



VISITCANBERRA INDUSTRY BRIEFING

28 NOV 2018



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T2020 UPDATE

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2020 Tourism Review

- 2018 VisitCanberra undertook a review of T2020 performance to date
- Recent changes driving the need for a review:
 - aviation benefits: international & LCC flights
 - significant investment in new hotels & key precincts
 - significant changes to the digital landscape
 - investment in new sector strategies including Cycle and NBT
 - new destination marketing platform and whole of city brand
 - importance of events – acquisition and development.

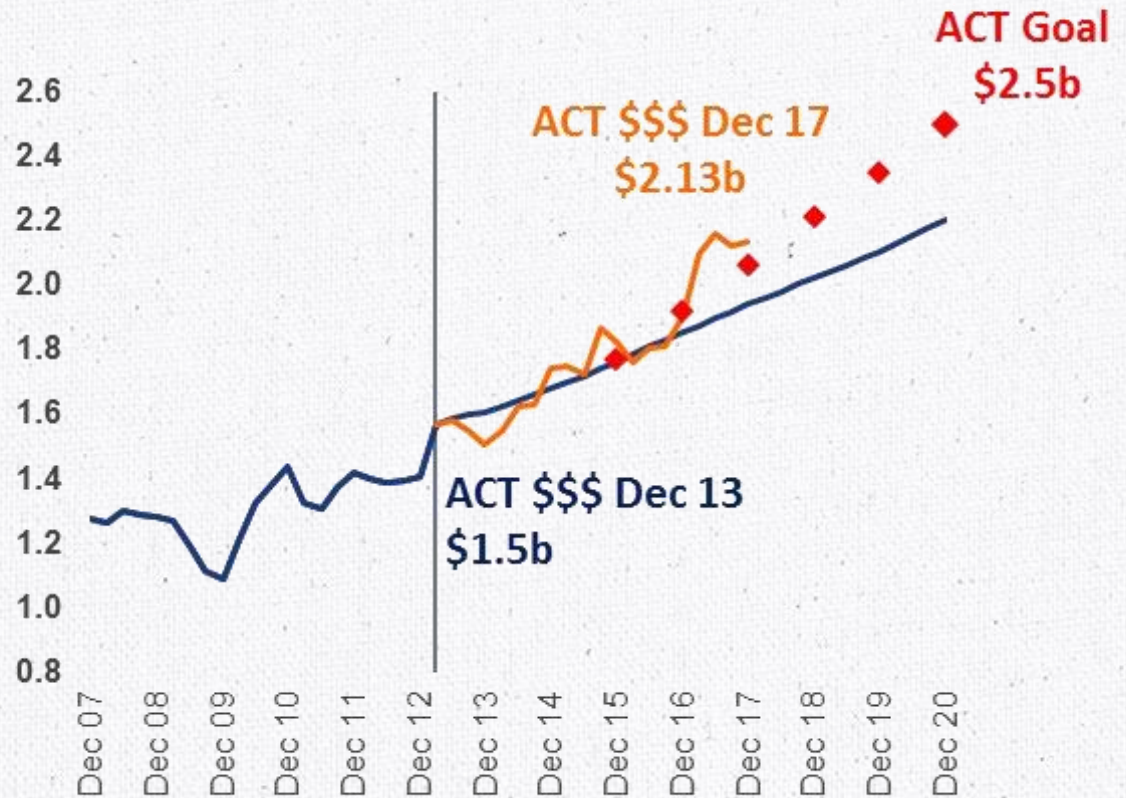
We Are On Track To \$2.5b...

December 2017

Target: \$2.06B

Actual: \$2.13B

ACT Tourism Expenditure
Domestic and International overnight expenditure (\$billions)
Derived by BDA



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ACT Domestic Overnight Visitation Performance

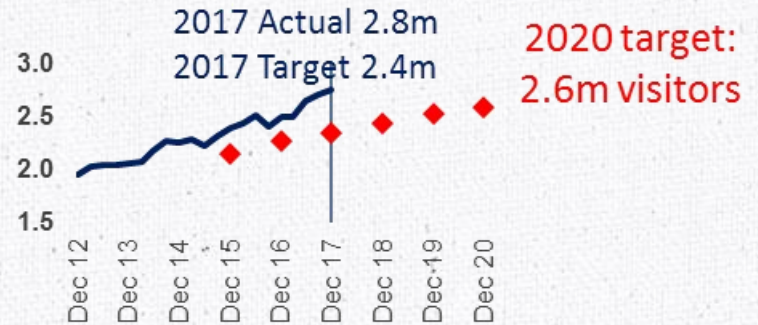
Progressing well against targets:

- Overnight visitation exceeded target strongly
- Visitor nights just exceeded target
- Performance is strong for total tourism and leisure visitors

YE June 18 results:

- 2.7m visitors 
- 7.1m visitor nights (getting there!)

ACT domestic trips – Total
Overnight (millions) – 12MMT
Derived by BDA from NVS



ACT domestic nights – Total
Overnight (millions) – 12MMT
Derived by BDA from NVS



ACT International Overnight Visitor Performance

Progressing well against targets:

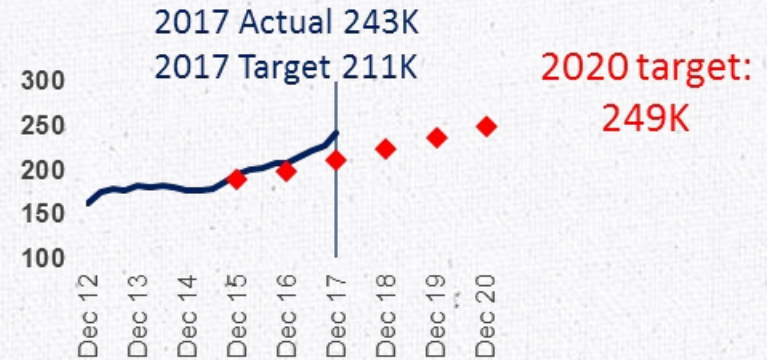
- Overnight visitation exceeded target strongly
- Visitor nights below target but growing (driven by leisure travel)

YE June 18 results:

- 249K visitors ★★ ★
- 5.7M nights (getting there!)

ACT international trips – Total

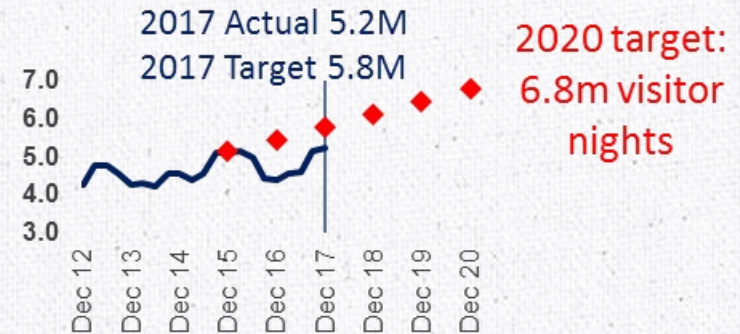
Overnight (000's) · Derived by BDA



ACT international nights – Total

Overnight (millions) – 12MMT

Derived by BDA from NVS

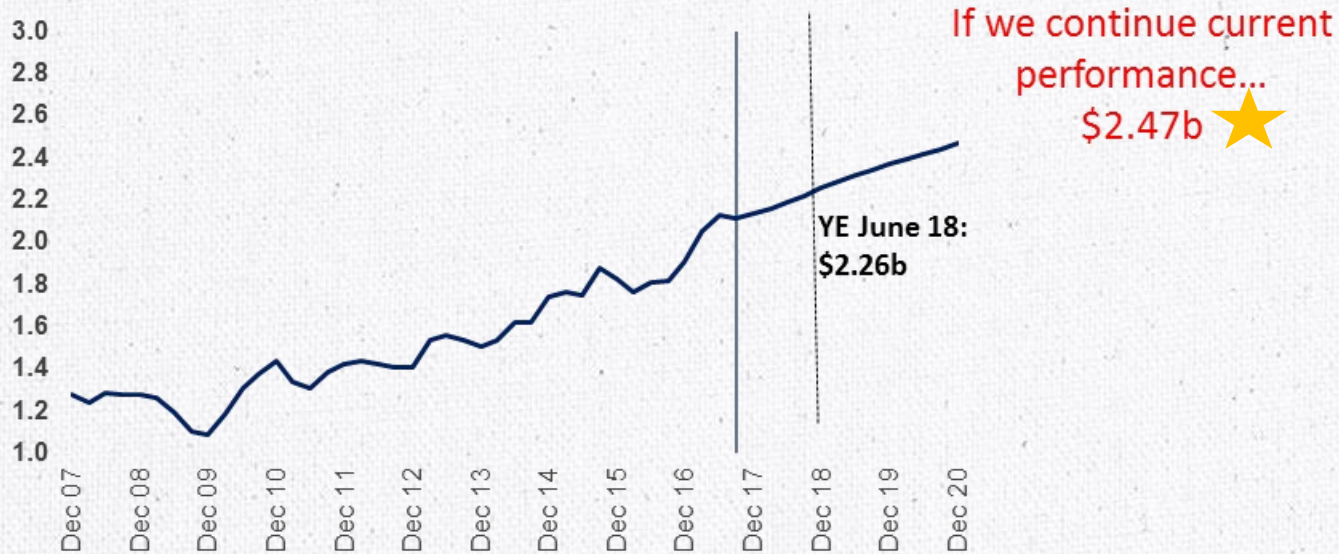


We Are On Track To \$2.5b...

ACT Tourism Expenditure

Domestic and International overnight expenditure (\$billions)

Derived by BDA



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T2020 Review – What We Learned...

- Canberra is performing strongly driven by overnight visitation and expenditure. Visitor Nights are improving.
 - Domestic performance is strong and driven by leisure
 - International performance is also growing rapidly. Visitation driven by leisure from China, USA, UK, India and Singapore. Expenditure growth driven by education
- Currently at \$2.26b in overnight visitor expenditure (June18)
 - On track to achieve our \$2.5b goal

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T2020 Review - Focus Areas

FOCUS:
Key markets...
• More flights!

FOCUS AREAS

Domestic Marketing

International Marketing

Experience Development

Aviation

Investment
(& Business Environment)

OUTCOMES

FOCUS:
New visitor segments...

- Greater awareness of our experiences /events
Greater overnight leisure spend per trip
- Greater advocacy for our destination

FOCUS:
HVT visitor segments...

- Greater awareness and consideration of the destination
- Greater overnight leisure spend and length of stay per trip

FOCUS:
Key markets...

- New & enhanced experiences & events
- More travel trade selling destination experiences & events
- Enhanced industry capabilities

FOCUS:
Key markets...

- More unique accommodation
- A connected tourism & events sector supported by Government.

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INTERNATIONAL STRATEGY

MAISI AHUJA

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International Strategy



Destination – awareness, consideration, intent



Our goal: grow the value of overnight visitor expenditure in the ACT to \$2.5b by 2020

Delivered through:



- Partnerships
- Industry



- Distribution
- Marketing

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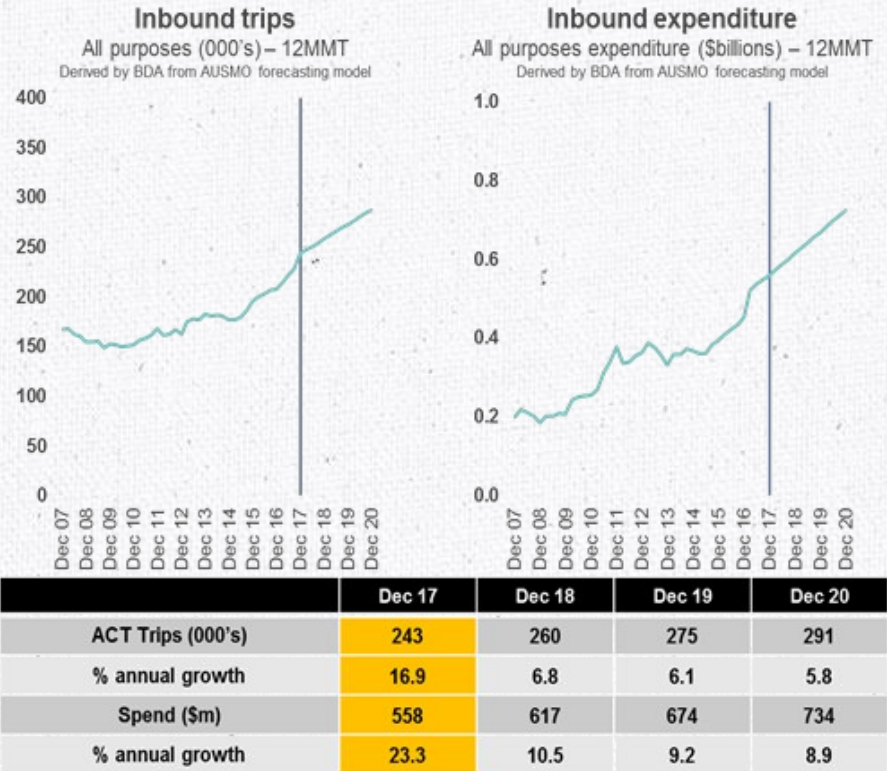


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Total International Inbound Arrivals

To achieve international visitor goals, ACT needs to grow:

- International arrivals by 5.7% per annum to 2020
- International spend by 9% per annum to reach \$734 million



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Challenges Achieving \$734m By 2020

- **Low awareness** of Canberra as a destination
- **Low awareness** of Canberra as a destination and its key experiences
- **Attracting** new travellers from key markets
- **Generating more value** from our international leisure visitors

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Australia's Global Audience

Definition of a High Value Traveller (HVT)



Travel Long Haul

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



Preference for Australia

Consideration or intention to visit Australia.



Key Drivers for Destination Choice

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



Represent High Value

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

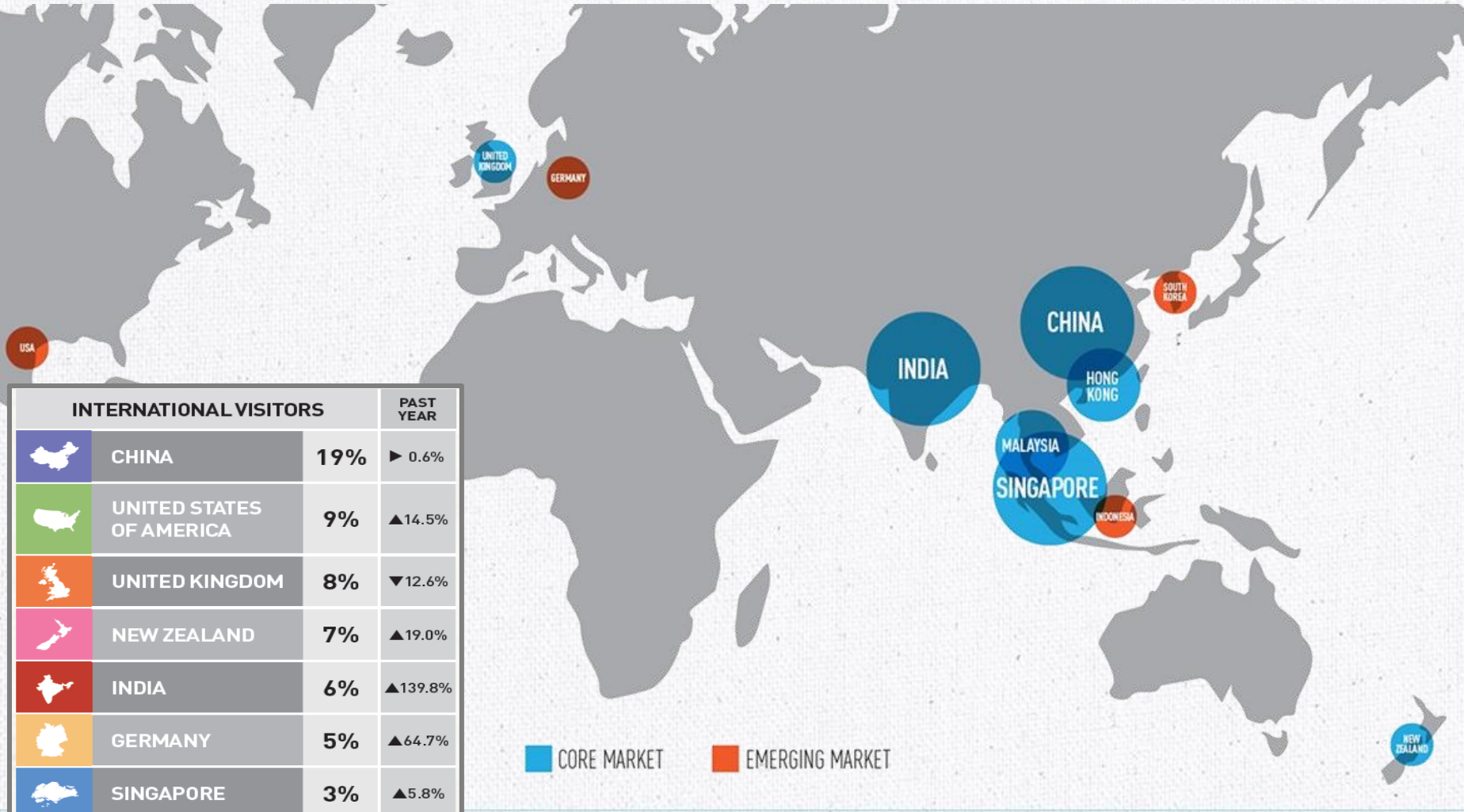












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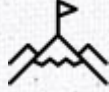
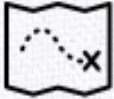


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Who's Coming & Why?



INTERNATIONAL VISITORS			PAST YEAR
	CHINA	19%	► 0.6%
	UNITED STATES OF AMERICA	9%	▲ 14.5%
	UNITED KINGDOM	8%	▼ 12.6%
	NEW ZEALAND	7%	▲ 19.0%
	INDIA	6%	▲ 139.8%
	GERMANY	5%	▲ 64.7%
	SINGAPORE	3%	▲ 5.8%
	HONG KONG	3%	▲ 56.8%
	MALAYSIA	3%	▲ 27.4%
	CANADA	3%	▲ 72.2%

Our Approach To Achieving 2020

- **Increase** leisure nights and spend 
- **Increase** awareness of Canberra and its experiences 
- Drive **consideration and intent** for Canberra 
- **Focus** on education and product development 

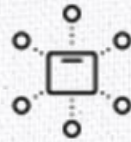
Delivered Through...

Partnerships



Singapore Airlines, Tourism Australia, NCETP, Canberra Convention Bureau

Marketing, PR and campaigns



Partnership marketing eg airlines, distribution partners

Owned channels

IMHP/VJP famils

Trade and Distribution

Implementing trade engagement strategy



Singapore in-market resource

Aussie Specialist Program

Attendance at key trade events

Trade famils

Sales Mission

Industry Development



Three year Accelerator Program

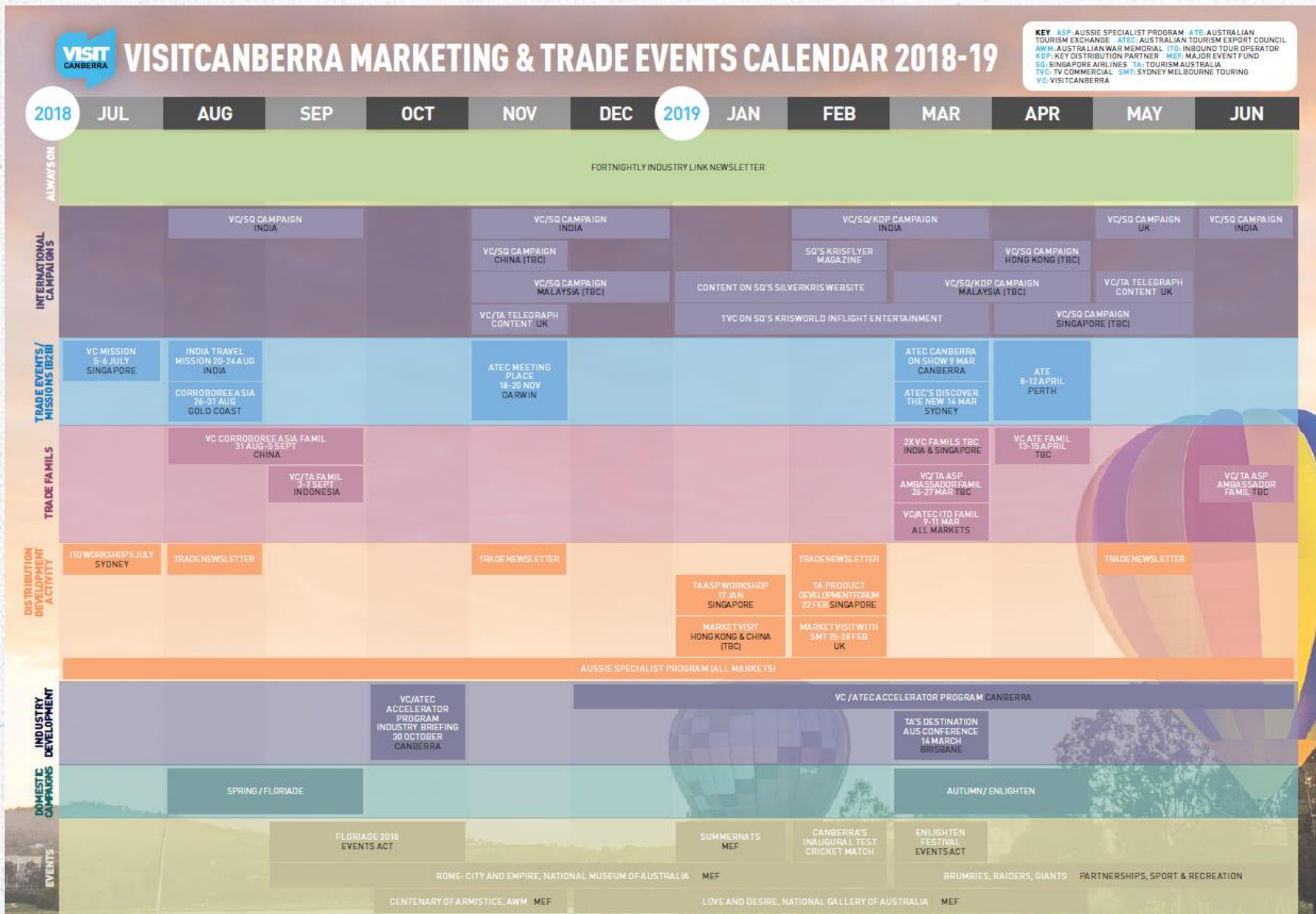
Signature Experiences of Australia

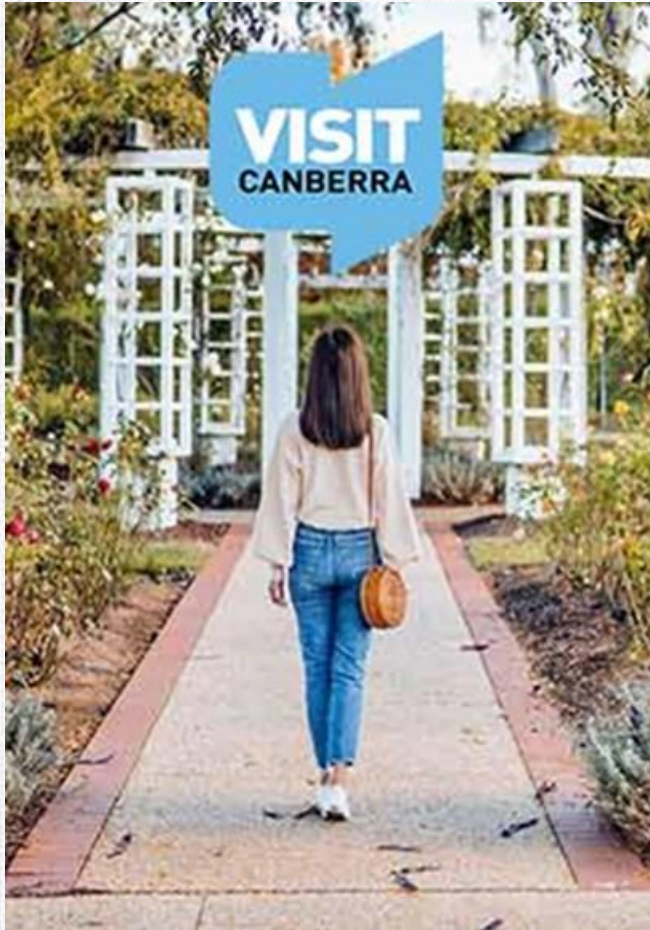
Industry education

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Overview of Planned Activities





DESTINATION MARKETING STRATEGY

HELENA CATALDO

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Campaign TVC



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Delivered Through...



Destination – awareness, overnight expenditure, advocacy



Our goal: grow the value of overnight visitor expenditure in the ACT to \$2.5Billion by 2020



Delivered through:

- OGTA Campaign
- Partnership Platform
- Destination Support



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Our Audience. Your Visitors.

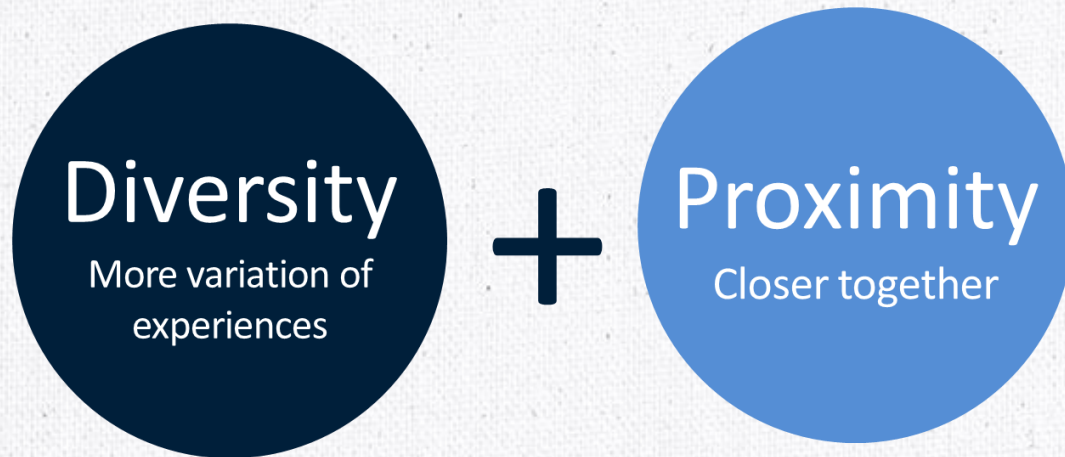


Variety Seekers	Memory Makers	Discoverers	Rechargers	Event Seekers
<i>"Life is action packed but there's always an excuse to get away. A short break for us is often jumping in the car and spending a weekend seeing and doing fun and interesting things"</i>	<i>"A short break is for family bonding"</i>	<i>"All forms of travel – long haul and short-breaks – help to fulfil our strong and innate sense of curiosity and our almost continual need to experiencing and understanding the world and the people in it"</i>	<i>"Short breaks are a time to decompress and escape from real life"</i>	<i>"Events are how we pursue interests and passions, and we'll often build short breaks around them"</i>
28%	18%	13%	20%	8%

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Canberra has something **true,**
unique and differentiating to
offer consumers...



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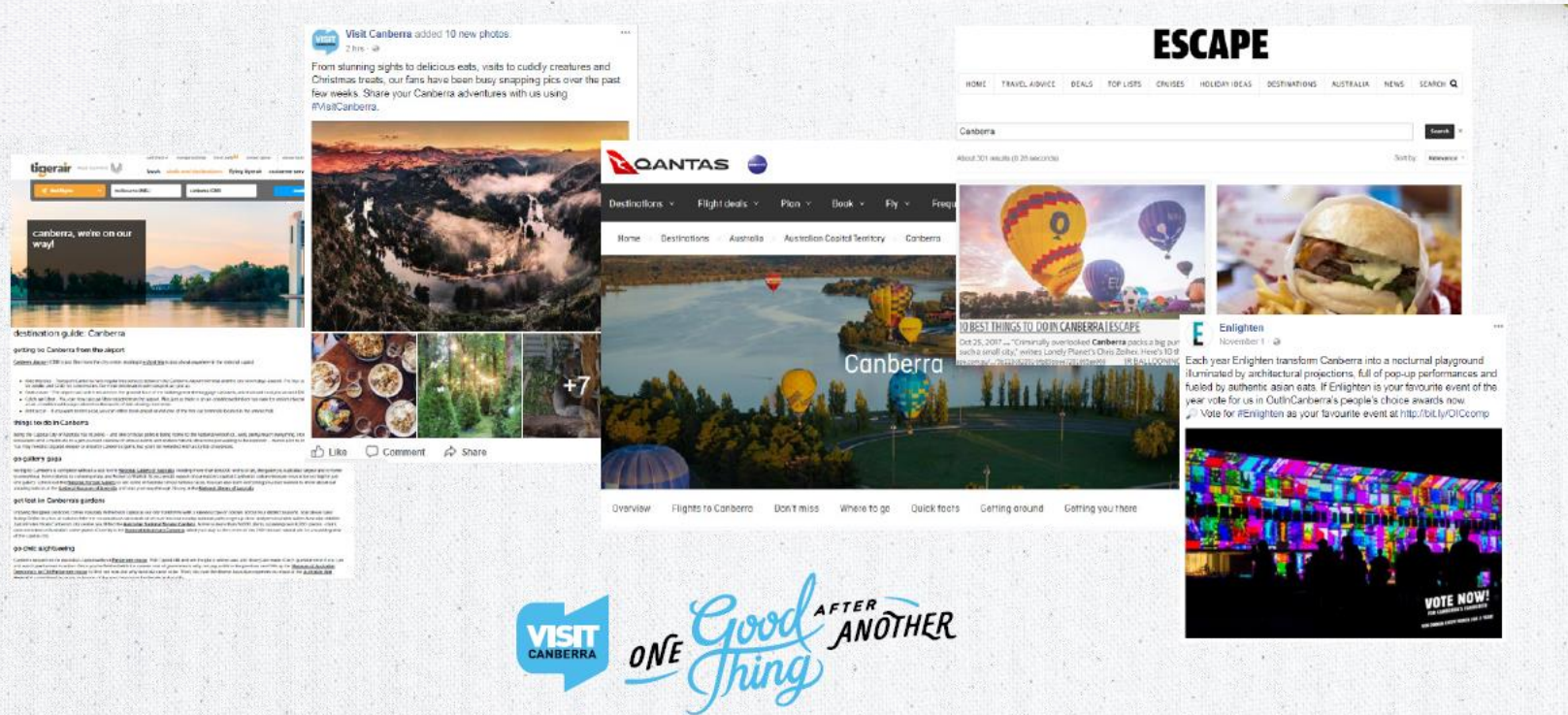
Long-term, integrated marketing platform that demands reappraisal of Canberra as a tourist destination.

- ◆ A **refreshed creative positioning** for all marketing activities/programs.
- ◆ **Excite and inspire** potential tourists about Canberra's evolution.
- ◆ Create **partnerships** inside and outside of the travel sector.
- ◆ Commercial success in the form of **increased room nights** and dollar spend.
- ◆ **Global** appeal.
- ◆ Encourage **advocacy and sharing**.

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Campaign Assets

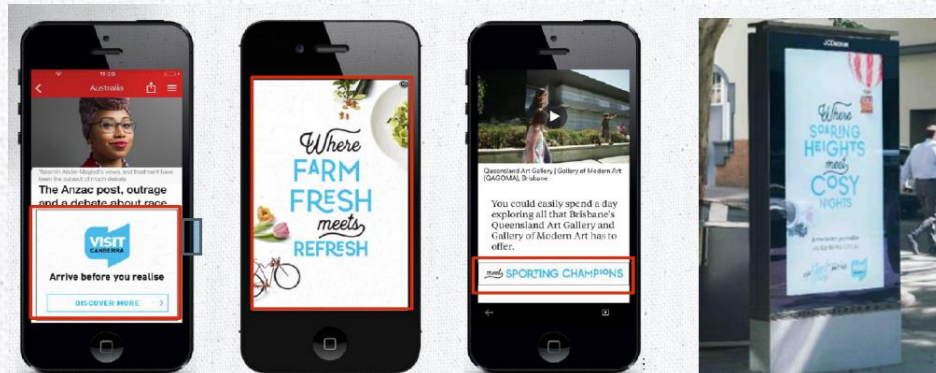
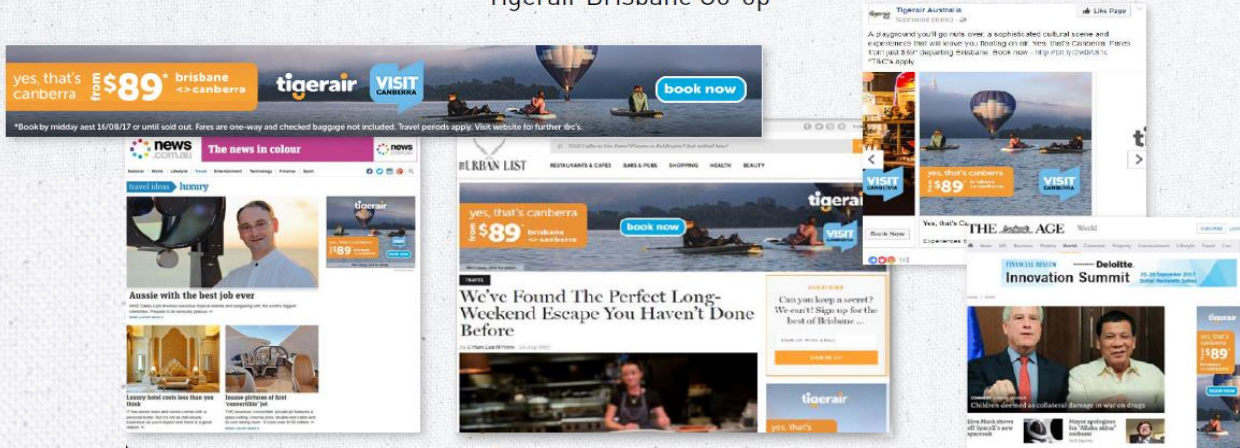


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Campaign Assets

Tigerair Brisbane Co-op



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FY 19 Domestic Marketing Approach

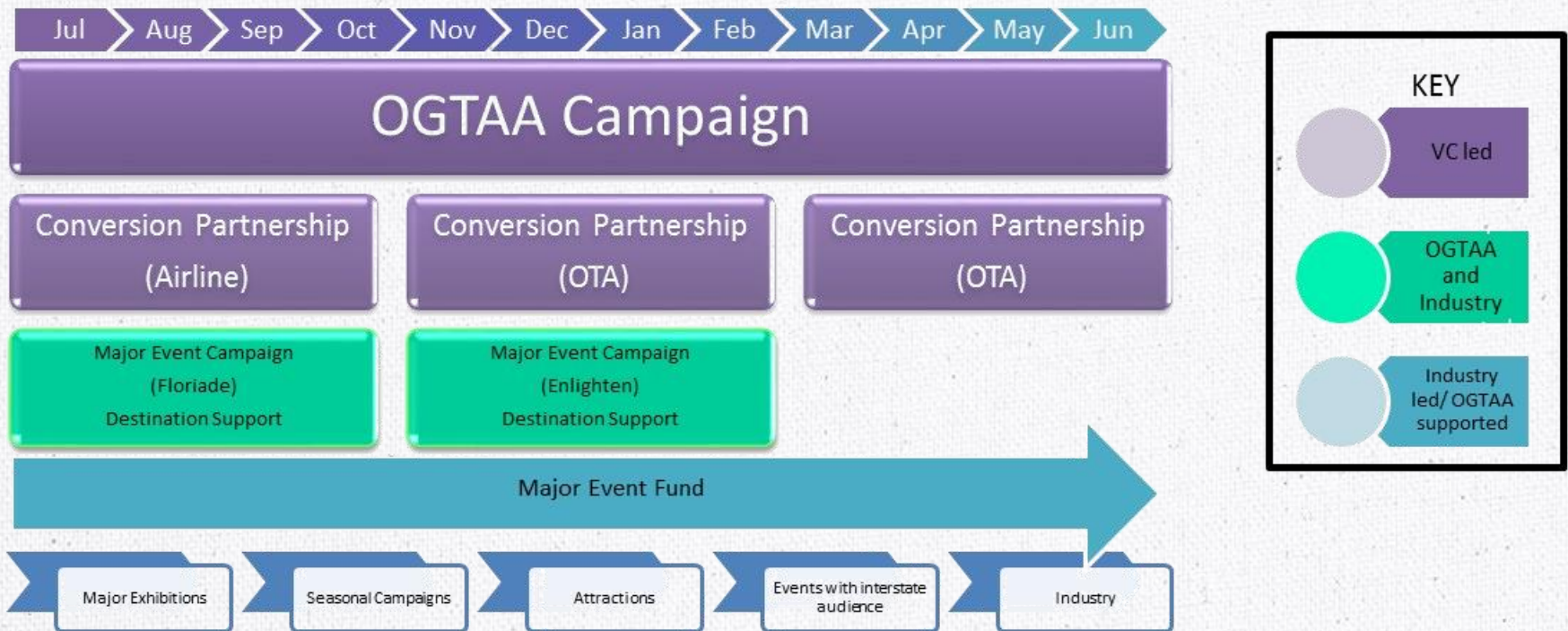


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Strategic Approach

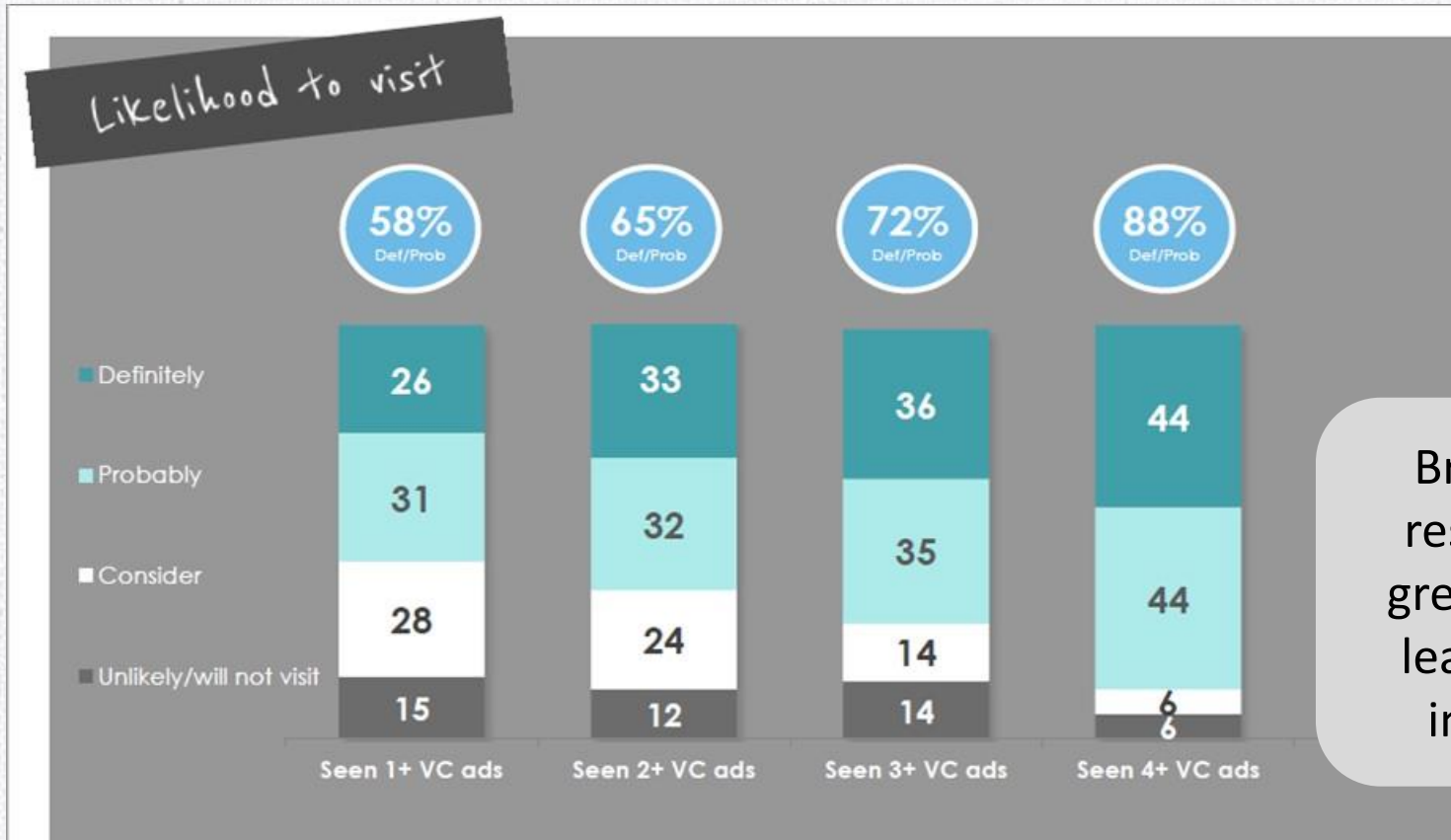
Campaign | Partnership Platform | Destination Support



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Our Campaign Activity Influences Visitation...



Brand tracking research shows greater exposure leads to greater intent to visit

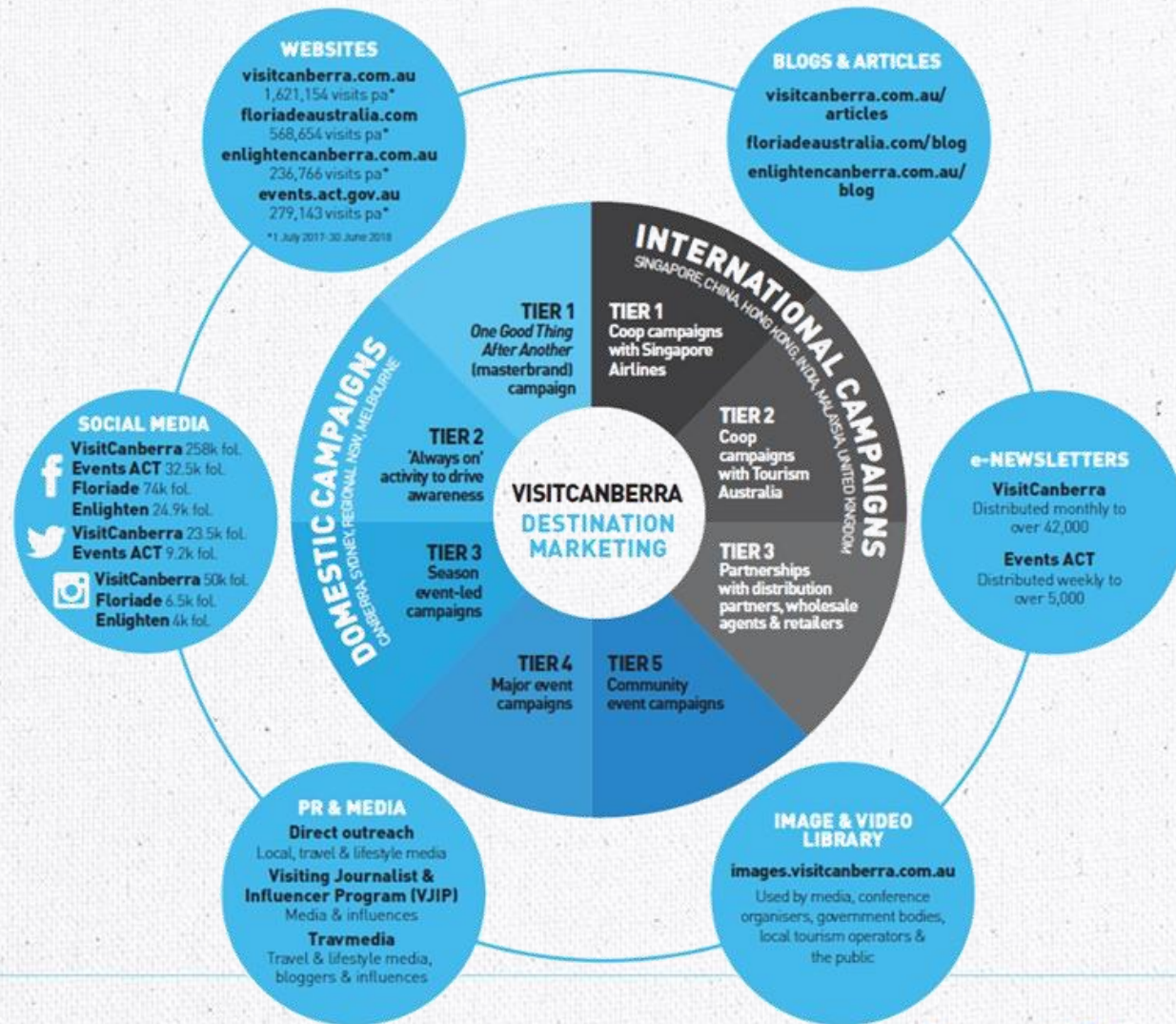
Campaign



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Campaign



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Partnership Platform



Conversion Partnership One

- When? July 2019
- Where? Sydney & Melbourne
- Who? Airline and Accommodation
- Why? Encourage visitation in July and August



Conversion Partnership Two

- When? September 2019
- Where? Regional & Metro NSW; Regional & Metro Vic
- Who? Online Domestic Travel Agent
- Why? Leverage Floriade and a range of other Canberra events in Spring to encourage visitation to Floriade and NightFest, in addition to boosting visitation and overnight expenditure to the Territory



Conversion Partnership Three

- When? February 2020
- Where? Regional & Metro NSW; Regional & Metro VIC
- Who? Online Domestic Travel Agent
- Why? Leverage March suite of events to create a sense of urgency to visit Canberra, and ultimately boost overnight expenditure for the Territory

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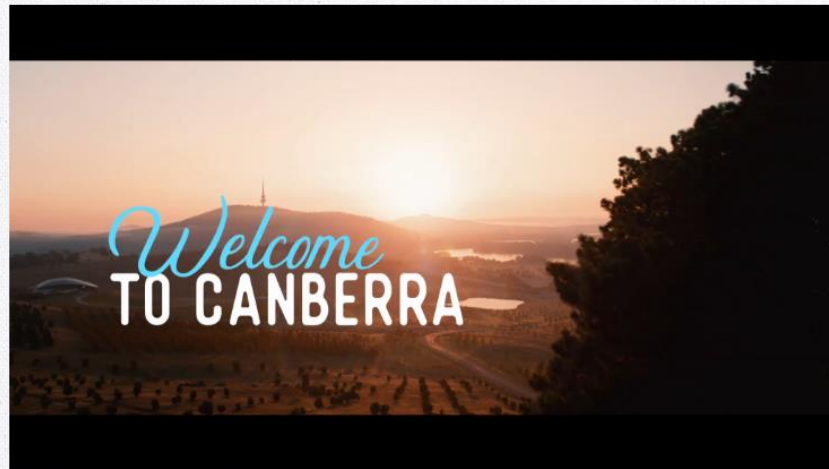
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Destination Support

Major Event Advertising and Industry led advertising will be supported in the same manner throughout the year.

OGTAA advertising placed inline with industry advertising to provide a destination connection.

Example – drawing a stronger destination link between Canberra and Jamala



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THANK YOU!



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