



ACT Visitor Profile and Satisfaction Report: Summary of results

The ACT Visitor Profile and Satisfaction (VPS) project was completed through the Destination Visitor Survey Program (DVS) run by Tourism Research Australia (part of the Department of Resources, Energy and Tourism).

Two waves (seasons) were completed:

	Research conducted	Visitor sample
Winter	July and August 2009	226
Spring	September and October 2009	365

Since 2006, about 65 VPS projects have been completed in Australian regional tourist destinations. Data from these projects have been collated to establish the VPS benchmark database. Benchmarks are the average of all (unweighted) VPS destination projects with at least 50 respondents. Only the most recent waves/seasons for each destination are included.

Comparisons against VPS benchmarks are made throughout this summary. To ensure consistency with other benchmark reporting from the benchmark database, benchmarks for all visitors are used.

Summary

In terms of visitation, Winter is a low season in the ACT, whereas Spring is a peak season. Visitation in Spring is boosted by the staging of Canberra's annual flower festival – Floriade.

Results are presented for leisure visitors including those visiting friends or relatives (VFR) and business visitors including those that attended conventions/conferences. The seasonal aspect is an important distinction – especially for leisure visitors – with interesting differences evident between seasons. Because of these differences, this study reports on leisure visitors in each season separately.

The business market is also important to the ACT. According to the National Visitor Survey, nearly 30% of overnight visitors to the ACT in 2009 visited for business purposes. The analysis of business visitors is more limited due to small sample sizes, however, there remain some interesting findings. No distinction is made between seasons for business visitors.



Australian Government

Department of Resources, Energy and Tourism

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Leisure visitors to the ACT

Visitor and trip characteristics

There were some differences in the characteristics of leisure visitors between seasons.

There was a higher proportion of younger visitors (15–44 years) in Winter than Spring. Furthermore, in Winter the majority of leisure visitors travelled to the ACT with their family and the highest proportion stayed in luxury hotels. Interestingly, 70% of those who stayed in luxury hotels in Winter were families.

In contrast, Spring visitors more commonly either travelled with their family or as a couple. Although luxury and standard hotels were the most popular accommodation options, a higher proportion of visitors stayed in commercial caravan parks in Spring than Winter.

There were also some similarities in the profile of visitors in both seasons:

- The majority in both seasons were from NSW and were self drive
- Of the couples, more than three quarters were 45 years or over
- The majority of VFR visitors would not have visited if their friends and relatives were not there.

About four in ten visitors in both seasons used the internet as their only information source. In contrast, less than a fifth of visitors relied solely on traditional sources such as travel agents and brochures.

In terms of the types of websites used, visitors in both seasons found visitcanberra.com.au and accommodation sites (both operator and third party sites) the most useful websites for information and/or bookings. Accommodation sites and airline sites were most often used for bookings.

ACT's national attractions were its key strength

For visitors to the ACT, national attractions were a major influence on their:

- reasons for visiting the ACT
- expectations of the ACT
- experiences in the ACT
- satisfaction with their visit to the ACT.

Apart from the national attractions, there were few other attributes influencing these factors.

With the exception of VFR, the main reasons for visiting the ACT were going to a specific attraction, experiencing the nation's capital and the variety of things to see and do. In Winter, a convenient stopover was also cited as an important reason for visiting the ACT, while in Spring, specific events such as Floriade were important.

The high proportion of visitors stopping for convenience in Winter might have contributed to the smaller lead time between deciding to visit and actually visiting and to the higher proportion using last minute or third party accommodation sites compared to visitors in Spring. In contrast, Spring visitors generally did not stop anywhere else besides the ACT and they decided to visit further ahead, possibly with the view of visiting Floriade.

History, arts, culture and education were the key experiences

Although expectations for experiences were lower in Winter compared with Spring (perhaps partly driven by the number of visitors stopping for convenience), in general leisure visitors to the ACT were expecting only a small number of experiences before arriving.

Four experiences rated above the VPS benchmarks in terms of the proportion of leisure visitors expecting the experience:

- To experience Australia's history
- A chance to discover or learn something new
- An opportunity to experience arts or culture
- Something the kids would enjoy.

From a leisure visitor's perspective, the ACT sits firmly within the area of history, education and arts/culture. Families have the added expectation that these experiences will deliver plenty for their kids to do.

Importantly, the ACT does an exceptional job at meeting expectations for these key experiences. The majority of leisure visitors' expectations were exceeded for these experiences and each experience was rated well above the VPS benchmarks.

In terms of the experiences offered in the ACT in general, Winter visitors' expectations were generally exceeded more often than Spring visitors.

Visitors' appreciation of the ACT's key experiences were also reflected in the very high satisfaction score for attractions. On average, over 90% of leisure visitors were satisfied with attractions, with 67% reporting they were very satisfied (both seasons combined). This was 18 percentage points above the VPS benchmark.

Areas where leisure visitors were not so happy

There were a number of experiences where the ACT ranked well below VPS benchmarks in terms of the proportion of leisure visitors expecting them. These included:

- Relaxation and rejuvenation
- Nature based experiences
- An adventure
- Good shopping
- Luxury and indulgence (Winter only)
- An opportunity to tour around and explore (Winter only)
- Enjoyable nightlife and entertainment (Winter only)
- A place to spend quality time with friends/family (Winter only)
- Food and wine experiences (Winter only)

Most of these experiences also sit on or below VPS benchmarks in terms of satisfaction. The exceptions were an adventure, touring around and exploring and enjoyable nightlife and entertainment which were above the benchmarks for Winter visitors.

Concentration of activities

The narrow scope of experiences expected by leisure visitors is reflected in the relatively small number of activities they participated in during their stay in the ACT. Participation in 13 of the 16 benchmarked activities was below the VPS benchmarks, most well below. However, participation in two activities scored well above the VPS benchmarks in both seasons:

- Visits to museums and/or art galleries
- Visits to historical/heritage buildings

Visits to botanical or other public gardens was also well above the VPS benchmarks in Spring – 39% participated in this activity. This result was influenced by visitors to Floriade.

Overall satisfaction with the ACT

As with expectations, visitors in Winter were more satisfied with their overall visit to the ACT. Around 56% of leisure visitors were very satisfied with their visit overall in Winter, which is higher than the benchmark (51%). This compares with 50% in Spring.

Furthermore, the satisfaction of visitors in Winter translated into a possible repeat visit in the next 12 months with the proportion likely to return in 12 months higher than both visitors in Spring and the benchmark.

Satisfaction with trip attributes

In addition to attractions, leisure visitors rated their satisfaction with variety of things to see and do and roads in the ACT above VPS benchmarks in both seasons. The rating for variety is particularly relevant as it was an attribute rated above the benchmark score in terms of importance.

Commercial accommodation and local transport were other attributes rated as very important by leisure visitors relative to the VPS benchmarks in both seasons. However, both these attributes scored poorly in terms of satisfaction.

The low satisfaction score for commercial accommodation was driven by visitors who stayed in standard hotels/motels and commercial caravan and camping parks.

Leisure visitors were generally satisfied with value for money in comparison to VPS benchmarks. The open ended comments from respondents indicated that while free access to many of the attractions in the ACT was highly valued by many leisure visitors, the cost of accommodation, restaurants and transport were often noted as negatives.

Drivers of overall satisfaction

The ACT VPS data showed that the following five attributes were strongly linked to the overall satisfaction of leisure visitors with their trip to the ACT:

- Attractions
- Variety of things to see and do
- Value for money
- Friendliness of locals
- Local atmosphere

Attractions and variety of things to see and do were rated very highly, while local friendliness and atmosphere were rated quite low. It would seem that the core strengths of the ACT, namely the attractions, were enough to drive a relatively positive overall satisfaction result. However, it also seems clear that improvement in the rating of friendliness of locals and local atmosphere could drive the overall satisfaction rating up.

One possibility for this low satisfaction rating is that many leisure visitors do not find/visit the precincts of Canberra that can readily be associated with providing local atmosphere as well as many of the food and wine experiences of Canberra. By promoting areas such as Manuka, Kingston, Dickson, Bunda Street etc to visitors, Canberra could be presented in a different light and help to change the view of the ACT that seems prevalent among leisure visitors.

Results of the VPS study suggest the ACT's historical, cultural and political attractions were the strongest experiences on offer in the eyes of most leisure visitors. Outside these experiences both the expectations and participation in other experiences was limited, which makes changing these perceptions a big task.

Business visitors to the ACT

The most important attributes for business visitors to the ACT were customer service and safety and security (these were also important for leisure visitors). In general, most attributes were less important to business visitors than leisure visitors.

Notably there were two exceptions:

- commercial accommodation
- local transport

In terms of overall satisfaction, business visitors were less satisfied than leisure visitors, with less than a third (31%) of visitors very satisfied with their visit to the ACT. Business visitors were also less likely to recommend the ACT to others and more than half reported they were not likely to consider the ACT as a leisure destination.

Business visitors were generally less satisfied than leisure visitors with most attributes during their trip to the ACT. They were, however, more satisfied with local transport than leisure visitors.

In terms of commercial accommodation, business visitors were twice as likely to be dissatisfied than leisure visitors. The level of dissatisfaction was also well above the benchmark for this attribute.

Motivating business visitors to return for pleasure presents another challenge, which could be approached by advertising in the airport, business lounges and conference packs and displaying a side to the ACT that perhaps they wouldn't expect.

"It has a sense of its self, and it needs to relay that to the rest of Australia. If I had not been for work, I may have never thought of going there let alone taking the family. Australia does not see Canberra for what it is but what it serves." (Spring visitor, Domestic, 55–64 years)

Australian Capital Tourism recognised the challenges around perception in their *Five Year Strategic Plan 2009–13*. To assist, Tourism Research Australia, in collaboration with Australian Capital Tourism, is currently undertaking a study examining ways of changing the perceptions of Canberra as a holiday destination.

The results in this study can be used as a benchmark to monitor any changes in the perceptions of both leisure and business visitors.

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

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