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**TOURISM  
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**DEMAND POTENTIAL  
FOR LEISURE EVENTS  
IN THE AUSTRALIAN  
CAPITAL TERRITORY**

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**Summary**  
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**AUGUST 2015**



# DEMAND POTENTIAL FOR LEISURE EVENTS IN THE AUSTRALIAN CAPITAL TERRITORY

## INTRODUCTION

Tourism Research Australia (TRA) in conjunction with VisitCanberra contracted BDA Marketing Planning to investigate the demand potential for leisure events in the Australian Capital Territory (ACT).

Research conducted in 2012 on major blockbusters in the ACT identified that events and exhibitions such as *Floriade* and *Masterpieces from Paris* provide compelling reasons to visit the ACT. Subsequently, the ACT's centenary year in 2013 continued to capitalise on the value of investing in events. Major events played a key role in generating impressive visitation and economic outcomes for the region.

This summary reports on key findings from the research, providing information on:

- previous leisure event travel
- the level of interest, awareness and attitudes to leisure events
- the uniqueness and best fit of events for the ACT
- the preferred seasons to hold events in the ACT
- events that best drive visitation to the ACT
- the impact of stimulus on intention to travel to the ACT in the future.

## KEY MESSAGES

- Leisure events travel continues to increase across Australia and to be an important driver of tourism demand.
- Entertainment events with a cultural or garden theme currently attract higher attendance than sporting events for the ACT.
- While for most respondents, the ACT was not top of mind as an events destination, opportunities exist to leverage off interest in travel to attend arts and culture events.
- Floriade—and its ticketed evening event, NightFest—was the event with highest awareness and was also rated as the most preferred, unique and best fit leisure event.
- Floriade and NightFest, the ICC Cricket World Cup and football games were identified as key demand drivers as they had high rates of awareness and preference.
- With a raising of awareness, food and wine events and Enlighten stood out as potential drivers of future demand as they had high rates of preference on viewing of stimulus.
- Sports participation events had lower appeal overall but those who are interested in them were more likely to visit the ACT specifically for these type of events.
- Outside of season specific events (e.g. football games and Floriade and NightFest), autumn was clearly the preferred season for travel to the ACT for leisure events.
- There is potential for greater events visitation in the ACT if awareness is improved. Intention to visit the ACT for a leisure event within two years increased from 21% to 33% once stimulus was viewed.

## RESEARCH APPROACH

The research was conducted in two phases throughout February and March 2015.

### DESKTOP RESEARCH

Previous national and ACT specific research studies were examined and results from TRA's *International Visitor Survey* and *National Visitor Survey* and BDA's online strategic planning survey - People Prophets Tracker (PPT) were analysed.

### QUANTITATIVE RESEARCH

Primary research was conducted through an online survey (referred to as the ACT Events Survey). All 1,218 survey respondents lived outside the ACT and had previously travelled to a leisure event (e.g. sports event, festival, performance or exhibition), and/or were considering travel to attend a leisure event in the next two years<sup>1</sup>. In total, 499 had visited the ACT for leisure in the past.

Each respondent viewed stimulus and provided responses across eight of 15 leisure events tested; each event was reviewed by a sample of approximately 600. Figure 1 provides a summary of the events tested which included a potential future event concept, the Canberra 100 Adventure Challenge.

The full report is available on request from [tourism.research@tra.gov.au](mailto:tourism.research@tra.gov.au)

<sup>1</sup> Leisure travel refers to travel for at least one night that is taken for recreational purposes; including holidays, visiting friends and/or relatives, or to attend an event. It does not include travel for which the primary purpose was business or to attend a conference, convention or seminar.

FIGURE 1: THE EVENTS





## DESKTOP ANALYSIS FINDINGS

TRA's *National Visitor Survey* shows that the number of people travelling interstate<sup>2</sup> to attend and/or participate in leisure events continues to increase. This has seen moderate gains in events share of the interstate leisure travel market in recent years.

In 2014, a leisure event was the main reason for travel for one in ten (10%) of all interstate leisure trips at the national level. For the ACT this rate was slightly higher at 11%, but has been as high as 16% when the ACT hosted the *Masterpieces* exhibition (2010) and celebrated its centenary (2013).

Interstate leisure event visitors were most likely to drive to the ACT, stay one or two nights and have no stopovers elsewhere. The majority had also been to the ACT before, often many times. The type of visitor attracted to events in the ACT varied depending on whether these were entertainment or sport focused:

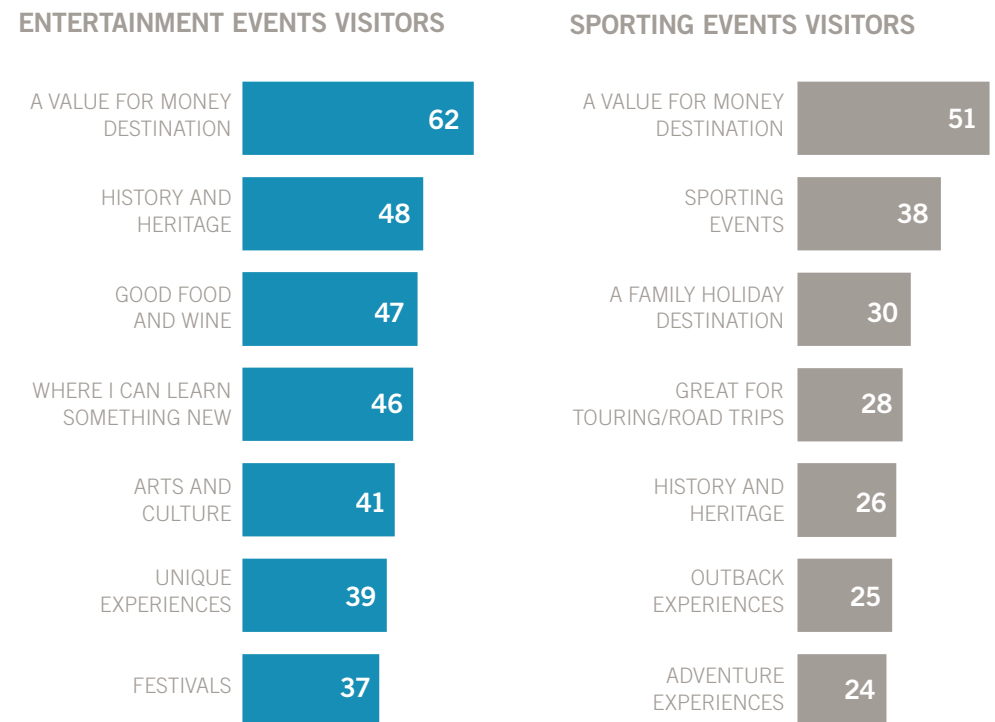
- Entertainment visitors were typically older empty nesters or retirees travelling as couples or with family/friends. They had a similar profile to the average leisure visitor to the ACT.
- Sport motivated visitors tended to be younger, travelling with families or other groups and from a broader spread of origins.

Visitation to the ACT by those travelling for entertainment events was seasonal, with September (coinciding with Floriade) the most popular month. Travel to sporting events was more evenly spread throughout the year although low in November and December.

Value for money was the most important factor considered by both entertainment and sporting event visitors to the ACT when they were choosing a holiday destination. However, Figure 2 shows:

- History and heritage, good food and wine, opportunities to learn something new, arts and culture, unique experiences and festivals were relatively more important influences on the holiday choices of entertainment visitors to the ACT.
- Sporting events, family oriented destinations and adventure experiences were more likely to be considered when sporting event visitors to the ACT chose a place to holiday.

FIGURE 2: MOST IMPORTANT FACTORS WHEN CHOOSING A LEISURE DESTINATION OF PAST ACT INTERSTATE VISITORS (% TRAVELLED INTERSTATE TO ACT ON LAST LEISURE TRIP)



Derived by BDA from PPT: Question: Which of the following factors are important when choosing a leisure destination for one or more nights?

<sup>2</sup> National Visitor Survey results used refer to domestic overnight travel only.

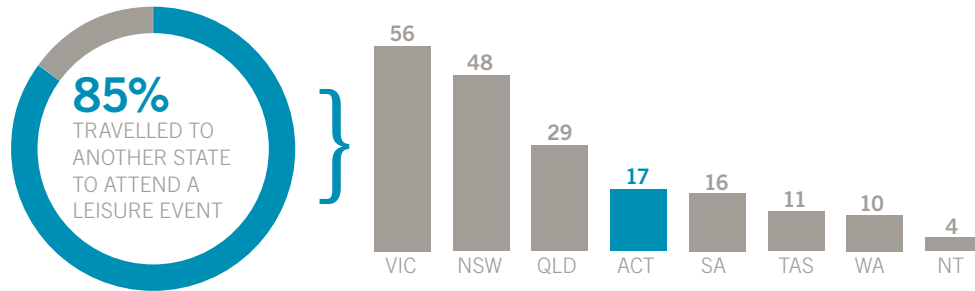
## ACT EVENTS SURVEY FINDINGS

### PREVIOUS LEISURE EVENT TRAVEL

Leisure events are an important driver of tourism demand.

The majority of respondents (85%) had travelled interstate to a leisure event in the past. Of these, 17% had visited the ACT previously for a leisure event (Figure 3).

FIGURE 3: STATES SPECIFICALLY VISITED TO ATTEND A LEISURE EVENT (% OF INTERSTATE RESPONDENTS WHO HAD PREVIOUSLY TRAVELLED INTERSTATE FOR A LEISURE EVENT)

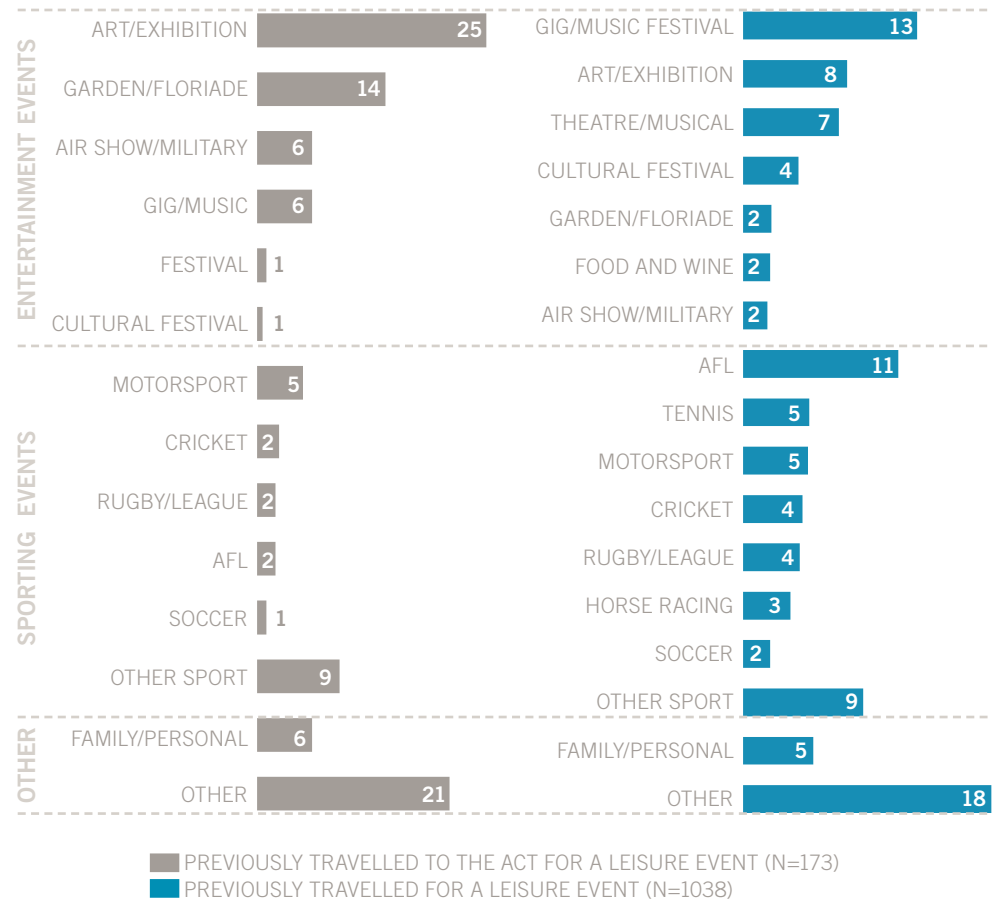


Derived by BDA from ACT Events Strategy: Questions: Have you ever travelled to another state specifically to attend a leisure event (e.g. sports event, festival, performance, exhibition etc.)? Which states have you specifically visited to attend a leisure event? (n=1,038)

Entertainment events with a cultural or garden theme currently attract higher attendance than sporting events for the ACT.

On their last trip, interstate leisure event travellers to the ACT were most likely to have attended entertainment events such as art/exhibitions (25%), Floriade and NightFest (14%) and air shows/military ceremonies (6%). However, at the national level, travellers were more likely to have headed out to gigs/music festivals (13%), watched AFL (11%) or attended the theatre (7%) (Figure 4).

FIGURE 4: LAST LEISURE EVENT TRIP (% WHO HAD TRAVELLED FOR A LEISURE EVENT)



Derived by BDA from ACT Events Strategy: Questions: On the most recent occasion you travelled for a leisure event, what event did you attend? On the most recent occasion you travelled to ACT for an event, what event did you attend?

## INTEREST IN LEISURE EVENT THEMES AND ATTITUDES TO EVENTS

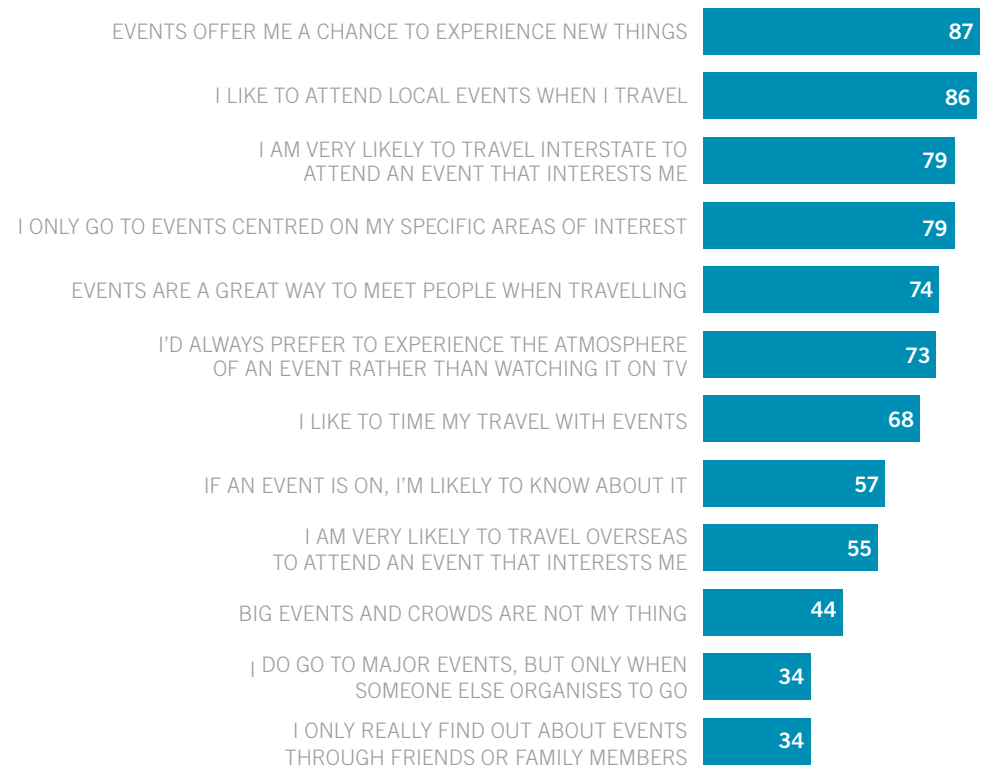
While for most respondents, the ACT is not top of mind as an events destination, opportunities exist to leverage off interest in travel to attend arts and culture events.

Overall, a relatively similar proportion of respondents indicated that they were interested in travelling within Australia to attend sporting (66%), arts and culture (62%) and food and wine (59%) events. Compared to other event themes, the ACT is best placed to take advantage of interest in arts and culture events as:

- nearly one-third of respondents associated the ACT with arts and culture events (30%)
- only 12% associated the ACT with food and wine, and 11% with sporting events.

Most respondents agreed that events offer a chance to experience new things (87%) and they liked to attend local events when travelling (86%). A high proportion were very likely to travel interstate to events that interested them (79%) and more than two-thirds time their travel with events (68%). Less than half were put off by big events and crowds (44%) and only one-third didn't organise event travel themselves (34%) (Figure 5).

FIGURE 5: LEISURE EVENT TRAVEL ATTITUDES (% OF INTERSTATE RESPONDENTS WHO AGREED WITH STATEMENT)



Derived by BDA from PPT. Question: *Please indicate whether you agree or disagree with the following statements when thinking about attending leisure events when you travel.*

## THE ACT AS AN EVENTS DESTINATION

While the ACT was recognised for its iconic attractions and its strong cultural reputation, it was not generally perceived as an events destination. Given its size, the ACT was seen as a place better suited to hosting of smaller events. There was also a perception that the ACT is more an educational and corporate destination which makes it less likely to hold energetic and adventurous leisure events.

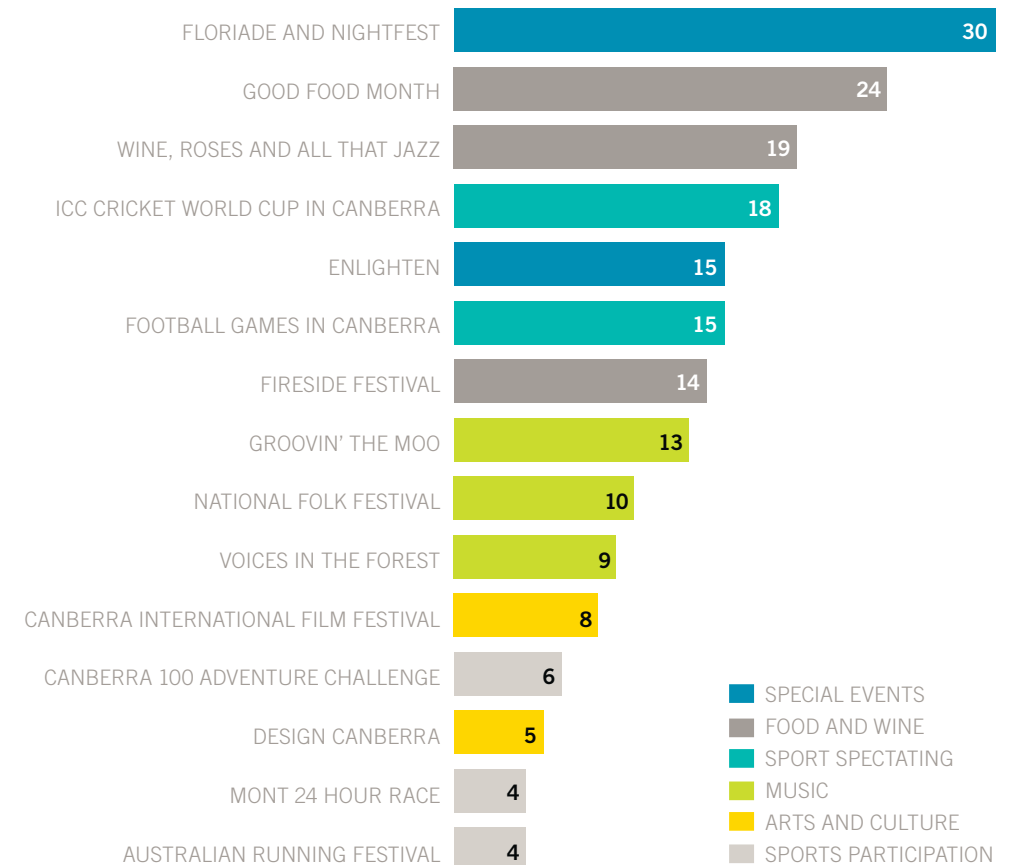
## AWARENESS OF SPECIFIC EVENTS (PRE-STIMULUS) AND MOST PREFERRED EVENTS (POST-STIMULUS)

Of the leisure events tested, Floriade and NightFest (39%), the ICC Cricket World Cup (33%) and football games (30%) had the highest awareness. The Canberra International Film Festival (19%), Groovin' the Moo (14%), Good Food Month (14%), National Film Festival (12%) and Wine, Roses and All That Jazz (12%) were the only others where more than one in ten respondents were aware of the event. For those aware of a particular event, they were most likely to have attended this event if it was Floriade and NightFest (40%), the Mont 24 Hour Race (36%), Enlighten (34%), DESIGN Canberra (32%) or Voices in the Forest (32%).

Floriade was considered the most preferred event overall.

On viewing stimulus material, respondents rated Floriade and NightFest (30%) the most preferred leisure event followed by Good Food Month (24%), Wine, Roses and All That Jazz (19%) and the ICC Cricket World Cup (18%). Overall, special events such as Floriade NightFest, Enlighten, food and wine and sport spectating events were preferred over more niche art and culture and sport participation events (Figure 6).

FIGURE 6: MOST PREFERRED EVENT (POST STIMULUS) (% INTERSTATE RESPONDENTS WHO CHOSE EVENT AS THE MOST APPEALING)



Derived by BDA from ACT Events Survey - Question: *Of the events that you have seen, please rank from most to least appealing*

While Floriade and NightFest had broad appeal, preference rates for the event were highest for those who had visited the ACT previously and for older respondents. Preference for football games and Wine, Roses and All That Jazz was also higher for these groups. Groovin' the Moo attracted the highest preference rating for younger respondents. Along with the ICC Cricket World Cup, this event also had greater appeal to those who had not previously visited the ACT (Figure 7).

FIGURE 7: DIFFERENCES IN MOST PREFERRED RATES BY PAST LEISURE VISITATION AND AGE GROUP (% OF INTERSTATE RESPONDENTS WHO CHOSE EVENT AS THE MOST APPEALING (POST STIMULUS))

HIGHER PREFERENCE IF VISITED PREVIOUSLY	SIMILAR PREFERENCE WHETHER OR NOT VISITED PREVIOUSLY	HIGHER PREFERENCE IF NOT VISITED PREVIOUSLY
<ul style="list-style-type: none"> <li>■ Floriade</li> <li>■ Enlighten</li> <li>■ Wine, Roses and All That Jazz</li> <li>■ Football games</li> </ul>	<ul style="list-style-type: none"> <li>■ Good Food Month</li> <li>■ Fireside Festival</li> <li>■ National Folk Festival</li> <li>■ Voices in the Forest</li> <li>■ International Film Festival</li> <li>■ Canberra 100 Adventure Challenge</li> <li>■ DESIGN Canberra</li> <li>■ Mont 24 Hour Race</li> <li>■ Australian Running Festival</li> </ul>	<ul style="list-style-type: none"> <li>■ ICC Cricket World Cup</li> <li>■ Groovin' the Moo</li> </ul>
HIGHER PREFERENCE FOR UNDER 35 YEARS	SIMILAR PREFERENCE WHETHER AGED UNDER 35 OR 55 YEARS AND OVER	HIGHER PREFERENCE FOR 55 YEARS AND OLDER
<ul style="list-style-type: none"> <li>■ Groovin' the Moo</li> <li>■ Canberra 100 Adventure Challenge</li> <li>■ Mont 24 Hour Race</li> <li>■ Australian Running Festival</li> </ul>	<ul style="list-style-type: none"> <li>■ Good Food Month</li> <li>■ ICC Cricket World Cup</li> <li>■ Enlighten</li> <li>■ Fireside Festival</li> <li>■ National Folk Festival</li> <li>■ Voices in the Forest</li> <li>■ International Film Festival</li> <li>■ DESIGN Canberra</li> </ul>	<ul style="list-style-type: none"> <li>■ Floriade</li> <li>■ Wine, Roses and All That Jazz</li> <li>■ Football games</li> </ul>

Derived by BDA from ACT Events Survey – Question: *Of the events that you have seen, please rank from most to least appealing*



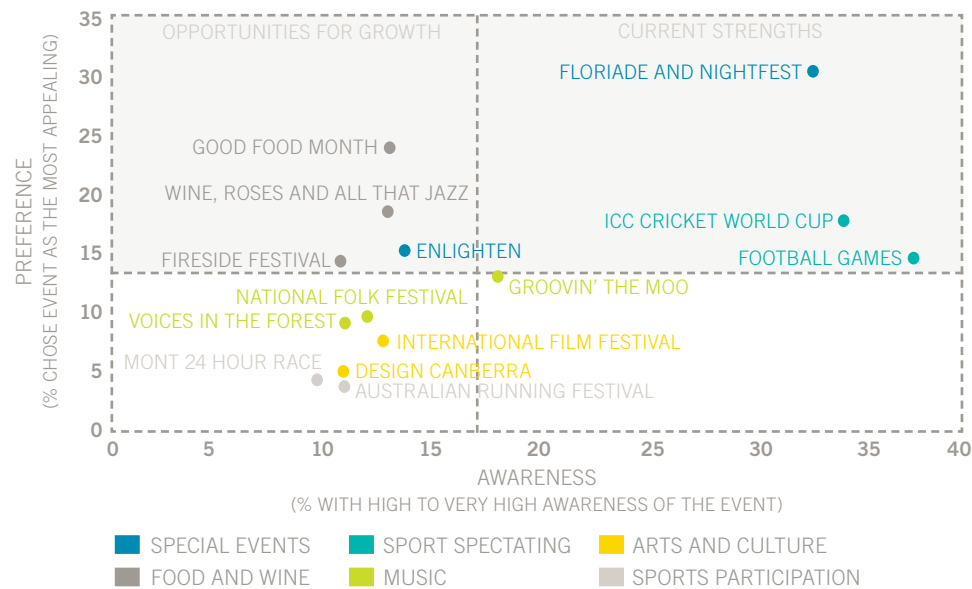


Floriade and NightFest is currently the leading driver of demand. Enlighten and food and wine events stand out as potential drivers of demand with improved awareness.

Overall, Floriade and NightFest, the ICC World Cup and football games were identified as key demand drivers as they had high rates of awareness and preference. Latent demand\* is most evident for Good Food Month, Wine Roses and All That Jazz, the Fireside Festival and Enlighten with each having lower awareness but high rates of preference (Figure 8).

Sports participation events demonstrated lower awareness and lower preference, however, their niche appeal could be high. While the number of respondents who found these events appealing enough to want to travel to the ACT was small, this high appeal was the strongest compared to other event types.

FIGURE 8: DRIVERS OF DEMAND – COMPARING AWARENESS TO PREFERENCE (% VERSUS AVERAGE OF 14 EXISTING EVENTS)



Derived by BDA from ACT Events Survey – Question examples: *How aware were you of Enlighten? Of the events that you have seen, please rank from most to least appealing.* \* In this report, latent demand represents the gap between the consumer wanting a particular product/service and their awareness of its availability. For example, food and wine events and Enlighten had higher rates of preference *after* respondents had viewed stimulus for these events.



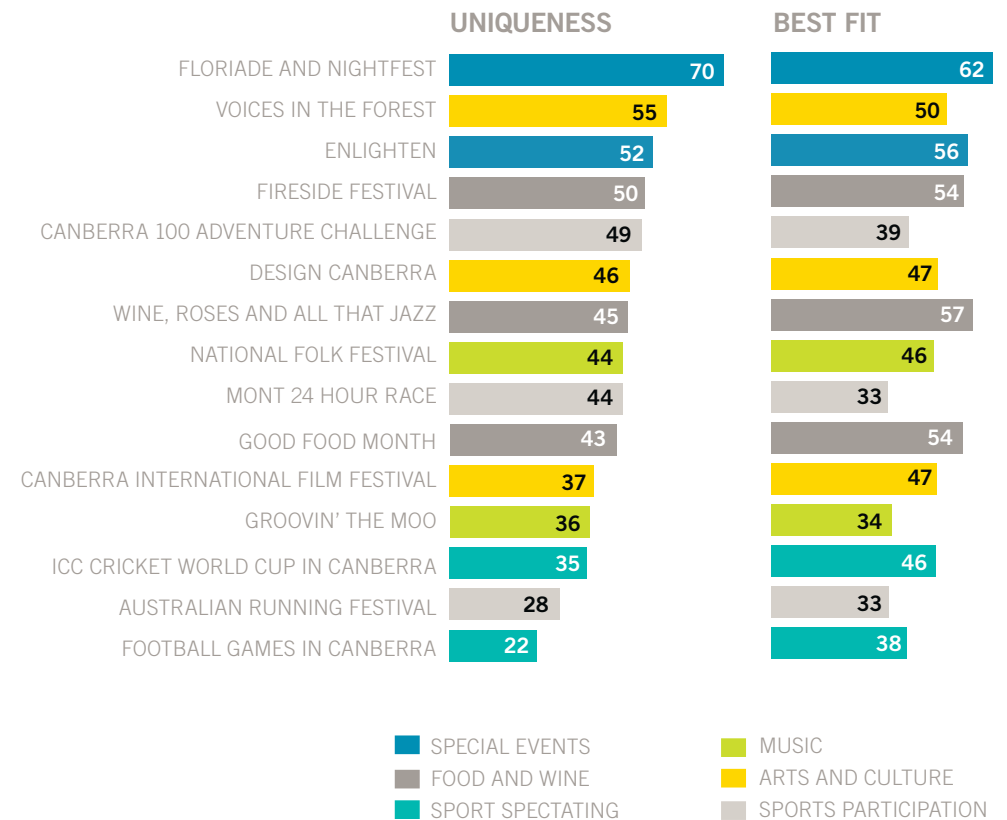
## UNIQUENESS AND BEST FIT OF EVENTS

As perceived by respondents, Floriade was seen as the most unique event and the best fit with the ACT.

Floriade and NightFest (70%) was the event most often identified as unique followed by Voices in the Forest (55%), Enlighten (52%) and the Fireside Festival (50%). Nearly half the respondents saw the potential Canberra 100 Adventure Challenge (49%) as unique. Sport spectating events, Groovin' the Moo and the Canberra International Film and Running Festivals had low uniqueness scores (Figure 9).

At least half the respondents perceived Floriade and NightFest (62%), Wine, Roses and All That Jazz (57%), Enlighten (56%), Good Food Month (54%), the Fireside Festival (54%) and Voices in the Forest (50%) as best fitting with the ACT as a holiday destination. Sports participation events and Groovin' the Moo had low fit scores (Figure 9).

FIGURE 9: UNIQUENESS AND BEST FIT (% INTERSTATE RESPONDENTS – 'SOMEWHAT UNIQUE – VERY UNIQUE')



Derived by BDA from ACT Events Survey – Question examples: (Uniqueness) *Thinking of all the different events you have travelled to outside your state, how unique would you say Football Games in the ACT are?* (Best fit) *How well does the Canberra International Film Festival fit with your perception of Canberra as a holiday destination?*

## PREFERRED SEASON FOR EVENTS

Autumn is clearly the preferred season to travel to the ACT for most leisure events.

This not only applied to all events that are currently hosted in autumn but also to Voices in the Forest, the Canberra International Film Festival and DESIGN Canberra which are all currently held in spring.

Winter and spring were preferred for season specific events such as football games and the Fireside Festival (winter) and those with a floral theme (spring). Summer was not the preferred season for any of the events tested (Figure 10).

FIGURE 10: PREFERRED SEASONS FOR HOLDING EVENTS



\* Event currently occurs in another season. Derived by BDA from ACT Events Survey.

## FUTURE INTENTION TO ATTEND LEISURE EVENTS IN THE ACT

The appeal of Floriade and Nightfest extends to visitor intentions.

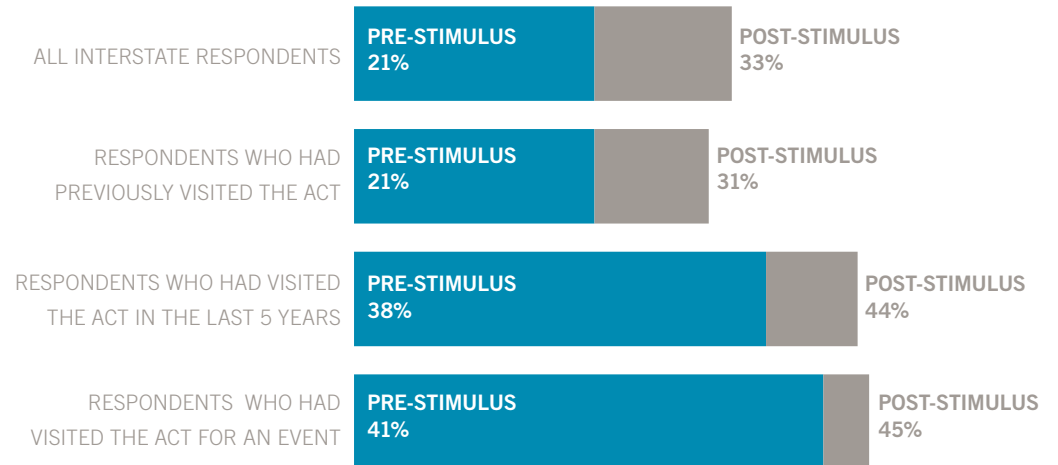
Within the next two years, respondents were most likely to visit the ACT specifically to attend Floriade and NightFest (28%) or go along if already visiting for another purpose (55%). Enlighten, Good Food Month, Wine, Roses and All That Jazz and the Fireside Festival were the next most likely to specifically attract visitors and to be attended by those who happened to be visiting the ACT.

## IMPACT OF STIMULUS ON INTENTION TO VISIT

Overall, intention to travel to the ACT for an event was solid and stronger for those who had already travelled to the ACT in the past.

Results indicated there was considerable latent demand for leisure event travel to the ACT. Overall, intention to travel to the ACT for a leisure event within the next two years increased from 21% pre-stimulus to 33% after stimulus was viewed. However, as Figure 11 shows, the impact of stimulus was less for those who had visited the ACT previously, particularly for those who had attended a leisure event in the ACT.

FIGURE 11: IMPACT OF STIMULUS ON INTENT TO TRAVEL TO THE ACT IN THE NEXT TWO YEARS



Derived by BDA from ACT Events Survey – Questions: *How likely are you to travel to the ACT to attend a leisure event in the next two years? Considering all the information you have been shown today, how likely are you to travel to the ACT to attend a leisure event in the next two years?*



## CONCLUSION

Leisure events are an important driver of tourism demand.

Most respondents (85%) had travelled to another state specifically to attend a leisure event. For the ACT, they were most likely to have travelled to attend entertainment events with a cultural or garden theme.

Strong interest from interstate leisure travellers in attending arts and culture events presents an opportunity to grow the events market as nearly one-third of respondents associated the ACT with these type of events.

Floriade and NightFest is a leading driver of demand.

Floriade and NightFest (along with sport spectating events such as football games and the ICC Cricket World Cup) were identified as key demand drivers as they had high rates of awareness and preference.

Participation sports display lower demand potential but exhibit higher conversion of appeal to intention.

While the appeal was generally lower than for other events, sports participation events were likely to convert a high proportion of those who were interested.

The potential future concept, the Canberra 100 Adventure Challenge, was not likely to drive significant demand volume, but did compare favourably to other sports participation events.

Autumn is clearly the preferred season to travel to the ACT for most leisure events.

Autumn was the preferred season for all events except Floriade and Wine, Roses & All That Jazz (preferred in spring) and football games and the Fireside Festival (preferred in winter).

Substantial latent demand is evident for events in the ACT.

Intention to visit the ACT lifted from 21% to 33% after exposure to events stimulus. This latent demand is most evident for food & wine events and Enlighten, which had low awareness but were among the most preferred events after viewing of stimulus.

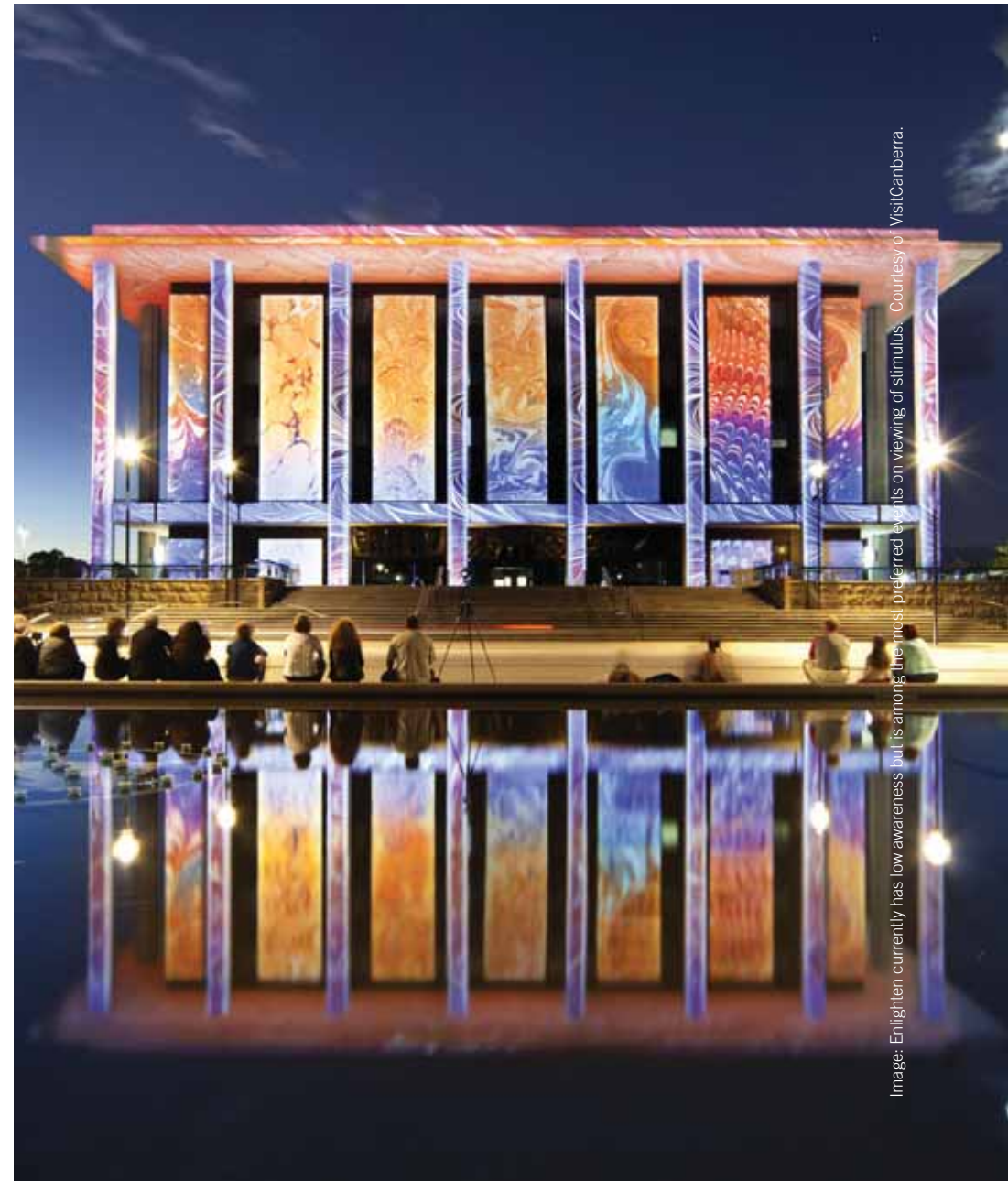


Image: Enlighten currently has low awareness but is among the most preferred events on viewing of stimulus. Courtesy of VisitCanberra.



