



Destination Visitor Survey Strategic Regional Research – Australian Capital Territory: Major Blockbuster Events in the ACT

Introduction

This study was commissioned by Tourism Research Australia (TRA) in partnership with Australian Capital Tourism to gain a better understanding of the value of blockbuster exhibitions in the Australian Capital Territory (ACT) and the potential for undertaking a major exhibition program.

The tourism industry currently contributes \$1.3 billion to the ACT economy and is one of the territory's largest private sector employers. Given tourism's importance to the city as an economic driver, it is Australian Capital Tourism's principal aim to increase the value of tourism to the ACT by stimulating visitation and growing visitor yield¹.

The success of established tourism events such as *Floriade* and recent blockbuster art exhibitions such as *Masterpieces from Paris* clearly demonstrate that events and exhibitions provide compelling reasons to visit the Canberra region. These exhibitions also play an important role in enhancing year-round use of the ACT's venues and infrastructure, create stimulus for investment in event infrastructure development and services, and generate a range of new employment opportunities.

The ACT Government's investment in *Masterpieces from Paris* was ultimately offset by an influx of interstate and international visitors. Over a four-month period, the National Gallery of Australia estimated that the exhibition welcomed over 470,000 attendees (80% from interstate or overseas) and generated an economic impact of \$95 million. To understand the value and potential of these major exhibitions in detail, Australian Capital Tourism partnered with TRA to conduct further research.

This research was undertaken in early 2012 to coincide with the *Renaissance* exhibition running at the National Gallery of Australia and the *Handwritten: Ten centuries of manuscript treasures* exhibition at the National Library of Australia. The objectives of this research were to:

- Develop a detailed profile of major exhibition visitors to the ACT
- Identify key visitor insights about major exhibitions in the ACT
- Assess the viability of establishing an annual schedule of major exhibitions in the ACT.

¹ Australian Capital Tourism: Five year strategic plan 2009–13.



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Research approach

This study was conducted quantitatively in two phases:

- Phase 1 (N=1,281, 5 minute interviews): face-to-face at *Handwritten* and *Renaissance* exhibitions.
- Phase 2 (N=653, 10 minute surveys): follow-up online interviews within 2 weeks of the event visit.

Phase 1 was used to determine visitor profile and to estimate expenditure in the Canberra region (conducted 16–19 February and 8–11 March 2012). Phase 2 concentrated on visitor behaviour and motivations and captured actual expenditure post-trip (conducted 23–27 February and 16–20 March 2012).

To qualify for an interview, visitors needed to be an Australian resident aged 18 years or over attending either the *Handwritten* or *Renaissance* exhibitions in Canberra.

Quotas were placed on previous visitation to Canberra and place of residence in order to control the Canberra resident sample.

Visitor profile²

Key visitor characteristics included:

- 54% of visitors were in a travel party of two adults
- 76% did not have children in the household
- 67% of visitors were female
- 45% were aged 55 years or older, with 34% being aged 35–54 years
- 33% of visitors came from Sydney and 19% from other parts of New South Wales.

In terms of the trip nature:

- 65% visited Canberra specifically for the exhibitions, while 22% said the exhibitions were a contributing factor for their visit
- 81% stayed for one or more nights, while 19% were day visitors
- On average, visitors stayed 2.8 nights in Canberra.

Key findings

'Blockbuster' exhibitions play a key role in drawing visitors to Canberra and stimulating repeat visitation. They are also doing 'work for Canberra' by creating very strong levels of word-of-mouth recommendation from visitors:

- 78% of visitors stated that the *Renaissance* exhibition was a reason for their visit to Canberra (of these, 74% said it was the main reason).
- 49% said that the *Handwritten* exhibition was a reason for their visit to Canberra (of these, 78% said it was the main reason).
- 69% of exhibition visitors were very/fairly likely to return to Canberra in the next 12 months to attend another blockbuster exhibition. Of these visitors, 72% said the quality of the exhibition would be a key influencing factor on their decision.
- 88% of visitors to the *Renaissance* and/or *Handwritten* exhibitions had recommended the exhibitions to their friends or family.

In terms of actual expenditure from exhibition visitors, the economic benefit to Canberra is clear:

- On average, exhibition visitors spent \$314 on their trip to Canberra.
- Expenditure prior to and during the trip was spread across a range of categories including accommodation, entertainment, transport, food/drink and shopping (including gifts/souvenirs).
- Day visitors to Canberra spent \$106 on average, while the average expenditure of overnight visitors was \$373.

² For the purpose of this report, 'visitor' refers to the survey respondents. The results of this research have not been weighted.

The Visiting Friends and Relatives (VFR) market plays an important role in facilitating visitation to exhibitions, and local residents see the economic and image benefits for Canberra that stem from hosting these types of events:

- 28% of exhibition visitors said that a reason for visiting Canberra was to see friends or relatives, while 23% stayed in the home of a friend or relative during their visit to Canberra.
- Of the Canberra residents interviewed, 63% said they had either hosted or would host visitors while the events were on in Canberra.
- 50% of these local hosts either took or planned to take their visitors to both the *Renaissance* and *Handwritten* exhibitions.
- There was a positive sentiment towards the exhibitions from Canberra residents: 88% said exhibitions help profile Canberra in a positive light; 64% said they showcase Canberra's ability to host major events; and 64% said they provide economic benefits to the region.

The broader Canberra tourism industry also clearly benefits from exhibition visitors, who are highly likely to disperse to other attractions; return to Canberra for other activities; and recommend Canberra as a destination to friends or family:

- Exhibition visitors also visited other attractions in Canberra: 70% visited art-based attractions, 66% restaurants/cafes, 44% museums/memorials, 23% nature parks/gardens and 20% major shopping centres/boutique stores.
- 85% said they would consider returning to Canberra in the next 12 months to visit national attractions, while 52% would consider returning for music events, 45% for food and wine and 37% for nature-based activities.
- 78% said they would be very/fairly likely to recommend Canberra as a destination for a holiday and/or short break to their friends and family.

Visitors have a strong link to past exhibitions in Canberra, a desire to attend multiple exhibitions and a strong propensity to re-visit. As a result, over three-quarters of respondents said that an annual schedule of blockbuster exhibitions was an attractive proposition. Messaging should focus on the key historical aspects of the exhibition (where relevant) and the opportunity to see a rare, high calibre exhibition that would normally require an overseas trip:

- 68% of exhibition visitors had been to previous blockbuster events at the National Gallery of Australia, while 53% had been to *Floriade*.
- 56% said they would be very likely to return to Canberra for a blockbuster exhibition in the next 12 months, while 25% would be fairly likely to do so.
- 76% found an annual schedule of blockbuster exhibitions appealing (very/fairly appealing).
- In terms of what visitors liked most about the exhibitions, 86% said it was an opportunity to see a piece of history, 75% said it was rare to see such a high calibre exhibition and 57% said they would usually have to go overseas to see an exhibition like *Renaissance* or *Handwritten*.

Packages (accommodation and exhibition tickets at a number of price points) were 'lukewarm' in appeal, particularly to the strong VFR market. Reactions may also have been impacted by the desire to 'trade down' (i.e. sleep cheap, eat expensive) and uncertainty over the range of product options (particularly accommodation):

- 17% said that packages were very attractive when deciding whether to visit, 36% said they were fairly attractive and 32% were indifferent about packages when deciding to visit (i.e. they were neither attractive nor unattractive).
- 74% said the cost would be the most important driver when choosing a package.
- Findings from TNS' Domesticate™ 2011 qualitative study³ found that being able to 'trade up/trade down' is an important driver of domestic travel and visitors may feel that packages limit this – especially amongst the VFR market.

³ Commissioned by Tourism Australia – Key findings available at www.tourism.australia.com

Recommendations

In its five-year strategic plan, Australian Capital Tourism has focused on shifting perceptions and building awareness of Canberra using both the 'See yourself' brand architecture and also via a strong focus on partnerships. Canberra can offer visitors an attractive mix of experiences and activities including world-class cultural experiences, nature-based and outdoor adventure activities along with food and wine tourism products (some based outside the ACT but with strong brand associations).

However, changing perceptions require a significant investment of time and capital. Therefore, it is important to identify experiences that have strong potential to communicate a message about Canberra as a diverse, innovative and evolving tourism destination. Research around visitor perceptions of Canberra consistently indicate that visitors to Canberra are pleasantly surprised by the quality of their experience in the nation's capital. The challenge is to further raise awareness of the experiences on offer, thus increasing engagement and preference.

The following recommendations are based on key research findings and encourage increased visitation to Canberra through experiences and activities.

Exhibition visitors have a strong link to past exhibitions in Canberra, a desire to attend multiple, high-calibre exhibitions and a strong propensity to re-visit:

- An annual program of 'blockbuster exhibitions' in Canberra is an attractive proposition to visitors and consideration of this strategy is strongly recommended.
- However, being able to attend multiple exhibitions during the same visit is a stronger influencing factor. Therefore, scheduling of exhibitions should include some that run concurrently.
- The quality of exhibitions is very important and high-calibre exhibitions should be widely promoted.

The VFR market plays a strong role in facilitating visitation to exhibitions, with positive sentiment and advocacy amongst Canberra residents:

- There is a clear opportunity to leverage the VFR market – particularly to generate awareness of Canberra as a short-break destination.
- TNS' Domesticate™ 2011 research has shown that the most appealing messages for this market are 'connection and experience', which aligns well with this strategy.
- The already strong positive sentiment and advocacy from Canberra residents should be encouraged further to generate increased visitation and word-of-mouth recommendation.

The main target audience for blockbuster exhibitions has been identified as older couples, typically with no children, who reside in Sydney or regional NSW and are on a short break:

- This group should be considered as the core target market for major exhibitions.
- Communications should be tailored to address this group accordingly and focus on short-break experiences.

Finally, dispersal to other attractions and events by exhibition visitors either during the trip or as part of a plan for re-visitation is strong:

- By exceeding expectations, exhibitions can affect visitors' overall experience of Canberra and generate a positive economic impact for Canberra as a whole.
- A co-operative marketing strategy with other attractions, events or experiences should be supported to maximise yield from exhibition visitors while they are in Canberra.
- In addition to future exhibitions, visitors are most likely to return to Canberra to visit national attractions, attend music events, experience local food and wine and for nature-based activities. These activities should be promoted alongside exhibitions to increase engagement and preference for Canberra.

Acknowledgements

This summary is extracted from research conducted by TRA and Australian Capital Tourism in partnership with TNS. For the full Strategic Research Report, please email tourism.research@ret.gov.au.

Contributors

TRA: Robyn Agnew, Hannah Killalea

Australian Capital Tourism: Justin Lalor

Editing, design and production

TRA: Darlene Silec

Whalen Image Solutions

Tourism Research Australia

Department of Resources, Energy and Tourism

GPO Box 1564

Canberra ACT 2601

Email: tourism.research@ret.gov.au

Web: www.ret.gov.au/tra

ABN: 46 252 861 927

Image: Sandro Botticelli, *The story of Virginia the Roman* c. 1500, part of the *Renaissance* exhibition (15th and 16th Century Italian Paintings from the Accademia Carrara, Bergamo)

Courtesy of National Gallery of Australia

Publication date: August 2012



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