

*Mr Rance*  

---

*Thanks  
Shw.*

CANBERRA TRIP SURVEY

A Strategic Study of Canberra's Potential  
as a Short Trip Destination

Undertaken for and on behalf of:

THE CANBERRA TOURISM TASK FORCE

by:

Price Waterhouse Urwick

Consultants: John Chegwyn  
Mark Woodbridge  
Andrew McWilliam

and

Lenehan Lynton Bloom Blaxland

Consultants: Jane Blaxland  
Ashley Sparkes

SCOPE OF THE STUDY

LOCATION:	N
Southern Sydney	193
Bathurst/Orange	104
Albury/Wodonga	101
-----	-----
Total	398

RESPONDENTS:

Age: 18 years +

Car Ownership/Access: own or partner has a car for personal use

Travel Away from Home for Weekends or Short Trips: At least once in past 2 years

QUESTIONNAIRE TOPICS

- 1) Attitude Towards:
  - Going Away on Holidays
  - Types of Recreation
  - Going Away for the Weekend
  - Travelling by Car
  - Going to Canberra
  - A Short Stay in Canberra
- 2) Awareness of tourism attractions in Canberra
- 3) Attractions ever visited
- 4) Attractions which would be the main reason for a weekend or short stay
- 5) Attractions which would be included in a weekend or short stay
- 6) Events which would be the main reason for a weekend or short stay
- 7) Events which would be included in a weekend or short stay
- 8) Impressions of different types of tourism product in Canberra
- 9) Interest in specific dining/eating establishments
- 10) Interest in different types of accommodation
- 11) Weekend/short trips made in past
- 12) Demographics
- 13) Media usage

## 2.2 Canberra as a Destination

Six factors emerged from the analysis which reflect distinctive attitudes that people have towards Canberra as a short trip destination (see 2.2.1).

The relevance of Canberra as a destination is also reflected in the statements that respondents chose to apply to broadly defined types of tourism product (see 2.2.2).

### 2.2.1 Dimensions which Define Perceptions of Canberra as a Short Trip Destination

Six factors reflect attitudes towards Canberra as a short trip destination, these being:

- |           |                                       |
|-----------|---------------------------------------|
| Factor 1: | Oh What a (Boring) Feeling            |
| Factor 2: | Canberra - State of the Arts          |
| Factor 3: | Myths and Excuses                     |
| Factor 4: | Where to Stay and Eat?                |
| Factor 5: | Is Anything Open?                     |
| Factor 6: | The National Capital - A 'Must Visit' |

The meaning of each of these is reflected by the loading of each of the statements as shown on pages 6 to 11 and is summarised below.

#### Factor 1 - Oh What a (Boring) Feeling

This aspect of people's perceptions of Canberra reflects a belief among some that Canberra lacks stimulation and excitement. The perspective is extremely negative, reflecting as it does the view that there is 'nothing going on' (see p. 6 ).

### Factor 2 - Canberra - State of the Arts

Another aspect of Canberra's "personality" is the extent to which it is regarded as a civilised and culturally stimulating environment. This dimension acknowledges Canberra's emergence as a cultural centre (see p. 7 ).

### Factor 3 - Myths and Excuses

The image of Canberra is, for some, heavily laden with myths concerning its unattractiveness as a short-trip destination. The myths take the form of popular beliefs ranging from crowded attractions to lack of accommodation, and the confusing road system. The 'prospect' of rubbing shoulders with public servants and politicians is also disconcerting to those who hold to this (dated) view of Canberra (see p. 8 ).

### Factor 4 - Where to Stay and Eat?

There is an impression among some that Canberra has a limited range of accommodation and places to eat (see p. 9 ).

### Factor 5 - Is Anything Open?

Some even doubt that the places they'd like to inspect will be open on weekends (see p. 10).

### Factor 6 - The National Capital - A 'Must Visit'

For some, Canberra is unique and everyone can benefit by going there, especially children. (see p. 11).

FACTOR 1  
OH WHAT A (BORING) FEELING

Factor  
Loading \*

.70	It's just unbelievably boring
.63	You wouldn't really go there unless you had friends or relatives living there
.62	It's too spread out and lacking in character to be of much interest to me
.52	Visiting Canberra is the sort of thing that you can easily knock over in a day
.51	No-one else really goes to Canberra apart from school children and pensioners on coach tours
.50	It is still too much of a country town for my liking
.50	I can think of a whole lot of places which would be higher on my list for a weekend trip than Canberra
.48	It's full of public servants and politicians to be avoided at all costs
-.44	It's a wonderful place for family outings and activities
-.43	Canberra has many interesting things going on and places to visit without the drawbacks of a big city
-.34	It is more alive and interesting than it was even a few years ago
.32	You can't get close enough to many of the things you'd like to see

\* The factor loading is a correlation which measures the degree to which a statement shares whatever it is that the factor represents. The factor is named so as to reflect the higher factor loadings.

FACTOR 2CANBERRA - STATE OF THE ARTSFactor  
Loading

.66	It's become a marvellous cultural and historical centre
.57	Canberra has many interesting things going on and places to visit without the drawbacks of a big city
.53	It is more alive and interesting than it was even a few years ago
.48	I'm glad they put Canberra where it is - the countryside is marvellous and it's away from all the problems of the Big Smoke
.41	It's a wonderful place for family outings and activities
.40	It's a place to go if you like to be "up-to-date" - in sport or science or politics or culture
.40	I used to think of Canberra as boring but there's heaps to do and see
-.33	It's just unbelievably boring
.33	Children should be taken to Canberra every so often as an educational outing
.31	There is a great range of places to choose from in the way of interesting places to eat

FACTOR 3MYTHS AND EXCUSESFactor  
Loading

- .63 The most popular attractions are too crowded to make it worthwhile visiting Canberra on the weekend
- .43 It's full of public servants and politicians to be avoided at all costs
- .39 It has very little in the way of accommodation to choose from
- .35 Canberra is probably the hardest place to find your way around
- .32 It's too spread out and lacking in character to be of much interest to me



FACTOR 4WHERE TO STAY AND EAT?Factor  
Loading

- |      |   |
|------|---|
| .57  | Canberra lacks hotels which can provide high standards of accommodation and service     |
| .49  | It has very little in the way of accommodation to choose from                           |
| -.43 | There is a great range of places to choose from in the way of interesting places to eat |

FACTOR 5IS ANYTHING OPEN?Factor  
Loading

- |     |  |
|-----|--|
| .54 | Many of the places you'd like to visit are closed on weekends      |
| .38 | You can't get close enough to many of the things you'd like to see |
| .33 | It is still too much of a country town for my liking               |

FACTOR 6THE NATIONAL CAPITAL - A 'MUST VISIT'Factor  
Loading

- |     |  |
|-----|--|
| .67 | Children should be taken to Canberra every so often as an educational outing                                   |
| .57 | Visiting Canberra is the sort of thing you should do from time to time, just because it's the national capital |

## SECTION THREE: MARKET SEGMENTS

### 3.1 Introduction

One of the key objectives of the survey was to identify the nature and size of the market segments which account for attitudes towards Canberra as a short trip destination. These segments were identified on the basis of responses to 26 statements about Canberra which encompassed a number of perspectives as outlined in Section 2.2. Respondents were subsequently "classified" (via the use of cluster analysis) into "think-alike" groupings on the basis of their impressions of Canberra as a short trip destination. Statistical and interpretive guidelines were used before opting for the 4-cluster solution. These 4 clusters or segments represent groups of people who "think alike" and positions them against other "different thinking" groups in a way that highlights the internal similarities (or shared values) within each group while showing what attitudes etc. separate one group from another. The clusters were subsequently labelled as a way of summarising their basic characteristics. However, full understanding can only be gained by thoroughly reading the profiles encompassing the "mind sets" (Section 3.2), the market map (Section 3.3), demographic characteristics (3.4), characteristic attitudes towards Canberra (Section 3.5) and their perceptions of different types of Canberra tourism product (Section 3.8).

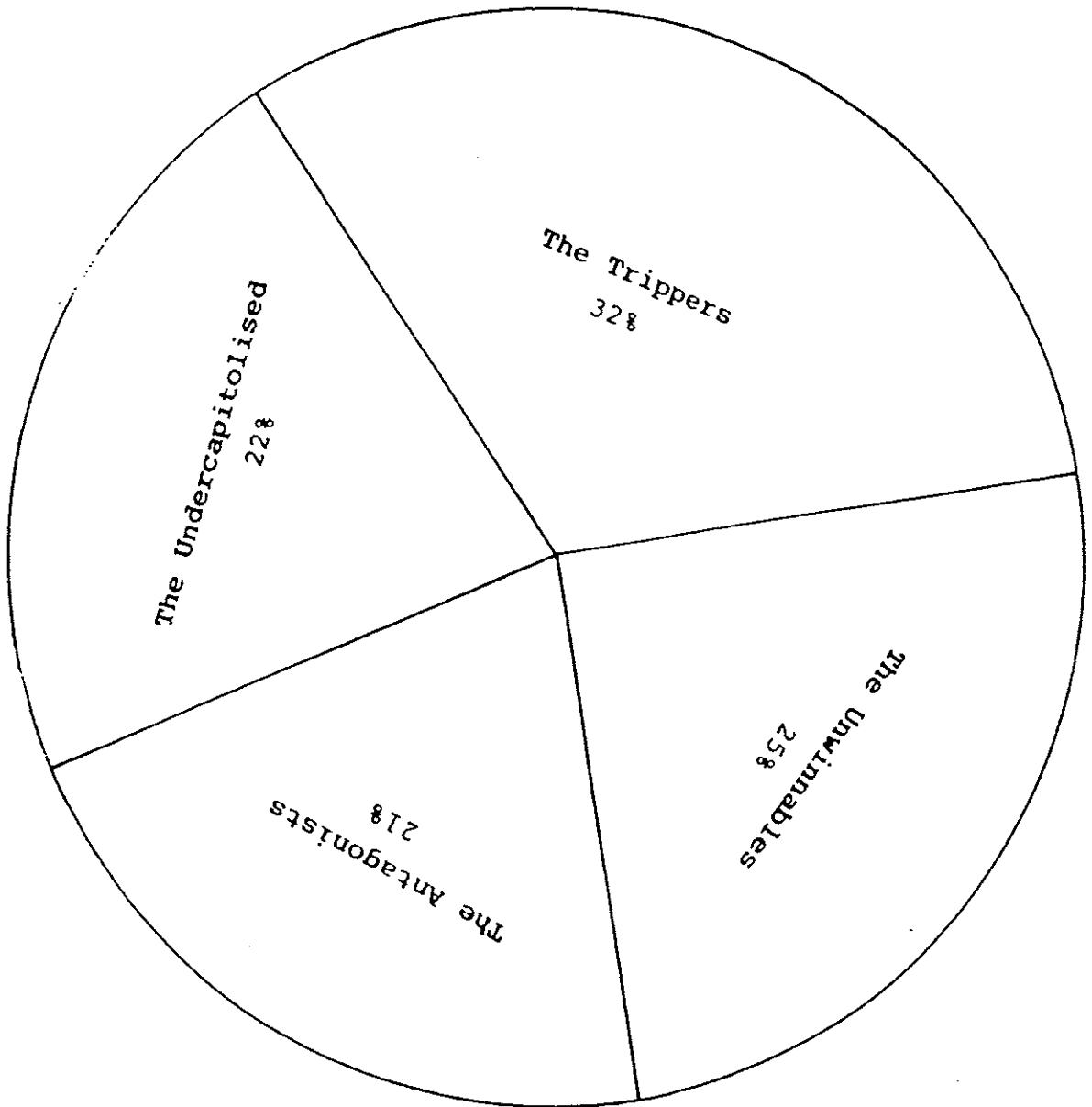
The four segments were labelled as follows, with the proportion of the total sample that they account for represented in Diagram 2 .

Cluster 1	The Trippers	32%
Cluster 2	The Unwinnables	25%
Cluster 3	The Undercapitolised	22%
Cluster 4	The Antagonists	21%

Diagram 3 , overleaf, provides a starting point for an introduction as to "who" these basic attitudinal groups are. The impressions that they have of Canberra are presented in Section 3.2, commencing with a description of their "mind set" and followed by a rank ordering of statements which highlights the way in which the cluster differs from the overall market.

DIAGRAM 2

THE SEGMENTS - PROPORTION OF THE TOTAL SAMPLE



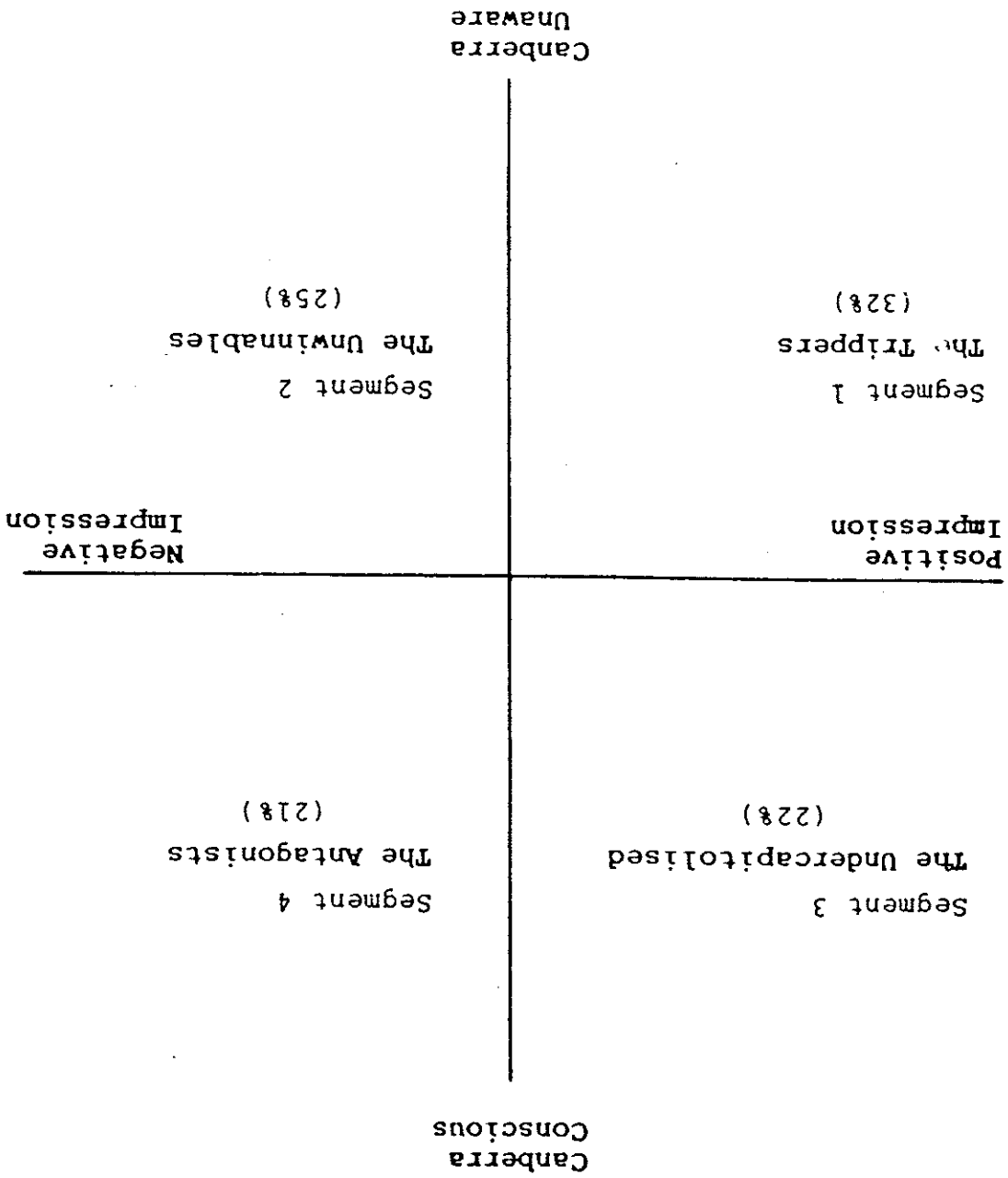


DIAGRAM 3

THE TRIPPERS - AGREEMENT WITH STATEMENTS (8)

TABLE 2

CLUSTER NO. 1                      Proportion of Sample = 32%

Total    The    Difference  
Trippers

21	81	60	Canberra has many interesting things going on and places to visit without the drawbacks of a big city
21	73	52	It's a wonderful place for family outings and activities
14	71	57	I'm glad they put Canberra where it is - the countryside is marvellous and it's away from all the problems of the Big Smoke
13	71	57	It's become a marvellous cultural and historical centre
13	70	57	Children should be taken to Canberra every so often as an educational outing
11	54	43	I used to think of Canberra as boring but there's heaps to do and see
5	50	45	It is more alive and interesting than it was even a few years ago
5	40	35	There is a great range of places to choose from in the way of interesting places to eat
-6	26	32	It's a place to go if you like to be "up-to-date" - in sport or science or politics or culture
-6	27	33	I never think of Canberra as an option for a weekend trip
-6	26	32	Visiting Canberra is the sort of thing you should do from time to time, just because it's the national capital



TABLE 3  
THE TRIPPERS - DISAGREEMENT WITH STATEMENTS (1)

Statement	Total	The Trippers	Difference
It's just unbelievably boring	58	92	34
It's too spread out and lacking in character to be of much interest to me	51	78	27
You wouldn't really go there unless you had friends or relatives living there	51	77	26
It is still too much of a country town for my liking	66	92	26
The most popular attractions are too crowded to make it worthwhile visiting Canberra on the weekend	42	67	25
It's full of public servants and politicians to be avoided at all costs	35	60	25
No-one else really goes to Canberra apart from school children & pensioners on coach tours	54	78	24
You can't get close enough to many of the things you'd like to see	37	58	21
Many of the places you'd like to visit are closed on weekends	30	46	16
Visiting Canberra is the sort of thing that you can easily knock over in a day	59	74	15
It has very little in the way of accommodation to choose from	39	53	14
Canberra is probably the hardest place to find your way around	30	43	13

TABLE 5  
 THE UNWINNABLES - DISAGREEMENT WITH STATEMENTS (1)

Total	The Unwinnables	Difference
20	72	52
51	93	42
26	35	9
12	20	8
46	49	3
30	32	2
10	12	2
59	60	1
10	11	1
10	9	-1
66	65	-1
30	29	-1

Children should be taken to Canberra every so often as an educational outing

Visiting Canberra is the sort of thing you should do from time to time, just because it's the national capital

There's very little to do after 5.00pm

I'm glad they put Canberra where it is - the countryside is marvellous and it's away from all the problems of the Big Smoke

I never think of Canberra as an option for a weekend trip

Many of the places you'd like to visit are closed on weekends

It's become a marvellous [cultural] & historical centre

Visiting Canberra is the sort of thing that you can easily knock over in a day

It's a wonderful place for family outings & activities

Canberra has many interesting things going on & places to visit without the drawbacks of a big city

It is still too much of a country town for my liking

Canberra is probably the hardest place to find your way around

THE UNDERCAPITOLISED - AGREEMENT WITH STATEMENTS (%)

TABLE 6

CLUSTER NO. 3

Proportion of Sample = 22%

The

Under-

capitolised

Total Difference

59	91	32	Visiting Canberra is the sort of thing you should do from time to time, just because it's the national capital
42	99	57	Children should be taken to Canberra every so often as an educational outing
29	74	45	It is more alive and interesting than it was even a few years ago
29	86	57	It's become a marvellous cultural & historical centre
28	57	29	Many of the places you'd like to visit are closed on weekends
28	71	43	I used to think of Canberra as boring but there's heaps to do and see
27	84	57	I'm glad they put Canberra where it is - the countryside is marvellous and it's away from all the problems of the Big Smoke
20	67	48	Canberra is probably the hardest place to find your way around
19	79	60	Canberra has many interesting things going on and places to visit without the drawbacks of a big city
19	53	35	There is a great range of places to choose from in the way of interesting places to eat
18	35	17	The most popular attractions are too crowded to make it worthwhile visiting Canberra on the weekend
17	42	25	There's very little to do after 5.00pm

TABLE 8

THE ANTAGONISTS - AGREEMENT WITH STATEMENTS (%)

CLUSTER NO. 4 Proportion of Sample = 21%

	The Antagonists	Total	Difference
It's just unbelievably boring	16	52	36
You wouldn't really go there unless you had friends or relatives living there	27	54	26
It's too spread out and lacking in character to be of much interest to me	20	45	25
It's full of public servants and politicians to be avoided at all costs	31	56	25
I can think of a whole lot of places which would be higher on my list for a weekend trip than Canberra	64	87	23
Visiting Canberra is the sort of thing that you can easily knock over in a day	27	44	17
I never think of Canberra as an option for a weekend trip	33	50	17
No-one else really goes to Canberra apart from school children & pensioners on coach tours	19	35	15
It has very little in the way of accommodation to choose from	15	26	12
It is still too much of a country town for my liking	9	20	11
Canberra Jacks hotels which can provide high standards of accommodation & service	13	24	11
You can't get close enough to many of the things you'd like to see	25	33	9
The most popular attractions are too crowded to make it worthwhile visiting Canberra on the weekend	17	25	8

TABLE 9THE ANTAGONISTS - DISAGREEMENT WITH STATEMENTS (%)

	<u>Total</u>	<u>The Antagonists</u>	<u>Difference</u>
Canberra has many interesting things going on and places to visit without the drawbacks of a big city	10	29	19
It is more alive & interesting than it was even a few years ago	11	29	18
It's become a marvellous cultural & historical centre	10	27	17
I used to think of Canberra as boring but there's heaps to do and see	23	36	13
Visiting Canberra is the sort of thing you should do from time to time, just because it's the national capital	51	62	11
There is a great range of places to choose from in the way of interesting places to eat	10	20	10
It's a wonderful place for family outings & activities	10	20	10
I'm glad they put Canberra where it is - the countryside is marvellous & it's away from all the problems of the Big Smoke	12	19	7
It's a place to go if you like to be "up-to-date" - in sport or science or politics or culture	31	31	-
Many of the places you'd like to visit are closed on weekends	30	23	-7
Canberra is probably the hardest place to find your way round	30	19	-11

## SECTION TEN: EXECUTIVE SUMMARY

This section summarises the key findings of the Study and, in point form, looks at some of its implications. The point form conclusions are intended to form the basis for the Task Force to workshop the results of our investigations and move to the strategic planning stage.

### 10.1 The Key Market Segments

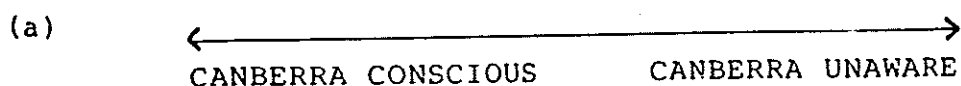
The study has identified four main types of Canberra visitors who live in the Southern Sydney, Bathurst/Orange and Albury/Wodonga regions. These have been called the Undercapitoliseds, the Trippers, the Antagonists and the Unwinnables.

### 10.2 Primary Targets

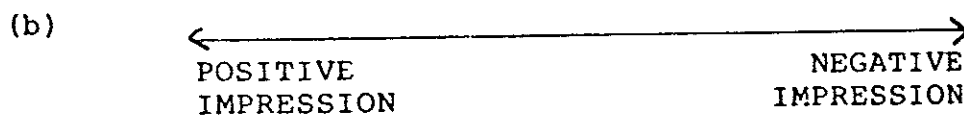
The Undercapitolised and the Trippers represent the best primary target markets for weekend and short stay trips to Canberra. The Antagonists also warrant some attention if their cliché-based hostility to "the Canberra myth" can be counteracted. The Unwinnables should be left alone, since counteracting their indifference, their lack of knowledge of Canberra and their negative predisposition to the destination represents an uneconomic use of resources.

### 10.3 Key Market Dimensions

The two main dimensions which affect predisposition to visit the ACT region for short stays have to do with (a) an awareness or consciousness of the capital as a destination and (b) a negative or positive predisposition towards Canberra.

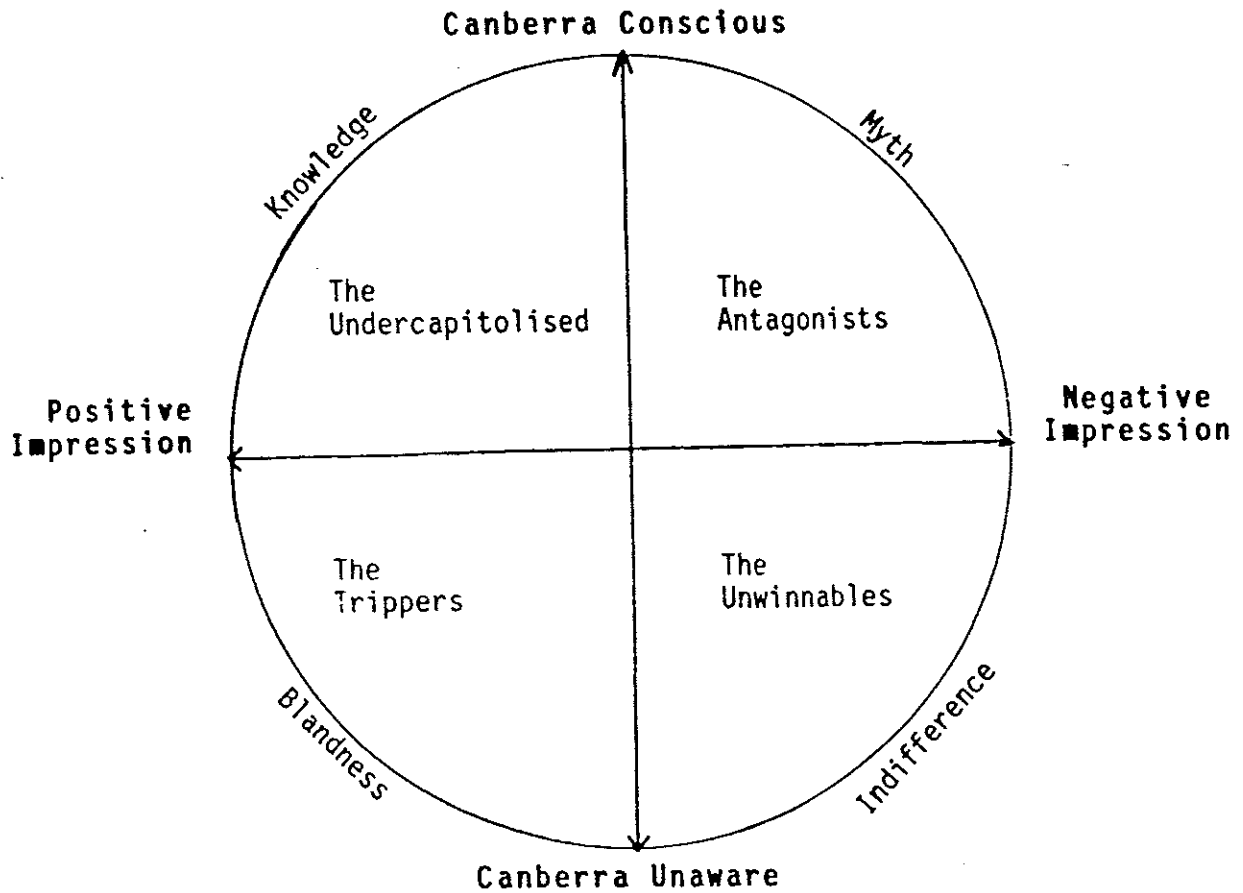


For Canberra Conscious consumers, the capital is a distinctive destination, with characteristics which set it apart. They are brand aware consumers for whom Canberra has an established personality, whether it be positive or negative. The Canberra Unaware end of the dimension describes people for whom the destination is not distinctive and for whom other destinations will claim a great deal more of their conscious consideration.



This dimension speaks for itself - consumers either like or dislike the Canberra/ACT region as a tourist destination. The nature of their like or dislike depends on where they sit on the Canberra Conscious  $\longleftrightarrow$  Canberra Unaware dimension.

#### 10.4 Characteristics of Segments



Here the Canberra-Consciousness and the negative impression of Canberra which characterise the Antagonists combines to form a myth-driven attitude in which Canberra is distinctive but undesirable. Antagonists subscribe to the clichés about Canberra: it's full of politicians and public servants, you end up driving around in circles, only kids and pensioners go there etc. Canberra consciousness and a positive impression together produce the product knowledge of the Undercapitalised. There is a definite air of experience about these consumers and they are concerned not with the negative idea of Canberra (which occupies the Antagonists) but with the positive logistics of how to get around, what to see, what to do.



The lack of awareness of Canberra as a distinctive destination, together with a positive impression of the capital, produces the well-meaning blandness of the Trippers. While Trippers are positively disposed, their response to Canberra is difficult to distinguish from their likely responses to Wagga or Mt. Gambier or Timbuctoo. Trippers are active, out-doors, family-oriented travellers who are likely to enjoy themselves pretty well anywhere as long as there is enough to do. A negative impression of Canberra, together with a view of it as an undistinctive destination, produces the indifference of the Unwinnables. Even their negativity is not strong enough to be hostile...Canberra simply does not figure on their list of desirable destinations and is highly unlikely to do so.

#### 10.5 The Undercapitolised in Summary

In summary, the Undercapitolised are:

- a high opportunity group for more frequent visits and longer stays
- concerned with the logistics of "how to" (get there, see things, do things)
- acquisitive - they like to collect destinations and visits and attractions
- motivated by the idea of Canberra as a national capital
- somewhat driven by what they ought to do rather than what they want to do

- attracted to mental stimulation on holidays (into education, learning, curiosity, culture)
- into being pampered and looked after (DFY - done for you)
- turned on by authenticity, especially when it's Australian
- car travellers
- keen to 'use' their weekends
- attached to home
- in favour of pageantry, national landmarks and passive spectatorship
- fond of Sydney and Canberra as short-trip destinations; also interstate
- older
- often without children at home
- lower socio-demographic
- not working

## 10.6 The Antagonists in Summary

In summary, the Antagonists:

- are myth-driven, responding to negative clichés about Canberra
- are unimpressed with the Canberra product
- are bored with the idea and image of Canberra
- want good accommodation and dining facilities
- are 'experiential' in holiday behaviour (being there is more important than having been there - they don't "collect" destinations)
- are DIY (do-it-yourself)
- like authenticity and naturalness - back-to-nature is a turn-on
- like overseas travel
- like a degree of physicalness and participation in their travel products
- like to spend the weekend with the kids
- want to "use" the weekend
- are into places and moods rather than events and buildings
- like informal and inexpensive dining

- prefer medium-cost accommodation
- favour the NSW coast as a destination
- like the snowfields
- are younger (65% under 36 years)
- have more males than the general population
- have more singles, working, no kids

#### 10.7 The Trippers in Summary

In summary, the Trippers

- are positive about any destination which offers "the good, active Australian weekend"
- are positive but bland about Canberra - they don't set it apart as a destination
- are both active and interactive - they want to do rather than watch
- are not problem-oriented - easygoing and fairly undemanding
- like a bit of mental stimulation when travelling
- are not "house bound"
- like car travel
- like the natural environment
- like popular eateries and the occasional restaurant splurge

- are not overly concerned about kids
- have much the same short-trip patterns as the Undercapitolised
- have a higher proportion of people with tertiary education.

#### 10.8 The Unwinnables in Summary

In summary, the Unwinnables

- don't like Canberra, in the rare moments when they bother to think about it
- prefer coastal and interstate destinations and Sydney
- like physical, outdoors, Australian travel without too much mental involvement - they like to do rather than learn
- are children-oriented
- evince no interest in national landmarks
- don't like spending up big
- are younger
- are not highly educated

### 10.9 Opportunities

The desirable territory in our diagram model of the market is that occupied by the Undercapitalised - Canberra conscious and positively disposed. It is this which represents the greatest opportunity for tourist operators. The Undercapitalised are already there and constitute the primary target market. They have been called Undercapitalised because there are very solid clues in the data that these consumers have by no means reached their full potential as frequent and extended visitors to Canberra. The key to activating the Undercapitalised is to devise communications and product offerings which undermine the normative("I ought to...") nature of their response to Canberra as a destination and provide them with significantly more immediacy - i.e. to move them from the statement, "I'd like to go to Canberra..." towards the response, "I want to go to Canberra now". The Undercapitalised are passive but committed spectators and the best motivator for them is events which are located within an environment to which they are already well disposed.

The other three segments need more attention, better communications and better product management than the Undercapitalised because they need to be moved along at least one of the two key market dimensions. The Trippers are positively disposed but Canberra to them is no more than just another nice place to do nice things. They need product and communications which will move them along the central axis (see diagram below) to a point where they are willing to set Canberra apart as a tourist destination and invest it with some distinctive personality. If we imagine "Canberra" as a brand, a brand name set on a tourist product, then we are saying that to realise the potential of Trippers as consumers of that brand, we need

to bring them to see it as different from any other brand on offer in the marketplace. Trippers are not particularly turned on by the things which make Canberra distinctive to Undercapitoliseds or Antagonists (nationalism, landmarks, buildings, monuments, museums, pageantry, politicians etc.). Thus raising the Canberra brand awareness of Trippers involves devising and offering tourism products which fit into their preferred framework and which they cannot get anywhere else. Activity and interactivity, natural attractions with both physical and mental involvement are the key characteristics of products these pleasant but currently unexciting consumers favour.

Canberra is certainly distinctive to Antagonists, but in all the wrong ways. These consumers need to be shifted along the vertical axis (see below) to counteract their negative impressions of Canberra. Myth-driven consumers should never have their myths attacked head-on (they only dig their heels in). The key to altering the perceptions of Antagonists is to bypass their beliefs and give them an actual experience - i.e. to talk to them about specific product benefits whose reality can catch their attention and whose consumption can gradually alter their negative preconceptions. Unlike the Trippers, for whom "Canberra-the-brand" needs to become distinctive, Antagonists will be turned on by specific, attractive products which just happen to be located within the Canberra region. These products are active, physical, demanding, experiential, young (skiing, riding, canoeing, rafting, hang-gliding, ballooning, fishing, hiking). Antagonists are best aimed at Canberra's Winterland.

The Unwinnables have been so-named advisedly. They occupy the worst territory in the diagram model (see below) because they need to be shifted along both axes: towards Canberra-consciousness and towards a positive predisposition.

It is our recommendation that the planners for the Task Force basically let the Unwinnables be, and concentrate on the potential represented by the other 75% of the market.

Thus:

