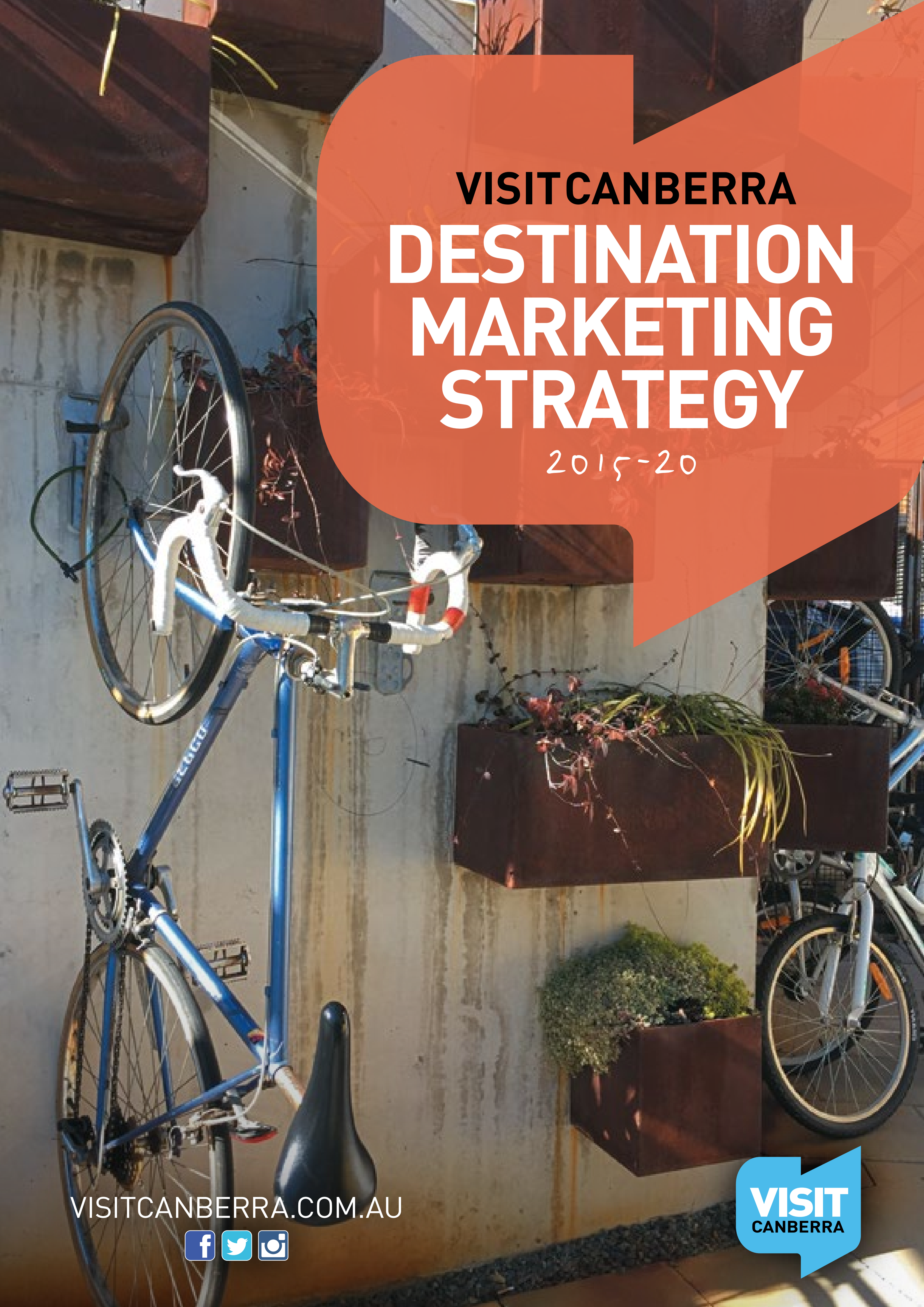
VISITCANBERRA

DESTINATION MARKETING STRATEGY

2015-20



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ACT Government

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A Bite to Eat

Introduction

VisitCanberra's role is to lead 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 destination marketing strategy provides a framework that will inform and support VisitCanberra's integrated marketing approach. We will do this by:

- Raising awareness and knowledge of key destination experiences and events.
- Capturing and growing the number of people considering a visit to the ACT and Canberra region.
- Converting potential visitors.
- Growing the network of destination advocates for the ACT and Canberra region.

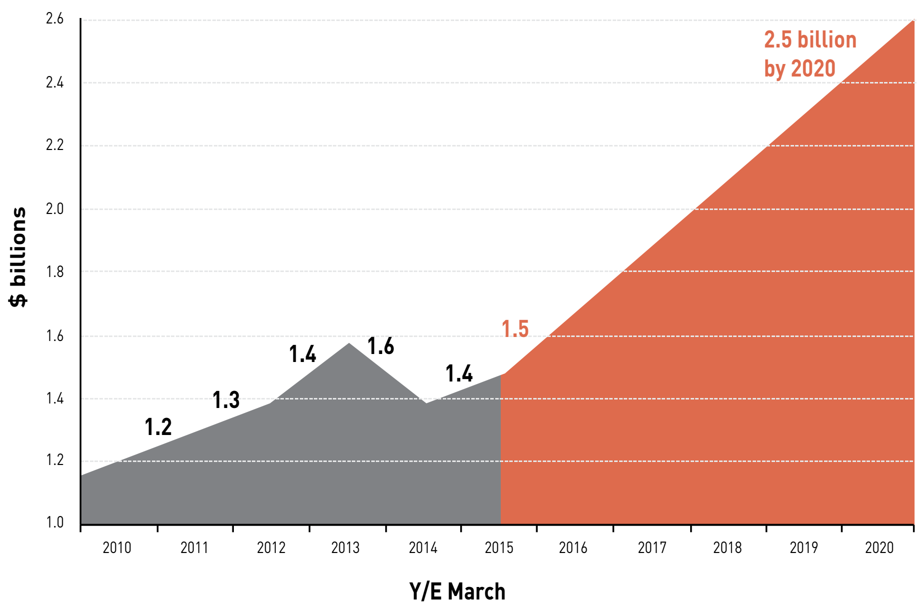
It has been designed to align with the ACT's Tourism 2020 Strategy goal of increasing the value of tourism to $2.5 billion by the year 2020.

VisitCanberra's key priorities will be to:

- Market the ACT and Canberra region as a short break destination of choice both domestically and internationally.
- Advocate and engage in partnerships that add value.

The strategy outlines important factors in the marketing and tourism environments. It outlines VisitCanberra's marketing approach for the next five years and details our target audiences, our markets, mix of programs and activities and how we will measure success.

Tourism 2020 — overnight visitor expenditure



Source: IVS and NVS March 2015.

Our audience

With clear audience segmentation we are better able to understand and prioritise our audiences to ensure marketing programs and activities reach the right people. That is, those people with higher incomes and those who have the highest desire to visit the ACT and Canberra region.

VisitCanberra targets three key audience segments:

SOCIALLY AWARE

"I want to try something ***new and different****"*

Represents 16% of the population.

81% have been on a trip in the last 12 months.

Biases:

- even male to female
- 40% are 35-49 (mean 45 years)
- 55% are married 35+
  - 29% no children
  - 26% with children
- 36% are in NSW
- employed full time (white collar professionals)
- higher income (mean $72k)
- work is a key priority
- higher tendency to travel (including short breaks)

Key barriers:

- time poor
- one in four have no annual leave

This pattern of thinking is usually associated with the highest socioeconomic group in the community. This mindset is the specialty of public servants, pressure groups, business analysts and politicians of all political colours. These 'insatiable information vacuum cleaners' are addicted to finding out or trying anything that's new or different and persuading others to accept their opinions, priorities and lifestyle preferences.

VISIBLE ACHIEVERS

"I want ***value*** *out of my experiences"*

Represents 19% of the population.

76% have been on a trip in the last 12 months.

Biases:

- male skew
- 37% are 35-49 (mean 48 years)
- 70% are married 35+
  - 42% no children
  - 28% with children
- 33% are in NSW
- employed full time (white collar professionals)
- higher income (mean $75k)
- work is a key priority
- high intention to travel (including short breaks)

Key barriers:

- time poor; this segment has the longest working hours

This pattern of thinking is associated with the proof of having made it up in the seemingly never-ending social ladder. Personal recognition, higher incomes, job satisfaction and other tangible rewards of success such as travel, recreation and high-quality homes, vehicles and holiday location provide the very best of visible good living.

EXPERIENCE SEEKERS

"I want to ***immerse myself in experiences*** *that differ from my day-to-day life"*

They place high importance on value and want to come away having learnt something.

They are experienced international travellers who travel year round.

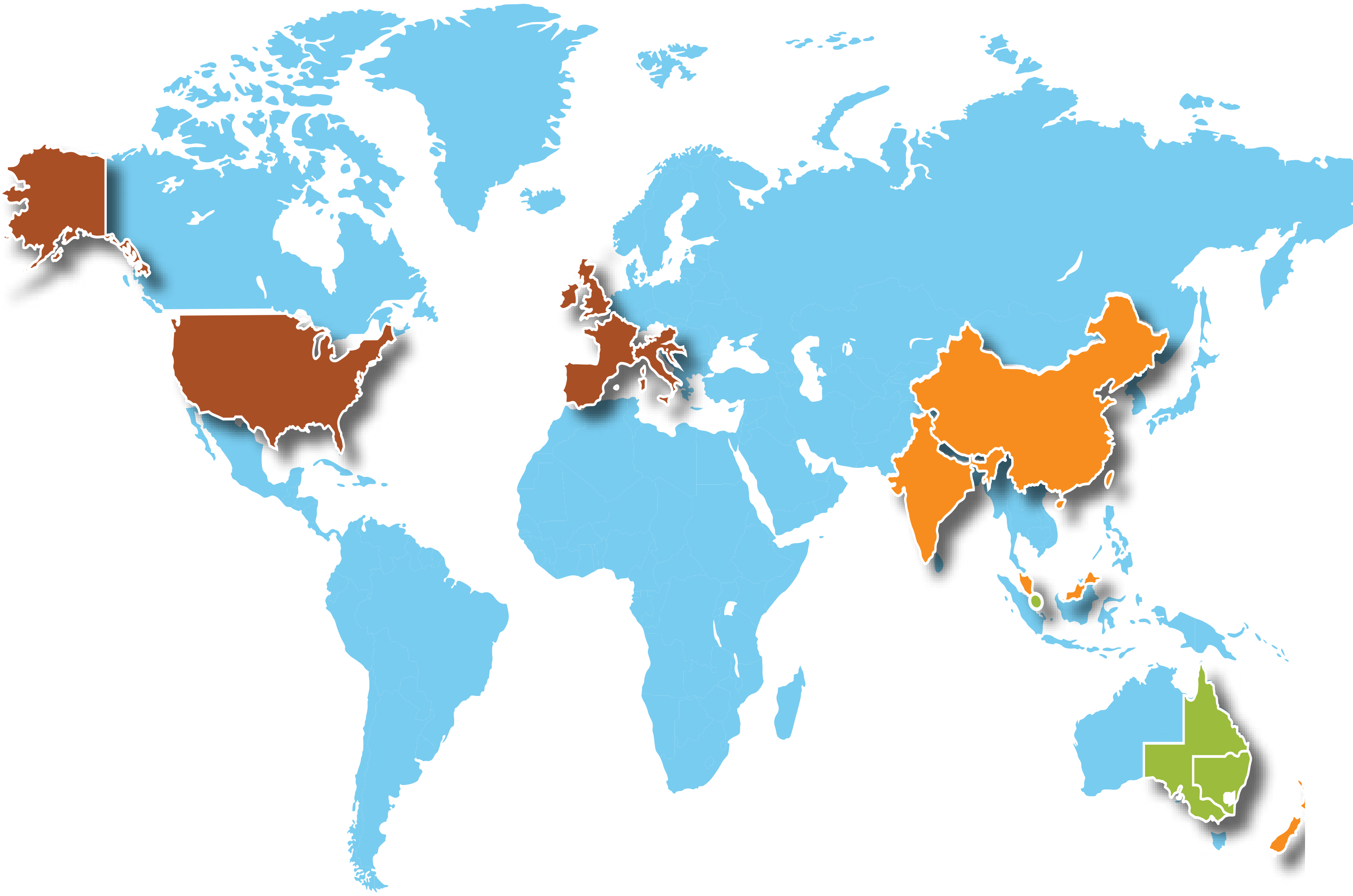
Biases:

- 25-40+
- married with/without children
- tertiary educated
- higher than average household income
- place high importance on value
- main information sources include search, talking to friends and family and travel advice websites
- comfortable booking holidays online. Airfares and accommodation generally booked direct

These people are typically open minded and have an interest in world affairs. They are opinion leaders within their peer and social groups. They are not characterised by nationality, preferred holiday style/mode or age. They are sociable and seek out and enjoy authentic personal experiences they can talk about.

Holiday Tracking Survey (HTS), Roy Morgan Research Ltd. Year ending December 2012; Tourism Australia.

Our markets



TIER 1

NSW, VIC, QLD, SA, SINGAPORE

Most likely audience to visit the ACT and Canberra region

Marketing efforts will focus on Australia and Singapore. Activities will include a mix of consumer-led and cooperative campaigns. Partners include Tourism Australia, airlines, wholesalers and key distribution partners.

TIER 2

NEW ZEALAND, CHINA, INDIA, SOUTH EAST ASIA*

Potential to visit the ACT and Canberra region via Sydney

Marketing efforts will focus on cooperative marketing activities and trade events with an emphasis on self drive products. Partners include Tourism Australia, airlines, wholesalers and key distribution partners.

* Malaysia, Indonesia

TIER 3

USA, UK, EUROPE

Potential to visit the ACT and Canberra region via Sydney

Marketing efforts will focus on cooperative marketing activities and trade events with an emphasis on self drive products. Partners include Tourism Australia, airlines, wholesalers and key distribution partners.

Our approach

VisitCanberra will focus its marketing efforts on domestic and international priority markets that have the greatest potential for significant growth in visitation and yield.

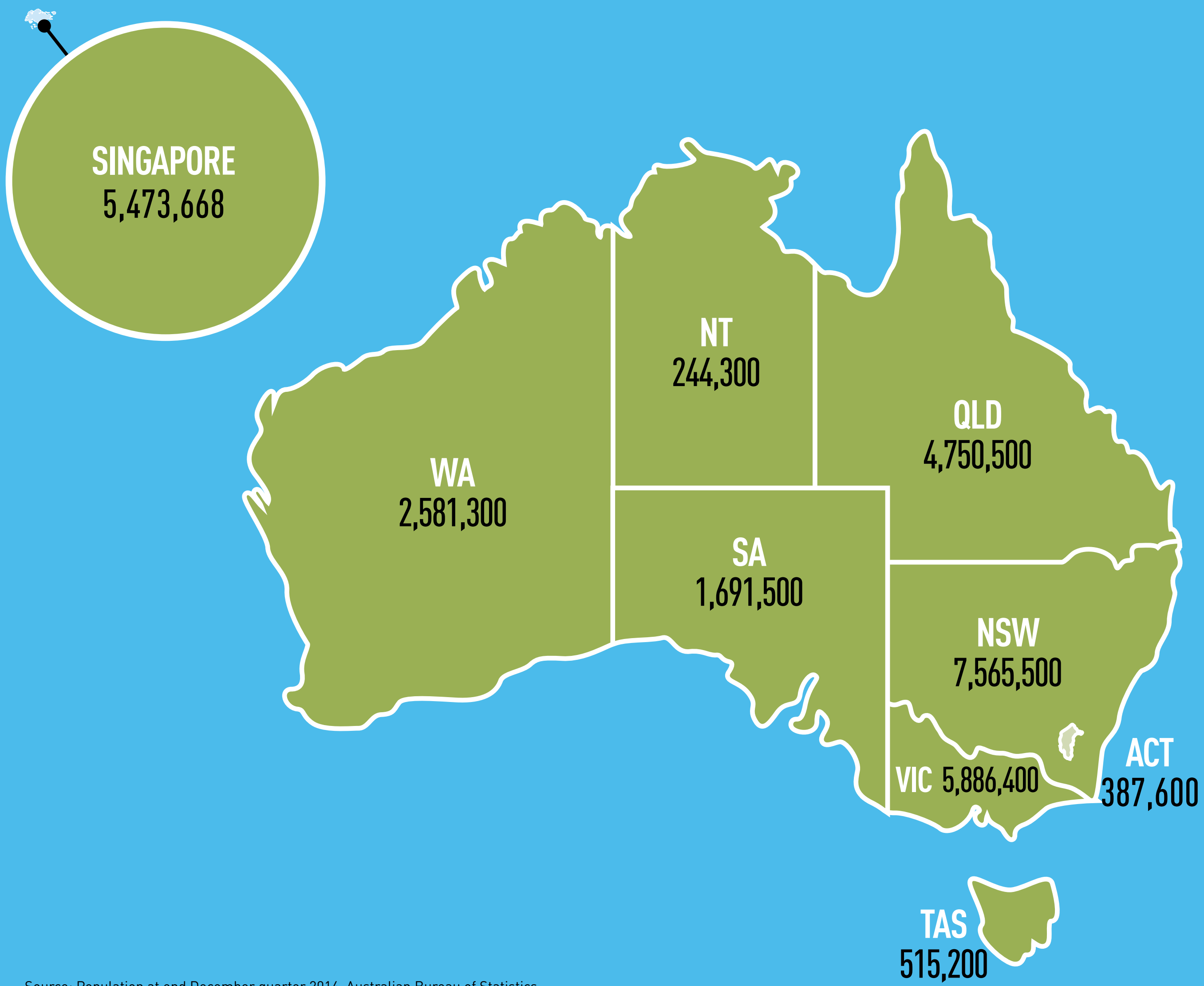
Domestically, the greatest opportunity is to convert target audiences from Sydney, regional NSW and Melbourne who are intending to take a short break. Internationally, the greatest opportunity currently is to convert South East Asian 'experience seekers' intending to travel to Australia.

Residents of Sydney, regional NSW, Melbourne and South East Asia are key to delivering our objectives, not only because of the size of the target population, but also because of their propensity to take a short break and high concentration of target audiences.

To increase visitation, VisitCanberra will maintain an integrated marketing approach led by campaign activity in priority domestic markets and cooperative partnership activities internationally.

In response to research, VisitCanberra has focused its marketing efforts on building awareness of Canberra as a short break destination among members of its target audience. Research highlighted that any lift in awareness would create a proportionately higher lift in consideration to travel to Canberra for a short break.

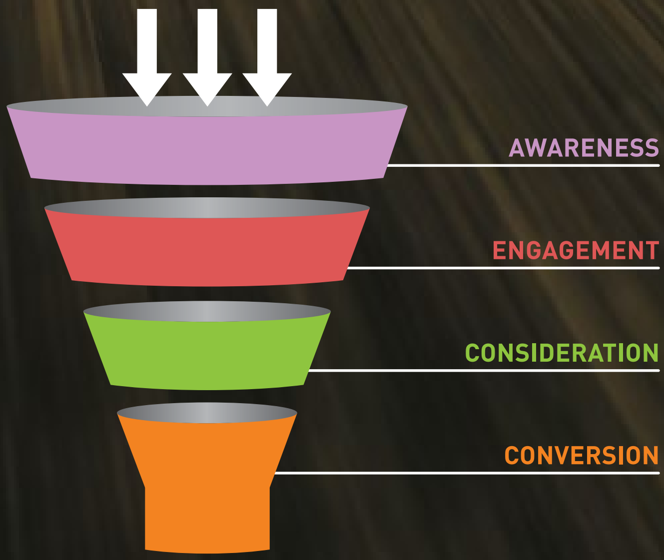
TIER 1 MARKETS POPULATION SIZE



Source: Population at end December quarter 2014, Australian Bureau of Statistics.

DESTINATION CONVERSION FUNNEL

A greater emphasis will be placed on the mid to lower sections of the conversion funnel to further engage and encourage conversion. Better integrated campaigns, partnership programs to stimulate travel as well as embracing technology will ensure VisitCanberra has the right mix of communications and robust systems to better engage, influence and direct visitors through this funnel.



VisitCanberra will sustain awareness of the ACT and Canberra region as a short break destination throughout the year with an 'always on' approach. This media approach will include a mix of public relations activities and targeted digital activities.

A new creative platform incorporated across all of our marketing activities from 2016 will ensure a consistent message, tone, look and feel. It will communicate what's unique and appealing about the destination and provide a platform to cut through the usual marketing clutter in a highly competitive tourism category.

VisitCanberra will continue to administer programs to bolster and leverage efforts of industry. The Special Event Fund enables an increased focus on events as key drivers for visitation. Additionally, the Tourism Marketing Partnership Program encourages industry collaboration on innovative marketing campaigns that drive visitation and increase awareness of the ACT as a leisure destination.

VisitCanberra will promote the destination's core experiences:

- Arts and culture
- Food and wine
- Outdoors and nature
- Family fun
- Major events and festivals

Marketing activity in overseas markets is undertaken in conjunction with industry and distribution partners such as Tourism Australia, airlines, online travel agents and aggregators and, where relevant, non-traditional partners.

The ACT and Canberra region is actively promoted in multiple countries. VisitCanberra also initiates targeted public relations activity in primary markets in association with industry partners.

International operations manage cooperative trade and marketing activities including travel shows, trade missions, agent familiarisations and partnership programs. Activities include the Aussie Specialist Program and Key Distribution Partner Program to assist industry to get their products to market.

Marketing framework

WHAT WE DO	HOW WE DO IT	HOW IT SUPPORTS 2020
ALWAYS learn	**Research insights** Research will continue to evolve and refine consumer led marketing strategies. VisitCanberra will develop an annual research plan for the destination to ensure up-to-date research is available on all priority markets and consumer trends.	Informs the development of targeted and focused domestic and international marketing activities.
ALWAYS grow	**Be nimble** We will identify and take advantage of emerging markets and consumer trends.To facilitate growth VisitCanberra will 'test and learn' across all areas of the organisation. We will allocate financial and human resources to explore new ways of doing things that align with key research insights.	
ALWAYS communicate what's unique and appealing about the destination's places, people and products	**Special Event Fund (SEF)** Events continue to play a strong role in increasing destination awareness and desirability. They provide the urgency to 'visit now' and book travel and encourage repeat visitation by those looking for something new and different. VisitCanberra will continue to administer the ACT Government's SEF to broaden the events calendar through partnerships that support new major tourism events, exhibitions or festivals.	Investment in drivers to the visitor economy including major events, blockbuster exhibitions and festivals.
	New integrated campaign Marketing activities will communicate what's unique and appealing about the destination and look for ways to cut through the usual marketing clutter visible in the tourism category. All of our marketing activities will have a consistent message, tone, look and feel. From 2016 a refreshed creative positioning will flow through all of our communication and marketing activities and programs. Communications will occur prior to visiting, while in-destination and post visit.	Investment in targeted and focused domestic and international marketing activities.
ALWAYS be on	**Messaging and delivery** Multiple devices and platforms enable our consumers to be 'always on' so we need to be 'always there'. VisitCanberra will continue to be 'always on' to ensure awareness of destination experiences remain top of mind. Always on activity will include a mix of public relations (PR) and low cost digital advertising. • PR: Our public relations programs include hosting visiting media, featuring in social media platforms and media outreach activities. • Targeted digital activities: We will maintain a consistent level of digital advertising year round using low cost/high performing platforms including search, social, video and mobile.	

WHAT WE DO	HOW WE DO IT	HOW IT SUPPORTS 2020
ALWAYS engage and influence	**Content is king** There will always be content and it will always be important. A key emphasis will be on improving the quality and quantity of content on our owned channels. We will continue to build on our key content initiatives — refreshing and relaunching the annual *Visitor Guide* and our consumer website **visitcanberra.com.au** Quality content will improve Search Engine Optimisation (SEO) and Search Engine Marketing (SEM), help grow and engage our audiences and over time, convert our audiences into visitors. We will co-create and curate content (words, images, videos) with key influencers. We will identify the voices that ring loudest on topics related to travel, key experiences (i.e. food and wine) and specific interest areas (i.e. coffee culture). Voices will be those of experts, trusted sources and peers (i.e. locals, past visitors). VisitCanberra will also implement technology that: • boosts re-use of content • extends content lifecycle, and • streamlines processes around content management, aggregation and distribution.	Investment in digital assets and continued commitment to content creation and distribution through digital channels. Growing the digital marketing and transactional capabilities of the tourism industry.
ALWAYS share	**To share is human** We need to understand what content gets shared and enable ease of sharing at every stage of the customer journey. VisitCanberra will continue to refine its social media strategy and supporting tools to ensure continued growth and engagement via the most popular and influential social media channels (Facebook, YouTube and Instagram).	
ALWAYS connect and convert	**Digital marketing landscape** Research indicates that we need to connect with our customer across multiple digital channels and devices at the right time and with the right information, to pull them further through the conversion funnel. VisitCanberra will use technology to better understand, connect and convert 'always on' consumers in real time. This will ensure we provide visitors with content that is relevant to their area of interest, location and language (and is easy to find). It will also help us determine what areas of our owned digital channels produce the most effective levels of engagement and conversions.	
	Partnerships Partnership marketing provides additional opportunities to promote the destination by connecting with new markets and broadening reach. VisitCanberra will implement the new Tourism Marketing Partnership Program which provides matched dollar-for-dollar funding to partners that deliver innovative, cooperative destination marketing campaigns that drive overnight visitation. VisitCanberra will continue to work with Tourism Australia, airlines and Key Distribution Partners to cooperatively promote Canberra to key international markets and stimulate demand.	Drive demand through investment in targeted marketing activities. Develop and maintain productive working relationships with Tourism Australia and drive demand through investment in targeted international marketing activities.
	Access Initiatives Lack of low cost air services to Canberra is a barrier to converting non-drive markets of Victoria, Queensland and South Australia. VisitCanberra will continue its efforts to secure a low cost domestic carrier and cooperative marketing campaigns that promote sale fares and key destination messages. VisitCanberra will also continue in its efforts to secure direct international flights.	Invest in initiatives to support the establishment of direct international flights and low cost air carriers.

Tourism trends

DOMESTIC INSIGHTS

Domestic tourism across Australia continues to grow, with increases experienced in both visitation and spend — during 2014 there were more than 80 million overnight trips taken, accounting for 209 million domestic visitor nights, and a domestic overnight spend of $54.4 billion.[1]

By monitoring domestic travel trends that are driving these increases, VisitCanberra can ensure we are claiming our share of the domestic travel market and targeting our marketing activities most effectively.

Current trends in the Australian domestic market include the need for travel to provide opportunities to relax, reconnect and rejuvenate, and that short breaks, events and festivals are cornerstone components and drivers for travel.[2]

Some of the more specific components of these trends include the following:

- Too much choice and information makes decisions difficult for consumers and increases their risk of making the wrong decision. Therefore, we need to make it easier. For example, package deals have strong appeal and are motivating as they create a call to action and offer a sense of urgency to book.
- Technology is both a friend and an enemy. Australians are prolific uses of technology but are also looking to take a step back from technology — there is a strong desire to reconnect through disconnecting; going back to basics and taking a holiday from the online world.
- Holiday time is precious and reconnection remains central to travel. Taking time out to be with family and friends allows you to connect, recharge, escape and enjoy the small things in life.
- Holidays must appeal to everyone in the travel party.
- Creating a reason or occasion to travel provides an opportunity for domestic travel to grow, particularly when holidaying overseas is now more affordable.
- Customer service remains a grumbling point and competitive destinations build their offer around this.
- Food and wine experiences, as well as events and festivals, generate a lot of excitement and interest and can provide a reason to travel, however they need to be authentic experiences.
- Food and wine experiences must showcase local products, promote food and dining as an experience in itself, leverage other key experiences (including events) and offer an element of interactivity.
- Logistics are important for event and festival attendees, including transport, being able to book online, value for money and ticketing options.
- The appeal of events and festivals can be maximised by providing tourist information on the event website, linking to a charitable cause, having an easy online booking process, partnering with media to help raise awareness, and ensuring the event reflects Australia's lifestyle, environment, or a particular community.
- Close to two-thirds (63%) of those who intend to travel domestically or locally in the next 6-12 months (as at May 2015) have visited a travel website in the past month. Not surprisingly, there is a strong link between searching on both flight and accommodation websites.[3]
- There is an increased expectation with regards to authenticity and engagement. The quest for a deeper connection to a place and its people continues to be a strengthening travel goal. More visitors are looking for ways to have a local, connected experience.[4]

INTERNATIONAL TRENDS

According to the World Tourism Organization (WTO), tourism continues to be one of the fastest growing economic sectors in the world. For example, international tourism accounts for 30 per cent of the world's export services, and 6 per cent of overall exports of goods and services. As a worldwide export category, tourism ranks fourth after fuels, chemicals and food.[5] Similarly, Deloitte has named tourism as one of five super-growth sectors (along with agribusiness, gas, international education and wealth management).[6]

This growth is also reflected in results from the International Visitor Survey (IVS) for the year ending June 2015, with national figures showing an increase of 7 per cent to 6.6 million international visitors for the year, while nights increased 8 per cent to 236 million and spend increased 11 per cent to $22.3 billion.

China is Australia's second largest inbound market for visitor arrivals and the largest market for total visitor expenditure and visitor nights, with an impressive year-on-year growth. For example, there was a 22 per cent increase in the number of visitors from China for the year ending June 2015 when compared to the previous 12 months. Similarly, visitor nights increased by 18 per cent while expenditure increased by 34 per cent over the same period.[7]

Findings from Tourism Australia's 2014 Consumer Demand Project indicate that for aspiration, awareness and intention to visit, Australia ranks ahead of any other country for the Chinese traveller. This research also indicates that approximately half of Chinese leisure travellers cite world class nature and beauty along with interesting attractions as their main motivations when selecting a travel destination. Australia performs strongly in terms of its core natural offering among Chinese leisure travellers, with high rankings for its interesting attractions, world class beauty and coastal scenery.

There is room for improvement with respect to Australia's associations with food and wine, rich history and heritage, in addition to value for money. Australia's coastline, wildlife and food and wine generate the greatest appeal for Chinese travellers.[8]

In order to get the most out of this global industry, and reach Tourism 2020 targets, Tourism Australia has identified specific consumer segments and geographic markets.

Identifying specific source markets is important because travellers from different places can have different travel motivations, interests and behaviours.

In addition to geographic location, travel motivations and patterns are influenced by factors such as age, cultural background, previous travel experience, available holiday time and current economic, environmental and political concerns.

Tourist perceptions are also influenced by their knowledge of the destination, the distance they need to travel to the destination, media coverage, advertising, their available holiday time and whether it is a first or repeat visit. For example, in short haul markets, such as New Zealand, Australia is a highly achievable destination. Short haul visitors often travel to Australia more than once and purchase shorter, more frequent trips. With familiarity comes the confidence to plan their own trip, travel to destinations beyond the gateways or travel in a less structured, more independent style.

In long haul travel markets, such as the United States and Europe, Australia is seen as a destination that requires a large commitment of both time and money. There is much greater pressure on first time visitors to see as much as possible or to see the key 'icons'. In many instances, long haul travellers believe Australia is the 'trip of a lifetime' and see it as a single visit destination.

1. Tourism Research Australia (2015), *National Visitor Survey December 2014*; 2. TNS, Domesticate 2013; *Domesticate 2014*; 3. The Neilson Company, *Jet. Set. Go! 11 Million Australians Visit A Travel Site In May 2015*, 2015; 4. Traveller; 5. UNTWO, *World Tourism Barometer*, April 2015; 6. Deloitte (2013), *Positioning for Prosperity: catching the next wave*, Building the Lucky Country Series; 7. IVS June 2015; 8. Tourism Australia.

TOURISM AUSTRALIA'S EXPERIENCE SEEKER

Experiences are increasingly important to international travellers, and what compels and motivates people to travel varies from market to market. When planning a trip, travellers will generally select a destination that can provide the experiences that they are looking for. These experiences are underpinned by specific tourism products. While the product itself is an important part of the overall tourism experience, it is generally not the primary reason for visiting a destination.

Tourism Australia's target market — Experience Seekers — have a particular mindset and can be found among all age groups, income levels, and geographic locations. Experience Seekers are less affected by the traditional barriers to travel of distance, time and cost. They are more informed, interested and curious about potential travel destinations.

They constitute about 30 to 50 per cent of all potential long haul outbound travellers from key source markets. This target market is highly predisposed to Australia's offer and is more likely to stay longer, spend more and disperse to regional areas.

Experience Seekers look for:

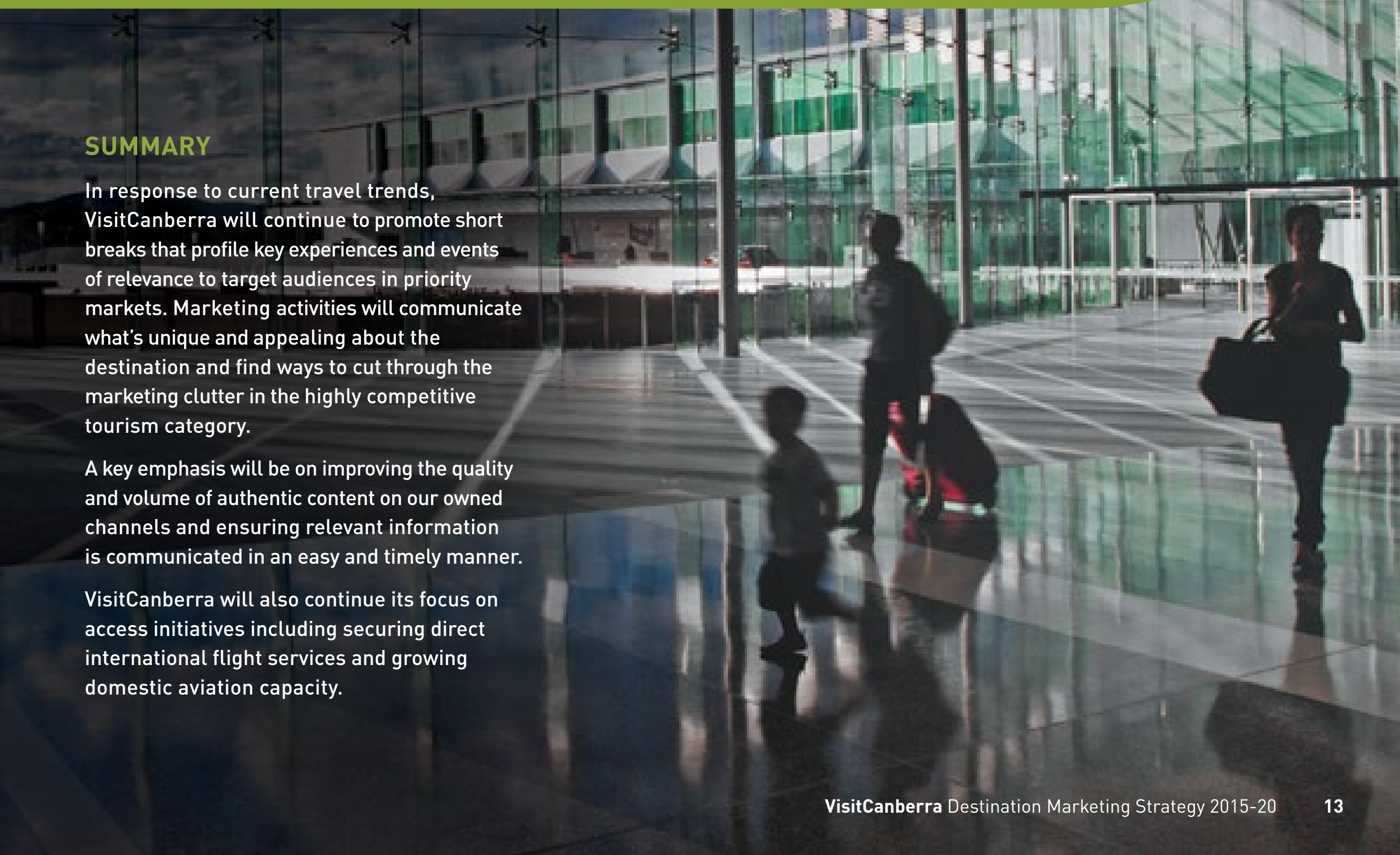
- authentic personal experiences
- social interactions
- meeting and interacting with the locals
- experiencing something different from their normal day-to-day life
- understanding and learning about different lifestyles and cultures
- participating in the lifestyle and experiencing it, rather than observing it
- challenging themselves — physically, emotionally and/or mentally
- visiting authentic destinations that are not necessarily part of the tourist route
- exposure to unique and compelling experiences

IMPACTS ON THE ACT AND CANBERRA REGION TOURISM VISITATION

Building on the identified broad trends in domestic and international travel, it is important to understand which factors influence domestic and international visitation to the ACT and Canberra region. The role short breaks play in the domestic travel landscape, and the value of authentic events, festival and food and wine offerings, are particularly important elements in marketing activities designed to drive visitation to the ACT and Canberra region and increase overnight spend.

VisitCanberra continues to utilise research from Tourism Research Australia and Tourism Australia, as well as undertaking additional research and monitoring and analysing activities that influence visitation to our region. Key insights from these activities include the following:

- Events are a strong catalyst for driving visitation to the destination, as demonstrated by the success of Canberra's event-centred centenary year, the continued success of the Special Event Fund, and the strong visitation and yield associated with flagship events such as Floriade and Enlighten. Events will continue to be a key tool in attracting visitors to the ACT.
- New reasons to visit are also key tools in attracting visitors — industry and product development remains a priority.
- Investment in carefully targeted marketing activities is key to unlocking the latent demand potential that exists in key domestic and international target markets.
- Marketing to international markets must take into account travel preferences and behaviours of each individual market.
- We are operating in an environment where other state and territory competitor destinations (with significant tourism budgets) are competing vigorously for market share — particularly Victoria, New South Wales and Queensland. This reinforces the need for communications to be consistent and to cut through the usual marketing clutter in the tourism category.
- Access initiatives including securing direct international flight services and growing domestic aviation capacity are key to realising the tourism potential of the ACT and Canberra region.
- Outbound/overseas travel continues to be an attractive alternative to domestic travel, particularly when the $AUD is strong.
- High fuel prices can be a barrier to travel, while falling prices can provide a boost to short break travel and day trip travel.
- There is potential to enhance the business events market through greater links to leisure tourism products.
- Recent Federal Government policies in relation to business travel have had a direct and negative impact on business travel to Canberra, which has adversely affected visitation figures.
- Parliamentary sitting periods typically generate high mid-week accommodation occupancy levels and high accommodation prices, with availability generally returning on weekends — however, during peak times, including during some major events, there can be a lack of accommodation stock in the ACT and Canberra region.



SUMMARY

In response to current travel trends, VisitCanberra will continue to promote short breaks that profile key experiences and events of relevance to target audiences in priority markets. Marketing activities will communicate what's unique and appealing about the destination and find ways to cut through the marketing clutter in the highly competitive tourism category.

A key emphasis will be on improving the quality and volume of authentic content on our owned channels and ensuring relevant information is communicated in an easy and timely manner.

VisitCanberra will also continue its focus on access initiatives including securing direct international flight services and growing domestic aviation capacity.

Marketing trends

With the increasingly fragmented media landscape, no single platform can claim the majority of consumer influence although user generated content is by far the most influential form of content. Word of mouth still dominates travel information sources.

VisitCanberra will continue to use popular online platforms and formats including search, social, video, mobile and travel sites to promote the destination. Our focus will be on growing a network of marketers to build authentic positive reviews that inform and inspire potential visitors. VisitCanberra will also monitor growth and relevance of other platforms like digital outdoor advertising if it aligns with campaign activities.

THE CONSUMER TRAVEL PLANNING CYCLE

TNS is a world leader in market research and provides valuable insights on domestic travel trends, particularly on how consumers plan their travel. VisitCanberra refers to TNS insights often to inform decisions.

Diagram 1.0 identifies the different stages of the consumer travel planning cycle while **Table 1.0** helps us understand how consumers behave across the cycle.

Diagram 1.0

Table 1.0

DREAMING	Actively thinking about where to go. Focus is on selecting a location.
PLANNING	Actively collecting information and seeking recommendations.
BOOKING	Most people book flights before considering accommodation options. This stage provides a great opportunity to up-sell.
ANTICIPATING	Generates a need for detailed information — further opportunity to up-sell.
EN ROUTE	Commence their holiday. There is an opportunity to enhance the 'travel' part of their trip and their experience.
DESTINATION	On holiday. Plans change — high potential to influence what people see and do.
POST HOLIDAY SHARING	Back to the real world. Share experiences with friends and family — become an advocate.

MEDIA AND CONSUMER TRENDS

In short, our priority audiences in our Tier 1 markets (Australia and Singapore) are online and spending more time there too. They are more connected, accessing the internet via multiple devices. While the share of web traffic is still predominantly laptop and desktop, the biggest growth in both Australia and Singapore is mobile. Mobile phone use, specifically with regards to social use, has had the highest growth in both markets.

Our target audiences are more socially active with the penetration of active social users in both markets now on par sitting at 86% for Australia and 91% for Singapore. The landscape continues to become even more fragmented as new platforms emerge, particularly social platforms (see insights below).

Video consumption, specifically short form content (fewer than 5 mins) via mobile, is on the rise. YouTube leads the way in key markets with Facebook a close second. Viewing location and times vary slightly in different markets. Consumption peaks between 8-11pm for Australia while in South East Asia significantly more late night (11pm-2am) viewing occurs.

People viewing videos are also watching ads specifically when the ads are tailored to the video content they are watching. While video ad formats dominate across regions, 'sponsored' ads are more visible in Australia.[9]

Digital is also driving the future of the out-of-home advertising industry and the platform is indexing strongly among members of our target audience domestically. More outdoor sites in key markets of Sydney and Melbourne are being transformed from static to digital. This is helping drive the growth.[10]

AUSTRALIA AND SINGAPORE DIGITAL INSIGHTS

SINGAPORE	AUSTRALIA
DIGITAL TRENDS	**DIGITAL TRENDS**
81% are active internet users	89% are active internet users
91% are active social media users	58% are active social media users
80% are active mobile social users	52% are active mobile social users
This represents a 56% growth in social and 57% growth in mobile social since 2014.	This represents an 8% growth in social and 15% growth in mobile social since 2014.
While the share of web traffic is still predominantly laptop and desktop (60%), the biggest growth is mobile (up 16% to sit at 32%).	While the share of web traffic is still predominantly laptop and desktop (64%), the biggest growth is other devices — namely internet TV (up 43% but only 0.1% overall share) and mobile (up 32% to sit at 23%).
TOP THREE SOCIAL PLATFORMS	**TOP THREE SOCIAL PLATFORMS**
Whats App (46%)	Facebook (40%)
Facebook (39%)	Facebook Messenger (18%)
Facebook Messenger (24%)	Twitter (14%)
TOP THREE MOBILE ACTIVITIES	**TOP THREE MOBILE ACTIVITIES**
Video (34%)	Banking (28%)
Banking (33%)	Social (26%)
Social (32%)	Video (23%)

9. iab Australia, *On device research. Mobile Video 2015: A Global Perspective.* 2015; 10. Roy Morgan Asteroid, June 2014

NIELSEN'S AUSTRALIAN CONNECTED CONSUMERS REPORT: KEEPING PACE WITH DIGITAL CONSUMERS FOR MORE THAN A DECADE

THEN 2003 — 10 years later... — **NOW** 2013

MORE AUSSIES ONLINE & MUCH MORE TIME ONLINE

TIME SPENT ONLINE GROWS X3.5

- 2003: 73% AUSTRALIANS 16+ ONLINE; 6.7hrs PER WEEK
- 2013: 23.3hrs PER WEEK; 82% AUSTRALIANS 16+ ONLINE

MORE CONNECTED MORE FRAGMENTED

HOUSEHOLD OWNERSHIP

- DESKTOP: 80% → 72%
- LAPTOP: 33% → 77%
- MOBILE PHONE: 21% WAP MOBILE → 60% SMART PHONE
- PDA: 11%

\+

- TABLET: 31%
- INTERNET ENABLED TV: 33%
- INTERNET ENABLED GAMES CONSOLE: 43%

38% HAVE 4+ CONNECTED DEVICES IN THE HOME

74% ARE DUEL-SCREENERS: CONSUMING TV+INTERNET SIMULTANEOUSLY

SOCIAL BRINGS MORE PLATFORMS

0% ARE ACTIVE USERS OF FACEBOOK (LAUNCHED IN 2004)

60% ARE ACTIVE USERS OF FACEBOOK

Fewer than **1 in 10** made regular use of online chat rooms

More than **7 in 10** actively use social media

MORE MONEY TO ONLINE ADVERTISING

ONLINE AD EXPENDITURE SHARE GROWS X8

- 2003: OTHER MEDIA; 3% ONLINE; $236m
- 2013: OTHER MEDIA; 27% ONLINE; $1,883m

Source: Nielsen's Australian Connected Consumer Report, PWC / IAB Australia Online Advertising Expenditure Report August 2013
2003=full year, 2013 FY 20012-2013

Our brand

VISITCANBERRA'S DESTINATION BRAND

VisitCanberra's brand persona and the consistency with which it is used, is important because what we promote and how we promote it shapes a consumer's impression of and interaction with our city.

A visit to Canberra is packed with intriguing events and people and unrivalled cultural attractions that are within easy reach of the vibrant city and surrounding national parks. The diversity and proximity of experiences is unique to Canberra and contributes to a strong competitive position in the tourism market.

Canberra is Australia's capital – the city that tells the story of our country's freedom, spirit, achievements and aspirations.

VisitCanberra's Brand Book and Style Guide are available to download from VisitCanberra's corporate website: **tourism.act.gov.au/corporate**

BRAND CANBERRA: WHOLE OF CITY BRAND

The tourism sector also plays a key role in bringing the ACT's whole of city branding to life. The tourism sector provides an array of proof points to show our confident, bold and ready city is evolving.

Canberra is a great place to visit as well as live, study and invest.

Find out more about Brand Canberra at **brandcanberra.com.au**

Measuring success

This strategy informs integrated marketing programs for the destination to increase economic return from domestic leisure travel.

VisitCanberra will use the Marketing Framework to guide the development and implementation of marketing activities for 2015-20 and partnership opportunities including:

- Integrated campaign activities
- Public relations activities
- Digital marketing activities
- Content marketing opportunities
- Trade marketing activities

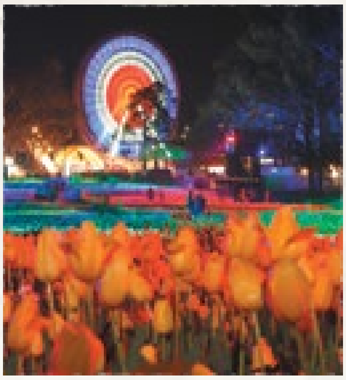
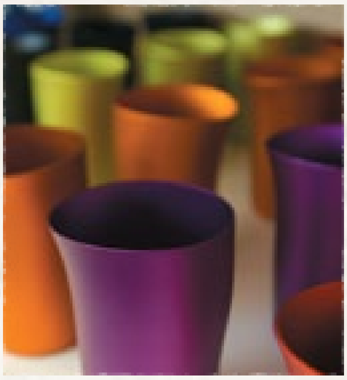
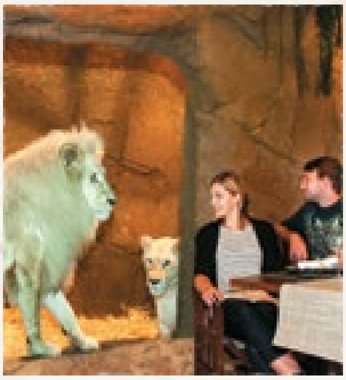
Details of partnership activities will be communicated via Industry Associations and VisitCanberra's Industry Link.

METRICS

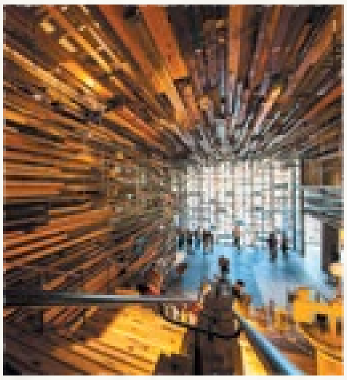
VisitCanberra will draw on a number of different data sources to monitor and respond to changing customer preferences and attitudes.

Metrics will include:

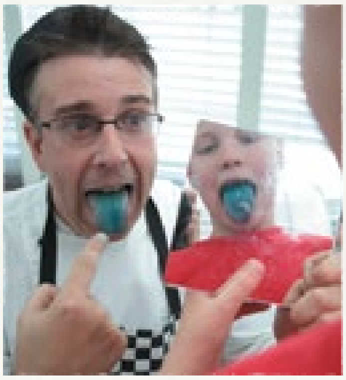
- Increased exposure to and awareness of the destination and key experience pillars
- Year-on-year growth in engagement and visitation to **visitcanberra.com.au** and other key digital channels
- Increase in quality and integrity of content on owned channels, specifically on ATDW and **visitcanberra.com.au**
- Year-on-year growth in national and international overnight visitor expenditure from key markets





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