



Australian Government
National Capital Authority

Australians' Perceptions of their National Capital

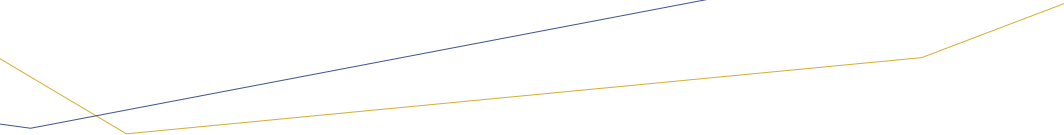
National Perceptions Study

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Results and information contained within this report are derived from extensive research undertaken by the Centre for Tourism Research at the University of Canberra. The results are based upon the authors' interpretation of the material and data collected in the study of Australian's perceptions of the national capital. All attempts have been made to ensure the accuracy of the results and clarity of interpretation; however, other interpretations may be possible from this data. It is the responsibility of the National Capital Authority to draw its own conclusions from the data and this report.

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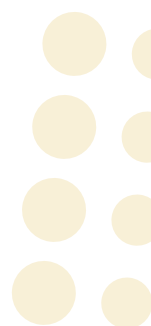
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1 Executive Summary

The key findings of the research are as follows:

- 74.9% of respondents were female, with 43.4% aged between 35 and 54 years of age. Those aged between 18 and 34 years represented a larger proportion of the sample at 30.4% compared to 17.8% in 2002.
- Approximately 31% of respondents were from New South Wales, 25% from Victoria and 20% from Queensland.
- 65% of respondents were married or de facto, while only 18% were unmarried. 73.3% have children with the majority having between two and three children.
- Respondents were highly educated with 54% completing a higher education qualification, while 36.8% were employed full time and 21.8% part time mainly as managers/administrators (20.1%) or professionals (13.3%).
- 43.2% of gross annual household income of respondents were between \$20,000 and \$59,999 per annum.
- 74.4% of respondents had visited Canberra previously, with 46.2% in the past five years and 53.8% over five years ago.
- Approximately 52% visited for holiday/leisure purposes, while 13% visited for business and 16% for other purposes for 2-3 days (45.6%).
- Approximately 13% did not stay overnight, while 67% stayed in commercial accommodation and 19% stayed with friends and relatives.
- 70.6% of respondents' first impressions/images of Canberra were associated with politicians/parliament followed by national capital/ACT, similar to 2002.
- Weather was rated in the top 5 first impressions by 22-24% of respondents and Lake Burley Griffin was mentioned by 19-22% of respondents.
- Floriade was mentioned by over 30% as the most important Canberra event, followed by Anzac Day (10.5%).
- Respondents strongly agreed that Canberra has a political focus (64.6%), is conservative (46.1%) and clean (30%). Furthermore, 61.7% note that Canberra is located in an appealing natural setting (61.7%) with first class educational and sporting facilities (51.3% and 47.5% respectively).
- Approximately 56% of respondents agreed that Canberra reflects national values, while 72.3% agreed or strongly agreed that Canberra reflects Australia's defence forces, democracy (69.9%) and Australian history (66.9%).

- Responses related to the future aspirations of the national capital were highly supportive although slightly down on 2002 figures. A total of 91.6% agreed or strongly agreed that the national capital should be something Australian's are proud of while 83.7% agreed or strongly agreed that the national capital should symbolise Australian's ideals and aspirations. A total of 48.5% of respondents agreed or strongly agreed that the national capital should be a place for important national and international events.
- 44.5% felt that the media portrayal of Canberra was neutral, 24.9% stated it was positive and 20.3% negative. Of those that perceived it as negative, only one fifth perceived that this was a fair portrayal.
- 62.3% of respondents were somewhat interested in politics compared with those that were very interested (25.8%) and not at all interested in politics (11.9%).
- 86.7% felt that it is appropriate for Canberra to mark its centenary, and 50% indicated they would like to share in the celebrations in some way indicating high interest and support for Centenary Celebrations.
- A total of 19.3% of the sample watched the Australia Day Live concert telecast, 79.4% did not and 1.3% were uncertain about whether they had viewed the event.
- Differences were found between previous visitation and respondent perceptions of the national capital. Similar to the 2002 study, those that had visited (especially in the last 5 years) were more positive towards the national capital with respect to city images and the values and aspirations of the national capital.
- Compared to the 2002 study, there were seven perception statements were no longer influenced by previous visitation. Six new perception statements had changed related to visitation, affecting many national value perceptions positively. The new statements found to differ by previous visitation included Canberra mirrors Australia's culture, reflects mateship, tolerance, environmental values, is a place of consensus and is easy to navigate.
- Twelve perceptions (mostly national values portrayed in the national capital) were more positive as a result of watching the Australia Day Live Concert telecast compared to previous visitation indicating the importance of hosting national events in increasing pride and changing perceptions.
- Similar to the 2002 study, three clusters were found and named in a similar way to the 2002 study. The largest cluster (and an increase by approximately 10% in size compared to 2002) was named the 'Capital Enthusiasts' and comprised respondents who were more positive about Canberra and agreed more strongly that the national capital portrays/represents a number of national values.



- The second largest cluster was named 'The Misinformed' and comprised 43.1% of the sample (an increase by approximately 10% compared to 2002). Despite being more likely to have visited Canberra in the last 5 years, they were least likely to agree that Canberra represents several national values and had mixed perceptions of the city.
- The final cluster representing 12.6% of the sample (18% less in size than in 2002) were named 'The Uninformed' as they were more likely to have never visited Canberra and perceived Canberra to be like any large city being unsafe, hectic, unfriendly, dirty but also progressive. Cluster membership differed by socio-demographics, previous visitation, media and interest in politics but not concert viewing, indicating the value of concert viewing as a tool to change perceptions toward the national capital.



2 Introduction

Political capital cities are one of seven classifications of capital cities suggested by Peter Hall (2000) and examples include The Hague, Washington, Ottawa, Brasilia and Canberra. Although a capital can be significant for tourism with respect to place promotion (Page & Hall 2003), changing negative perceptions and images of potential visitors is difficult and time intensive and can be even more problematic for political capitals. Their political and administrative importance is often cited as their downfall for tourism. However, political national capitals are “symbolically rich cities that capture the qualities a state wishes to portray to the larger world” (Milroy 1993 p. 86 in Campbell 2003 p. 5) and consequently provide the setting for the nation’s culture, history and democracy.

In being the centre for national administration they often draw an image of being ‘dull’, ‘government orientated’, ‘cool’ and ‘stuffy’, where Canberra has been described as “reserved” and “closed” (Hall 2002 p.236), and Ottawa as a “sleepy government town” (NCC 2003). However the task of changing negative perceptions of potential visitors can be difficult and time intensive because stereotypical images can be difficult to dislodge (Lury 2001). In addition Neilsen (2001) suggests that promoting a destination in normal circumstances can be a difficult task, while promoting a destination that faces challenges from negative press, such as political capitals is perhaps even more difficult. This is further exacerbated by the fact that it is a national capital’s primary function that is so often the source of its negative image, which is difficult to alter.

This research project was undertaken in 2006 to provide an understanding of Australian’s perceptions and attitudes concerning the national capital (Canberra). Although a separate study, the project was developed in a similar way to a Sustainable Tourism CRC study conducted in 2002 by the University of Canberra in partnership with the National Capital Authority on the same topic.

The objectives of this current research project were to:

- investigate attitudes and perceptions towards Canberra as the national capital based on an image analysis of Canberra;
- examine whether Australians’ perceptions of, and attitudes towards, Canberra as a national capital are still altered positively by a visit to Canberra by comparing attitudes towards the national capital of those who have visited, and those who have not;
- investigate the role of tourism as a tool to create awareness and a better understanding of Canberra as our nation’s capital;
- explore Australians’ expectations of the national capital;
- examine Australians’ awareness of the Australia Day Live concert and whether viewing the event has altered perceptions and attitudes of the national capital; and
- examine Australians’ awareness and opinions of the Canberra Centenary celebrations for 2013.

In recent years the National Capital Authority has expanded its areas of responsibility to develop all Australians' awareness and understanding of the national capital. This is evident in the Authority's mission to build the national capital in the hearts of all Australians. This research hopes to contribute to the National Capital Authority's mission and assist in reaching the key outcomes outlined in their communications strategy.



3 Methodology

Similar to the 2002 study, this study utilised a self-completion questionnaire, which was distributed by mail to a random sample of Australian households. As an incentive to participate in the study, respondents were informed that all who returned a completed questionnaire by the due date, using the attached pre-paid return envelope, would go into a draw for a chance to win a \$500 cash prize.

A random sample of 5,000 Australian householders were initially selected by a list broker using verified Telstra data in accordance with privacy regulations. The surveys were distributed after the Australia Day Live concert in the week beginning January 30th 2006, so that data on the concert telecast viewing could be collected. Approximately 50% of surveys (or 2,500) were returned by early March 2006, nearly twice as many as required for the study and double that of the 2002 study. However, as this initial sample was found to be unrepresentative of the Australian population, the questionnaire was later distributed to a further 2,000 Australian households in New South Wales, Victoria and Queensland to increase responses from these under-represented states. The response rate for the second mail-out of the surveys was 14.5% (284 surveys) which were returned by 12 June 2006. The returned surveys from both mail-outs were collated and a random stratified sample of 1002 surveys was selected using statistical analysis software (Statistical Package for the Social Sciences) for analysis and presentation. Based on the population of Australia the results are confident to +/-3% margin of error at the 95% confidence level.

This report first outlines the profile of respondents compared with relevant ABS statistics before discussing the level of previous visitation to the national capital and the nature of that travel. The report will then outline respondents' perceptions of the national capital and whether perceptions differ on previous visitation or viewing the 2006 Australia Day Live concert on television. Results concerning a cluster segmentation exercise will be presented and differences outlined on their perceptions and attitudes toward the national capital depending on their cluster membership composition. Finally, the report will draw some conclusions and make some recommendations.

4 Results

4.1 Profile of Respondents

4.1.1 Age and Gender

The majority of survey respondents were female (74.9%) and approximately one quarter (25.1%) were male. This is reflective of typical patterns of survey respondents, with females being more likely to respond, especially on topics which relate to the household (such as travel behaviour).

The age distribution of participants is generally representative of the Australian population, as compared with 2001 Census data produced by the Australian Bureau of Statistics (ABS) (Table 1). However the sample does comprise fewer respondents aged between 18 and 24 and a greater number of respondents aged between 45 and 64 and over 75.

Compared to the previous Perceptions of Canberra study sample, the 2006 study received more respondents in the younger age groups, aged between 18 and 34 years, and fewer respondents aged between 65 and 74 years.

Table 1: Age and Gender Distribution

Compared with 2002 Study Sample and ABS Population Data (n=1002)

Age Group	2002 Study Sample Percent	2006 Study Sample Percent			ABS Population Age Distribution Percent		
	Total	Male	Female	Total	Male	Female	Total
18-24 years	4.2	4.8	12.9	10.9	6.4	6.2	12.6
25-34 years	13.6	8.3	23.2	19.5	9.6	9.8	19.4
35-44 years	21.8	14.3	23.5	21.2	10.0	10.4	20.4
45-54 years	24.8	30.6	19.3	22.2	9.1	9.2	18.3
55-64 years	17.7	17.9	14	15	6.3	6.2	12.5
65-74 years	12.1	15.9	4.1	7.1	4.4	4.7	9.1
>75 years	5.8	8.3	2.9	4.3	3.0	4.7	7.8
Total	100	25.1	74.9	100	48.8	51.2	100

Source: ABS Census of Population & Housing 2001.

4.1.2 Place of Residence

As shown in Table 2 below, the majority of respondents were residents of New South Wales, Victoria and Queensland. This reflects the Australian population distribution and is generally representative of the population when compared to ABS figures. The state of residence of respondents is also comparable to the previous study findings, with a slightly smaller proportion of respondents from New South Wales.

Table 2: Place of Residence

Compared with 2002 Study Sample and ABS Population Data (n= 1002)

Place of Residence	2002 Study Sample Percent	2006 Study Sample		ABS Population Data Percent
		Frequency	Percent	
New South Wales	34.2	306	30.5	33.9
Victoria	26.8	246	24.6	25.1
Queensland	17.2	202	20.2	19.8
South Australia	8.5	91	9.1	7.7
Western Australia	8.9	115	11.5	10.1
Tasmania	3.8	36	3.6	2.4
Northern Territory	0.6	6	0.6	1.0

Sources: Population by Age and Sex, Australian States and Territories, Cat. No. 3201.0 June 2005 figures.

4.1.3 Country of Birth and Ancestry

As Table 3 below demonstrates, the vast majority of respondents (81.6%) were born in Australia. This is generally representative of the Australian population, though ABS figures indicate a fewer proportion of people are born in Australia. The sample also has fewer respondents born in 'other' countries and a higher proportion of respondents born in the United Kingdom.

Table 3: Country of Birth

Compared with 2002 Study Sample and ABS Population Data (n=992)

Country	2002 Study Sample Percent	2006 Study Sample Percent	ABS Population Data Percent
Australia	77.6	81.6	71.8
United Kingdom	-	7.5	5.5
New Zealand	2.5	2.1	1.9
Other	6.1	8.9	19.5

Source: ABS Census of Population & Housing 2001.

Most respondents (77.3%) (Table 4) identified their ancestry as Australian or English. The other ancestries most commonly identified were Irish and Scottish. As the ABS asks a series of questions to identify ancestry, these results are not directly comparable.

They do however provide an indication of the differences and similarities between the samples. On the whole, the sample is representative of the Australian population in regards to ancestry. The key differences are a higher percentage of respondents identifying their ancestry as Scottish, and a smaller percentage of respondents identifying 'other' (more diverse) ancestries, as also found in respondents' country of birth.

Table 4: Predominant Ancestry

Compared with 2002 Study Sample and ABS Population Data (N=941)

Ancestry	2002 Study Sample Percent	2006 Study Sample		ABS Population Data Percent
		Frequency	Percent	
Australian	27.9	434	46.1	35.9
English	46.6	294	31.2	33.9
Irish	7.2	99	10.5	10.2
Scottish	-	84	8.9	2.9
Other	10.6	224	23.9	19.7
Total		1135	120.6	114.1

Source: ABS Census of Population & Housing 2001.

Note: Totals amount to more than 100% as respondents could list up to three nationalities (responses).

Respondents' country of birth and ancestry have indicated more diverse backgrounds than the 2002 study, as shown in Table 4.

4.1.4 Australian Citizenship/Residency Status

Table 5 shows most respondents (93.6%) were Australian citizens, with only 6.3% stating they were permanent residents. This reflects the findings of the 2002 study.

Table 5: Citizenship

Compared with 2002 Study Sample and ABS Population Data (n=1002)

Citizenship/Residency Status	2002 Study Sample Percent	2006 Study Sample	
		Frequency	Percent
Australian citizen	93.2	938	93.6
Australian permanent resident	6.5	63	6.3
Australian temporary resident	0.3	1	0.1

4.1.5 Marital Status

Table 6 shows the majority of respondents (64.8%) were married or in a de facto relationship, and 18% of respondents stated they had never married. Approximately 13% indicated they were divorced or separated and four percent stated they were widowed. In comparison to the ABS Australian population data, the sample comprises a higher percentage of respondents who are married or de facto (+33%) and fewer respondents (-33.2%) who have never been married.

Compared to respondents from the previous study, there is a smaller percentage of respondents who are married or in a de facto relationship.

Table 6: Marital Status

Compared with 2002 Study Sample and ABS Population Data (n=1002)

Marital status	2002 Study Sample Percent	2006 Study Sample Percent	ABS Population Data Percent
Married or defacto	67.7	64.8	31.8
Never married	14.5	18.0	51.2
Divorced or separated	11.7	13.3	6.2
Widowed	6.1	4.0	10.8

Source: ABS Census of Population & Housing 2001.

4.1.6 Children

As Figure 1 illustrates, the majority of respondents have children (73.3%). Approximately 43% have two children, and approximately a quarter of respondents have three children (refer to Table 7 for complete figures). This is consistent with the 2002 study, which found 23% of respondents did not have children and 77% did have children.

Figure 1: Do you have children? (n=1000)

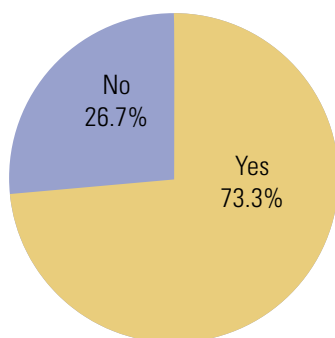


Table 7: Number of Children Compared with 2002 Study Sample (n=735)

Number of Children	2002 Study Sample Percent	2006 Study Sample Percent
2	43.0	43.4
3	27.2	24.5
1	13.2	16.6
4	10.3	9.4
5	3.6	3.7
6	1.2	1.9
7	0.8	0.3
9	0.0	0.1
11	0.2	0.1

4.1.7 Level of Education

Respondents overall were highly educated. Almost 54% completed tertiary or higher education and 38.9% completed secondary schooling (Table 8). This is also consistent with findings of the 2002 study. Whilst the data for Educational Level is not directly comparable to the ABS Census 2001 data, broad comparisons can be made to provide an indication of the respondents' educational background in relation to the Australian population. In relation to the ABS data, a greater percentage of respondents (+25.6) had completed tertiary/higher education. This can also be seen in the comparably lower percentage of respondents who completed secondary education.

Table 8: Highest Level of Educational Completed

Compared with 2002 Study Sample and ABS Population Data (n=1000)

Education level completed	2002 Study Sample Percent	2006 Study Sample Percent	ABS Population Data	
			Education level completed	Percent
Completed tertiary/higher education	55.0	53.9	Year 8 or below	7.6
Completed secondary	37.8	38.9	Yr 9 to Year 12	64.1
Completed primary	7.2	7.2	Tertiary/Higher Education	28.3

Source: ABS Census of Population & Housing 2001.

4.1.8 Employment Status and Occupation

As shown on Table 9, most respondents were either employed on a full-time basis (36.8%) or were not in the labour force (35.5%). Of those respondents not in the labour force, 13% indicated their employment as 'home duties' and 15.6% were retired. Again, this was generally consistent with ABS figures, with minor variations between the spread. The sample included approximately 5% more respondents who were employed part-time, and fewer full-time students. This is also the case when comparing results to the 2002 study.

The majority of respondents indicated their occupation as Managers and Administrators, Professionals and Retired, as per the employment status responses. As shown on Table 10, respondents from this study indicated they were employed in more diverse occupations compared to respondents from the 2002 study. Compared to the ABS data, there were lower percentages of respondents in most of the occupation fields, and a higher proportion of respondents in Managers and Administrators field (Table 10).

Table 9: Employment Status

Compared with 2002 Study Sample and ABS Population Data (n=1002)

Employment status	2002 Study Sample Percent	2006 Study Sample Percent	ABS Population Data Percent
Employed full time	39.1	36.8	33.7
Employed part time	16.6	21.8	16.9
Not currently employed	2.9	2.5	4.2
Not in Labour Force (includes retired, home duties and disability pensioners)	39.0*	35.5	33.1
Student (full-time)	2.4	3.4	12.1

Source: ABS Census of Population & Housing 2001.

* Estimate only, includes respondents who are retired, employed in home duties and indicated 'other' as employment status.

Table 10: Occupational Classification

Compared with 2002 Study Sample and ABS Population Data (n=974)

Occupation	2002 Study Sample Percent	2006 Study Sample		ABS Population Data Percent
		Frequency	Percent	
Managers and Administrators	26.4	130	20.1	9.4
Professionals	30.6	196	13.3	18.6
Associate Professionals	4.6	48	8.4	12
Tradespersons & Related Workers	7.6	46	7.6	12.5
Advanced Clerical & Service Workers	7.1	74	4.9	3.8
Intermediate Clerical, Sales & Service Workers	6.7	82	4.7	16.8
Intermediate Production & Transport Workers	1.4	7	3.3	8.3
Elementary Clerical, Sales & Service Workers	1.7	29	3	9.8
Labourers & related Workers	2.6	32	0.7	8.8
Other:	11.3			n/a
Disabled pension		18	1.8	
Home duties		126	13	
Retired		152	15.6	
Student (full-time)		34	3.5	

Source: ABS Census of Population & Housing 2001.

4.1.9 Household Income

The majority (43.2%) of respondents' annual gross household income is between \$20,000 and \$59,999. Approximately 18% indicated their earnings to be less than \$20,000, and 23.2% had household income ranging from \$80,000 to \$100,000. Estimates of annual earnings (from weekly earnings figures) from ABS Census data show this to be generally representative of the study population, with the key difference being a larger percentage of respondents in the higher household income brackets. Similarly when compared to the previous study, there are fewer respondents with lower household income.

Table 11: Total Household Income Per Annum (Gross)

Compared with 2002 Study Sample and ABS Population Data (n=949)

Household income	2002 Study Sample Percent	2006 Study Sample Percent	ABS Population Data	
			Annual Household Income a	Percent a
Less than \$20,000	20.9	17.8	Less than \$20,748	23.9
\$20,000-\$39,999	23.4	21.8	\$20,800-\$41,548	26.9
\$40,000-\$59,999	19.1	21.4	\$41,600-\$62,348	19.7
\$60,000-\$79,999	14.5	15.8	\$62,400-\$77,948	9.1
\$80,000-\$99,999	8.6	11.3	\$78,000-\$103,948	11.3
\$100,000 or more	13.5	11.9	\$104,000 +	9.2
Total	100	100	Total	100

a Calculated from Household Weekly Earnings, Source: ABS Census of Population & Housing 2001.

Overall, compared to the ABS 2001 Census data the study sample is representative of the Australian population. The major differences exist with respect to a larger percentage of respondents who are female, aged between 25 and 54 years of age. A large proportion of respondents were either married or in defacto relationships, have high educational levels and indicated they were employed part time. Some of these differences could be due to the profile of respondents who complete surveys (females, middle age groups and those with high educational levels). The profile of respondents should be kept in mind when viewing the results in the following sections of the report.

4.2 Visitors to Canberra

4.2.1 Visitation History

The majority of respondents (74.4%) had visited Canberra previously, of which 46.2% visited in the past five years, and 53.8% visited over five years ago (Figure 2). Of those respondents who had not visited (25.6%), a third intended to visit in the future, 43% did not know and almost a quarter of respondents did not intend to visit (Table 13). Compared to the 2002 study, there were fewer respondents who have visited Canberra and fewer respondents who had no intention of visiting in the future.

Table 12: Previous Visitation

Compared with 2002 Study Sample (n=997)

Visited Canberra Previously	2002 Study Sample Percent	2006 Study Sample	
		Frequency	Percent
Yes	83.8	742	74.4
No	16.2	255	25.6

Figure 2: Visitation History (n=738)

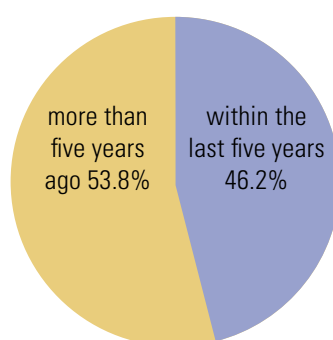


Table 13: Future Visit Intentions (no previous visitation)

Compared with 2002 Study Sample (n=251)

Intend to visit Canberra in the future?	2002 Study Sample Percent	2006 Study Sample	
		Frequency	Percent
Yes	32.6	83	33.1
No	35.3	60	23.9
Don't Know	32.1	108	43.0

4.2.2 Main Purpose of Visit

Most respondents (51.7%) stated their main purpose of visit was for holiday/leisure. The next most common reason was to visit friends and relatives (18.9%). A total of 16.1% were visiting for other purposes (such as education and training). These findings are similar to the 2002 study findings, with the exception of a greater percentage of respondents visiting Canberra to visit friends/relatives.

Compared with Tourism Research Australia data (for year ending December 2005 for overnight domestic visitors), which found approximately 25% of visitors to Canberra came for Holiday/leisure, 38% to visit friends and relatives, 32% for business and 5% travelled for other reasons, a much greater percentage of respondents were holiday/leisure visitors with fewer business and visiting friends and relatives (VFR) visitors.

Table 14: Main Purpose of Visit (n=739)

Main purpose of visit	2002 Study Sample Percent	2006 Study Sample	
		Frequency	Percent
Holiday/Pleasure	53.2	382	51.7
Visiting Friends/Relatives	17.3	140	18.9
Business	14.0	98	13.3
Other	15.3	119	16.1

4.2.3 Length of Stay

Most visitors (45.6%) stayed between 2-3 days when visiting Canberra, and approximately one quarter stayed between 4 to 7 days. Twenty one percent were day visitors. This compares with 80% of overnight domestic visitors who stay between 1-3 nights in the ACT and 16% between 4 and 7 nights (according to Tourism Research Australia data for year ending December 2005). Compared to the 2002 study, a greater number of respondents were day visitors to the capital, and overall respondents tended to visit for fewer days.

Table 15: Length of Stay (n=737)

Length of Stay	2002 Study Sample		2006 Study Sample	
	Percent	Frequency	Percent	Frequency
1 day	17.6	155	21.0	155
2-3 days	47.9	336	45.6	336
4-7 days	24.3	194	26.3	194
8-14 days	4.9	31	4.2	31
More than 14 days	5.4	21	2.8	21

4.2.4 Accommodation

As detailed in Table 16, most visitors used commercial accommodation, including hotels, motels, serviced apartments and bed and breakfast accommodation. Approximately 20% stayed with friends and relatives.

Table 16: Study Sample Accommodation Type (n=736)

Type of Accommodation Used	Frequency	Percent
Hotel, Motel, Serviced Apartments and other commercial accommodation	493	67.0
Friends/Relatives property	141	19.2
Other	9	1.2
Did not stay overnight	93	12.6

4.2.5 Travel Arrangements

That vast majority of visitors (87.6%) were free and independent travellers, who made their own travel arrangements, while a total of 12.4% of visitors were package or part package travellers.

Table 17: Study Sample Travel Arrangement (n=785)

Travel Arrangement	Frequency	Percent
Free and Independent Traveller	645	87.6
Part Package Traveller	24	3.3
Package Traveller	67	9.1

4.3 Perceptions of the National Capital

Respondents were asked to name their first impressions of Canberra, which Canberra attractions and events they believed to be the most important and which Canberra attractions and events they perceived as nationally significant. Respondents were also asked to indicate their level of agreement to a series of statements about Canberra's attributes, characteristics, and facilities as well as whether they believed national values and achievements were reflected in the national capital. This section presents their responses.

4.3.1 Initial Perceptions of Canberra

Respondents' first impressions of Canberra were gauged by asking them to name what they thought of when they heard the word 'Canberra'. A large majority (70.6%) associated Canberra with politicians and parliament (including government) and almost 42% thought of the words 'national capital' or the 'ACT'. Other frequently identified aspects were Parliament House, identified by 38.8% of respondents, and the War Memorial/Defence Force History, identified by 32.8% of respondents. Almost one quarter of respondents mentioned an aspect of Canberra's weather. The main differences in the first impressions of Canberra were responses for those who had never visited. They were more likely to mention weather, and a higher proportion of those who had not visited mentioned politicians, parliament and government.

Table 18: First Impressions/Images of Canberra (n=253-995)

Total Sample	2002 Study Sample Percent	2006 Study Sample Percent
Politicians/Parliament (Government)	68.4	70.6
National Capital/ACT	40.8	41.9
Parliament House	34.5	38.8
War Memorial/Defence Force History	32.6	32.8
Weather (Cold/Hot/Bad/Good)	19.9	24.4
Lake Burley Griffin	23.0	19.4
Respondents who visited within last 5 years		
Politicians/Parliament (Government)	62.5	59.0
National Capital/ACT	38.8	39.2
Parliament House	34.5	38.9
War Memorial/Defence Force History	34.9	36.3
Weather (Cold/Hot/Bad/Good/Pleasant)	-	22.4
Respondents who visited over 5 years ago		
Politicians/Parliament (Government)	70.1	73.4
National Capital/ACT	41.8	41.9
Parliament House	36.3	38.8
War Memorial/Defence Force History	36.1	37.3
Weather (Cold/Hot/Bad/Good)	-	24.4
Lake Burley Griffin	25.4	21.8
Respondents who have never visited		
Politicians/Parliament (Government)	81.2	80.6
National Capital/ACT	44.1	45.5
Parliament House	29.7	39.1
Weather (Cold/Hot/Bad/Good)	24.8	27.7
War Memorial/Defence Force History	17.3	21.3

Note: Totals do not amount to 100% due to multiple responses. Respondents could list up to five aspects (responses).

4.3.2 Most important tourist attractions in Canberra

The two attractions identified as the most important in Canberra were Parliament House (77.7%) and the Australian War Memorial (62.3%). Almost one quarter of respondents believed Lake Burley Griffin to be an important Canberra tourist attraction and 20% named the National Gallery of Australia. The National Museum of Australia and Telstra Tower were also frequently mentioned.

Questacon was an important attraction identified by over 20% of respondents who had visited in the last five years. A greater percentage of those who had visited the Capital mentioned Parliament House and the Australian War Memorial as important tourist attractions.

Table 19: Most Important Tourist Attractions in Canberra (n=251-997)

Total Sample	2002 Study Sample Percent	2006 Study Sample Percent
Parliament House	86.4	77.7
Australian War Memorial	71.5	62.3
Lake Burley Griffin	34.6	24.5
National Gallery of Australia	37.7	21.2
National Museum of Australia	12.4	13.9
Telstra Tower	15.6	13.2
Respondents who visited within last 5 years		
Parliament House	86.4	80.0
Australian War Memorial	76.1	74.1
National Gallery of Australia	51.9	34.7
Lake Burley Griffin	31.7	25.9
Questacon	19.3	22.4
Respondents who visited over 5 years ago		
Parliament House	87.0	81.6
Australian War Memorial	75.1	69.0
Lake Burley Griffin	39.0	29.5
National Gallery of Australia	28.9	22.2
Royal Australian Mint	11.3	14.9
Telstra Tower	15.1	13.6
Respondents who have never visited		
Parliament House	84.7	68.9
Australian War Memorial	43.9	36.3
Lake Burley Griffin	31.2	14.3
Old Parliament House	9.6	6.8

Note: Totals do not amount to 100% due to multiple responses. Respondents could list up to five attractions (responses).

4.3.3 Most important festival and events held in Canberra

As shown in Table 20, Floriade was identified as the most important event held in Canberra by 30.4% of respondents. Compared with responses to the most important tourist attractions in Canberra, responses to this question were notably lower, with the next most frequently identified event, Anzac Day, only being identified by 10.5% of respondents. A significant number of respondents were not aware of important Canberra festivals and events as indicated by lower percentage of responses compared to 2002. Respondents who had visited in the last five years had a lower response for key events and festivals, and like the other respondents identified Floriade and Anzac Day as important Canberra events.

Table 20: Most Important Festivals and Events held in Canberra (n=246-981)

Total Sample	2002 Study Sample Percent	2006 Study Sample Percent
Floriade	79.0	30.4
Anzac Day	13.0	10.5
Summernats	14.6	8.7
Australia Day Celebrations (including concert)	-	7.1
Respondents who visited within last 5 years		
Floriade	84.3	51.0
Anzac Day	12.4	13.7
Summernats	16.2	13.7
Australia Day Celebrations (including concert)	-	7.8
Respondents who visited over 5 years ago		
Floriade	72.7	26.3
Anzac Day	15.5	11.2
Summernats	-	6.9
Australia Day Celebrations (including concert)	-	6.4
Respondents who have never visited		
Floriade	58.1	9.3
Australia Day Celebrations (including concert)	-	6.9
Summernats	20.9	4.9
Anzac Day	-	4.5

Note: Totals do not amount to 100% due to multiple responses. Respondents could list up to five festivals/events (responses).

4.3.4 Nationally Significant Canberra attractions and events

The majority of respondents identified Parliament House and the Australian War Memorial as the two Canberra attractions of national significance, corresponding with responses to the most important tourist attractions. Approximately 11% of respondents listed Anzac Day as an event of national significance, as well as the Australia Day Celebrations (7.8%), which included the Australia Day Live concert. It is interesting to note that the Australia Day ceremonies (including the concert) were rated by a greater proportion of respondents that had never visited Canberra.

Table 21: Attractions and Events in Canberra of National Significance (n=198-843)

Total Sample	2002 Study Sample Percent	2006 Study Sample Percent
Parliament House	37.8	38.1
Australian War Memorial	35.7	35.1
Anzac Day	-	11.2
National Gallery of Australia	13.1	8.4
Australia Day Celebrations (including concert)	-	7.8
Old Parliament House	-	7.0
Respondents who visited within last 5 years		
Parliament House	38.8	43.4
Australian War Memorial	37.9	43.1
National Gallery of Australia	18.0	13.5
Anzac Day	-	12.8
Respondents who visited over 5 years ago		
Australian War Memorial	36.3	38.1
Parliament House	36.3	37.8
Anzac Day	-	11.1
Australia Day Ceremonies (including concert)	-	7.9
National Gallery of Australia	-	7.3
Australian Institute of Sport	-	6.2
Respondents who have never visited		
Parliament House	38.8	30.3
Australian War Memorial	24.5	17.7
Australia Day Ceremonies (including concert)	-	11.6
Opening of Parliament	-	9.1

Note: Totals do not amount to 100% due to multiple responses. Respondents could list up to five attractions/events (responses).

4.3.5 Perceived Attributes of Canberra

Respondents were asked to indicate their views on a range of statements about Canberra's attributes, ranging from positive to negative. As shown on Figure 3 and Table 22, overall the majority of respondents indicated neutral beliefs, with the exception of Canberra having a political focus, which 64.6% of respondents agreed strongly with. A high proportion of respondents (51.3%) view Canberra as conservative. Over 30% of respondents also strongly agreed that Canberra is clean. Perceptions regarding Canberra's attributes are mostly unchanged, as seen when comparing to 2002 findings, perceptions regarding Canberra's attributes are overall similar, indicating little change over four years.

Figure 3: Perceptions of Canberra –
Canberra's Attributes Compared with 2002 Study
Mean Response by Rank (n=976-993)

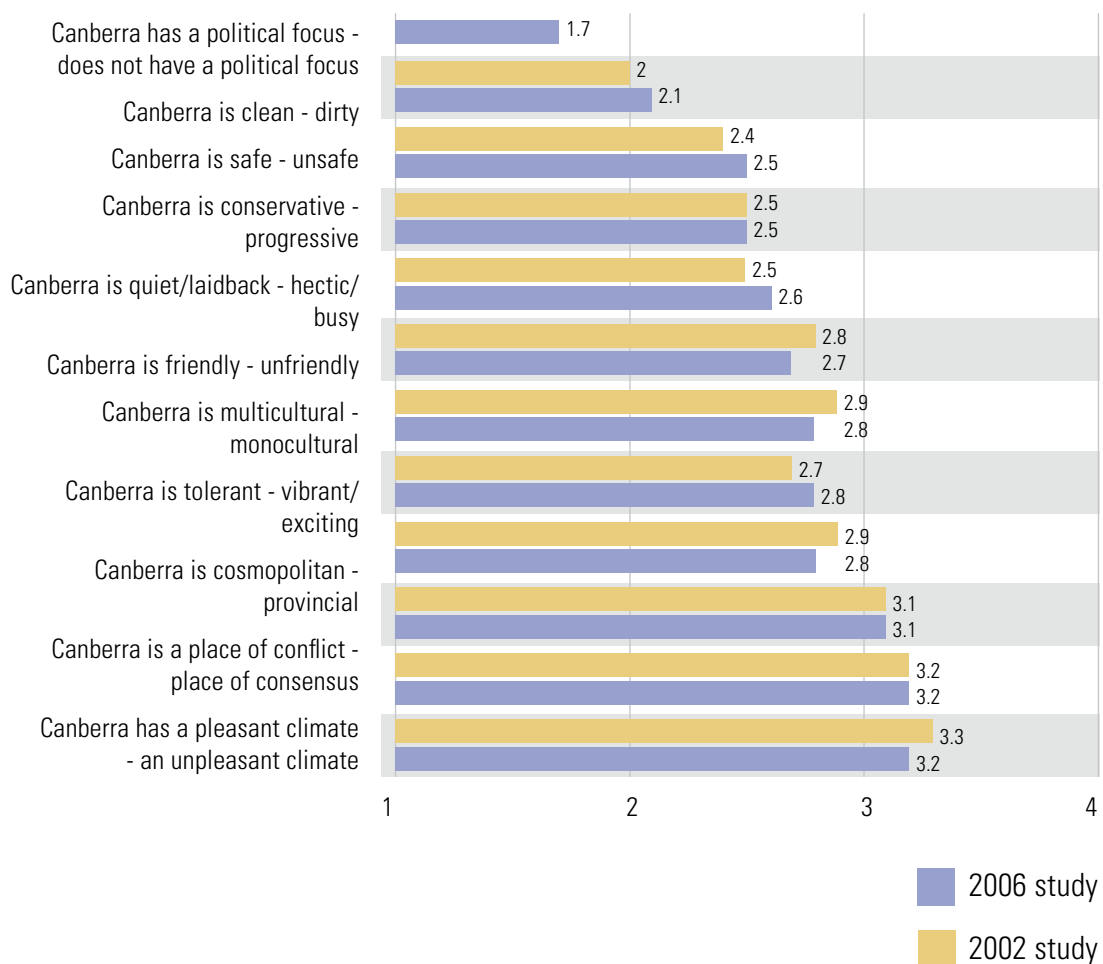


Table 22: Perceptions of Canberra – Canberra’s Attributes

Response Distribution by Percentage (n=976-993)

Attribute	1%	2%	3%	4%	5%	Attribute
Canberra has a political focus	64.6	19.1	7.8	2.8	5.7	does not have a political focus
Canberra is clean	34.8	35.7	18.3	7.7	3.4	dirty
Canberra is conservative	21.0	30.3	32.9	12.7	3.1	progressive
Canberra is safe	12.0	34.8	44.7	6.3	2.2	unsafe
Canberra is quiet/laidback	11.8	34.2	39.3	11.4	3.4	hectic / busy
Canberra is friendly	9.6	24.7	52.2	10.5	2.8	unfriendly
Canberra is boring	13.5	25.4	38.0	19.0	5.1	vibrant / exciting
Canberra is tolerant	6.6	26.4	54.2	10.2	2.5	intolerant
Canberra is multicultural	12.0	20.6	41.1	18.7	5.6	monocultural
Canberra is cosmopolitan	5.3	18.9	45.7	22.8	7.3	provincial
Canberra has a pleasant climate	5.5	17.0	40.2	26.4	10.9	an unpleasant climate
Canberra is a place of conflict	5.9	10.8	46.0	29.4	8.0	a place of consensus

4.3.6 Canberra’s Facilities and Characteristics

As shown on Table 23 (over page), the majority of respondents agree that Canberra is a city located in a very appealing natural setting (61.7%) which offers first-class educational facilities (51.3%) and first-class sporting facilities (47.5%) and reflects Australian heritage (46.2%). Most respondents (82%) agree that Canberra is dominated by politics. Like perceptions of Canberra’s attributes, Figure 4 shows that perceptions regarding Canberra’s facilities and characteristics remain mostly the same with minor changes in respondents’ views on Canberra’s nightlife and entertainment, commercial activities, educational facilities, ease of navigation, natural setting and heritage.

Figure 4: Perceptions of Canberra - Facilities and Characteristics Compared with 2002 Study

Mean Response by Rank (n=993-999)

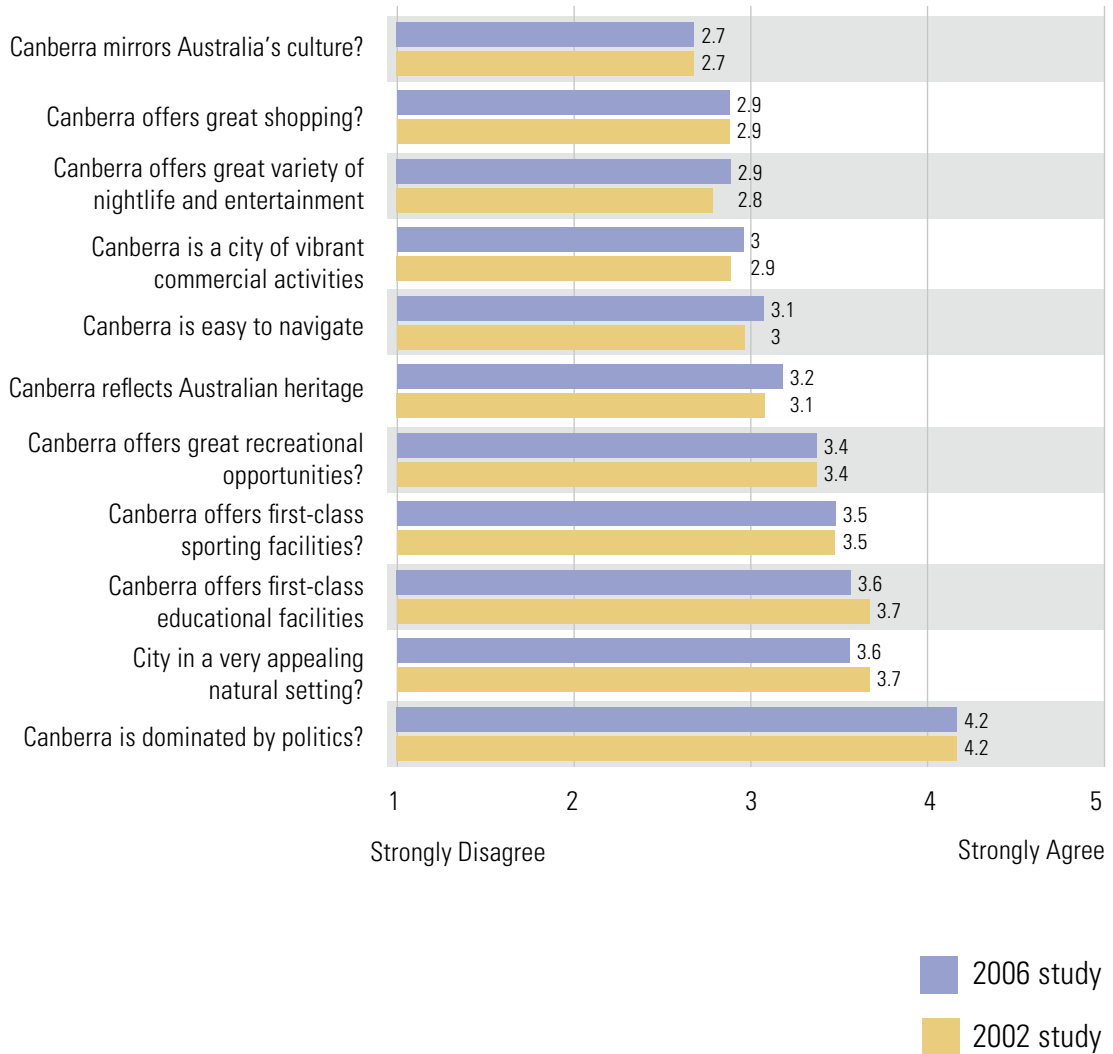


Table 23: Perceptions of Canberra: Facilities and Characteristics

Response Distribution by Percentage (N=993-999)

Statement	Strongly Disagree %	Disagree %	Neither Agree Nor Disagree %	Agree %	Strongly Agree %
Canberra is dominated by politics?	2.1	4.2	11.6	39.0	43.0
City in a very appealing natural setting?	1.9	9.5	26.8	46.7	15.0
Canberra offers first-class educational facilities?	1.0	1.2	46.5	38.6	12.7
Canberra offers first-class sporting facilities?	2.8	7.9	41.7	35.5	12.0
Canberra offers great recreational opportunities?	1.8	8.4	47.0	35.7	7.2
Canberra reflects Australian heritage?	5.2	20.1	28.5	38.8	7.4
Canberra is easy to navigate?	8.6	19.1	36.8	29.4	6.1
Canberra is a city of vibrant commercial activities?	3.2	17.5	58.2	19.1	2.0
Canberra offers great variety of nightlife and entertainment?	4.6	18.3	63.1	11.6	2.3
Canberra offers great shopping?	4.7	23.4	49.5	19.4	3.0
Canberra mirrors Australia's culture?	10.8	30.9	35.7	19.4	3.3

4.3.7 National Values Reflected in Canberra

The great majority of respondents agree that many national achievements and values are reflected in the national capital (Table 24). Respondents indicated the values and achievements most strongly reflected were the Australia's Defence Forces (72.3%), Australia's democracy (69.9%) and Australia's history (66.9%), which reflects respondents' initial perceptions of Canberra (Politicians/Parliament/Government, Parliament House, Australian War Memorial/Defence Force History). Other values and achievements most respondents indicated were reflected in Canberra are science and technology (58.5%), sports (54%) and sporting achievements (48.7%), achievements in arts and literature (49.7%) and environmental values (49.7%).

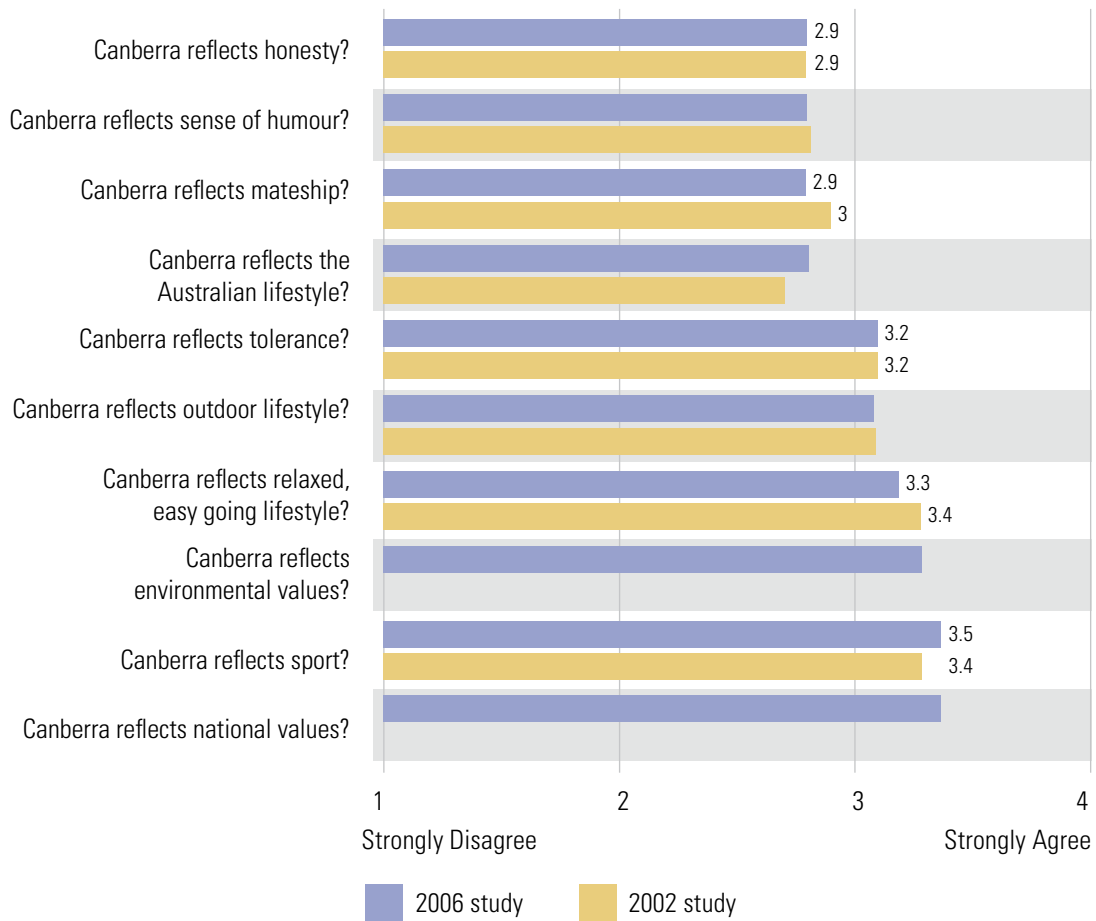
Table 24: National Values and Achievements Reflected in Canberra
Response Distribution by Percentage (N=985-993)

Statement	Strongly Disagree %	Disagree %	Neither Agree Nor Disagree %	Agree %	Strongly Agree %
Canberra reflects national values?	1.9	9.3	33.3	46.1	9.4
Canberra reflects sport?	1.0	12.6	32.4	45.3	8.7
Canberra reflects environmental values?	1.9	9.7	38.7	43.2	6.5
Canberra reflects relaxed, easy going lifestyle?	0.9	16.0	43.6	34.9	4.6
Canberra reflects outdoor lifestyle?	1.8	16.0	43.3	33.6	5.3
Canberra reflects tolerance?	1.8	13.8	54.0	28.1	2.2
Canberra reflects the Australian lifestyle?	8.1	26.7	37.9	22.1	5.2
Canberra reflects mateship?	4.1	21.1	53.8	18.2	2.8
Canberra reflects sense of humour?	4.4	23.0	54.3	16.9	1.4
Canberra reflects honesty?	8.2	20.5	50.4	18.3	2.5
Canberra reflects Australia's Defence Forces?	0.6	4.1	23.0	53.1	19.2
Canberra reflects Australia's democracy?	1.4	4.5	24.1	54.6	15.3
Canberra reflects Australia's history?	1.8	10.3	21.0	53.7	13.2
Canberra reflects Australia's scientific and technological achievements?	1.2	6.1	34.2	47.1	11.4
Canberra reflects Australia's achievements in arts/literature?	1.4	11.0	37.9	40.7	9.0
Canberra reflects Australia's success in sports?	2.5	12.0	36.8	37.5	11.2

As demonstrated in Figures 5 and 6, findings regarding national values and achievements are also similar to the 2002 study, indicating views have generally remained unchanged.

Figure 5: National Values Reflected in Canberra

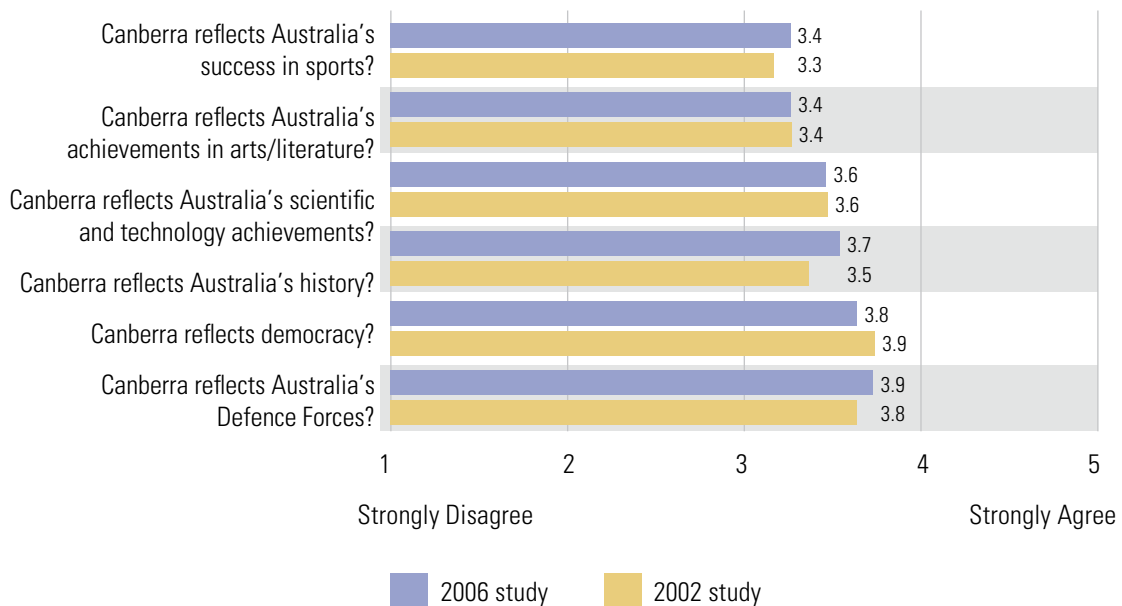
Mean Response by Rank (n=985-993)



Note: Environmental values and national values questions were not included in the 2002 study.

Figure 6: National Achievements Reflected in Canberra

Mean Response by Rank (n=985-993)



4.3.8 Future Directions for the National Capital

Respondents were asked what they believed the role of Canberra as the national capital should be, by indicating the extent to which they agreed or disagreed to the following statements. Most respondents indicated that they believed Canberra as the nation's capital should symbolise Australia's ideals and aspirations and a place Australians are proud of (Figure 7). Compared to the 2002 study, respondents indicated they were less likely to agree that Canberra should be something Australians are proud of and that it should symbolise Australia's ideals and aspirations. Respondents were also less likely to agree Canberra should be the place for important international and national events, though it should be noted that this question was reworded for the current study, from 'Canberra should be a place for important regional, national and international events'. Also, the 2002 study only asked whether Canberra should symbolise aspirations, while this study included ideals.

Figure 7: Role of the National Capital

Mean Response by Rank (N=997-998)

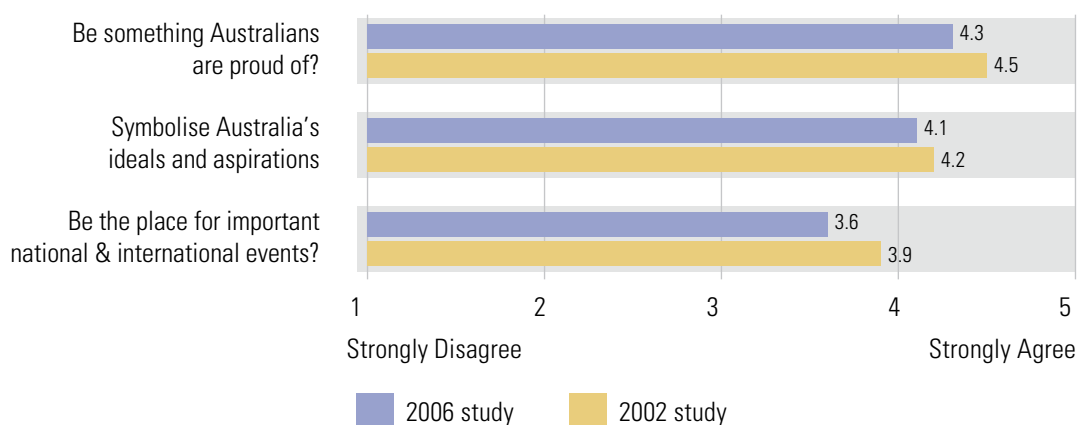


Table 27: Role of the National Capital (N= 997-998)

Aspirations for the national capital	Strongly Disagree %	Disagree %	Neither Agree Nor Disagree %	Agree %	Strongly Agree %
Be something Australians are proud of?	1.4	1.0	6.0	46.4	45.2
Be the place for important national & international events?	3.0	14.0	24.5	39.3	19.2
Symbolise Australia's ideals & aspirations	1.7	2.3	12.3	52.6	31.1

4.3.9 Portrayal of Canberra in the Media

As Figure 8 demonstrates, the majority of respondents believed Canberra is portrayed in the media in a neutral manner. Almost 25% believed it was portrayed positively and approximately

20% believed the capital was portrayed negatively. Table 29 shows almost half of the respondents believed the media’s portrayal of Canberra was fair. However, half of those who felt that Canberra was perceived negatively felt that it was unfair.

Figure 8: Portrayal of Canberra in the Media

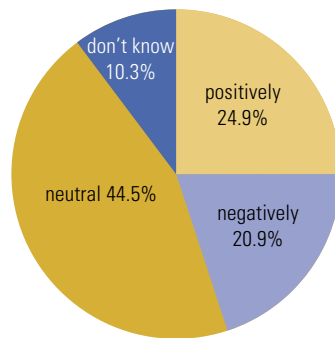


Table 29: Perceived treatment of Canberra by the media (n=993)

Is this a fair portrayal?	Canberra Portrayed in the Media				Total %
	Positively %	Negatively %	Neutral %	Don't Know %	
Yes	21.0	3.8	22.3	0.2	47.3
No	1.0	9.9	4.9	0.6	16.4
Don't Know	2.9	6.5	17.3	9.5	36.3
Total	25.0	20.2	44.5	10.3	100.0

4.3.10 Level of Interest in Politics

As Table 30 shows, the majority of respondents (88.1%) stated they were interested in politics, with 25.8% indicating they were very interested, and 62.3% were somewhat interested. Only 11.9% of respondents were not at all interested in politics.

Table 30: Interest in Politics (n=997)

Interest in Australian politics?	Frequency	Percent
Very interested	257	25.8
Somewhat interested	621	62.3
Not at all interested	119	11.9

4.3.11 Canberra Centenary Celebrations

The great majority of respondents (86.7%) indicated they believe it is appropriate for Canberra to mark its birthday centenary, and over 50% stated they would like to share in the celebrations. Only 7.5% indicated it would not be appropriate to mark the centenary birthday.

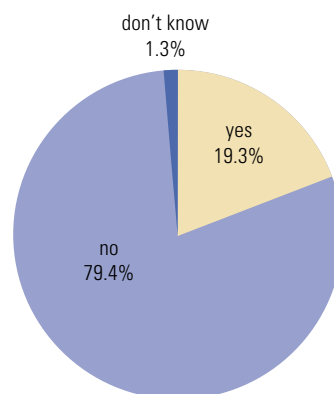
Table 31: Cross-Tabulation: Canberra Centenary Celebrations & Participation % (N=995)

Would you like to share in the celebration of the national capital's centenary?	Canberra celebrates its 100th birthday in 2013 do you think it appropriate to mark this occasion?			Total
	Yes	No	Don't Know	
Yes	49.9	1.0	0.8	51.8
No	13.6	5.3	2.2	21.1
Don't Know	23.2	1.2	2.7	27.1
Total	86.7	7.5	5.7	100.0

4.3.12 Australia Day Live Concert Telecast

As Figure 9 illustrates, the majority of respondents (79.4%) did not watch the Australia Day Live telecast while 19.3% did. It is important to note that this figure stayed consistent even with the extra surveys collected in June 2006 some 5 months after the event. A statistical test was conducted on the socio-demographics of those who watched the telecast compared to those that did not. There were no statistical differences between the overall sample profile presented earlier in the report.

Figure 9: Did you watch the Australia Day Live telecast? (N=995)



4.4 Influences on Perceptions

Table 32 below illustrates the differences in respondents' perceptions of Canberra depending on whether they watched the Australia Day Live telecast or not, and whether they had visited the Capital and when they had visited.

Respondents who had watched the Australia Day Live telecast were more likely to agree that Canberra should symbolise Australia's ideals and aspirations and that Canberra should be a place for important national and international events. Those who had viewed the telecast were also more likely to perceive that Canberra reflects Australia's culture, lifestyle, honesty and heritage. In terms of the influence of viewing the concert, the key differences are respondents' belief that Canberra should symbolise Australia's ideals and aspirations, that Canberra should be a place for important national and international events and that Canberra reflects Australia's culture, lifestyle, honesty and heritage. Respondents who watched the concert were more likely to agree with these statements.

Respondents who had visited the national capital, particularly those who had visited in the past five years, were more likely to believe Canberra offers great recreational opportunities, is a city in a very appealing natural setting and that Canberra reflects Australia's achievements in the arts and literature and in science and technology. They were also more likely to believe Canberra is friendly, vibrant/exciting, tolerant and quiet/laidback. Those who had visited Canberra were less likely to believe that Canberra is dominated by politics.

It is interesting to note that there were twelve perceptions (beliefs) which were influenced by respondents watching the concert, but not by them visiting the capital. Respondents who watched the concert telecast were more likely to agree with the following statements:

- Canberra reflects Australia's history
- Canberra reflects national values,
- Canberra reflects Australian lifestyle
- Canberra reflects honesty
- Canberra reflects sense of humour
- Canberra reflects Australian heritage
- Canberra is a city of vibrant commercial activities
- Canberra offers a great variety of nightlife
- Canberra offers great shopping
- Canberra is multicultural
- Canberra should symbolise Australia's ideals and aspirations
- Canberra should be the place for important national and international events

In comparing the influence of previous visitation on perceptions across the two studies, seven perceptions were found to no longer be influenced by previous visitation. Respondents from the 2002 study who had visited Canberra were more likely to agree to the statements listed below (whilst the perceptions of respondents from this recent study were not influenced by previous visitation):

- Canberra reflects Australia lifestyle
- Canberra reflects honesty
- Canberra reflects Australia's democracy
- Canberra offers a great variety of nightlife
- Canberra offers great shopping
- Canberra should be something Australians are proud of
- Canberra should be the place for important national and international events

Comparison also shows six perceptions which are influenced by previous visitation in the current study, and which were not affected by previous visitation in the 2002 study. Respondents from this study who had visited Canberra were more likely to agree to the statements listed below:

- Canberra mirrors Australia's culture
- Canberra reflects mateship
- Canberra reflects environmental values
- Canberra is easy to navigate
- Canberra is tolerant
- Canberra is a place of consensus

These results are presented in detail in table 32.

Table 32: Influence of Previous Visitation and Concert Viewing on Perceptions

Statement	Previous Visitation			2002 Study Sample Statistical Difference Y/N	Watched Australia Day Live Concert Telecast	
	Within 5 years (YW5)	Over 5 years ago (Y05)	Never Visited (N)		Yes	No
	Mean score for statement				Mean score for statement	
Australian values and achievements reflected in Canberra						
Canberra reflects sport?	<u>3.6</u>	<u>3.4</u>	<u>3.4</u>	✓	3.6	3.5
Canberra reflects Australia's success in sports?	<u>3.5</u>	3.4	<u>3.3</u>	✓	3.5	3.4
Canberra reflects Australia's history?	3.7	3.6	3.6	✓	<u>3.8</u>	<u>3.6</u>
Canberra reflects outdoor lifestyle?	<u>3.3</u>	<u>3.2</u>	<u>3.1</u>	✓	<u>3.3</u>	<u>3.2</u>
Canberra mirrors Australia's culture?	<u>2.7</u>	2.7	<u>2.9</u>	✗	<u>3.1</u>	<u>2.6</u>
Canberra reflects mateship?	<u>2.9</u>	2.9	<u>3.1</u>	✗	<u>3.2</u>	<u>2.9</u>
Canberra reflects national values?	3.5	3.5	3.5	✗	<u>3.7</u>	<u>3.5</u>
Canberra reflects environmental values?	<u>3.6</u>	<u>3.4</u>	<u>3.3</u>	✗	<u>3.5</u>	<u>3.4</u>
Canberra reflects relaxed, easy going lifestyle?	<u>3.4</u>	3.2	<u>3.2</u>	✓	<u>3.4</u>	<u>3.2</u>
Canberra reflects honesty?	2.9	2.8	2.9	✓	<u>3.1</u>	<u>2.8</u>
Canberra reflects tolerance?	<u>3.2</u>	3.1	<u>3.1</u>	✓	<u>3.3</u>	<u>3.1</u>

Note: Underline indicates that statistical differences exist between respondents who watched the concert and those who did not, and respondents who visited Canberra and when they visited. The mean difference is statistically significant at the 95% confidence level.

Table 32: Influence of Previous Visitation and Concert Viewing on Perceptions (Continued)

Statement	Previous Visitation				2002 Study Sample Statistical Difference Y/N	Watched Australia Day Live Concert Telecast	
	Within 5 years (YW5)	Over 5 years ago (Y05)	Never Visited (N)	Significance between Visitation History		Yes	No
	Mean score for statement					Mean score for statement	
Australian values and achievements reflected in Canberra							
Canberra reflects Australia's achievements in arts/literature?	<u>3.6</u>	<u>3.4</u>	<u>3.3</u>	N & YW5 YW5 & Y05	✓	<u>3.6</u>	<u>3.4</u>
Canberra reflects Australia's scientific and technological achievements?	<u>3.8</u>	<u>3.5</u>	<u>3.4</u>	N & YW5 YW5 & Y05	✓	<u>3.7</u>	<u>3.6</u>
Canberra reflects Australian heritage	3.3	3.2	3.3		✗	<u>3.5</u>	<u>3.2</u>
Canberra reflects Australia's democracy?	3.8	3.7	3.8		✓	3.9	3.8
Canberra reflects Australia's Defence Forces?	<u>4.0</u>	<u>3.8</u>	<u>3.8</u>	N & YW YW5 & Y05	✓	<u>4.0</u>	<u>3.8</u>
Canberra reflects Australian lifestyle?	2.9	2.9	2.9		✓	<u>3.1</u>	<u>2.8</u>
Canberra reflects sense of humour?	2.9	2.9	2.9		✗	<u>3.0</u>	<u>2.8</u>
Canberra's attributes							
Canberra is easy to navigate?	3.0	<u>3.0</u>	<u>3.1</u>	N&Y05	✗	<u>3.2</u>	<u>3.0</u>
City of vibrant commercial activities?	3.0	2.9	3.1		✗	<u>3.2</u>	<u>2.9</u>
Canberra offers great variety of nightlife and entertainment?	2.9	2.9	2.9		✓	3.1	2.8
Canberra offers great shopping?	2.9	2.9	3.0		✓	<u>3.1</u>	<u>2.9</u>
Canberra offers great recreational opportunities?	<u>3.6</u>	<u>3.4</u>	<u>3.2</u>	N&YW5 N&Y05 YW5&Y05	✓	<u>3.5</u>	<u>3.3</u>

Note: Underline indicates that statistical differences exist between respondents who watched the concert and those who did not., and respondents who visited Canberra and when they visited. The mean difference is statistically significant at the 95% confidence level.

Table 32: Influence of Previous Visitation and Concert Viewing on Perceptions (Continued)

Statement	Previous Visitation			2002 Study Sample Statistical Difference Y/N	Watched Australia Day Live Concert Telecast	
	Within 5 years (YW5)	Over 5 years ago (Y05)	Never Visited (N)		Yes	No
	Mean score for statement				Mean score for statement	
Canberra's attributes						
Canberra is a city in a very appealing natural setting?	<u>3.9</u>	<u>3.6</u>	<u>3.4</u>	✓	<u>3.8</u>	<u>3.6</u>
Canberra offers first-class educational facilities?	<u>3.7</u>	<u>3.6</u>	<u>3.5</u>	✓	<u>3.7</u>	<u>3.6</u>
Canberra offers first-class sporting facilities?	<u>3.5</u>	<u>3.5</u>	<u>3.3</u>	✓	<u>3.6</u>	<u>3.4</u>
Canberra is dominated by politics?	<u>4.0</u>	<u>4.2</u>	<u>4.3</u>	✓	<u>4.1</u>	<u>4.2</u>
Canberra has a political focus - does not have a political focus	1.6	1.7	1.7	✗	1.8	1.6
Canberra is clean - dirty	<u>1.9</u>	<u>2.1</u>	<u>2.3</u>	✓	<u>2.2</u>	<u>2.1</u>
Canberra is conservative - progressive	2.4	2.6	2.4	✗	2.5	2.4
Canberra is safe - unsafe	<u>2.4</u>	<u>2.6</u>	<u>2.6</u>	✓	<u>2.6</u>	<u>2.5</u>
Canberra is quiet/laidback – hectic/busy	<u>2.4</u>	<u>2.7</u>	<u>2.7</u>	✓	<u>2.7</u>	<u>2.6</u>
Canberra is friendly - unfriendly	<u>2.6</u>	<u>2.8</u>	<u>2.8</u>	✓	<u>2.7</u>	<u>2.7</u>
Canberra is boring – vibrant/exciting	<u>2.9</u>	<u>2.7</u>	<u>2.6</u>	✓	<u>2.9</u>	<u>2.7</u>
Canberra is tolerant - intolerant	<u>2.6</u>	<u>2.8</u>	<u>2.9</u>	✗	<u>2.7</u>	<u>2.8</u>
Canberra is multicultural - monocultural	2.8	2.9	2.8	✗	<u>2.7</u>	<u>2.9</u>

Note: Underline indicates that statistical differences exist between respondents who watched the concert and those who did not., and respondents who visited Canberra and when they visited. The mean difference is statistically significant at the 95% confidence level.

Table 32: Influence of Previous Visitation and Concert Viewing on Perceptions (continued)

Statement	Previous Visitation			Significance between Visitation History	2002 Study Sample Statistical Difference Y/N	Watched Australia Day Live Concert Telecast	
	Within 5 years (YW5)	Over 5 years ago (Y05)	Never Visited (N)			Yes	No
	Mean score for statement					Mean score for statement	
Canberra's attributes							
Canberra is cosmopolitan - provincial	3.0	3.1	3.0		✗	3.0	3.1
Canberra has a pleasant climate – unpleasant climate	<u>3.1</u>	<u>3.3</u>	3.2	YW5&Y05	✓	3.1	3.2
Canberra is a place of conflict – place of consensus	<u>3.3</u>	<u>3.2</u>	<u>3.1</u>	N&YW5 N&Y05	✗	3.2	3.2
Aspirations for the national capital							
✗							
Canberra should symbolise Australia's ideals & aspirations	4.1	4.1	4.1		✗	<u>4.3</u>	<u>4.0</u>
Canberra should be something Australians are proud of?	4.4	4.3	4.3		✓	4.4	4.3
Canberra should be place for important national & international events?	3.6	3.6	3.6		✓	<u>3.8</u>	<u>3.5</u>

Note: Underline indicates that statistical differences exist between respondents who watched the concert and those who did not, and respondents who visited Canberra and when they visited. The mean difference is statistically significant at the 95% confidence level.



5 Cluster Analysis

A cluster analysis was performed in order to segment and further profile the study sample, as was performed in the 2002 study. This involved firstly running a Hierarchical analysis to identify the number of clusters in the sample and then carrying out a K-means cluster analysis with a series of Canberra attributes questions (including friendly/unfriendly, boring/vibrant, cosmopolitan/provincial, clean/dirty, pleasant/unpleasant climate, safe/unsafe, tolerant/intolerant, place of conflict/consensus, and multicultural/monocultural) to identify cluster membership of the respondents and the number of respondents within each cluster.

A series of Analysis of Variance (ANOVA's) and Cross-Tabulation Chi-Square Tests were then run on the clusters and their responses to Canberra perceptions questions as well as demographics to identify characteristics and enable profiling. As in the previous study, three clusters were identified. The clusters were named according to their characteristics, and were similar to the previous study: *the Misinformed*, *Capital Enthusiasts* and *the Uninformed*. However the profile and number of respondents within each cluster varied.

The Misinformed: Have generally negative views about Canberra. They are most likely to believe Canberra is dominated by politics, is boring and conservative and are least likely to agree it offers variety of nightlife and entertainment. They also perceive Canberra as quiet/laidback, safe and clean. Respondents are most likely to be in the youngest age bracket, between 18 and 34 years, are most likely to be highly educated and reside in Victoria. The profile of this cluster is overall consistent with the 2002 study's 'The Misinformed' cluster, although they are younger.

Capital Enthusiasts: Respondents in this cluster are the most likely to have positive views regarding Canberra. They are the most likely to agree that Canberra is friendly, vibrant/exciting, multicultural, cosmopolitan, that it has a pleasant climate, and that it offers great recreational opportunities. They also believe Canberra reflects national values, achievements, and Australia's history. Respondents in this cluster tend to be aged between 35 and 44 years. They are most likely to have children, reside in New South Wales and are less likely to have never visited Canberra.

Compared to the 2002 study clusters, this group of respondents most resembles the Capital Lovers, although the number of positive views they hold of Canberra are not as great as the Capital Lovers. The 2006 study found a greater number of respondents within this cluster, who have positive perceptions of Canberra. Results also show some differences between their visitation history and demographic profile. Unlike Capital Enthusiasts, Capital Lovers respondents from the 2002 study were most likely to have visited within the past five years and were most likely to be in the younger 18-34 age bracket.

The Uninformed: Have mostly negative views about Canberra and are the smallest cluster. Respondents are most likely to agree that Canberra is unsafe, dirty, hectic/busy and a place of conflict. Interestingly, they also tend to believe Canberra does not have a political focus, is progressive and intolerant. Respondents are most likely to be aged between 45 and 74 years. Like 'The Uninformed' cluster of the 2002 study, this segment is least likely to have visited Canberra.

Tables 33, 34 and 35 provide a full profile of these clusters showing only statistically significant differences between the cluster members.

Cluster 1: The Misinformed

43.1% of the sample (n=408)

Table 33: Profile of Cluster 1 – The Misinformed

PERCEPTIONS	DEMOGRAPHICS
Most likely to agree that:	More likely to be aged between 18 and 34
Canberra is dominated by politics	More likely to have never been married
Canberra is boring	Less likely to have children
Canberra is clean	Most likely to have higher household income (\$40,000-\$59,999 and between \$80,000 to \$100,000+)
Canberra is conservative	Most likely to have completed tertiary or higher education
Canberra is quiet/laidback	Most likely to be employed full-time
Canberra is safe	More likely to be a full-time student
More likely to agree that:	Most likely to be a resident of Victoria
Canberra has an unpleasant climate	More likely to be a resident of Western Australia
Canberra is a place of consensus	
Canberra is provincial	
Canberra is monocultural	
Canberra reflects Australia's democracy	
Least likely to agree that:	PREVIOUS VISITATION
Canberra mirrors Australia's culture	More likely to have visited Canberra within the last five years
Canberra offers great shopping	PORTRAYAL OF CANBERRA IN THE MEDIA/POLITICS
Canberra offers great variety of nightlife and entertainment	More likely to believe Canberra is portrayed in a neutral manner
Canberra reflects Australian lifestyle	More likely to believe Canberra is portrayed negatively
Canberra reflects honesty	More likely to be very or somewhat interested in politics
Canberra reflects mateship	
Canberra reflects sense of humour	
Canberra is a city of vibrant commercial activities	

Note: results presented are based on hierarchical and k-means cluster analysis to identify clusters and Analysis of Variance (ANOVAs) and Chi-Square Tests to identify cluster characteristics.

Cluster 2: Capital Enthusiasts

44.3% of the sample (n=420)

Table 34: Profile of Cluster 2 – Capital Enthusiasts

PERCEPTIONS	DEMOGRAPHICS
Most likely to agree that:	Includes more respondents aged 35-44
Canberra is vibrant/exciting	More likely to be married or in a defacto relationship, and more likely to be separated or divorced
Canberra mirrors Australia's culture	Most likely to have children
Canberra offers great recreational opportunities	More likely to have mid-range household income (ranging from less than \$20,000 to \$39,999)
Canberra reflects Australia's history	More likely to have completed secondary education and tertiary or higher education
Canberra reflects Australia's scientific and technological achievements	More likely to be employed part-time
Canberra reflects environmental values	Most likely to be employed in home duties
Canberra reflects national values	Most likely to be retired
Canberra reflects sport	Most likely to be a resident of New South Wales
Canberra has a pleasant climate	More likely to be a resident of Queensland and South Australia
Canberra is cosmopolitan	PREVIOUS VISITATION
Canberra is friendly	Less likely to have never visited
Canberra is multicultural	PORTRAYAL OF CANBERRA IN THE MEDIA/POLITICS
Canberra is tolerant	More likely to believe Canberra is portrayed positively
Less likely to agree that:	More likely to believe that this portrayal is fair
Canberra is dominated by politics	

Note: results presented are based on hierarchical and k-means cluster analysis to identify clusters and Analysis of Variance (ANOVAs) and Chi-Square Tests to identify cluster characteristics.

Cluster 3: The Uninformed

12.6% of the sample (n=119)

Table 35: Profile of Cluster 3 – The Uninformed

PERCEPTIONS
Most likely to agree that:
Canberra does not have a political focus
Canberra is dirty
Canberra is progressive
Canberra is unfriendly
Canberra is hectic/busy
Canberra is unsafe
Canberra is intolerant
Canberra is a place of conflict
Least likely to agree that:
Canberra reflects Australia's democracy
DEMOGRAPHICS
Oldest age demographic. Most likely to be aged 45-74
Less likely to have never married, and more likely to be widowed
More likely to have children
More likely to have lower household income
More likely to have completed secondary education
More likely to be retired
More likely to be a resident of South Australia
PREVIOUS VISITATION
More likely to have never visited
PORTRAYAL OF CANBERRA IN THE MEDIA/POLITICS
More likely to believe Canberra is portrayed in a positive or neutral manner
More likely to be very or somewhat interested in politics

Note: results presented are based on hierarchical and k-means cluster analysis to identify clusters and Analysis of Variance (ANOVAs) and Chi-Square Tests to identify cluster characteristics.



6 Conclusion and Recommendations

Political national capitals provide the location for national institutions, represent national values and are the seat of government. Despite the importance of political national capital cities as tourism destinations, they may be faced with a poor image and perceptions from potential tourists and residents because of their association with government and associated negative media coverage. This study was undertaken as a follow up to a 2002 study to examine the attitudes and perceptions of Australians' towards the national capital. In particular, the research sought to examine whether Australians' perceptions of the city and values that the national capital represent or portray differ by previous visitation and by viewing the Australia Day Live Concert telecast.

A sample fairly representative of Australia by State/Territory and socio-demographics were surveyed and a total of 1002 completed surveys. The results illustrate similar results to the 2002 study in both the visitation levels, images, perceptions and attitudes. A total of 74.4% of respondents had visited Canberra previously with approximately half visiting within the last five years and half visiting more than five years ago mainly for holiday purposes. Respondents first images and impressions of Canberra are still centred around Canberra being the seat of government, although this study indicates an increase in the association of weather with Canberra (including cold/hot/good/bad) compared to 2002. Floriade was still noted as the most important event for Canberra and Anzac Day was mentioned by approximately 11% of respondents. Those who have not visited Canberra previously were more likely to focus on the role of Canberra as the national capital and seat of government and were less likely to name any important tourist attractions compared with those who had visited previously. This clearly illustrates the role of a visit in fostering alternative and diverse city images and perceptions.


Overall perceptions remain similar to the 2002 study, with respondents perceiving Canberra to be dominated by politics, conservative and clean. However, many positive perceptions of Canberra were identified with respect to its location in a natural setting and its educational and sporting facilities. Over half of respondents perceived that the national capital reflects national values and in particular Australia's defence force history, democracy and Australian history. Overwhelmingly respondents perceived that the national capital should be something Australian's are proud of and 86.7% felt that it was appropriate for Canberra to mark its centenary celebrations in 2013 with half wanting to share this occasion in some way. 58.5% agreed that the national capital should be a place for important national and international events. A total of 19.3% had watched the Australia Day Live concert on television, 79.4% had not and 1.3% were uncertain.

An analysis of the perceptions and attitudes of respondents based on previous visitation levels and viewing of the Australia Day Live concert illustrated statistical differences among many attitudes and perceptions. In particular, in a similar way to the 2002 study, previous visitation determined a more positive impression of the city on a number of city images and perceptions.

However, a total of seven perception statements, which were statistically different in 2002, were not found to be statistically different in this study, while 6 perception statements were found to be different in this study but not previously discovered in the 2002 study. Most of the new differences were related to changes in perception of national values, with visitation levels responsible for an improved perception that the national capital represents a range of national values. This indicates that tourism can be a positive force for building national pride and awareness of national achievements. However, 12 statements which remaining unchanged based on visitation levels, with many relating to national values reflected in the capital were found to be improved based on viewing of the concert telecast. Among them was an increased belief that Canberra should symbolise Australia's ideals and aspirations and should be the place for important national and international events. These results confirm the importance of using events in communication and marketing strategies to help alter attitudes and perceptions of the national capital. Concert viewing could be a useful tool to influence the perceptions of 'The Misinformed' and 'The Uninformed' who viewed the concert at similar levels to 'The Capital Enthusiasts.' The NCA should consider continuing their support of Australia Day Live and consider other national events to foster an awareness and pride in the national capital, possibly considering events in other parts in Australia as many respondents noted that national events do not necessarily have to be held in Canberra.

Nevertheless, a small number of perceptions were not altered by either visitation or concert viewing and include 'Canberra reflects Australia's democracy,' the political focus of Canberra, whether Canberra is progressive/conservative, whether Canberra is multicultural/monocultural, cosmopolitan/provincial and whether Canberra should be something Australian's are proud of. These illustrate perhaps deep-rooted perceptions (some of which may be negative) which are hard to shift due to political beliefs and negative media coverage associated with the national capital. However, overwhelmingly the majority of perceptions did differ based on either visitation, viewing the concert, or in some instances both visitation and concert viewing.

A cluster analysis was undertaken on the data in a similar way to the 2002 study and again three clusters were discovered. However, there were differences in the size of these clusters and some socio-demographic differences related to their composition. The 'Capital Enthusiasts' were named after the 2002 'Capital Lovers' and although the size of this cluster has grown by approximately 10%, the number of positive statements were fewer than in 2002. Similarly to 2002, they perceived that Canberra was portrayed positively in the media and that this portrayal was fair compared to the other clusters. These respondents comprised older respondents than the 2002 study (35-44 age), were more likely to have children and most likely to be a resident of New South Wales, and more likely to be a resident of Queensland and South Australia. They were also more likely to have visited Canberra in the past. The other two clusters were named the same as the 2002 study as 'The Misinformed' and 'The Uninformed' and display similar characteristics although the cluster size of 'The Uninformed' is substantially less than in 2002. 'The Uninformed' were the oldest demographic, more likely to be a resident of South Australia and more likely to have never visited Canberra. 'The



'Misinformed' are similar to the 2002 study except that they comprise younger respondents compared to 2002 and more likely to have visited in the last 5 years.

It should be noted that both 'The Uninformed' and 'The Misinformed' perceptions may be partly due to political values and beliefs, as both of these groups were shown to be interested or somewhat interested in politics while the 'Capital Enthusiasts' had no increased interest in politics. The role of political values or beliefs and their influence on perceptions of the national capital is not explored in this study, but may be responsible for deep-seated perceptions (especially negative ones), which may be hard to shift through the use of tourism and events. This may be demonstrated by 'The Misinformed' being more likely to have visited Canberra in the last five years, but still may hold potentially negative perceptions. For instance, they were least likely to believe that the national capital represents values such as mateship, honesty, sense of humour and had mixed city perceptions and images. In this instance a visit may help reinforce long standing beliefs or images based on politics or media, as this group also perceived Canberra to be portrayed more negatively or in a neutral way in the media. Future research should explore the role of the media and political values in shaping perceptions toward Canberra as the national capital.

This research has demonstrated that a national event can influence Australian's perceptions toward the national capital in a positive way and perhaps in a complementary way to visitation. However, events and visitation may not explain all perceptions and perhaps future research should explore the role of the media and political beliefs/values and their influence on perceptions of the national capital.

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