

VisitCanberra International Plan 2019



ACT
Government



CANBERRA



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Introduction

VisitCanberra leads the ACT and Canberra region tourism industry to create and implement a range of marketing and development programs that increase the economic return from domestic and international visitation.

This International Plan provides a framework to inform and support VisitCanberra's approach to identifying and growing visitation from key international markets. The plan is designed to align with the ACT's Tourism 2020 goal of increasing the value of tourism to \$2.5 billion by the year 2020.

VisitCanberra's key international priorities are to:

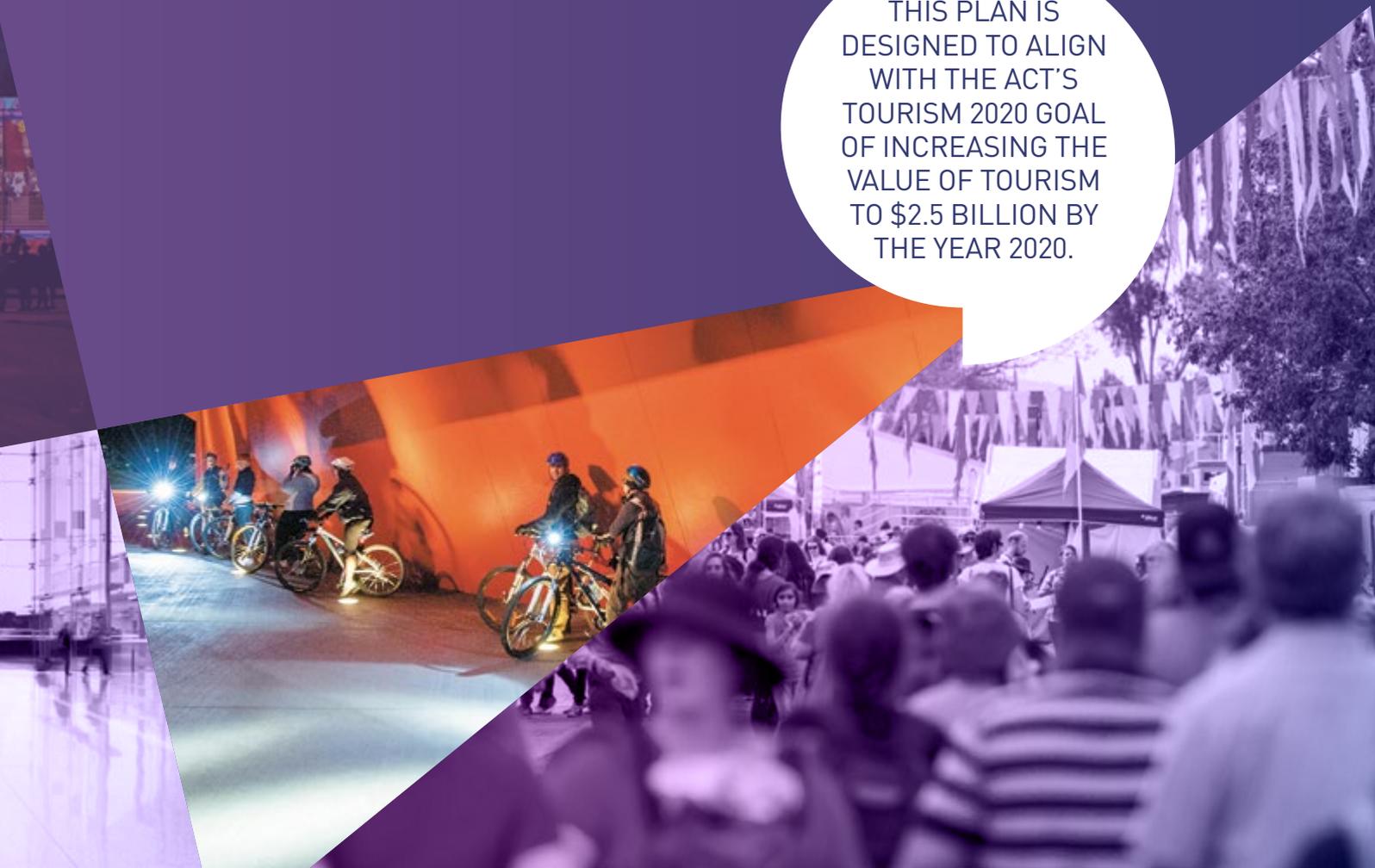
- Raise awareness of the destination and its experiences/events amongst key audiences in key markets
- Capture and grow the number of leisure visitors considering the ACT and Canberra region
- Convert potential leisure visitors and increase spend per trip
- Grow the number of bookable commissionable products for distribution to travel trade; and
- Increase aviation access from key markets.

We will do this by:

- Marketing the ACT and Canberra region as an Australian destination of choice through key distribution channels
- Advocating and engaging in partnerships that drive awareness and conversion outcomes for the destination
- Engaging with and educating industry to support and improve product and experience development that appeals to key audiences in key markets; and
- Developing and managing relationships (and business cases) that support negotiations with target airlines in key markets.

This plan outlines VisitCanberra's approach to identifying and growing international visitation for the next two years and provides an overview of our international audiences and markets; competitive advantage, mix of programs and activities; and how we measure success.

THIS PLAN IS
DESIGNED TO ALIGN
WITH THE ACT'S
TOURISM 2020 GOAL
OF INCREASING THE
VALUE OF TOURISM
TO \$2.5 BILLION BY
THE YEAR 2020.



Our performance

The primary research source used for tracking international performance is the International Visitor Survey conducted by Tourism Research Australia. This provides yearly data, updated quarterly, on the total number of international visitors, their duration of stay and, importantly, their overnight spend.

In 2013 the ACT Government and tourism industry set its Tourism 2020 target of achieving \$2.5 billion in total overnight expenditure by December 2020. At the time the strategy was launched the ACT received \$327 million in spend from our international visitors, representing 21.8 per cent of all overnight spend in the ACT. Fast forward to 2018 and international expenditure now represents 27.5 per cent of all overnight spend in the ACT, with international visitors spending a total \$686 million in 2018. International visitation, nights and spend have all been growing consistently since the

strategy was launched. The strong performance in both international visitors and visitor nights has led to strong overall international spend, with record breaking overnight expenditure being received from international visitors each year since the strategy commenced.

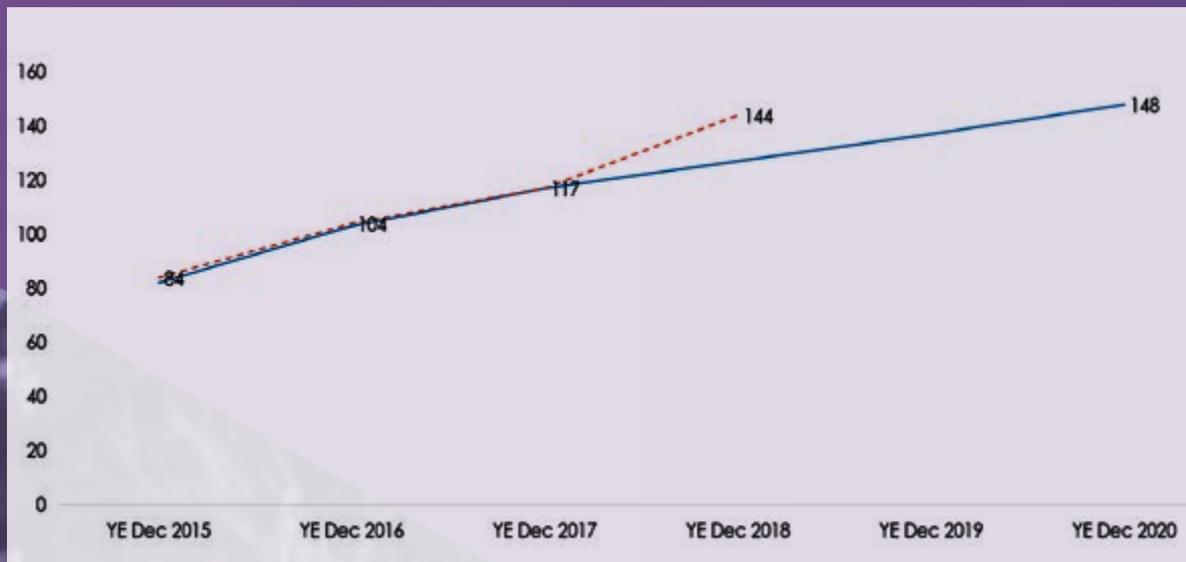
A focus on international leisure

The *Leisure* component of the Tourism 2020 strategy has a sub-target of achieving \$1.098 billion in overnight expenditure by December 2020. Within this sub-target, the international component is \$148 million, with the remaining \$950 million set to be achieved by domestic leisure expenditure.

Figure 1 shows tracking against the international leisure expenditure goal of \$148 million and highlights the ACT is currently above target (at year ending December 2018) and on track to achieve this goal.

Figure 1: International overnight expenditure for the leisure sector.

Year ending December 2018.



INTERNATIONAL
EXPENDITURE NOW
REPRESENTS 27.5
PER CENT OF ALL
OVERNIGHT SPEND
IN THE ACT.

Leisure is the main driver of all overnight expenditure received from our key markets with the exception of China where education accounts for over 90 per cent of all overnight expenditure received. Despite this, China's current leisure expenditure, at 28 million, is the highest for all key markets and shows very strong growth over the past three years, alongside India and also the UK, as outlined in Figure 2.

Figure 2: Key market leisure spend

Year ending December 2015 to year ending December 2018.

Key market:	2014	2015	2016	2017	2018	5 year growth
Hong Kong & China	15	14	20	15	32	113.3%
United Kingdom	10	7	13	12	12	20.0%
New Zealand	5	6	8	5	5	0.0%
India	1	1	2	2	7	600.0%
Singapore	3	5	9	4	4	33.3%
Malaysia*	np	np	np	np	np	np
Germany	3	3	3	5	7	133.3%
United States of America	6	6	10	11	7	16.7%
Key market overnight leisure spend		\$2,052	\$2,069	\$2,056	\$2,082	1.5%

* Sample size for Malaysia is too small to accurately publish data.



Our audience

Tourism Australia has embarked on a journey to transition from predominantly demographically defined and based target audiences across markets, to a global based behavioural and attitudinal target audience. This transformation is underpinned by the development of the High Value Traveller (HVT) segment.

VisitCanberra has adopted the High Value Traveller segment who:

- are likely to spend more, stay longer and disperse more regionally
- travel long haul (out of region) on a regular basis and have a preference for Australia as a holiday destination
- have distinct key drivers for destination choice such as food and wine, aquatic and coastal and nature and wildlife experiences when choosing a holiday destination; and
- represent high value with above average trip expenditure.

The High Value Traveller



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.

VISITCANBERRA
HAS ADOPTED
THE HIGH VALUE
TRAVELLER
SEGMENT.



Our markets

The International Visitor Survey and other key Tourism Research Australia reports, together with visitor demand research conducted by BDA Marketing Planning, has informed where VisitCanberra focuses its efforts internationally. Other considerations include ease of air access and ability to reach and influence key audiences in partnership with key international travel and trade.

The following diagram highlights the core and emerging international markets for the Canberra region — these are the markets that have the greatest potential to grow visitation and overnight expenditure from international visitors.



Our approach

Recent research continues to highlight our destination's ongoing awareness challenges and ability to attract first-time Australian travellers from key international markets. Generating more value from our international leisure visitors per trip also remains a focus.

VisitCanberra's approach to addressing these challenges focuses on working with our key industry, travel and trade partners and includes the following programs and activities:



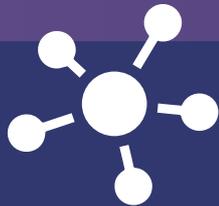
Partnerships that extend reach and impact of campaigns through their marketing and booking channels and drives conversion:

- Aviation partnerships
- Tourism Australia partnership
- Accommodation partnerships
- Canberra Convention Bureau partnership (business events)
- National Capital Education Tourism Project partnership (educational tours).



Trade & Distribution that enable more travel trade selling the diversity of experiences and events to drive intention to visit:

- Key Distribution & Inbound Tour Operator partner programs
- Dedicated in-market representation for Asia based in Tourism Australia Office
- Attendance at sales missions
- Participation in the Aussie Specialist Program
- Attendance at global trade events.



Marketing & Campaigns that enable distribution of quality content through influential channels to generate greater awareness of Canberra and its unique positioning:

- Consumer and trade specific campaigns
- Content marketing partnerships
- Key Distribution Partner marketing campaigns
- Media hosting and Influencer familiarisation programs.



Industry Development to support and improve product and experience development that appeals to our international traveller segment:

- Three Year Accelerator Program in partnership with Australia Tourism Export Council
- Product development support
- Signature Experiences of Australia product development
- China Ready program.

GENERATING MORE
VALUE FROM OUR
INTERNATIONAL
LEISURE VISITORS
PER TRIP REMAINS
A FOCUS.



Our competitive advantage

Destination Brand

One Good Thing After Another is the creative platform central to VisitCanberra's marketing activity. It has been designed as a long-term marketing platform, from which we can evolve destination messages.

One Good Thing After Another will continue to bring our destination's experiences and major events to life in an

engaging and vibrant way, and focuses on Canberra's competitive advantage of offering a diversity of visitor experiences that are so close together.

The diversity and proximity message underpins VisitCanberra's marketing efforts, and offers a unique selling proposition for our destination. It appeals to the consumers' desire to see and experience more in less time and offers a great opportunity to demonstrate that a visit to the Canberra region truly is *One Good Thing After Another*.



CBR — whole of city brand

As one of the world's most liveable cities — we have clear assets and strengths of a capital city with global reach. Coupled with a reputation for openness, inclusiveness and tolerance, Canberra truly is a city like no other.

The tourism sector is a key contributor to maintaining visibility of Canberra's whole of city brand. Destination marketing efforts provide an array of opportunities to position Canberra as a vibrant and inclusive city full of opportunity for visitors, investors, students, residents and business.

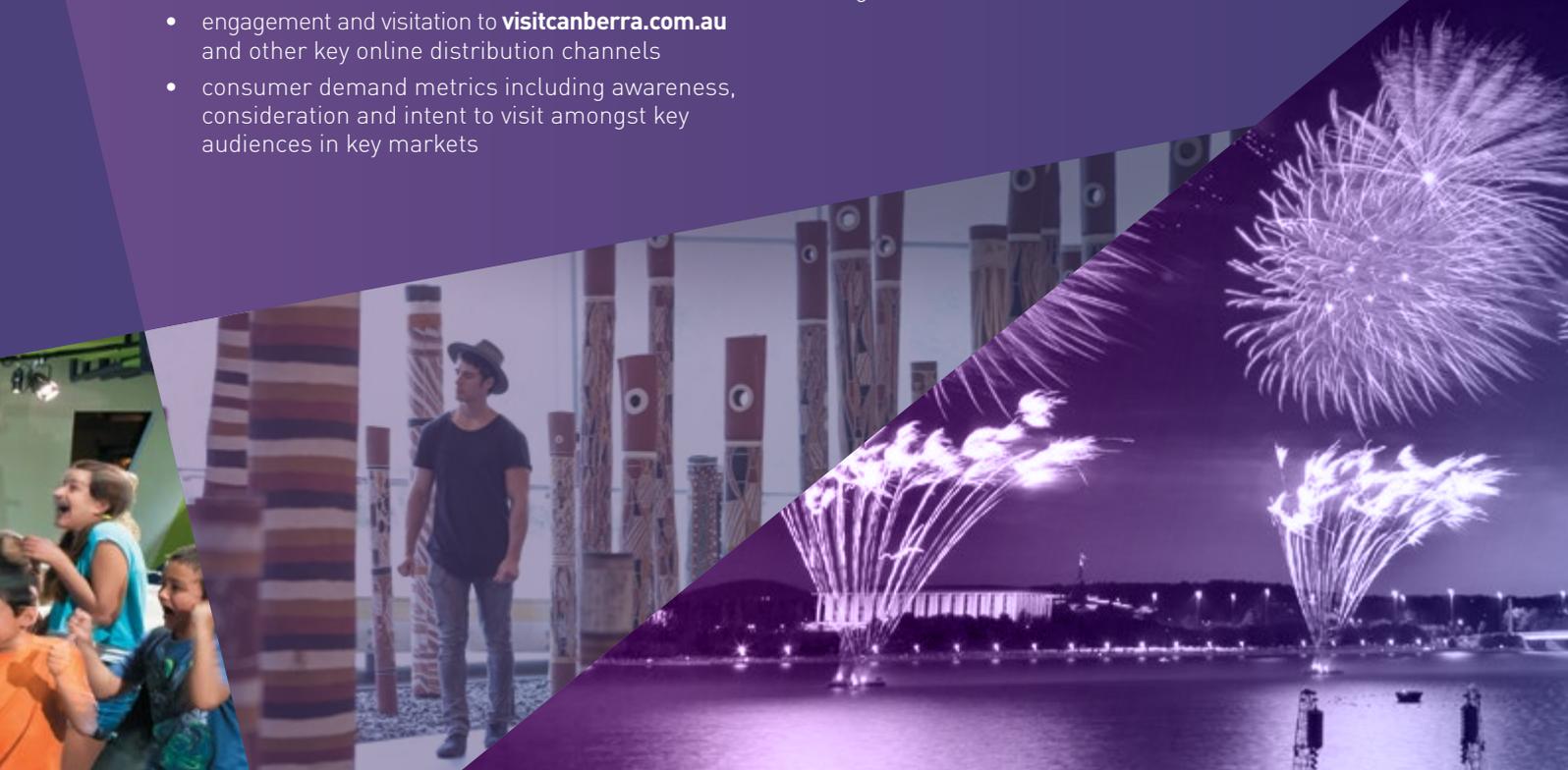
Our measure of success

This plan informs integrated marketing and development programs for the destination to increase economic return from international leisure travel.

VisitCanberra will draw on a number of different data sources to monitor and respond to changing visitor demand and preferences. Metrics will include year-on-year growth in:

- engagement and visitation to visitcanberra.com.au and other key online distribution channels
- consumer demand metrics including awareness, consideration and intent to visit amongst key audiences in key markets

- international overnight expenditure, nights and visitors from key markets
- availability and number of bookable commissionable products for distribution to international travel trade; and
- volume and/or frequency of international flights into Canberra.



VisitCanberra marketing & trade events

	JAN	FEB	MAR	APR	MAY	JUN	
ALWAYS ON	FORTNIGHTLY INDUSTRY LINK NEWSLETTER						
	AUSSIE SPECIALIST PROGRAM						
INTERNATIONAL CAMPAIGNS	VC/SQ KDP CAMPAIGN HK	VC/SQ CAMPAIGN INDIA		VC/SQ/FCM CAMPAIGN INDIA	VC/SQ CAMPAIGN UK		
	SQ'S KRISFLYER MAGAZINE SPREAD				VC/SQ CAMPAIGN CHINA (TBC)	VC/SQ CAMPAIGN INDIA	
	SQ'S SILVERKRIS ONLINE CONTENT						
	30s TVC ON KRISWORLD						
	VC/SQ CAMPAIGN SINGAPORE						
	VC/SQ CAMPAIGN MALAYSIA						
TRADE EVENTS / MISSIONS (B2B)			ATEC CANBERRA ON SHOW 9 MAR CANBERRA				
			ATEC'S DISCOVER THE NEW 14 MAR SYDNEY	ATE 8-12 APRIL PERTH			
TRADE FAMILS			SIN MISSION COMPETITION WINNER 1 10-14 FEB	INDIA ITO FAMIL 9-13 MAR			
				BECKY MCNUTT - UK ASP WINNER 5-7 MAR			
				SIN MISSION COMP WINNER 2 4-11 MAR			
DISTRIBUTION DEVELOPMENT ACTIVITY	HK & CHINA MARKET VISIT + HK ONE VOICE EVENT 18 JAN	TA ASP PRODUCT DEVELOPMENT FORUM 18 FEB SINGAPORE 20-22 FEB MALAYSIA	TRADE EDM	TA ASP EVENT 2-3 APRIL MALAYSIA (KL)	TA ASP EVENT MALAYSIA TRAINING 6-10 MAY MALAYSIA (IPOH/PENANG)	TRADE EDM	
	TA ASP WORKSHOP 17 JAN SINGAPORE					TA ROADSHOW 18-20 JUNE MALAYSIA	
	TA ROADSHOW 23-25 JAN MALAYSIA	UK SALES CALLS WITH SMT 25-28 FEB			TA ASP EVENT TRAINING SINGAPORE	ASP BANNER PROMOTION HK, INDIA & NZ	
	ASP BANNER PROMOTION UK & GERMANY						
INDUSTRY DEVELOPMENT	VC / ATEC ACCELERATOR PROGRAM CANBERRA						
				TA'S DESTINATION AUSTRALIA CONFERENCE BRISBANE			
MEDIA VISITS			IMHP HK DAY COOK 10-14 MAR	MAL SQ/VC KOL 30 APR-3 MAY			
PARTNER FAMILS			ASP AMBASSADOR PROGRAM FAMIL USA, GERMANY, NZ				
			ATEC ITO FAMIL 9-11 MAR			ASP AMBASSADOR PROGRAM FAMIL 18-26 JUN SINGAPORE, INDIA, MALAYASIA	

calendar 2019

KEY **ASP:** AUSSIE SPECIALIST PROGRAM **ATE:** AUSTRALIAN TOURISM EXCHANGE
ATEC: AUSTRALIAN TOURISM EXPORT COUNCIL **AWM:** AUSTRALIAN WAR MEMORIAL
ITO: INBOUND TOUR OPERATOR **KDP:** KEY DISTRIBUTION PARTNER **MEF:** MAJOR EVENT FUND
SQ: SINGAPORE AIRLINES **TA:** TOURISM AUSTRALIA **TVC:** TV COMMERCIAL
SMT: SYDNEY MELBOURNE TOURING **VC:** VISITCANBERRA

JUL AUG SEP OCT NOV DEC



	AUSTRALIA MARKETPLACE 8-12 AUG INDIA	AUSTRALIA MARKETPLACE 30 SEP-2 OCT SEA	AUSTRALIA MARKETPLACE 30-31 OCT LONDON	AUSTRALIA MARKETPLACE 11-15 NOV CHENGDU
	AUSTRALIA MARKETPLACE 26-29 AUG USA	WORLD ROUTES 21-24 SEP ADELAIDE	CORROBOREE WEST 8-11 OCT PERTH	

SINGAPORE TRADE FAMIL - WINTER			CORROBOREE WEST FAMIL 12-17 OCT DNSW/VC/UK/NZ	
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		TRADE EDM	ASP BANNER PROMOTION CHINA	ASP BANNER PROMOTION SINGAPORE & MALAYSIA	TRADE EDM
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			VC / ATEC ACCELERATOR PROGRAM INDUSTRY BRIEFING & EOI		ACCELERATOR PROGRAM COMMENCEMENT
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Further information

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