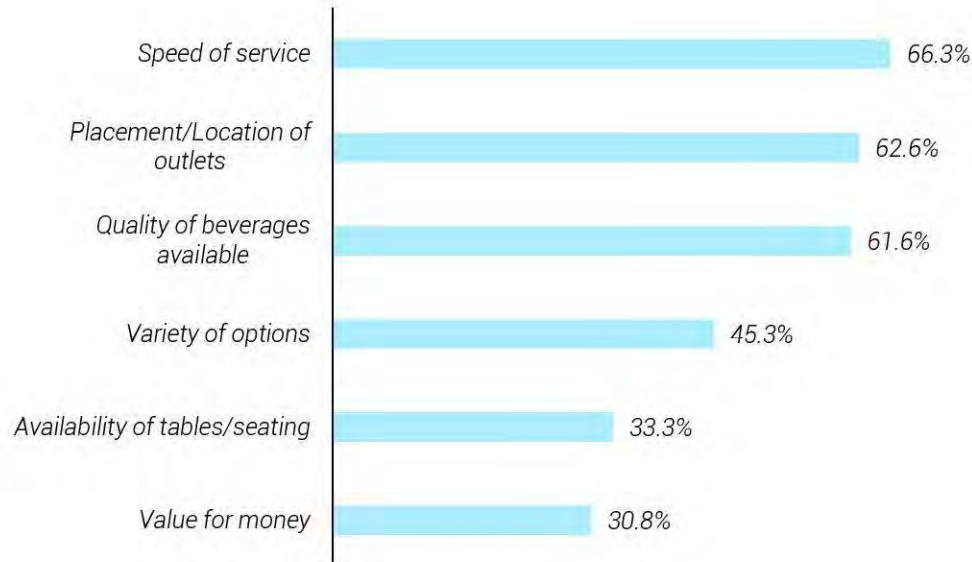
In addition to all the elements increasing, they all remained in the same order as reported in 2019.

# SATISFACTION WITH BEVERAGES

## OVERALL SATISFACTION WITH THE BEVERAGE OFFERING AT ENLIGHTEN



## OVERALL SATISFACTION WITH THE BEVERAGE OFFERING AT ENLIGHTEN – GOOD/VERY GOOD



For the first-time this year attendees were asked to rate their satisfaction with a number of different elements of the beverage offering.

Attendees provided their highest rating for 'speed of service' with 66.3% rating it good or very good.

The next highest rated were the 'placement/location of outlets' (62.6%) and 'quality of beverages' (61.6%).

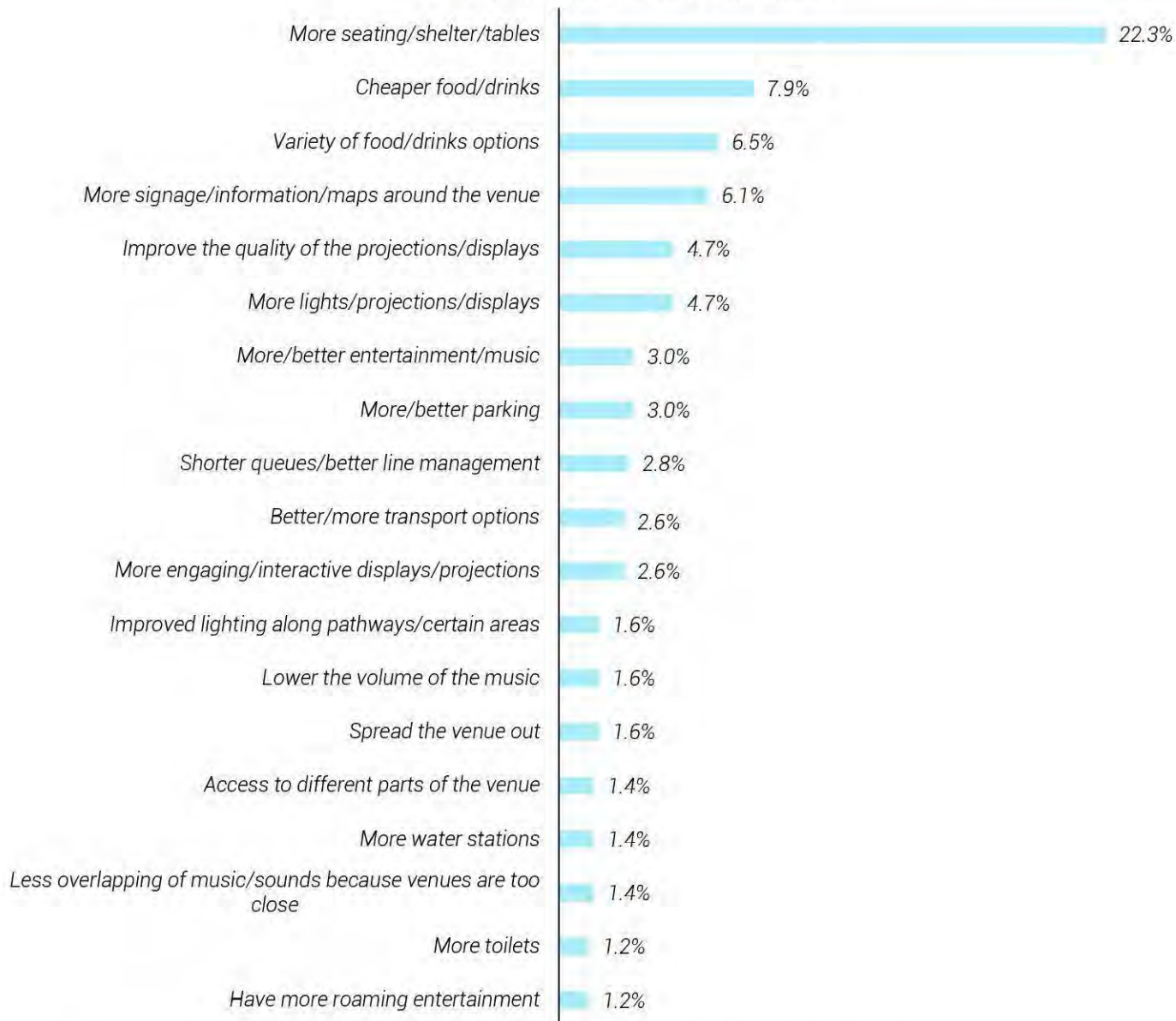
The lowest rated element of the beverages was the 'value for money' component (30.8%).

Q19. Overall, how satisfied were you with the beverage offering at Enlighten this year? (Where 1 = Very poor and 5 = Excellent) (n=283)

Q20. Overall how would you rate the beverage offering, in terms of the following? (Where 1 = Very poor and 5 = Excellent) (n=289-309)

# CUSTOMER EXPERIENCE

## SUGGESTIONS FOR IMPROVING ENLIGHTEN



Respondents were asked to provide suggestions for future improvement of the event.

The main theme that emerged from respondents was that they wanted 'more seating/shelter/tables' (22.3%). This was made specifically in reference to a lack of seating and tables at the Night Noodle Markets. The next highest-ranking suggestion was for there to be 'cheaper food/drinks' (7.9%).

The availability of seating/tables and value for money components were common themes that attendees expressed concern over. Both were the highest recommended for improvement and also the lowest rated when it came to the satisfaction of event elements and food and beverage.

These elements have been a common theme even in past years.



# CUSTOMER EXPERIENCE

## KEY SUGGESTED IMPROVEMENTS TO THE ENLIGHTEN EXPERIENCE

### More seating/shelter/tables

*"More tables and chairs."*

*"Places to sit and eat maybe picnic rugs, cushions, low communal tables made from pallets."*

*"More sit-down tables and chairs at the night noodle markets."*

*"Needs a lot more sit-down covered areas in the event of predicted bad weather."*

*"Seating for those unable to sit on the ground, it's really hard to get back up when joints are inflamed due to arthritis."*

*"Perhaps bean bag or picnic blanket rental, if you don't want to sit on the grass."*

*"A kiosk where you could hire picnic rugs to sit on."*

*"More tables and chairs to sit and eat while watching entertainment."*

### Cheaper food/drinks

*"Value for money at noodle market is very poor. Give us more cheaper options."*

*"Much cheaper food and drinks."*

*"The food at the noodle markets was VERY overpriced for basic street food. We went elsewhere later."*

*"Price of food and drinks for the family."*

*"Lower food prices for families."*

*"The pricing for what was offered was extremely poor. I would suggest lower pricing or better offerings in regards to the night noodle markets."*

### Variety of food/drink options

*"Have a greater range of food rather than just Asian, including more veg options."*

*"More gluten free options. We had very VERY little to choose from."*

*"More different types of food, there was way too many noodle places."*

*"A regular beer option that isn't craft beer."*

*"More non-alcoholic drinks available."*

*"Wider range of food/sweets options."*

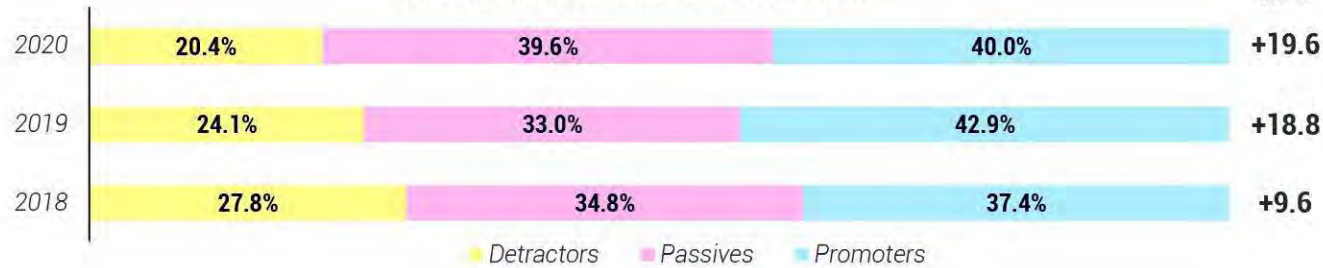
*"Have more vendors with different food. There were a few vendors that had the same food."*

*"More gluten-free, dairy free options for food."*

*"More Canberra local business participants. E.g. local food and food products and support of healthier choices Canberra."*

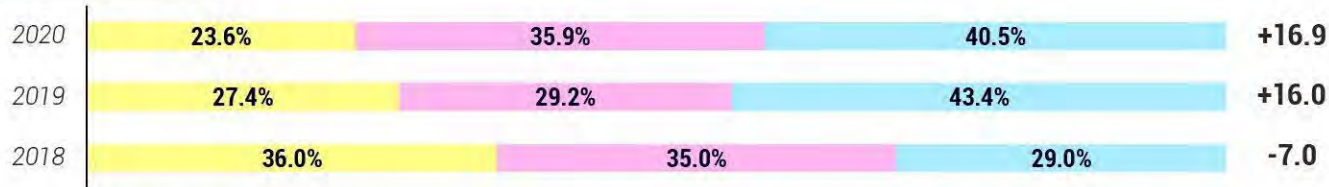
# ADVOCACY

## NET PROMOTER SCORE FOR ENLIGHTEN

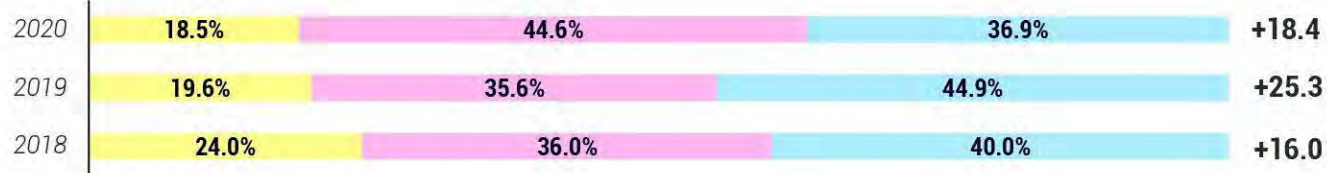


## NET PROMOTER SCORE BY EVENT

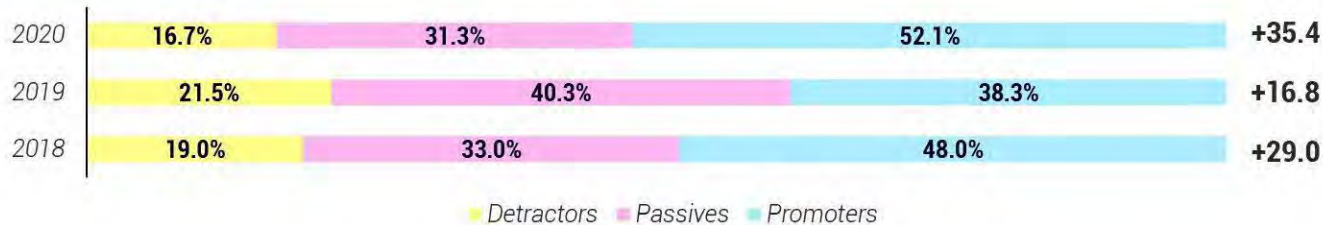
### NIGHT NOODLE MARKETS



### ILLUMINATIONS



### TICKETED EVENTS



The overall Net Promoter Score for Enlighten was +19.6. This represents an increase from the +18.8 from 2019. The ratio of detractors to passives shifted and promoters remained relatively consistent.

When assessed by event, the Net Promoter Score for the Enlighten NNM experienced a slight increase to +16.9.

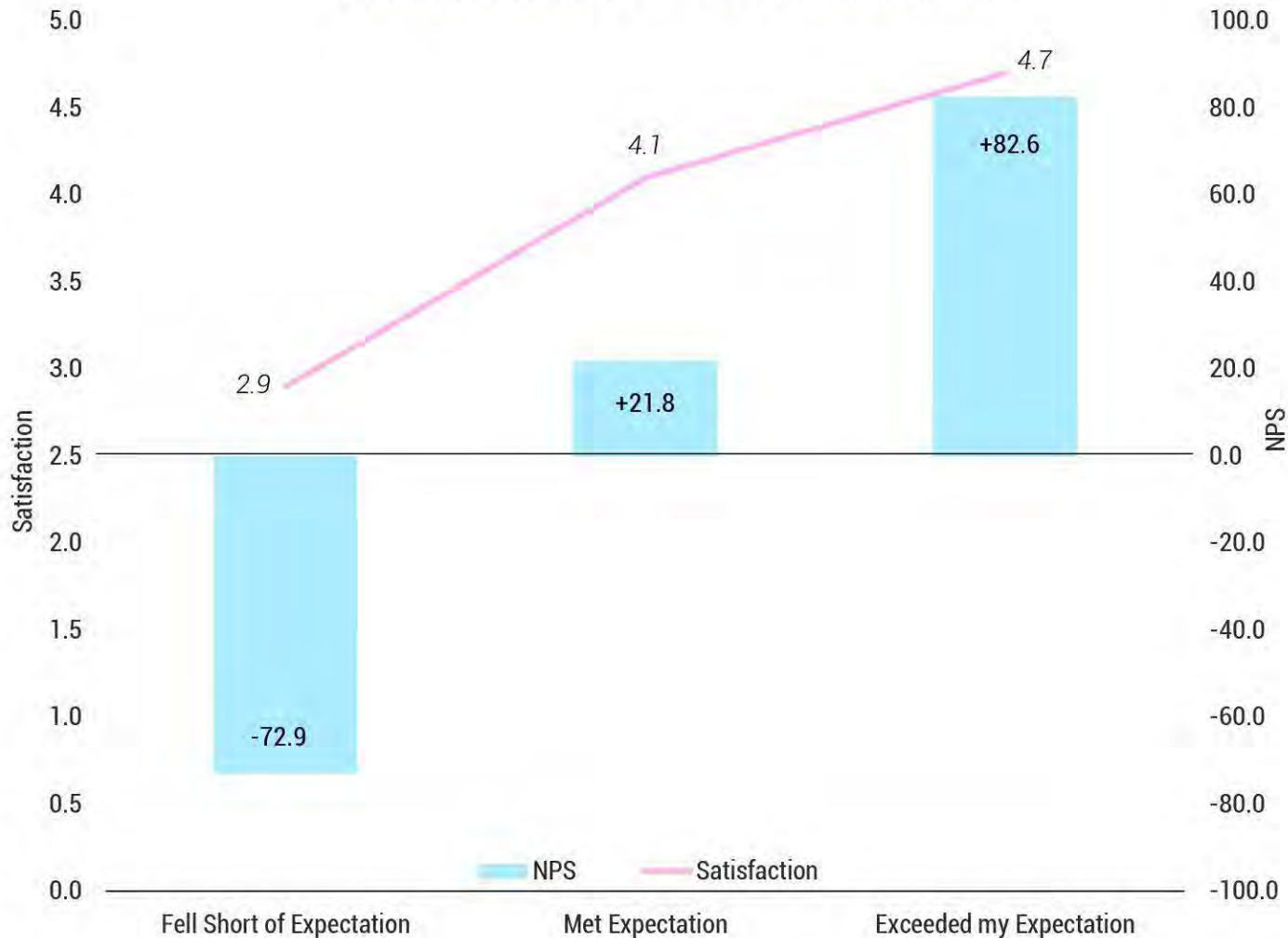
The Light Illuminations experienced a decrease of +25.3 to +18.4. This saw a decrease in the number of promoters and a rise in the number of passives. This may link back to some of the references made previously where attendees mentioned the quality of the projections needed improvement.

Lastly, the NPS for Ticketed Events increased 18.6 points to +35.4. Here, promoters were up 13.8 percentage points.



# CUSTOMER EXPERIENCE

CUSTOMER EXPECTATION VS OVERALL SATISFACTION VS NPS



% of Audience

**15.0%**

**65.1%**

**19.9%**

This chart illustrates the relationship between expectations, customer satisfaction and advocacy. It shows the vast difference in the likelihood of advocacy, that results from delivering an experience that is below customer expectations.

Those who felt that their experience exceeded their expectations rated their satisfaction at 4.7 (out of 5.0) and their NPS was +82.6 – which is a very positive result. Those whose expectations were met, still reported a high satisfaction rating 4.1 out of 5, and their NPS was +21.8 which is still a good result. However for those who felt that the event did not meet expectations (15% of the total audience), satisfaction fell below average and the NPS fell well into negative territory (-72.9).

Meeting expectations is not a bad result. It yields good satisfaction levels and advocacy. Exceeding expectations, however, inflates the advocacy impact significantly. This is why it is important to be continually thinking about ways to subtly innovate the event offering.

Q27. How likely is it that you would recommend attending Enlighten to family, friends or colleagues? (Where 0 = Not at all likely and 10 = Extremely likely) (n=465)

Q12. Overall, how satisfied were you with the experience that you had whilst attending Enlighten this year? (Where 1 = Very poor and 5 = Excellent) (n=514)

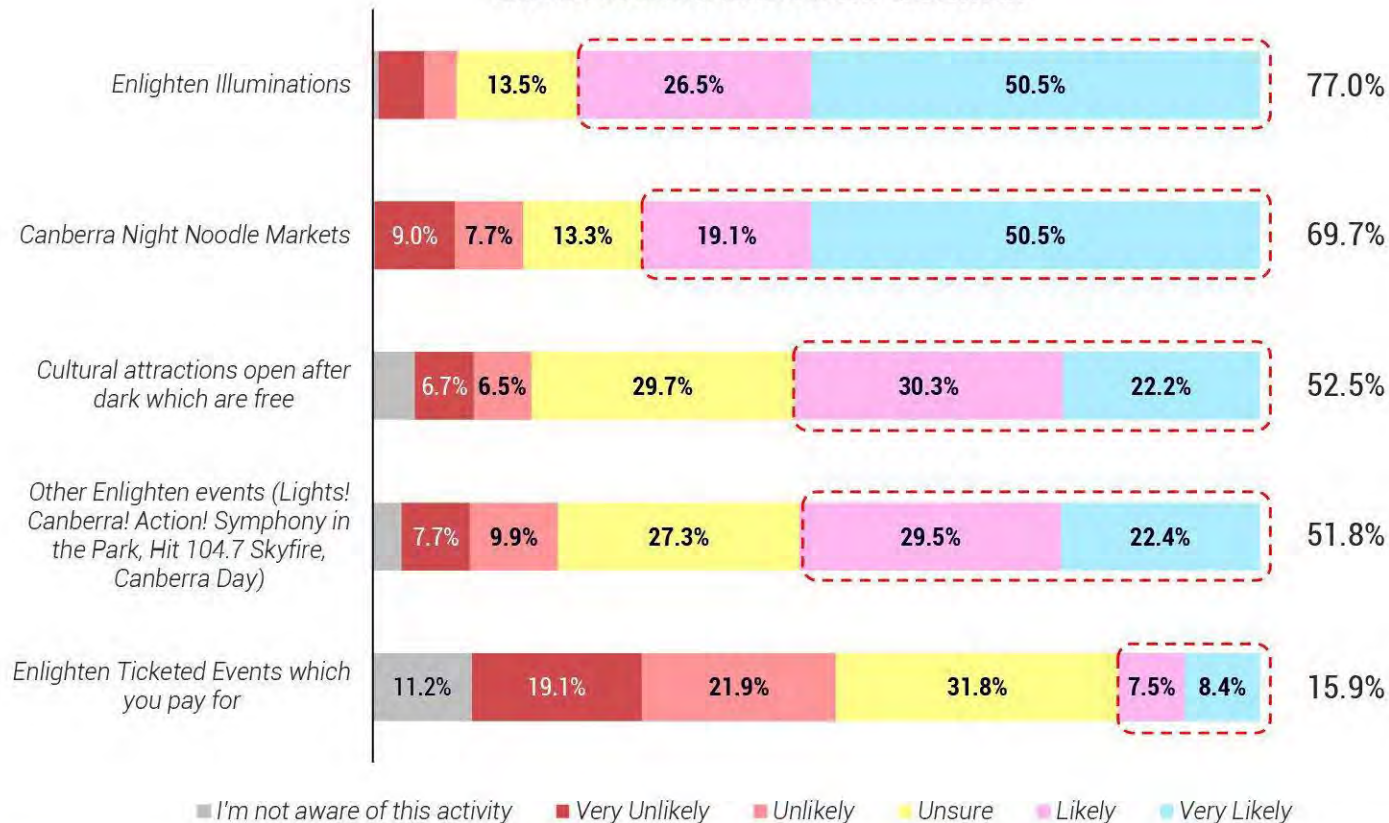
Q26. Having attended Enlighten, did the experience exceed, meet or fall below your expectations? (n=467)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups



# LIKELY FUTURE ATTENDANCE

## LIKELY FUTURE ATTENDANCE AT ENLIGHTEN



When assessing likely future attendance, the Enlighten Illuminations recorded the highest likelihood, with 77.0% indicating that they were likely or very likely to attend again. The event which achieved the lowest likely/very likely future attendance rating was Enlighten Ticketed Events which were paid for to attend (15.9%).

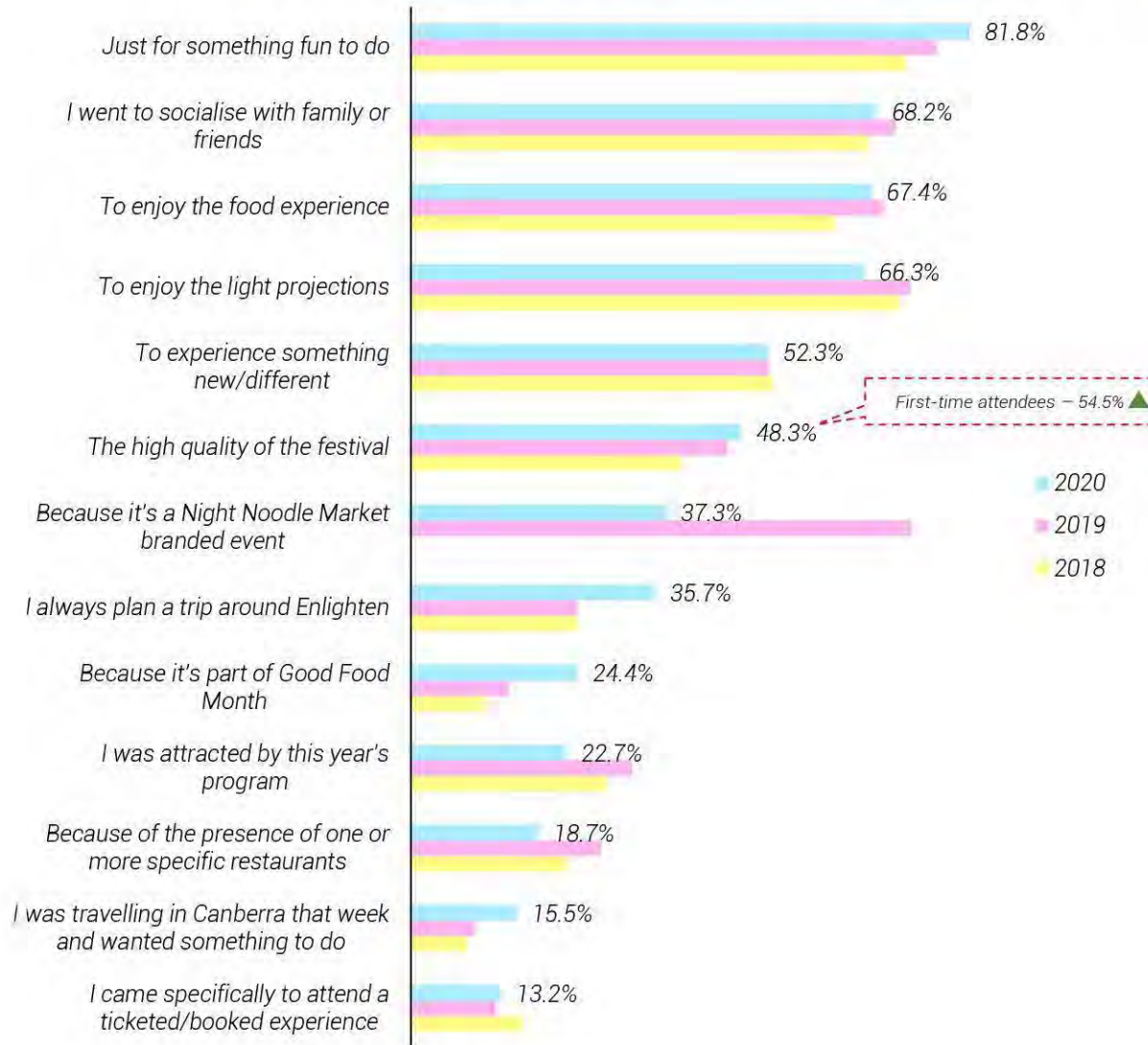
It is important to note that the likelihood of attendance is generally driven by a few factors, including:-

- The proportion of visitors in your audience and their propensity to travel to your destination again
- The experience that attendees had during their attendance
- The level of intrinsic connection with the event content (which is often higher for things that are unique to a destination)
- Awareness of the event content

## **KEY INSIGHTS**

# MOTIVATIONS FOR ATTENDANCE

## MOTIVATION TO ATTEND EVENT – TO A GOOD/GREAT EXTENT



Motivations to attend varied from what was seen in 2019.

However, attending 'just for something fun' was again the top motivator for attendees rising to 81.8% in 2020.

The next highest rating motivation was the social component of family and friends with 68.2%.

Following these were the core event offerings of the 'food experience' (67.4%) and the 'light projections' (66.3%).

Interestingly, there was a significantly high amount of first-time attendees who indicated they attended due to 'the high quality of the festival'. Given that it is their first time attending the event, it is likely that they have heard of the festival from others as they haven't witnessed the festival in person previously. This relates back to the power of 'promoters' and the importance of individuals spreading positive messages regarding the event to bring in new attendees in future.



# SOURCES OF INFORMATION

## INFORMATION SEARCH

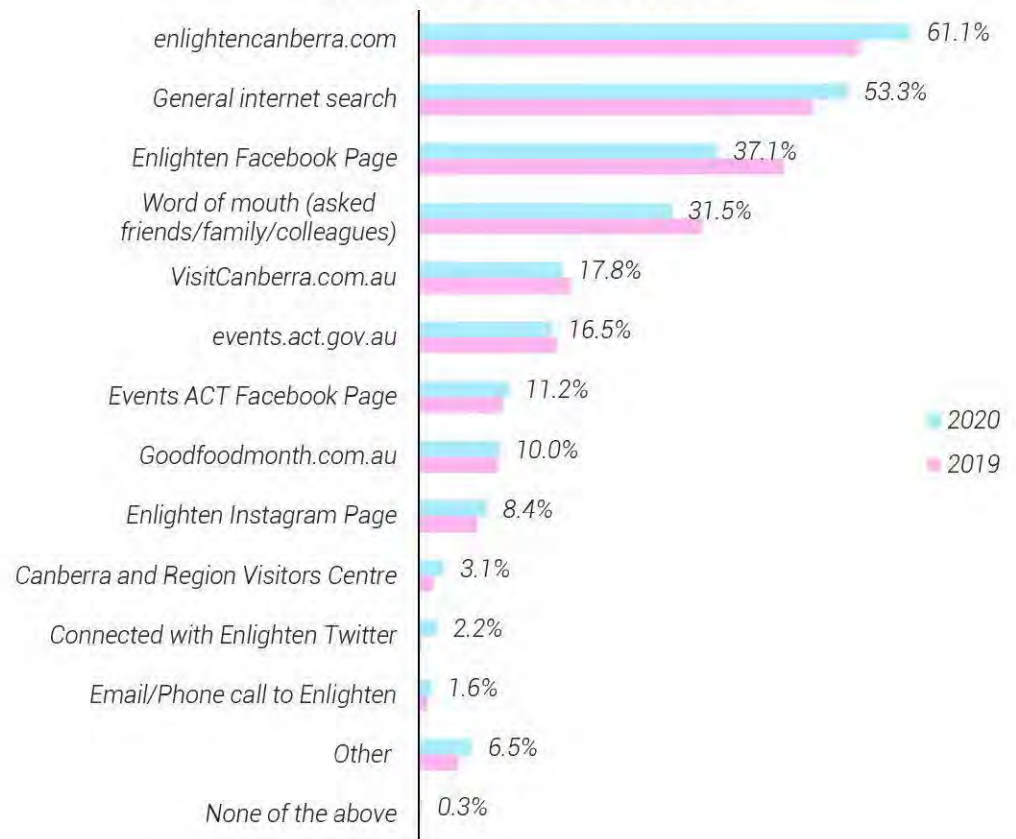


Actively searched for information on Enlighten this year (65.6% in 2019)

## INFORMATION SEARCH BY EVENT TYPE (YES)



## SOURCES OF INFORMATION SEARCH



More than 60% of attendees actively searched for information on Enlighten this year. This number was down from 65% in 2019.

Ticketed event attendees (69.2%) indicated that they searched for information more so than those who attended the light projections and the NNM.

The Enlighten website (61.1%), general internet searches (53.3%) and the Enlighten Facebook page (37.1%) were the most accessed sources for event information this year. This remained as the same top three from 2019.

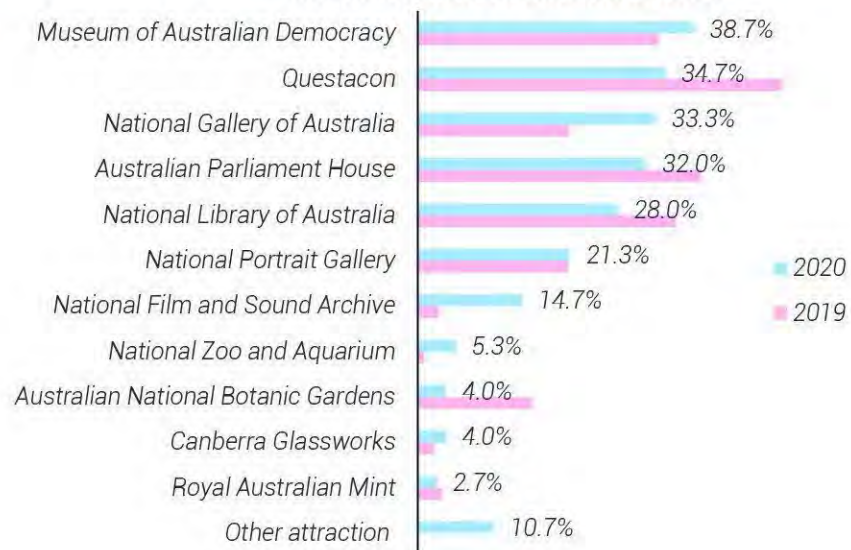
Q2. Did you actively search for information on Enlighten this year? (n=530)

Q2a. In which of the following places did you actively search for information about Enlighten this year? (n=321)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups

# CULTURAL ATTRACTION VISITATION IN CANBERRA

## CULTURAL ATTRACTION VISITATION



## CULTURAL ATTRACTION VISITATION BY AGE

	Under 25	25 - 34	35 - 44	45 - 54	55 - 64	65 +
Museum of Australian Democracy	14.3%	52.6%	41.7%	50.0%	33.3%	33.3%
Questacon	57.1%	42.1%	41.7%	41.7%	16.7%	0.0%
National Gallery of Australia	42.9%	36.8%	25.0%	41.7%	83.3%	0.0%
Australian Parliament House	71.4%	26.3%	33.3%	33.3%	16.7%	66.7%
National Library of Australia	57.1%	26.3%	25.0%	25.0%	66.7%	0.0%
National Portrait Gallery	28.6%	26.3%	16.7%	25.0%	33.3%	0.0%
National Film and Sound Archive	14.3%	21.1%	8.3%	8.3%	16.7%	0.0%
National Zoo and Aquarium	14.3%	5.3%	0.0%	16.7%	0.0%	0.0%
Australian National Botanic Gardens	14.3%	5.3%	0.0%	8.3%	0.0%	0.0%
Canberra Glassworks	14.3%	0.0%	0.0%	8.3%	0.0%	0.0%
Royal Australian Mint	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Other attraction (please specify)	0.0%	10.5%	16.7%	8.3%	0.0%	0.0%

Over a quarter of attendees (28%) indicated that they attended a cultural attraction after dark whilst attending Enlighten. These respondents were asked to indicate which cultural attraction they visited.

Around 39% visited the Museum of Australian Democracy, while 34.7% attended Questacon. These were followed by visitation at the National Gallery of Australia (33.3%) and the Australian Parliament House (32.0%).

When analysing by age, the following findings were evident:

- Those aged between 25-54 indicated higher visitation at the Museum of Australian Democracy.
- Visitation at the Australian Parliament House was highest among under 25's and those 65+, while those aged 55-64 indicated high visitation at the National Gallery of Australia.

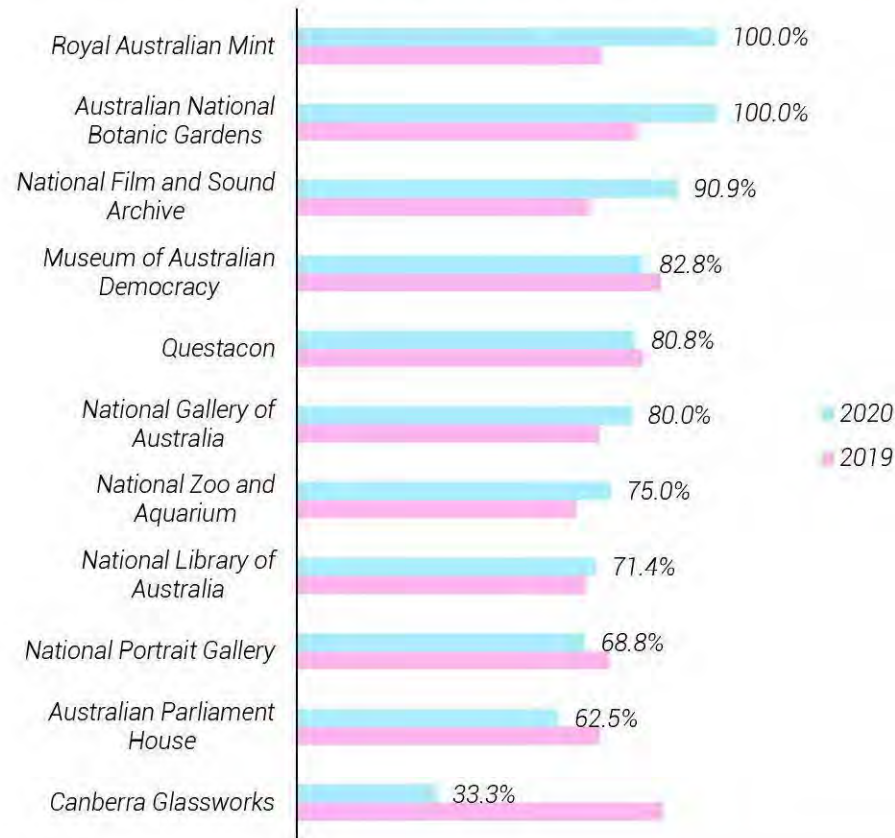
Q21. Did you attend any of the cultural attractions after dark whilst attending Enlighten? (n=271)

Q22. You indicated that you visited a cultural attraction after dark. Which of the following cultural attractions did you visit? (n=75)



# CULTURAL ATTRACTION VISITATION IN CANBERRA

## SATISFACTION WITH CULTURAL ATTRACTIONS – SATISFIED/VERY SATISFIED



Overall, respondents were relatively satisfied with each of the cultural attractions they visited in Canberra.

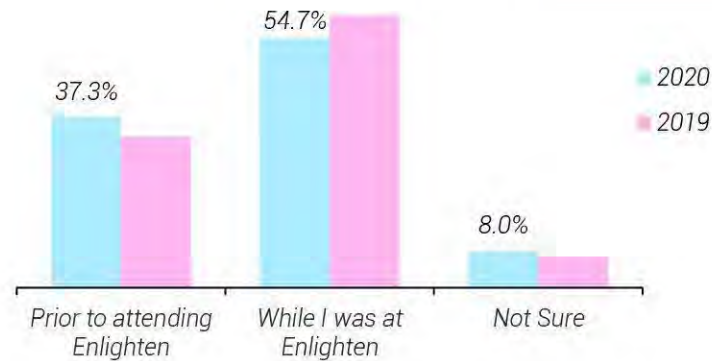
The Royal Australian Mint and the Australian National Botanic Gardens yielded the highest satisfaction ratings, with 100% indicating that they were satisfied or very satisfied.

It is important to note that this sample size is very small, and the results are not significant.



# CULTURAL ATTRACTION VISITATION IN CANBERRA

## DECISION TO ATTEND CULTURAL EVENTS



## MOTIVATION TO ATTEND CULTURAL ATTRACTIONS AFTER DARK



Indicated that being able to visit the cultural attractions after dark was a main driver for their Enlighten visit (35.6% in 2019)

Respondents were asked to indicate the time frame in which they decided to attend cultural events. Around 55% of respondents indicated that they made their decision to attend while they were at Enlighten (59.9% in 2019).

Motivation to attend cultural attractions after dark was also assessed. Over 42% indicated that being able to visit the cultural attractions after dark was a key motivator for them to visit Enlighten, and this was up from 36% in 2019.

# APPENDIX 1

## KEY PERFORMANCE MEASURES BY SEGMENT

### CUSTOMER EXPECTATIONS BY SEGMENT

	Variety Seekers	Family Memory Makers	Discoverers & Learners	Event Seekers	Family Visitors	Rechargers
Exceeded my expectations	18.7%	15.8%	23.6%	22.7%	23.8%	22.0%
Met my expectations	64.6%	72.4%	65.5%	61.4%	61.9%	61.0%
Fell below my expectations	16.7%	11.8%	10.9%	15.9%	14.3%	17.1%

### OVERALL SATISFACTION BY SEGMENT

	Variety Seekers	Family Memory Makers	Discoverers & Learners	Event Seekers	Family Visitors	Rechargers
Very Poor	1.2%	1.3%	0.0%	0.0%	0.0%	0.0%
Poor	4.7%	1.3%	1.8%	2.3%	2.4%	4.9%
Average	19.9%	18.4%	18.2%	20.5%	19.0%	24.4%
Good	44.5%	42.1%	45.5%	43.2%	38.1%	39.0%
Very Good	29.7%	36.8%	34.5%	34.1%	40.5%	31.7%
Average/5	4.0	4.1	4.1	4.1	4.2	4.0

Q26. Having attended Enlighten, did the experience exceed, meet or fall below your expectations? (n=467)

Q12. Overall, how satisfied were you with the experience you had whilst attending Enlighten this year? (Where 1 = Very Poor and 5 = Excellent) (n=514)



## KEY PERFORMANCE MEASURES BY SEGMENT

### LIKELY FUTURE ATTENDANCE BY SEGMENT – LIKELY/VERY LIKELY

	Variety Seekers	Family Memory Makers	Discoverers & Learners	Event Seekers	Family Visitors	Rechargers
Canberra NNM	71.0%	72.4%	61.8%	59.1%	71.4%	78.0%
Enlighten Illuminations	74.9%	80.3%	81.8%	79.5%	76.2%	73.2%
Ticketed Events	18.8%	11.8%	21.8%	6.8%	16.7%	9.8%

### NPS BY SEGMENT

	Variety Seekers	Family Memory Makers	Discoverers & Learners	Event Seekers	Family Visitors	Rechargers
Detractor	22.7%	23.7%	10.9%	25.0%	16.7%	14.6%
Passive	41.1%	26.3%	49.1%	34.1%	31.0%	58.5%
Promoter	36.2%	50.0%	40.0%	40.9%	52.4%	26.8%
NPS	+13.5	+26.3	+29.1	+15.9	+35.7	+12.2

Q28. How likely are you to attend the following Enlighten Festival events next year? (n=465)

Q27. How likely is it that you would recommend attending Enlighten to family, friends or colleagues? (Where 0 = Not at all likely and 10 = Extremely likely) (n=465)

## KEY PERFORMANCE MEASURES BY SEGMENT

### MOTIVATION TO ATTEND BY SEGMENT – TO A GOOD/GREAT EXTENT

	Variety Seekers	Family Memory Makers	Discoverers & Learners	Event Seekers	Family Visitors	Rechargers
Just for something fun to do	77.0%	85.5%	78.2%	88.6%	95.2%	85.4%
To enjoy the light projections	61.9%	72.4%	72.7%	77.3%	71.4%	53.7%
To enjoy the food experience	68.0%	65.3%	68.9%	53.7%	69.2%	79.5%
I went to socialise with family or friends	67.7%	71.1%	58.2%	75.0%	73.8%	65.9%
To experience something new/different	51.8%	53.9%	58.2%	52.3%	45.2%	51.2%
The high quality of the festival	47.3%	51.3%	52.7%	52.3%	45.2%	41.5%
I always plan a trip around Enlighten	36.3%	47.4%	34.5%	27.3%	33.3%	24.4%
Because it's a Night Noodle Market branded event	37.1%	41.9%	38.9%	25.0%	42.1%	37.5%
I was attracted by this year's program	25.7%	26.3%	25.5%	13.6%	19.0%	9.8%
Because it's part of Good Food Month	23.8%	22.6%	22.2%	25.0%	26.3%	31.3%
Because of the presence of one or more specific restaurants	19.0%	19.4%	11.1%	20.0%	21.1%	18.8%
I was travelling in Canberra that week and wanted something to do	18.1%	13.2%	14.5%	15.9%	16.7%	4.9%
I came specifically to attend a ticketed/booked experience	15.5%	10.5%	16.4%	9.1%	11.9%	7.3%

## **APPENDIX 2**



# DEMOGRAPHIC PROFILE OF ATTENDEES

## AGE

	Aggregate	Light Illuminations	Light Illuminations	Light Illuminations	Ticketed Events	Ticketed Events	Ticketed Events	NNM	NNM	NNM
	2020	2020	2019	2018	2020	2019	2018	2020	2019	2018
<b>Under 25</b>	12.3%	10.6%	11.5%	11.1%	0.0%	7.6%	3.4%	17.2%	22.5%	13.2%
<b>25 – 34</b>	24.9%	27.1%	19.5%	21.6%	22.2%	23.8%	23.6%	23.2%	29.6%	26.3%
<b>35 - 44</b>	22.1%	27.1%	25.9%	23.2%	5.6%	22.9%	23.2%	20.5%	22.2%	25.6%
<b>45 – 54</b>	17.6%	16.5%	26.4%	19.0%	25.0%	24.8%	22.7%	17.2%	17.2%	16.3%
<b>55 - 64</b>	14.0%	9.4%	12.1%	15.8%	25.0%	11.4%	19.2%	16.6%	5.3%	13.6%
<b>65+</b>	8.4%	8.8%	3.4%	8.7%	22.2%	9.5%	7.4%	4.6%	2.7%	4.8%
<b>I'd rather not say</b>	0.6%	0.6%	1.1%	0.5%	0.0%	0%	0.5%	0.7%	0.6%	0.2%

## GENDER

	Aggregate	Light Illuminations	Light Illuminations	Light Illuminations	Ticketed Events	Ticketed Events	Ticketed Events	NNM	NNM	NNM
	2020	2020	2019	2018	2020	2019	2018	2020	2019	2018
<b>Male</b>	27.7%	31.2%	24.7%	34.8%	30.6%	21.0%	22.2%	23.2%	28.4%	32.5%
<b>Female</b>	70.3%	66.5%	74.1%	64.6%	69.4%	78.1%	76.4%	74.8%	68.6%	65.6%
<b>Other</b>	0.3%	0.6%	0%	0%	0.0%	0%	0%	0.0%	0.3%	0.7%
<b>I'd rather not say</b>	1.7%	1.8%	1.1%	0.5%	0.0%	1.0%	1.5%	2.0%	2.7%	1.2%

Q35. Are you...? (n=357)

Q34. Which of the following age groups do you belong to? (n=357)

# DEMOGRAPHIC PROFILE OF ATTENDEES

## HOUSEHOLD COMPOSITION

	Aggregate	Light Illuminations	Ticketed Events	NNM
Family with mainly primary school aged children	14.6%	15.4%	8.3%	15.2%
Couple / Single, all children left home	16.6%	12.4%	25.0%	19.2%
Couple, never had children	15.7%	16.0%	19.4%	14.6%
Family with adult children still at home	12.1%	8.9%	11.1%	15.9%
Solo household, never had children	13.5%	14.8%	19.4%	10.6%
Family with mainly young children yet to attend school	6.5%	5.9%	2.8%	7.9%
Shared household	8.1%	8.9%	5.6%	7.9%
Family with mainly high school aged children	7.0%	9.5%	8.3%	4.0%
Other/I'd rather not say	5.9%	8.3%	0.0%	4.6%

## HOUSEHOLD INCOME

	Aggregate	Light Illuminations	Ticketed Events	NNM
Under \$40,000	5.9%	5.9%	5.6%	6.0%
\$40,000 - \$59,999	4.2%	3.0%	5.6%	5.3%
\$60,000 - \$79,999	7.9%	5.9%	5.6%	10.6%
\$80,000 - \$99,999	10.4%	12.4%	5.6%	9.3%
\$100,000 - \$149,999	14.6%	14.8%	11.1%	15.2%
\$150,000 - \$199,999	14.9%	12.4%	22.2%	15.9%
\$200,000 - \$249,999	9.0%	7.7%	13.9%	9.3%
\$250,000 +	8.1%	10.7%	8.3%	5.3%
I'd rather not say	25.0%	27.2%	22.2%	23.2%

Q36. Which of the following best describes your household? (n=356)

Q37. Approximately what would be your total HOUSEHOLD income per annum before tax. Including any payments from superannuation, pensions or other government payments (e.g. Centrelink?) (n=356)



# DEMOGRAPHIC PROFILE OF ATTENDEES

## EMPLOYMENT

	Aggregate	Light Illuminations	Ticketed Events	NNM
Employed full-time (35+ hours per week)	54.2%	56.2%	41.7%	55.0%
Employed part time (up to 35 hours per week)	16.9%	16.0%	22.2%	16.6%
Unemployed	0.6%	0.0%	0.0%	1.3%
Home duties	2.2%	0.0%	0.0%	5.3%
Retired	10.7%	10.1%	25.0%	7.9%
Student	6.2%	7.1%	0.0%	6.6%
Other	3.9%	4.7%	8.3%	2.0%
Prefer not to answer	5.3%	5.9%	2.8%	5.3%



# PERCEPTIONS OF CANBERRA

## DESIRE TO SEE MORE OF CANBERRA

Definitely not	1.6%
Probably not	6.6%
Unsure	18.0%
Probably	37.7%
Definitely	36.1%

## PERCEPTION OF CANBERRA

Yes, for the better	50.8%
No, it has remained unchanged	47.5%
Yes, for the worse	1.6%

## USE OF TAXPAYER FUNDS

Yes	75.9%
No	6.2%
Unsure	17.9%

## IMPORTANCE OF HOSTING ENLIGHTEN

Not at all important	0.2%
Unimportant	0.5%
Neither	5.2%
Important	29.2%
Very important	64.9%

## LOCAL RESIDENT AGREEMENT STATEMENTS

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	
They help make Canberra a more enjoyable place to live	0.5%	0.8%	8.1%	48.7%	41.9%	90.7%
They help enhance community spirit, pride and enjoyment	0.0%	0.8%	10.1%	53.3%	35.9%	89.1%
These festivals are well-liked and positively embraced by the people of Canberra/ACT	0.5%	0.5%	11.6%	51.5%	35.9%	87.4%
Holding these festivals in Canberra creates a real buzz in the city	0.5%	2.0%	11.4%	50.3%	35.9%	86.1%
I look forward to going to these festivals every year	0.5%	2.3%	16.2%	47.5%	33.6%	81.1%
Having these festivals run each year is worth any inconvenience caused by staging them	0.5%	3.0%	15.9%	51.0%	29.5%	80.6%
Attending these festivals is a way of life for local Canberrans	0.3%	2.5%	21.5%	48.5%	27.3%	75.8%
These festivals make me proud to be from Canberra	1.0%	2.5%	26.5%	42.2%	27.8%	69.9%
These festivals signal the start of spring for Canberra	17.7%	17.4%	34.1%	19.9%	10.9%	30.8%

Q29. Has your experience of visiting Canberra and attending Enlighten made you want to come back to see more of Canberra? (n=61)

Q30. Has the overall experience of your visit to Canberra changed your perception of Canberra? (n=61)

Q32. Do you think using taxpayer money to stage the Enlighten Festival in Canberra is reasonable? (n=403)

Q31. To what extent do you believe it is important for Canberra to host Enlighten each year? (n=404)

Q33. Please indicate your agreement with the following statements regarding festivals in Canberra such as Enlighten. (n=396)



# Canberra Balloon Spectacular 2020

## Economic Impact & Research Report

ENLIGHTEN FESTIVAL

28 FEBRUARY TO 15 MARCH



FOCUSED EVENT THINKING

# SUMMARY OF KEY FINDINGS

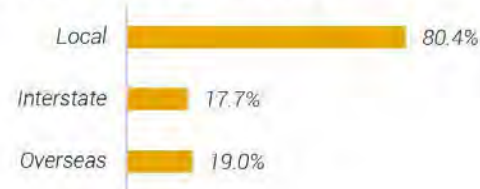


## ATTENDANCES

Canberra Balloon Spectacular attracted total attendances of **44,100**



## ATTENDEE ORIGINS



Visitors to Canberra made up more than **7,528 (20%)** of the total attendances at the Canberra Balloon Spectacular



## ATTENDANCES BY VISITOR ORIGINS

State	No.	Country	No.
NSW	4,863	Canada	208
VIC	1,337	United Kingdom	156
QLD	1,135	Germany	156
WA	203	France	52
SA	243	Singapore	52
TAS	41	South Africa	52
NT	0	United States	52
		Indonesia	52
		New Zealand	52



## TOURISM GENERATION

**6,079** unique visitors encouraged to come to Canberra because of the Canberra Balloon Spectacular



## VISITOR NIGHTS GENERATED IN THE ACT

Canberra Balloon Spectacular was responsible for generating **15,024** visitor nights in the ACT.

### AVERAGE LENGTH OF STAY



## ECONOMIC IMPACT



Canberra Balloon Spectacular generated in-scope expenditure of **\$2.3 million** for the ACT.

### AVERAGE DAILY SPEND





## SUMMARY OF KEY FINDINGS



### ATTENDEE EXPECTATIONS

*22.2% of attendees said that the festival **exceeded their expectations.***



### ATTENDEE SATISFACTION

*Overall, attendees recorded a moderate to high level of satisfaction **(4.3).***



### NET PROMOTER SCORE (ADVOCACY)

*Attendees recorded a positive Net Promoter Score of **+51.3.***



### LIKELY RETURN ATTENDANCE

***82.3%** of attendees at the **Enlighten Illuminations** said they would be likely to return next year.*

# BACKGROUND & RESEARCH APPROACH

## BACKGROUND

Canberra Balloon Spectacular was held between March 7 and 15 2020. Once again, the event was held under the 'Enlighten Festival' umbrella. This report covers the findings relating to the Canberra Balloon Spectacular only

## PURPOSE OF THE RESEARCH

IER was engaged by Events ACT to undertake a research study for the Canberra Balloon Spectacular 2020, following on from the assessment undertaken in 2018.

The research study contained a number of elements as outlined below:-

- Quantitative attendee research study
- Quality standards assessment
- Economic impact assessment

IER, in consultation with Events ACT, developed the quantitative and qualitative research tools to undertake this study.

## RESEARCH OBJECTIVES

The research study aimed to achieve the following key objectives:-

1. Develop a demographic profile of attendees at the Canberra Balloon Spectacular
2. To provide an estimate of the economic impact generated by the Canberra Balloon Spectacular

3. To measure attendee experience and likely advocacy and return attendance
4. To develop an understanding of key attendee behaviours both prior to and post attendance
5. To gather insights from attendees that can be used to help shape the event for future years
6. To measure the use and usefulness of a number of marketing and communication aspects of the event
7. To measure sponsorship outcomes generated by the event
8. To conduct a quality standards assessment of the event

## RESEARCH METHODS

IER utilised a number of different research methods to deliver this study. They are outlined below:-

1. **Incidence Survey** – IER conducted an incidence survey on various days across the event period. The purpose of this survey was to develop a detailed and robust assessment of visitor origins (for the purpose of accurate audience estimation) as well as recruiting participants to complete the post-event online survey
2. **Online Survey** – An online survey was built and disseminated to those who provided their email details during the incidence survey process. Furthermore, social media and ticketing databases were used to extend the footprint of the survey.

## BACKGROUND & RESEARCH APPROACH

- 3. Economic Impact** – IER conducted a detailed economic impact analysis of the Canberra Balloon Spectacular. For the purpose of this study, the assessment provides outputs at a direct spending perspective, and from both out-of-state and intrastate sources.
- 4. Quality Standards** – The quality standards assessment provides for a first-person visual assessment of various customer touchpoints at the Canberra Balloon Spectacular. It aims to complement the customer research by providing a visual report on where there may be opportunities to improve the customer experience



Throughout the research report, IER has reported findings in aggregate format. Further to this, detailed cross-analysis was undertaken to uncover where any deeper insights may exist.

### SURVEY DEVELOPMENT

IER liaised with Events ACT to develop an attendee survey aimed at meeting the objectives of the study. The survey was developed with specific pathways and skip logic to allow for different respondents to see specific sets of questions that were relevant to them.

The survey was built and hosted within IER's proprietary research system, [www.customerdirect.com.au](http://www.customerdirect.com.au). Invitations were branded with Enlighten creative and were sent by IER to those who opted in to participate in the research.

### REPORTING

Throughout the report, the symbols  and  have been used in various charts and tables. The red arrow means that the variable is significantly lower than other variables in that analysis. The green arrow means the opposite. Significant results are the function of both a significant difference in the data points as well as sample sizes that are large enough to be statistically confident in the data (this is why in some instances, two variables may appear significantly apart but may not be marked as such).

### SAMPLE SIZES

IER undertook a face-to-face survey at events to capture visitor origins, primary purpose and extended stay visitation as well as recruiting attendees to complete the on-line survey. The face-to-face survey yielded a sample of 1,149.

Through the online research process, IER yielded the following samples for use in this study

Respondent Type	Sample Size
Canberra Balloon Spectacular	265

These samples are statistically significant in their own right (at an aggregate level) and then were combined to provide an overall Canberra Balloon Spectacular data set. Please note that the final 2 days of the research yielded lower samples due to the COVID-19 pandemic making face-to-face fieldwork difficult.



# **ECONOMIC IMPACT OF ENLIGHTEN**

## BACKGROUND

The Canberra Balloon Spectacular was delivered under the Enlighten Festival umbrella in 2020. In order to determine the economic impact of the Canberra Balloon Spectacular, a model for the entire Enlighten event was developed and then impacts were apportioned to the Canberra Balloon Spectacular, the Night Noodle Markets or the Light Projections depending on which (individual or combination) events drove the decision to visit Canberra. Where a visitor identified more than one of these events, impacts for that visitor have been split equally between the events.

In order to undertake the economic impact assessment for the Canberra Balloon Spectacular, IER gathered data through the following sources: -

- **Incidence survey** – provided data on visitor origins and whether the visitor had travelled to Canberra primarily for the purpose of attending one or more events under the Enlighten banner, or for another reason
- **Post-event attendee survey** – used to gather data on whether visitors stayed overnight in Canberra, length of stay, accompanying persons and level of daily expenditure
- **Data from Events ACT** – provided IER with data on attendances and event organiser financials

All of this data was then fed into IER's economic analysis model.

## DEVELOPING SEPARATE ANALYSIS FOR EACH EVENT

This report constitutes only the impacts associated with the Canberra Balloon Spectacular. The apportionment of impacts to various events is a

difficult task. The approach undertaken, for this study, relied upon the consumer providing guidance on what exactly motivated their decision to visit Canberra on this trip. If the decision to attend was jointly driven by two or more of these events, then impacts were apportioned between them. This is a method used to ensure that credit for driving visitation can be allocated appropriately

## DEVELOPING VISITOR PROFILES

In order to develop this assessment, attendee data was analysed to develop mutually exclusive visitor profile based on whether the respondent was event motivated or extended stay, a day trip or an overnight visitor.

A combination of incidence survey and post event survey data was used to develop these profiles.

## CALCULATING THE ECONOMIC IMPACT

The economic impact was calculated based on the number of event motivated and extended stay visitors x the length of their stay x their average daily spend. In addition to this, event attendances have been grossed up with accompanying people – who represent individuals who travelled to Canberra with a visitor but did not, themselves, attend Enlighten.

The economic impact was reported at a direct spending level only and no additional modelling was undertaken.

# ECONOMIC IMPACT

## ATTENDEE ORIGIN



## ATTENDEE ORIGIN BY AGE GROUP

	Canberra & Surrounds (incl. Queanbeyan, Jerrabomberra)	Outside Canberra
Under 25	89.1%	10.9%
25 to 34	81.1%	18.9%
35 to 44	77.4%	22.6%
45 to 54	83.9%	16.1%
55 to 64	85.6%	14.4%
65+	88.9%	11.1%

In 2020, the Canberra Balloon Spectacular attracted total attendances of 44,100. Research data revealed that on average, an individual attended 1.7 times across the festival. Please note: - this estimate spans the entire Enlighten program as it is not possible to undertake separate assessments under the methodology employed for this study.

Therefore, it is estimated that the total number of unique individuals in attendance at the Enlighten was 26,524. Just over 80.0% were from Canberra whilst 17.7% were from interstate and 1.9% from overseas.



# TARGET AUDIENCE PROFILE

## ACT VISITOR SEGMENTATION

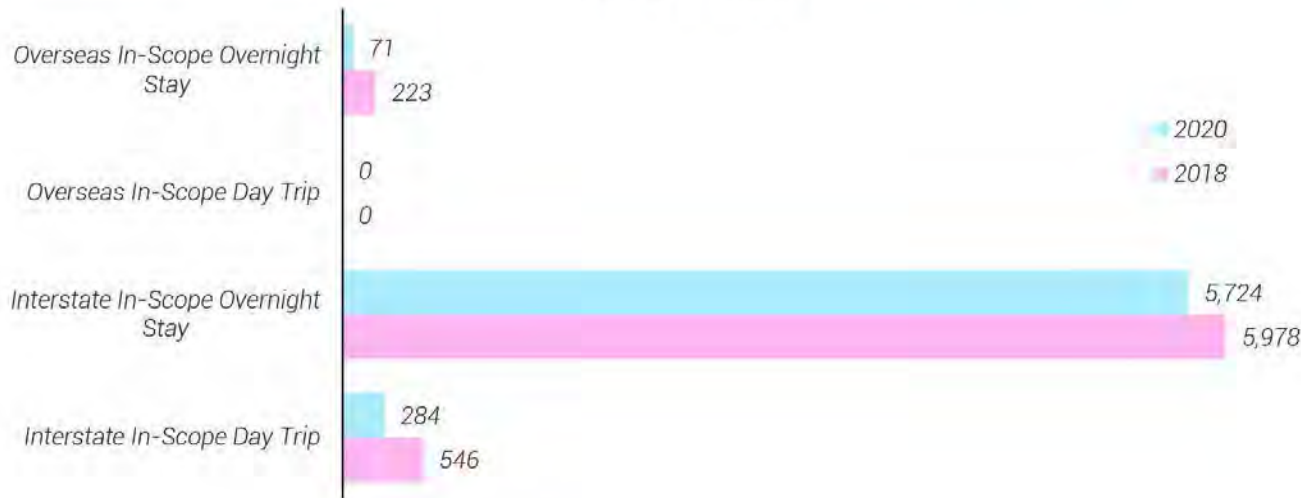
	Canberra Balloon Spectacular	Canberra Short Break Segments (Overall)	Enlighten Indexation
Variety Seekers	43%	14%	+29% ▲
Family Memory Makers	20%	8%	+12% ▲
Discoverers & Learners	13%	17%	-4% ▼
Event Seekers	6%	14%	-8% ▼
Family Visitors	9%	19%	-10% ▼
Rechargers	11%	29%	-18% ▼

Of those who fell within a segment, Variety Seekers made up the largest portion of the audience (43%) followed by Family Memory Makers (20%).

When assessed against the overall Canberra Short Break framework developed for the ACT, the Canberra Balloon Spectacular shows a significant under indexation on all segments, with the exception of Family Memory Makers and Variety Seekers.

# ECONOMIC IMPACT

## UNIQUE INDIVIDUALS



The Canberra Balloon Spectacular was responsible for bringing to 6,079 visitors to Canberra (who attended the event). The majority of these (6,008) were from interstate whilst a further 71 came from overseas.

The majority of visitors (5,795) stayed overnight in Canberra during their visit.

The Canberra Balloon Spectacular was responsible for generating more than 15,000 visitor nights in Canberra.

## TOTAL VISITOR NIGHTS IN THE ACT

Visitor Origin	Number of Overnight Visitors	Avg nights in ACT	Total Nights
Interstate – Event Motivated	5,510	2.52	13,886
Overseas – Event Motivated	71	4.00	284
<b>Total Event Motivated</b>	<b>5,581</b>	<b>2.45</b>	<b>14,171</b>
Interstate – Extended Stay	214	4.00	853
Overseas – Extended Stay			
<b>Total Extended Stay</b>	<b>214</b>	<b>4.00</b>	<b>853</b>
<b>Total Visitor Nights</b>	<b>5,795</b>	<b>2.59</b>	<b>15,024</b>

Note: Some totals may not add due to rounding

# ECONOMIC IMPACT

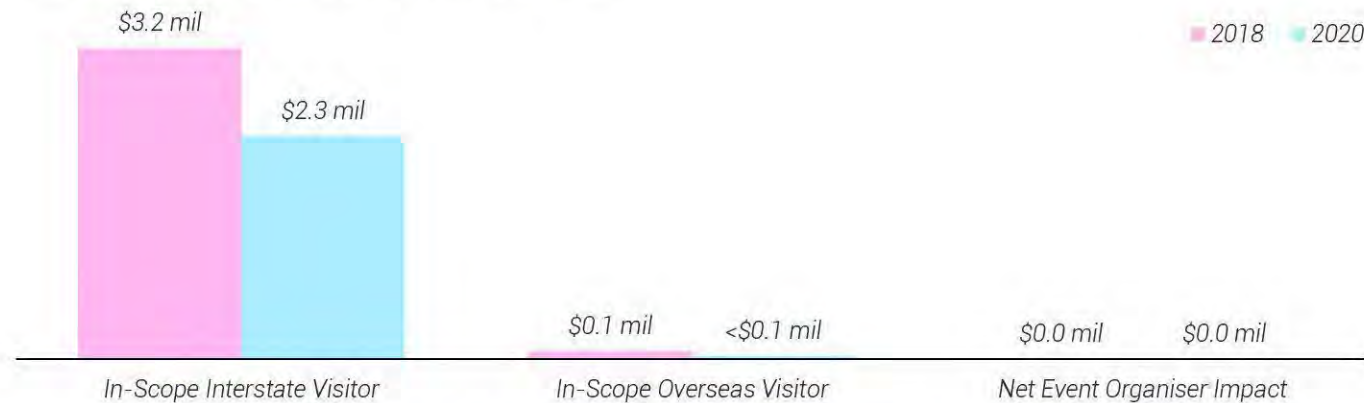
## EXPENDITURE GENERATED BY ENLIGHTEN

Visitor Group	Unique Individuals	Average Spend Per Day	Average Nights	Total Spend
Interstate – Event Motivated (Day Trip)	284	17.50	0.00	\$4,977
Interstate – Event Motivated (Overnight)	5,510	155.85	2.52	\$2,164,252
Interstate – Extended Stay (Overnight)	213	150.25	4.00	\$128,199
<b>Total Interstate</b>	<b>6,008</b>	<b>149.11</b>	<b>2.58</b>	<b>\$2,297,428</b>
Overseas – Event Motivated (Day Trip)	0	0.00	0.00	\$0
Overseas – Event Motivated (Overnight)	71	112.50	4.00	\$31,996
Overseas – Extended Stay (Overnight)	0	0.00	0.00	\$0
<b>Total Overseas</b>	<b>71</b>	<b>112.50</b>	<b>4.00</b>	<b>\$31,996</b>
Net Event Organiser Expenditure				\$0
<b>Total Direct Expenditure</b>	<b>6,079</b>	<b>\$148.68</b>	<b>2.59</b>	<b>\$2,329,424</b>

The Canberra Balloon Spectacular was responsible for bringing 6,079 visitors to Canberra. These visitors spent an average of \$148.68 per person per day. Overnight visitors spent an average of 2.59 nights in Canberra.

The overall expenditure impact generated by the Canberra Balloon Spectacular was \$2.3 million.

## TOTAL IN-SCOPE EXPENDITURE IMPACT ON THE ACT



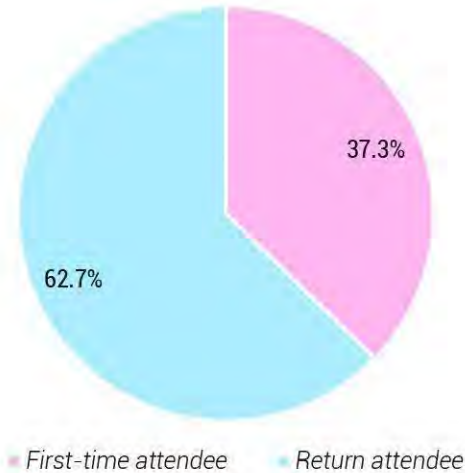
**Total In-Scope Expenditure Impact on ACT - \$2.3 mil**



# **EVENT PERFORMANCE METRICS**

## PREVIOUS ATTENDANCE

### FIRST TIME ATTENDANCE AT CANBERRA BALLOON SPECTACULAR



Over one-third of attendees (37.3%) at Canberra Balloon Spectacular 2020 were attending the event for the first-time.

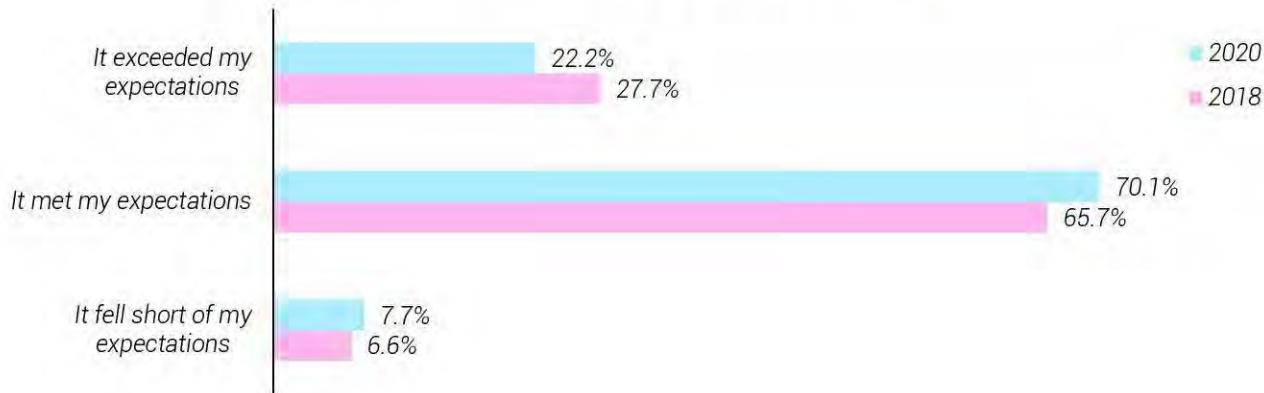
More than two-thirds (67.3%) of those who came from outside of Canberra to see the Canberra Balloon Spectacular were doing so for the first time.

Attendees from Canberra and Surrounds (69.7%) were more likely to return to the event in 2020 perhaps due to factors relating to a high level of satisfaction from previous years or an element of tradition around the event within the local community.

### FIRST TIME ATTENDEES BY VISITOR ORIGIN

	Canberra & Surrounds (incl. Queanbeyan, Jerrabomberra)	Outside Canberra
First Time Attendee	30.3%	67.3%
Return Attendee	69.7%	32.7%

## ATTENDEE EXPECTATIONS OF CANBERRA BALLOON SPECTACULAR



## ATTENDEE EXPECTATIONS BY PREVIOUS ATTENDANCE

	First Time Attendee		Return Attendee	
	2018	2020	2018	2020
Exceeded your expectations	41.4%	34.5%	19.1%	15.3%
Met your expectations	48.4%	61.9%	76.5%	74.7%
Fell below your expectations	10.2%	3.6%	4.4%	10.0%

Overall, 22.2% of attendees had their expectations exceeded when attending Canberra Balloon Spectacular. This was down from the 27.7% in 2018. However, over 70% had their expectations met in some way which was an increase from 65.7% two years ago. When combined, the results indicate that the event met or exceeded the expectations of over 92% of attendees.

First time attendees were less likely to have had their expectations exceeded. There was a drop in this number compared to 2018 which saw 34.5% of first-timers having their expectations exceeded. However, there was an increase in first-time attendees having their expectations met, with 61.9% agreeing to this.

This could suggest that the event was able to 'capture the imagination' in some way and inspire attendees. This in turn could lead to them being positive advocates of the event and return next year.



## CUSTOMER EXPERIENCE

### AREAS REQUIRING IMPROVEMENT BY THOSE WHO FELT THEIR EXPERIENCE FELL SHORT OF THEIR EXPECTATIONS

"Please make more child friendly. Especially kids u prams. This year was a very poor show. We all needed a better show as we all went through a tough summer . Please don't waste peoples time."

"More balloons (didn't seem like that many this year compared to other years)."

"Have some entertainment for the children, we were waiting around in the cold for hours."

"The balloons didn't launch the day I went but did launch from the Arboretum - information we did not receive about the change of location either at the event nor via Facebook."

"There's no need for pumped up music at 630 in the morning. The woosh of the burners and other natural sounds is ideal. Its not a party so loud music is inappropriate."

"More signage, more seating, better crowd control."

"I noticed that in previous years there were a lot more balloons, I don't know if I'm going crazy though... but MORE BALLOONS."

"Not have drinking venues in same location as balloons. Immense smell of vomit in many locations. Also, balloons were crowded in one corner, with other balloons launching from different sites. This was caused by balloons not being able to use front lawn as eating venues taking up space. So in summary, food venues impacted on enjoyment, atmosphere and range of balloons we could see."

"Launch some balloons, or at least communicate more efficiently when balloons are relocating. Loud hailer announcements couldn't be heard, some people said T. rex was going up so we waited, didn't end up going up. Huge disappointment. Stayed in Canberra just for this event and organisers couldn't organise a piss up in a brewery. Everyone understands logistics need change but there was a lot of disappointed people with kids who hadn't gotten up early And made a huge effort to attend. I'm from WA so not very simple to just try again the next day."

"Earlier notification of a change in take off location."

"Make sure all special balloons are in attendance every day."

"Ensuring that early morning buses are available from Town Centres. First bus from Belconnen on Canberra Day did not reach area till 7.30am."

"Sky whale should have gone up more than once. And when they take off from the arboretum, the festival should say so!"

"Mite coffee vendors. The line up took me close to 1 hour. I would not have bothered but I really wanted coffee."

"More food + drink vendors. I waited in line for 15 minutes to be told that they weren't serving a particular meal which was advertised for another 10 mins and it would take a further 10 minutes to cook. Bloody waste of time with my 2y/o. There wasn't much variety, ended up with pancakes from Lions. The coffee was also a bit of a wait and was 99% milk. Compared to Noodle markets where there was lots of options, breaky at balloons had half the stores closed??"

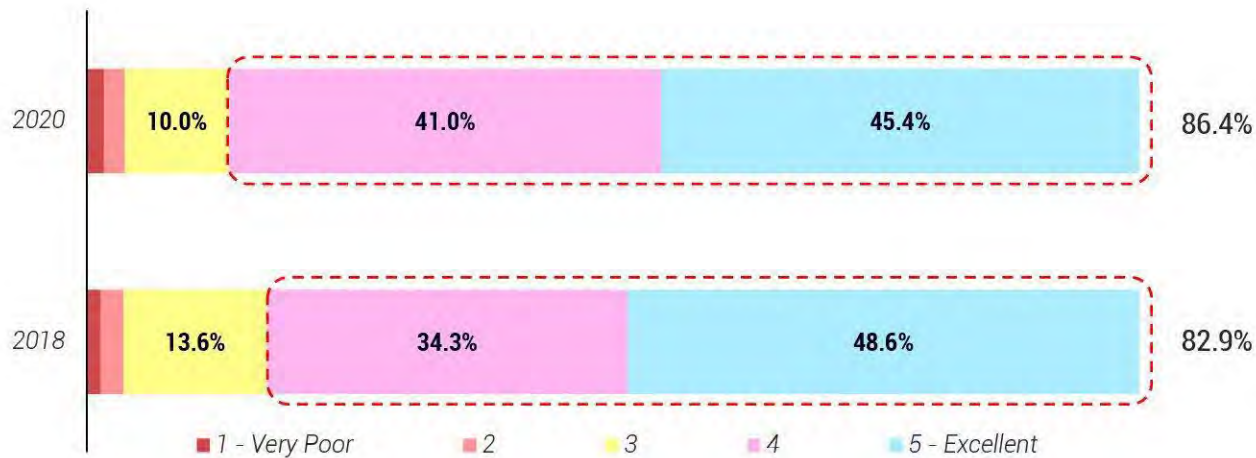
Also announcements for balloons launching probably needs to be earlier, or at least having a message that they are likely to launch but TBC."

"Speaker announcements on site."

"More variety."

"Keep the public more informed regarding launch time."

## OVERALL SATISFACTION WITH CANBERRA BALLOON SPECTACULAR



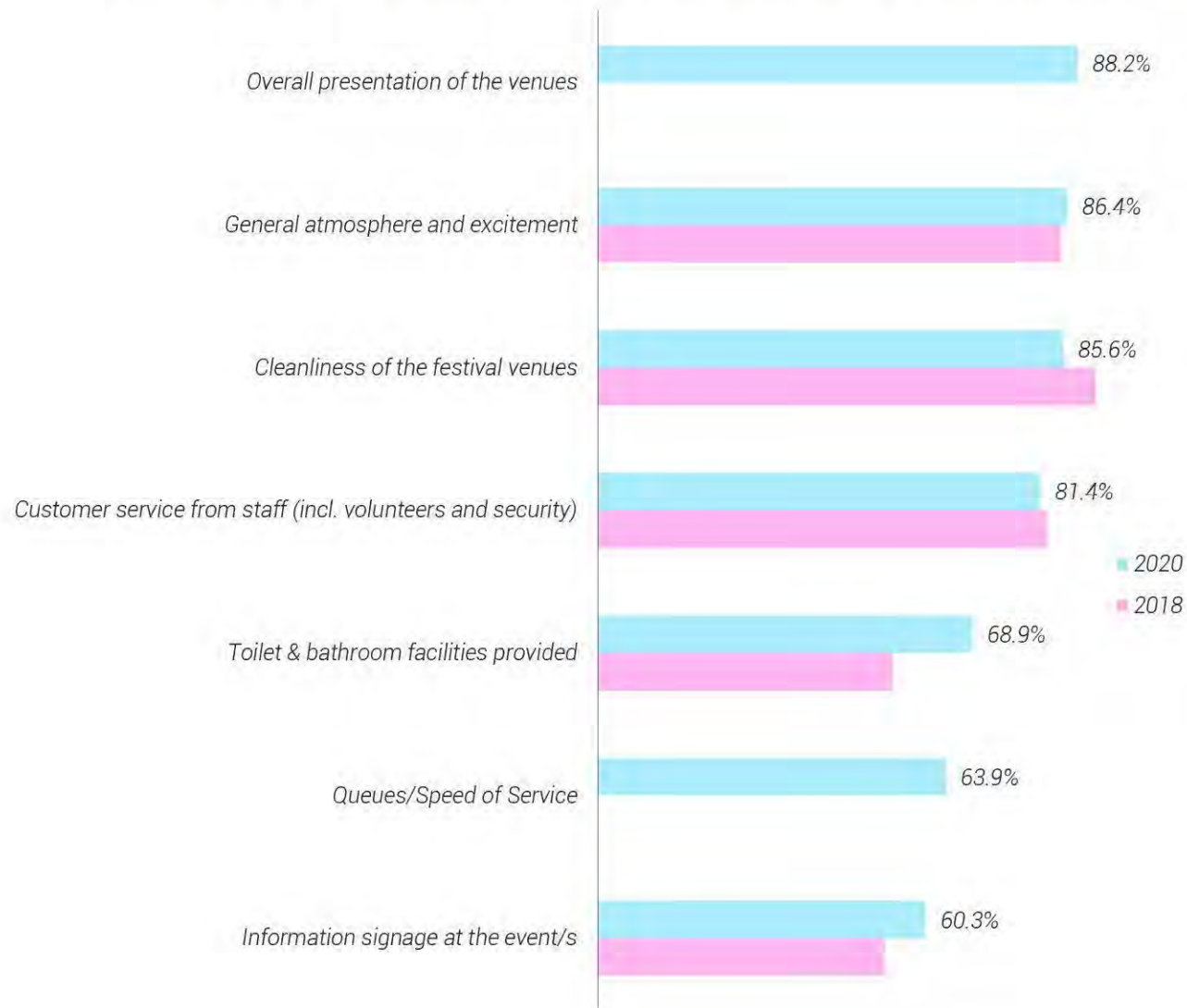
Attendees at Canberra Balloon Spectacular recorded an overall event experience rating of 86.4% (good or excellent). This was an increase from 82.9% in 2018.

A slight increase in the level of satisfaction of the event can be linked back to the increase of attendee's expectations being met.



# CUSTOMER EXPERIENCE

## SATISFACTION WITH ELEMENTS OF CANBERRA BALLOON SPECTACULAR – GOOD/EXCELLENT



Over 88% of attendees rated the 'overall presentation of the venues' as being 'good' or 'excellent'. The 'general atmosphere and excitement' (86.4%) and 'cleanliness of the festival venues' (85.6%) also recorded strong levels of satisfaction.

Satisfaction ratings were lowest for the 'information signage at the event/s' (60.3%) and 'queues/speed of service' (63.9%).

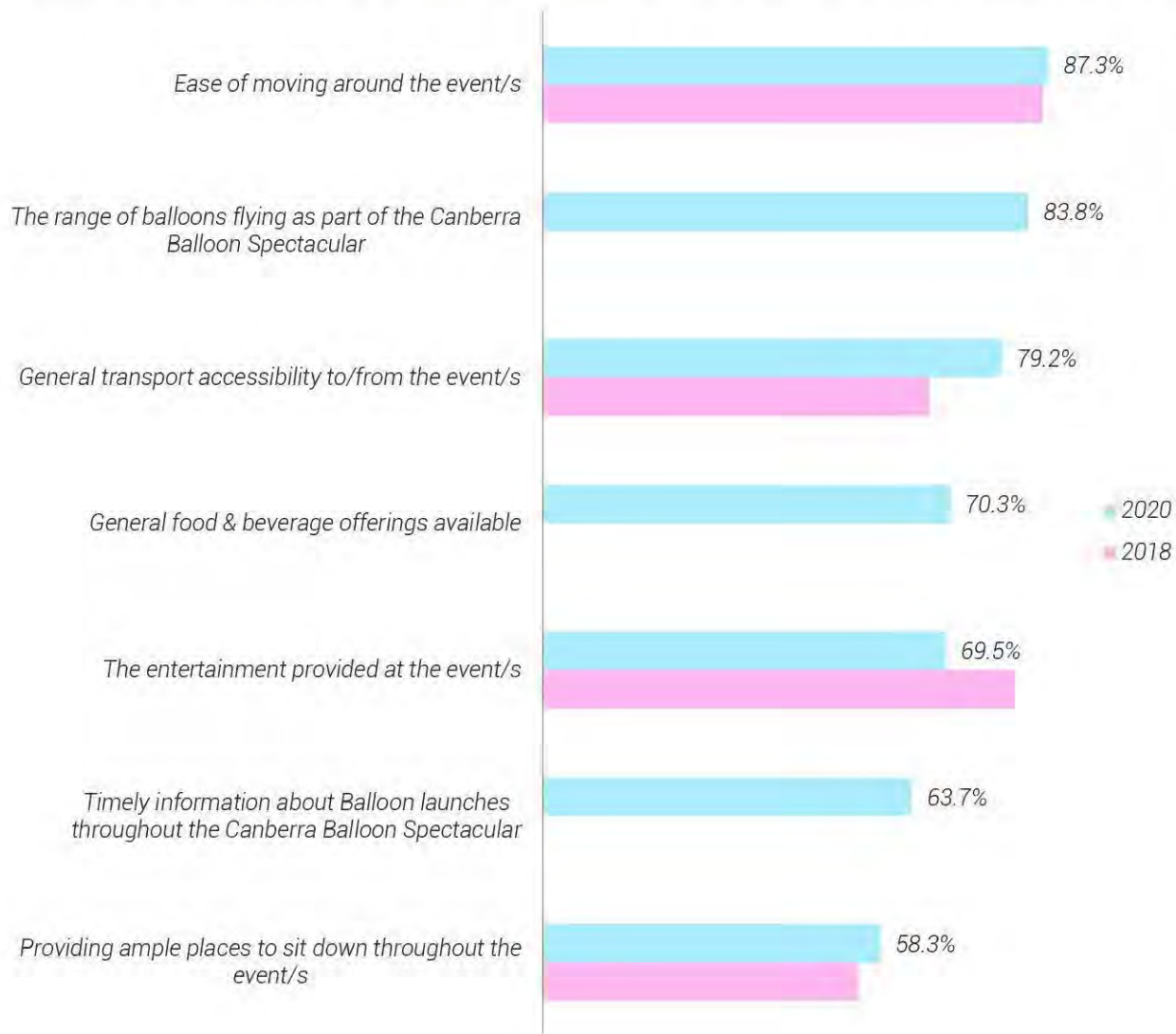
Some of the reasons provided by those who rated 'information signage at the event/s' and 'queues/speed of service' lower were:

- "More coffee vans to lessen line-up."
- "More coffee shops to reduce queue."
- "Lined up for coffee for 20 minutes before giving up. Maybe more vendors."
- "Further signage about parking."
- "Signs and directions at the venue."
- "Signs as public are arriving."
- "Better signage to advise on change of venue."



# CUSTOMER EXPERIENCE

## SATISFACTION WITH OTHER ELEMENTS OF CANBERRA BALLOON SPECTACULAR – GOOD/EXCELLENT



More than 87% of Canberra Balloon Spectacular attendees rated the 'ease of moving around the event/s' as being 'good' or 'excellent'. 'The range of balloons flying' also recorded a strong level of satisfaction (83.8%).

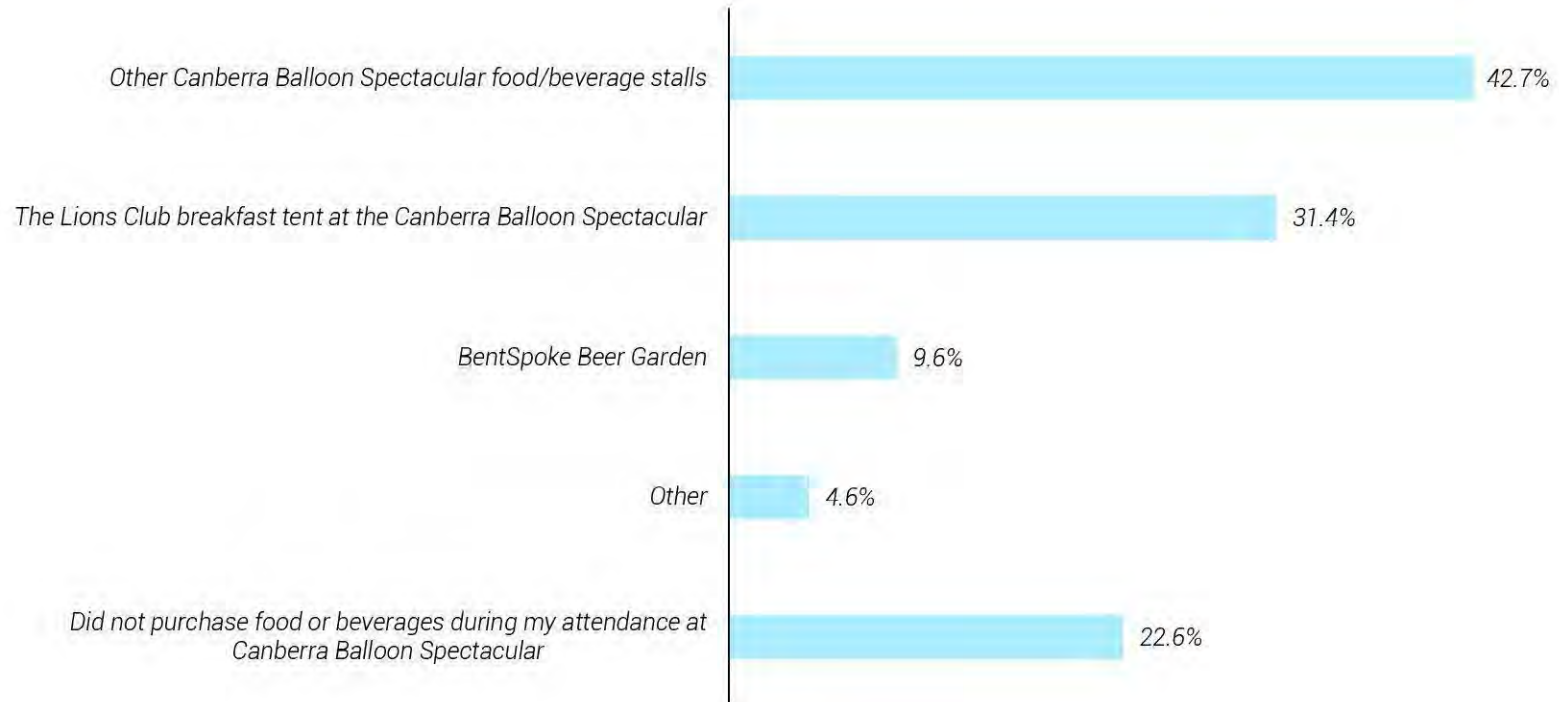
The satisfaction rating was lowest for 'ample places to sit down throughout the event/s' (58.3%) and 'timely information about balloon launches' (63.7%).

Some of the reasons provided by those who rated this lower were:

- "More seating undercover when eating breakfast."
- "Tiered seating for families to see over the crowds."
- "More seating in the food area."
- "More info on when particular balloons are taking off and landing."
- "Use social media to provide balloon updates."
- "Keep the public informed regarding launch time."
- "Earlier notification of a change in take off location."

# WHERE FOOD & BEVERAGES WERE PURCHASED

## WHERE FOOD & BEVERAGES WERE PURCHASED FROM

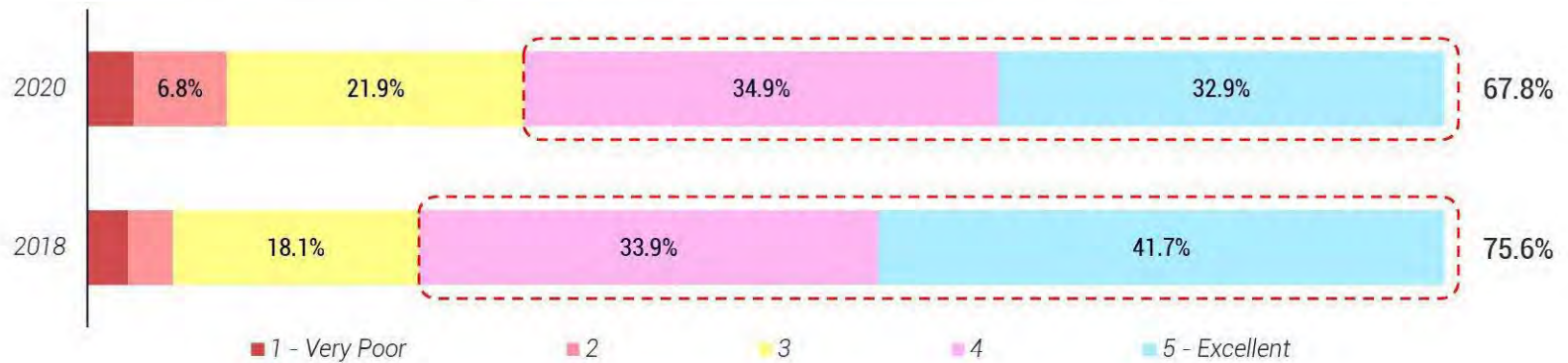


Over two-thirds (42.7%) of attendees purchased food and beverages from 'other Canberra Balloon Spectacular stalls.' Around a third (31.4%) also purchased their food and beverages from the 'Lions Club breakfast tent'.

Whilst 22.6% did not purchase any food or beverages during their attendance at Canberra Balloon Spectacular:

# SATISFACTION WITH FOOD

## OVERALL SATISFACTION WITH THE FOOD OFFERING AT CANBERRA BALLOON SPECTACULAR



## ATTENDEE EXPECTATIONS BY EVENT ATTENDED

	Very Good/Excellent
Purchased food from other Canberra Balloon Spectacular food/beverage stalls only	65.3%
Purchased from the Lions Club breakfast tent only	68.9%

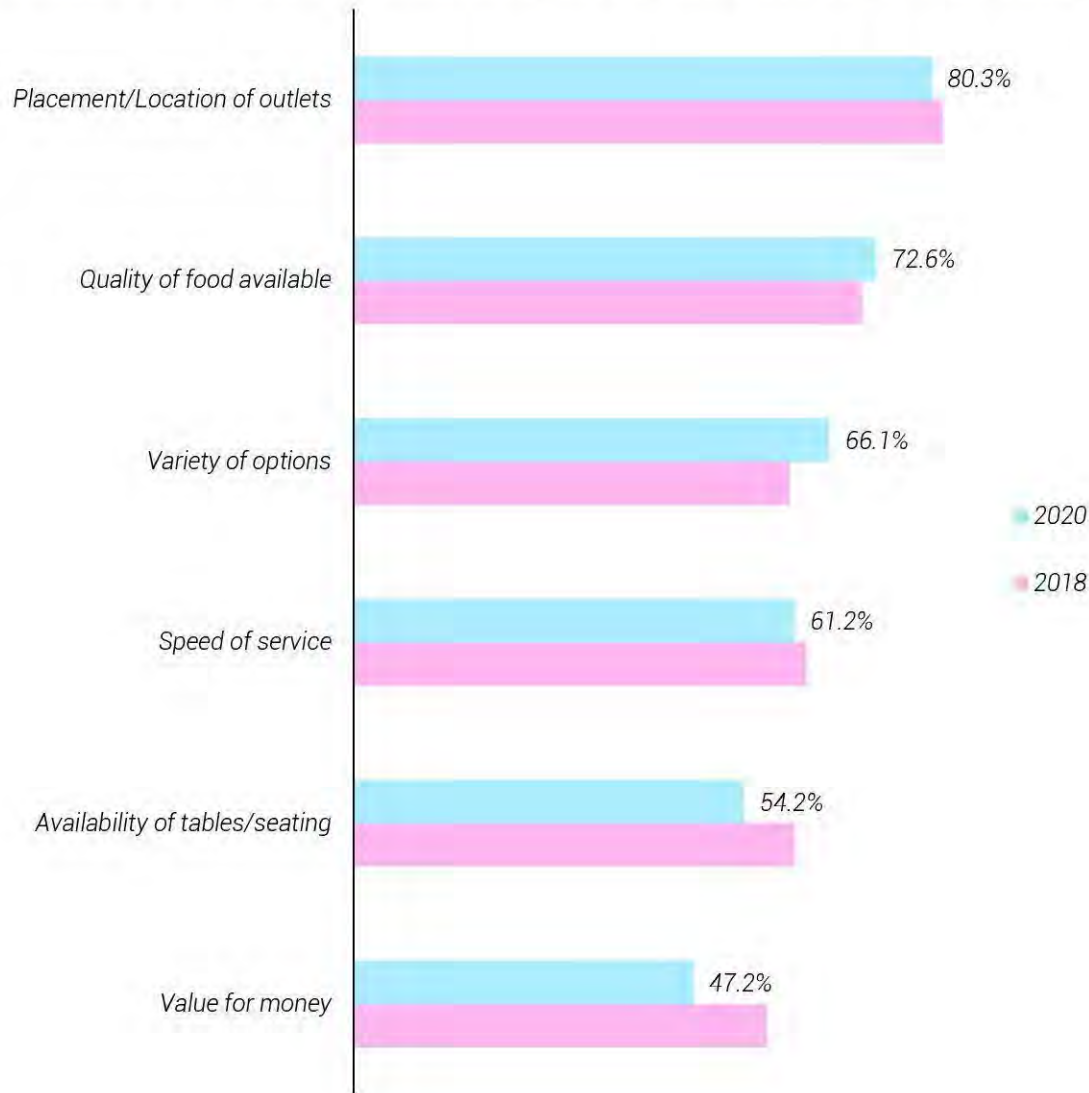
Over two-thirds of attendees indicated a high level of satisfaction with the food offering at Canberra Balloon Spectacular this year (67.8%). This was a decrease from 75.6% in 2018.

Amongst those who purchased food from other Canberra Balloon Spectacular stalls the satisfaction rating was 65.3%. This was compared to 68.9% of those who purchased from the Lions Club breakfast tent only.



# SATISFACTION WITH FOOD

## OVERALL SATISFACTION WITH THE FOOD OFFERING AT CANBERRA BALLOON SPECTACULAR –VERY GOOD/EXCELLENT



Attendees were asked to rate their satisfaction with a number of different elements of the food offering.

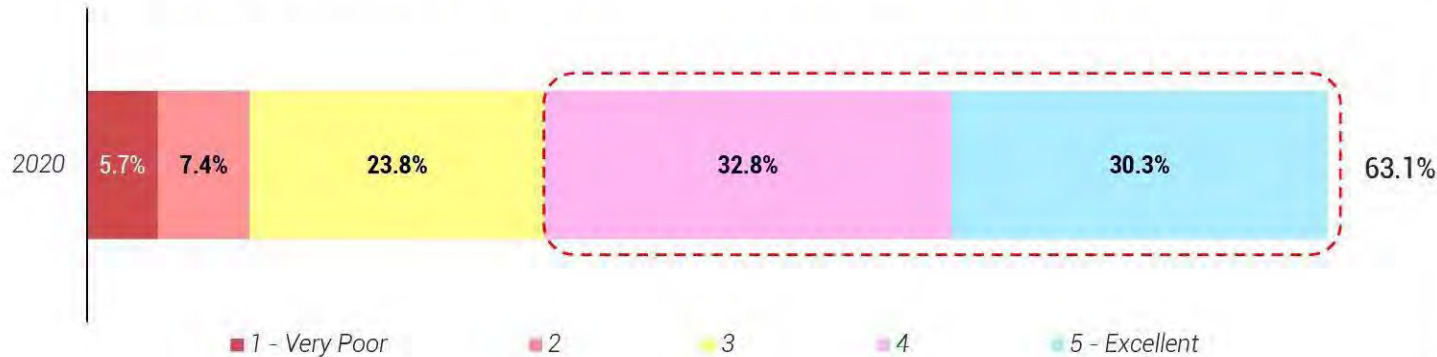
Attendees provided their highest rating for the 'placement/location of outlets' with 80.3% rating it 'good' or 'very good', a decrease from 81.8% last year.

Respondents were less satisfied with four elements, including 'value for money' (47.2%), 'availability of tables/seating' (54.2%), 'speed of service' (61.2%) and 'variety of options' (66.1%). Although three out of the four experienced percentages over 50%, they are a good base for further improvements.

Based on the research findings, the decrease in the overall satisfaction of the food offering this year could be attributed to declines in elements such as 'speed of service', 'availability of tables/seating' and 'value for money'. A total of 4 out of 6 elements in the food offering had a decrease in 2020.

# SATISFACTION WITH BEVERAGES

## OVERALL SATISFACTION WITH THE BEVERAGE OFFERING AT CANBERRA BALLOON SPECTACULAR



For the first-time this year attendees were asked to rate their satisfaction with a number of different elements of the beverage offering.

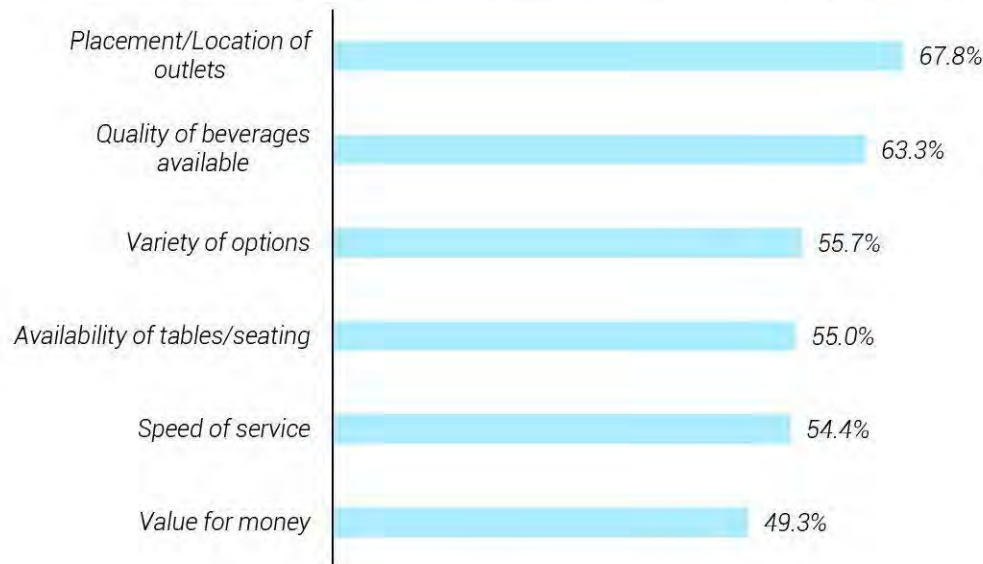
Nearly two-thirds (63.1%) of attendees rated the overall beverages at the Canberra Balloon Spectacular as either 'good' or 'excellent'.

For elements related to beverages, attendees provided their highest rating for 'placement/location of outlets' (67.8%), followed by 'quality of beverages available', with (63.3%) rating it 'good' or 'very good.'

The lowest rated element of the beverages was the 'value for money' component (49.3%).

The elements of the food and beverage offering both ranked in a similar order and this shows what was consistently well done but what is also in need of some improvement for future events.

## OVERALL SATISFACTION WITH THE BEVERAGE OFFERING AT CANBERRA BALLOON SPECTACULAR – GOOD/VERY GOOD



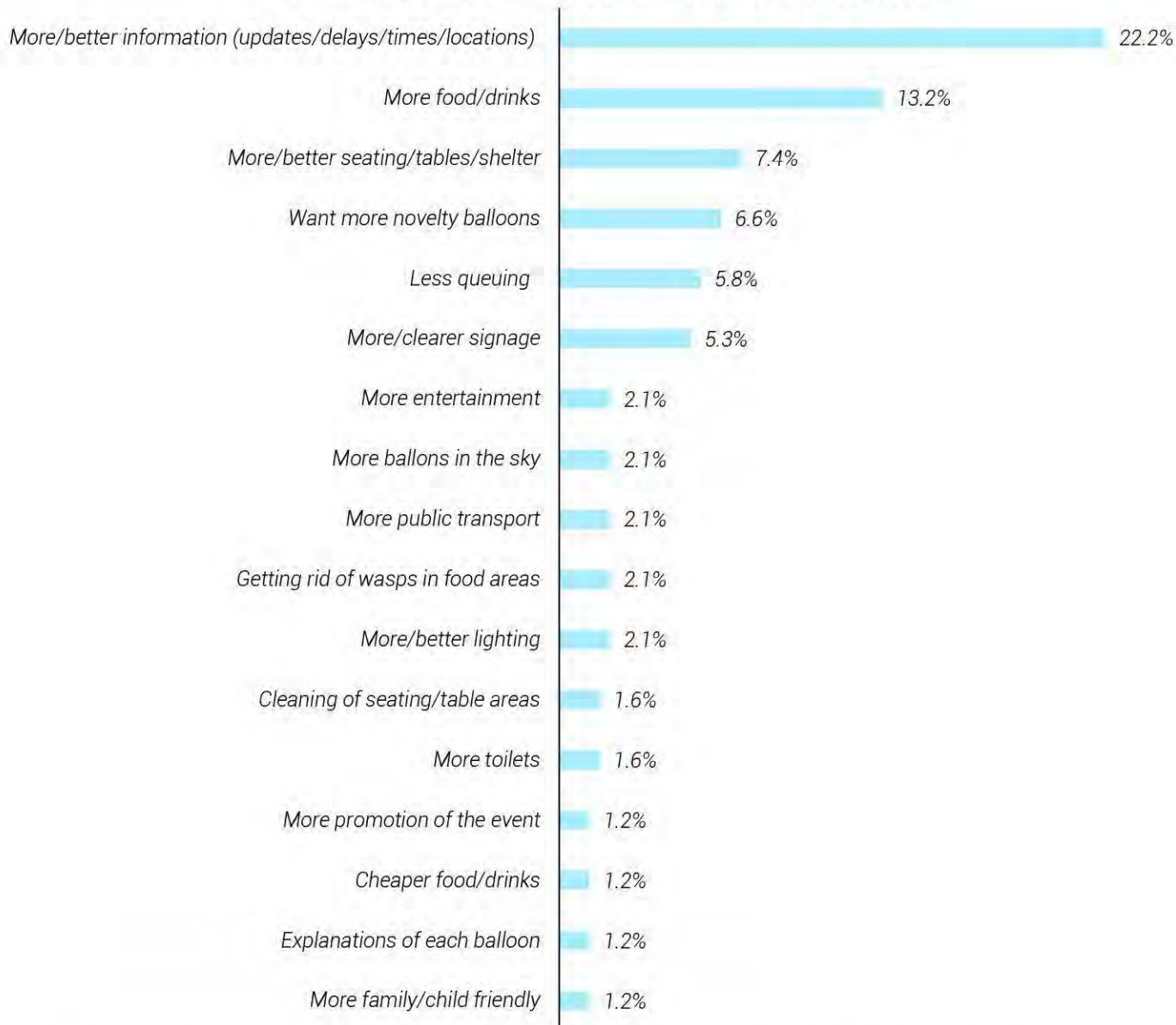
Q19. Overall, how satisfied were you with the beverage offering at Canberra Balloon Spectacular this year? (Where 1 = Very poor and 5 = Excellent) (n=76-122)

Q20. Overall how would you rate the beverage offering, in terms of the following? (Where 1 = Very poor and 5 = Excellent) (n=147-152)



# CUSTOMER EXPERIENCE

## SUGGESTIONS FOR IMPROVING CANBERRA BALLOON SPECTACULAR



Respondents were asked to provide suggestions for future improvement of the event.

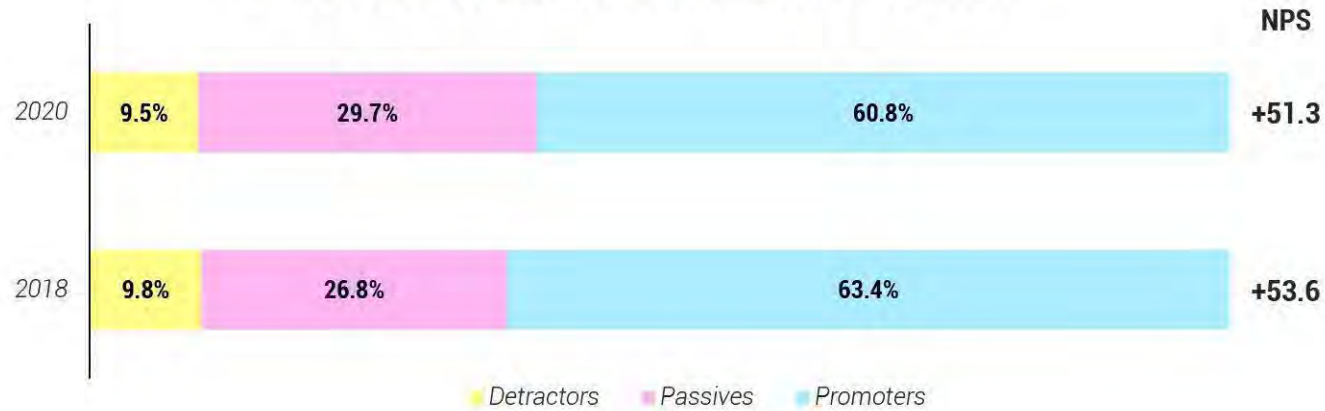
The main theme that emerged from respondents was that they wanted 'more/better information regarding updates, delays and changes to locations' (22.2%). This was made in reference to information not being relayed clear enough for attendees to know balloon flights were delayed or their launch destination had been changed. The next highest-ranking suggestion was for there to be 'more food/drinks (13.2%), in particular more coffee vendors.

Attendees mentioned they wanted to receive real-time updates as to when balloon flights were delayed and be notified of new take-off and landing locations. Suggestions from attendees included, clearer signage to show this or have updates on the event social media or website to make it easily noticeable and accessible.

Suggestions for an event map to track balloon flight paths was also mentioned.



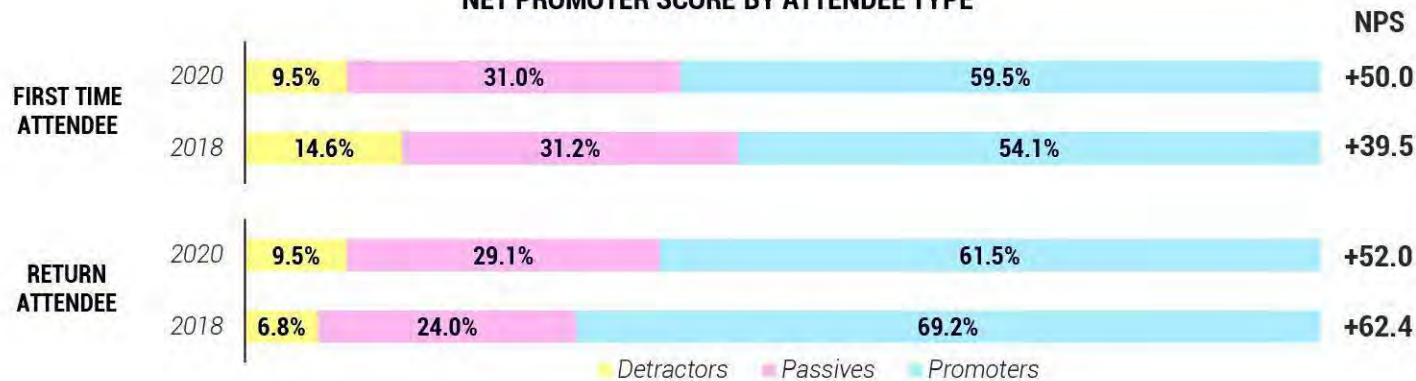
## NET PROMOTER SCORE FOR CANBERRA BALLOON SPECTACULAR



The overall Net Promoter Score for Canberra Balloon Spectacular was +51.3. This represents a slight decrease from the +53.6 from 2018. The percentage of promoters declined and in turn passives rose. Detractors and remained relatively consistent.

Although the NPS decreased, this score achieved by the Canberra Balloon Spectacular illustrates that the majority of attendees are highly likely to positively advocate attending the festival.

## NET PROMOTER SCORE BY ATTENDEE TYPE

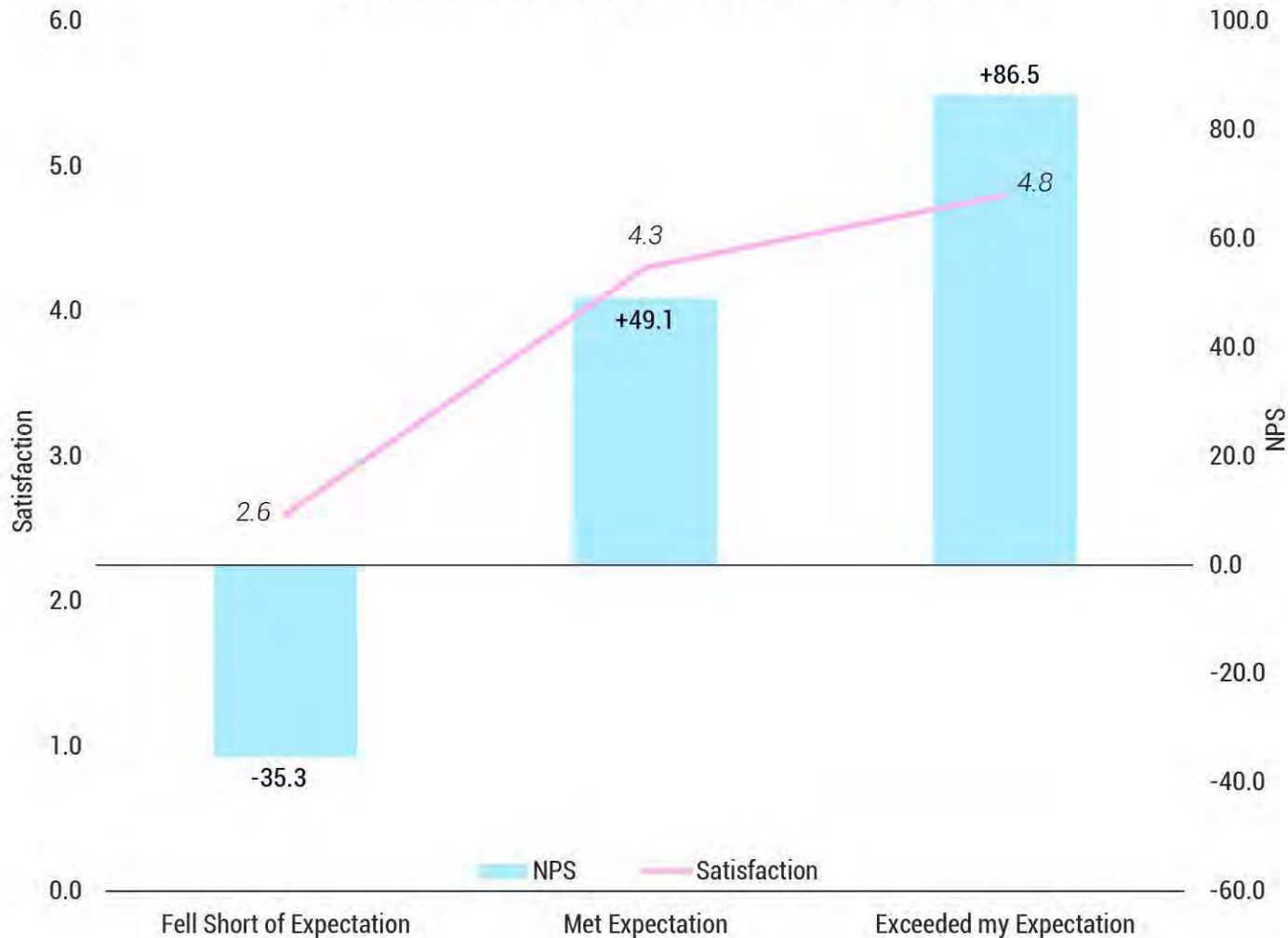


When compared to attendance type, in 2020 return attendees had a slightly higher NPS than first-time attendees. When looking at this year-on-year, the NPS score for return attendees was down 10.4 points. Whereas for first-time attendees the NPS was up 10.5 points.

The increase in first-time attendees NPS could be attributed to a decline in attendees expectations falling short and a rise in their expectations being met. On the other hand a decline in return attendees score may be linked to less attendees having expectations met.

# CUSTOMER EXPERIENCE

CUSTOMER EXPECTATION VS OVERALL SATISFACTION VS NPS



% of Audience

7.7%

70.1%

22.7%

This chart illustrates the relationship between expectations, customer satisfaction and advocacy. It shows the vast difference in the likelihood of advocacy, that results from delivering an experience that is below customer expectations.

Those who felt that their experience exceeded their expectations rated their satisfaction at 4.8 (out of 5.0) and their NPS was +86.5 – which is a very positive result. Those whose expectations were met, still reported a high satisfaction rating 4.3 out of 5, and their NPS was +49.1 which is still a good result. However for those who felt that the event did not meet expectations (7.7% of the total audience), satisfaction fell below average and the NPS fell well into negative territory (-35.3).

Meeting expectations is not a bad result. It yields good satisfaction levels and advocacy. Exceeding expectations, however, inflates the advocacy impact significantly. This is why it is important to be continually thinking about ways to subtly innovate the event offering.

Q27. How likely is it that you would recommend attending Canberra Balloon Spectacular to family, friends or colleagues? (Where 0 = Not at all likely and 10 = Extremely likely) (n=232)

Q12. Overall, how satisfied were you with the experience that you had whilst attending Canberra Balloon Spectacular this year? (Where 1 = Very poor and 5 = Excellent) (n=251)

Q26. Having attended Canberra Balloon Spectacular, did the experience exceed, meet or fall below your expectations? (n=234)

▲ Significantly higher than other groups  
▼ Significantly lower than other groups



# LIKELY FUTURE ATTENDANCE

## LIKELY FUTURE ATTENDANCE AT CANBERRA BALLOON SPECTACULAR



### ATTENDEE EXPECTATIONS BY PREVIOUS ATTENDANCE

	2018	2020
First Time Attendee	70.8%	68.7%
Return Attendee	92.4%	89.9%

### ATTENDEE EXPECTATIONS BY VISITOR ORIGIN

	2018	2020
Canberra and Surrounds (incl. Queanbeyan, Jerrabomberra)	90.0%	88.4%
Outside Canberra	61.0%	54.8%

The majority of attendees reported being likely to attend Canberra Balloon Spectacular next year with 82.3% indicating they are 'likely' or 'very likely' to do so.

Return attendees likelihood to attend again was down a small percentage and so was the likelihood of those who were from Canberra and Surrounds. The research shows that the majority of return attendees are Canberra locals and in 2020 this group of attendees had a decline in NPS score as well as expectations being met/exceeded.

It is important to note that the likelihood of attendance is generally driven by a few factors, including:-

- The proportion of visitors in your audience and their propensity to travel to your destination again
- The experience that attendees had during their attendance
- The level of intrinsic connection with the event content (which is often higher for things that are unique to a destination)
- Awareness of the event content



## **KEY INSIGHTS**