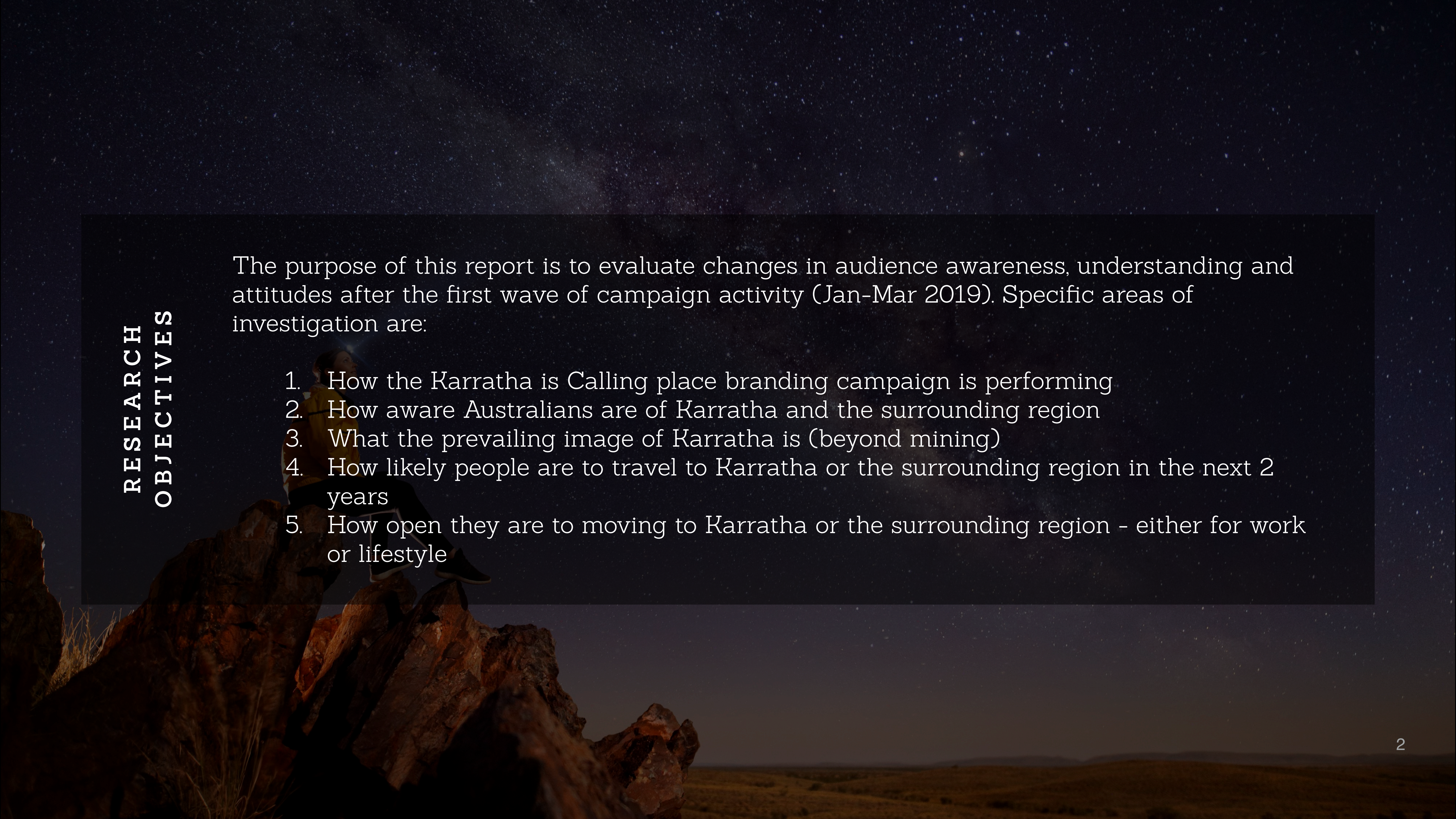


A person is sitting on a large, reddish-brown rock in the foreground, looking out over a body of water towards a distant, hilly coastline under a warm, orange-hued sky at sunset or sunrise. The person is wearing a dark t-shirt and dark pants, and is barefoot. The water is calm, reflecting the light from the sky. The background features a series of low, rounded hills and a small island in the distance.

CITY OF KARRATHA

**PLACE BRANDING
AUDIENCE RESEARCH
POST CAMPAIGN UPDATE (APRIL 2019)**

A person is sitting on a rocky outcrop in the foreground, looking up at a starry night sky. The background is a vast, dark landscape with distant hills under a sky filled with stars and the Milky Way. The overall mood is contemplative and serene.

RESEARCH OBJECTIVES

The purpose of this report is to evaluate changes in audience awareness, understanding and attitudes after the first wave of campaign activity (Jan-Mar 2019). Specific areas of investigation are:

1. How the Karratha is Calling place branding campaign is performing
2. How aware Australians are of Karratha and the surrounding region
3. What the prevailing image of Karratha is (beyond mining)
4. How likely people are to travel to Karratha or the surrounding region in the next 2 years
5. How open they are to moving to Karratha or the surrounding region - either for work or lifestyle

A person is standing on a rocky outcrop in the foreground, looking out over a vast, flat landscape under a starry night sky. The person is wearing a yellow jacket and dark pants. The sky is filled with stars and the Milky Way is visible. The landscape is dark and flat, with some low-lying vegetation in the distance.

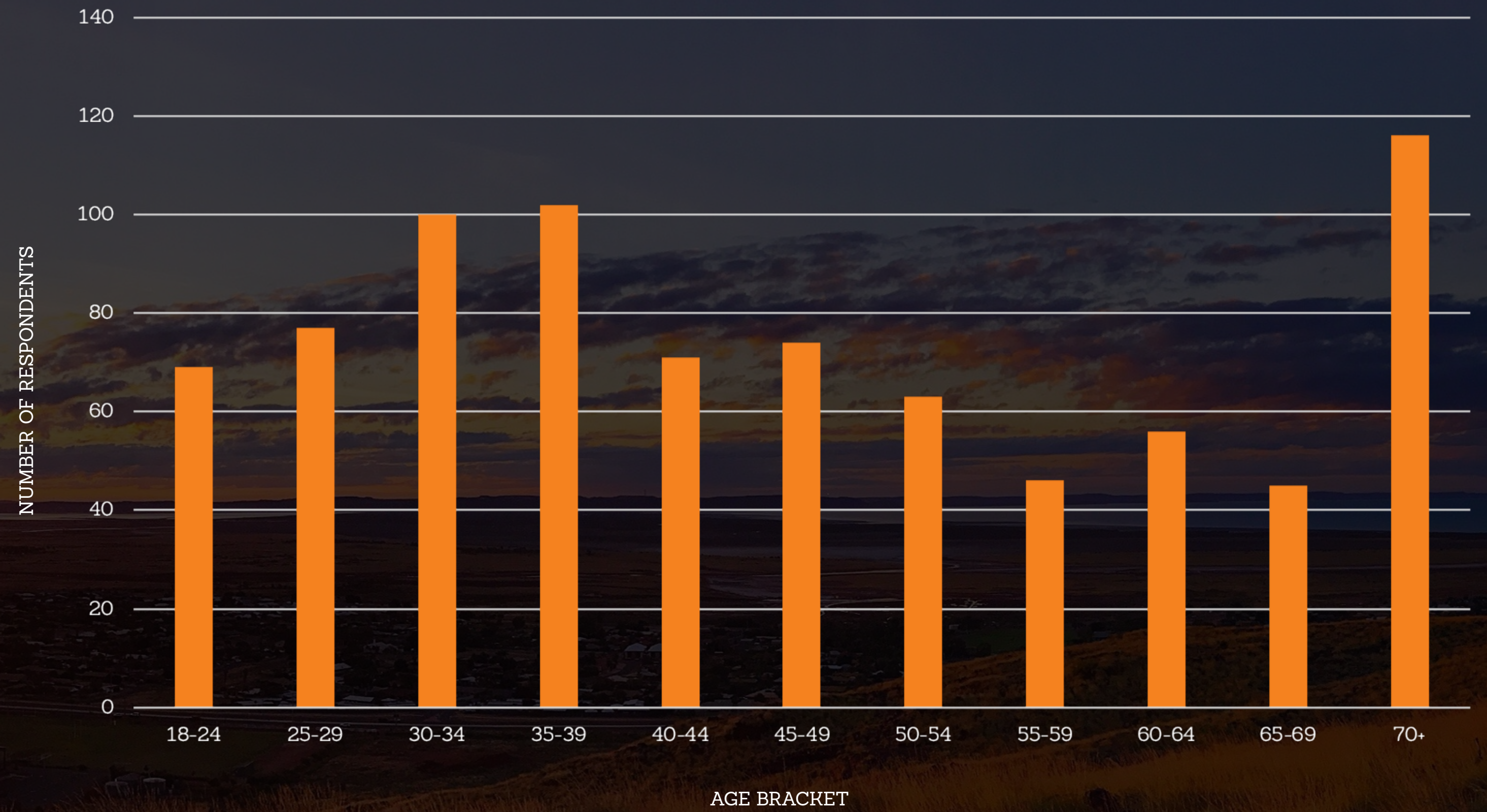
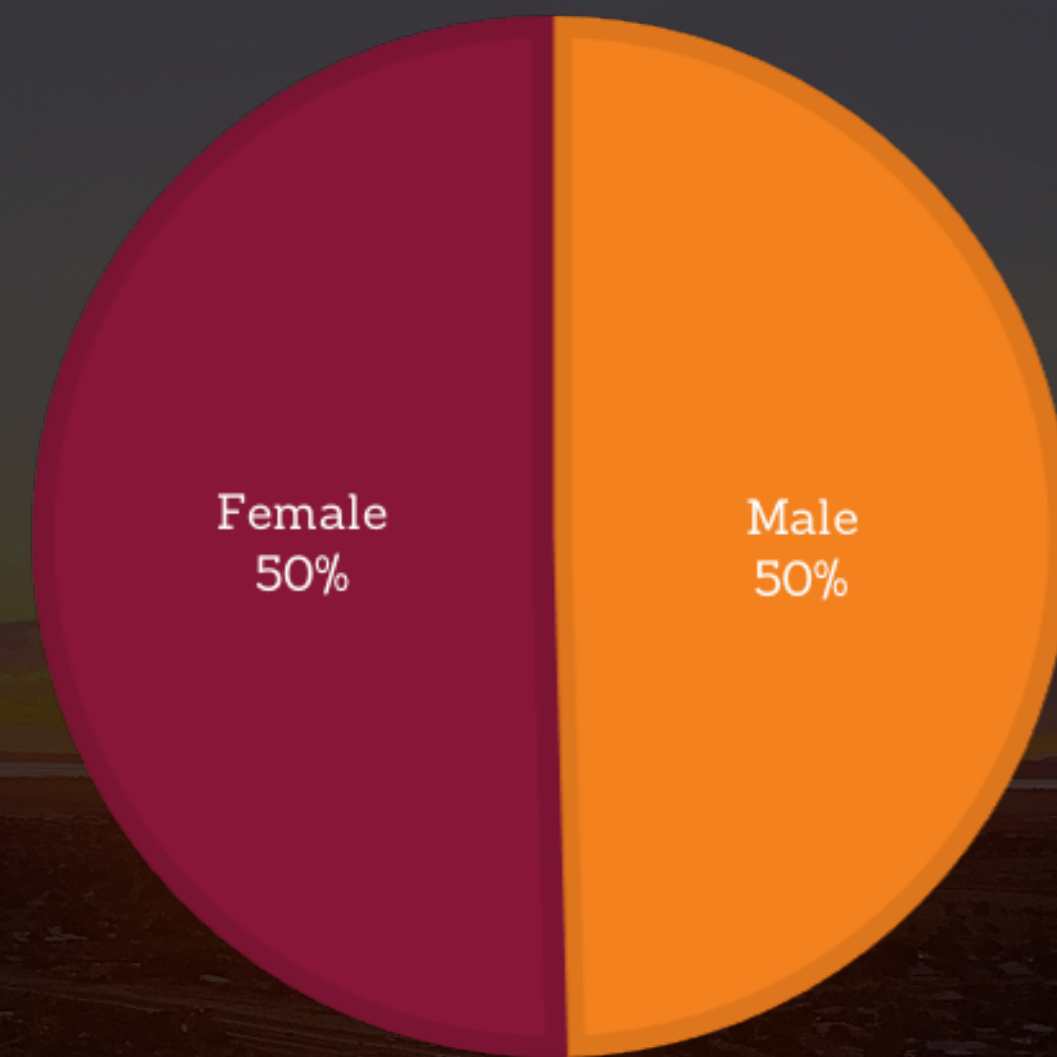
RESEARCH METHODOLOGY

- A short online survey was sent out to n=819 participants across WA, NSW and Victoria; (providing an overall Confidence Level of 95% and 3% Margin of Error)
- Fieldwork was completed between 24th March and 1st April 2019
- Participant recruitment and data collection was managed by an independent research company (Thinkfield)
- The research sample is post-weighted by Thinkfield to ensure age and gender proportions are representative of the latest ABS population statistics
- Results have been compared to pre-campaign figures from the Benchmark Research in November 2019

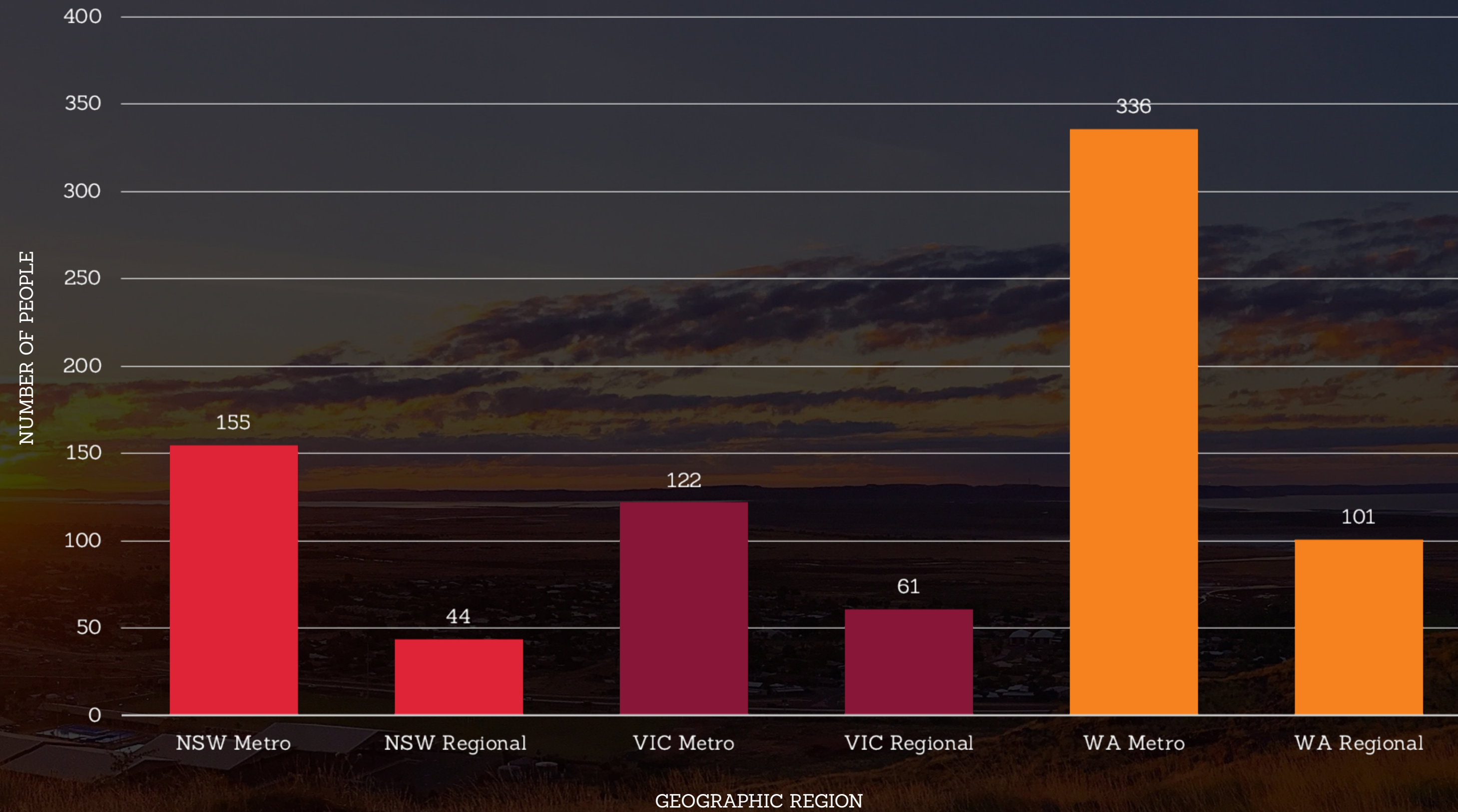


PART 1 SURVEY SAMPLE BREAKDOWN

SAMPLE



SAMPLE (CONT.)



PART 2 RESULTS



Do you recall seeing any of these ‘Karratha is Calling’ campaign elements before today?

SAMPLE	YES %	NO %
ALL PEOPLE (n=819)	25.40%	74.60%
WA (n=437)	26.54%	73.46%
NSW (n=197)	25.13%	74.87%
VIC (n=183)	22.95%	77.05%

Approximately 1 in 4 people who were surveyed could recall seeing at least one piece of ‘Karratha is Calling’ campaign material. This is an exceptional result given that it comes off the back of only 3 months of campaign activity, with a fairly light level of paid media investment. This suggests that the campaign creative is cutting through and capturing people’s attention.

The result was relatively consistent across regions with and without paid above-the-line advertising (ie Magazine, Outdoor, Cinema), suggesting that the Digital Advertising, Website SEO and Always-On Social components of the campaign are performing strongly.

Profiling the people who recall seeing the ‘Karratha is Calling’ campaign elements

SAMPLE	% of the Total Survey Sample	% of those who Recall Seeing the Campaign
WA Metro	41.03%	48.08%
WA Regional	12.33%	7.69%
NSW Metro	18.93%	19.23%
NSW Regional	5.37%	4.81%
VIC Metro	14.90%	11.54%
VIC Regional	7.45%	8.65%

Further analysis was conducted to determine whether the sample of people who recalled seeing the campaign varied in any significant way to the ‘Gen Pop’ total survey sample.

Not surprisingly given the paid advertising skew towards the WA Metro area, this sub-segment was over-represented among those who recalled seeing the campaign - accounting for 48.08% as compared to only 41.03% of the total sample.

Profiling the people who recall seeing the ‘Karratha is Calling’ campaign elements (cont.)

SAMPLE AGE	% of the Total Survey Sample	% of those who Recall Seeing the Campaign
18-24	8.42%	12.98%
25-29	9.40%	15.87%
30-34	12.21%	18.75%
35-39	12.45%	9.62%
40-44	8.67%	8.65%
45-49	9.04%	6.25%
50-54	7.69%	5.77%
55-59	5.62%	3.37%
60-64	6.84%	3.37%
65-69	5.49%	5.29%
70+	14.16%	10.10%

Perhaps more significant is the fact that the group of people who recalled seeing the campaign is significantly skewed towards those aged 18-34. Almost half of those who recalled seeing the campaign were in this younger age bracket, compared to only 30% of the total survey sample. This result is interesting given that paid activity has targeted a psychographic segment (‘Experience Seekers’) rather than any specific age range.

This finding warrants further discussion as we look forward to the second stage of activity - as it may mean that advertising is not reaching older audience segments OR that the message / creative isn’t cutting through as strongly with older audiences.



Profiling the people who recall seeing the ‘Karratha is Calling’ campaign elements (cont.)

SAMPLE HOUSEHOLD MAKEUP	% of the Total Survey Sample	% of those who Recall Seeing the Campaign
Couple, no children	14.04%	18.27%
Couple, with eldest child 12 years old or older	29.06%	28.37%
Couple, children not at home	17.09%	15.38%
Single, no children	22.59%	22.12%
Single, with eldest child 12 years old or older	6.47%	7.69%
Single, with children not at home	5.86%	5.77%
I'd prefer not to answer	4.88%	2.40%

In contrast, there were no noticeable differences in terms of lifestage or income between those who had seen the campaign and the total sample.



Profiling the people who recall seeing the ‘Karratha is Calling’ campaign elements (cont.)

SAMPLE HOUSEHOLD MAKEUP	% of the Total Survey Sample	% of those who Recall Seeing the Campaign
Nil to \$25,000	13.68%	12.02%
\$25,001-\$50,000	18.44%	17.31%
\$50,001-\$75,000	17.34%	16.83%
\$75,001-\$100,000	12.12%	14.42%
\$100,001-\$150,000	18.32%	18.27%
\$150,001-\$200,000	7.94%	9.62%
Over \$200,000	3.66%	6.25%
I'd prefer not to answer	8.42%	2.40%

A person wearing a helmet and a backpack is riding a mountain bike on a dirt trail. The background shows a vast, open landscape with rolling hills and sparse vegetation under a clear sky. The image is dimmed to serve as a background for the text.

How much do you know about Karratha and the surrounding region?

A key focus of the 'Karratha is Calling' place branding campaign is to raise awareness and understanding of what Karratha and the surrounding region has to offer - in terms of tourism, lifestyle and business.

The following 12-month objectives were set to measure the campaign's effectiveness in this area:

- Decrease % of people who know little/nothing about Karratha and surrounding region from 61% to 55% (Stretch Target 50%)
- Increase awareness of key attractions around Karratha from:
 - Dampier Archipelago (32.37%)
 - Karijini National Park (44.74%)
 - Millstream Chichester National Park (21.03%)
 - Murujuga National Park (20.42%)
 - Hearson's Cove (7.46%)
 - Cossack (22.13%)
 - Point Samson (31.42%)
- Establish a clear identity for Karratha tied to 'natural adventure'



How much do you know about Karratha and the surrounding region?

LEVEL OF AWARENESS	SAMPLE	BENCHMARK %	POST CAMPAIGN %	% CHANGE
NOTHING / VERY LITTLE	ALL PEOPLE	61.12%	59.54%	-2.58%
	WA	50.00%	47.94%	-4.12%
	NSW	74.62%	70.35%	-5.72%
	VIC	72.97%	75.41%	+3.34%
	SEEN CAMPAIGN	-	33.17%	
A LITTLE BIT	ALL PEOPLE	28.61%	29.95%	4.68%
	WA	39.68%	40.14%	1.16%
	NSW	14.21%	20.60%	44.97%
	VIC	17.84%	15.85%	-11.16%
	SEEN CAMPAIGN	-	43.27%	
QUITE A BIT / A LOT	ALL PEOPLE	10.27%	10.64%	3.60%
	WA	10.32%	12.16%	17.83%
	NSW	11.17%	9.05%	-18.98%
	VIC	9.19%	8.74%	-4.90%
	SEEN CAMPAIGN	-	23.56%	

After 3 months of activity, campaign performance is trending in the right direction, with fewer people reporting to no ‘Nothing or Very Little’ about Karratha and the surrounding region. WA and NSW in particular are seeing good results.

Most pleasing is the fact that among those who have seen the campaign, the percentage who say they know ‘Nothing or Very Little’ is almost half compared to all people survey (ie 33.17% compared to 59.54%). Similarly, those who have seen the campaign are more than twice as likely than all people surveyed to report knowing ‘Quite a Bit / A Lot’ about Karratha’

Which of the following places have you heard of before today?

LOCATION	SAMPLE	AWARENESS BENCHMARK %	AWARENESS POST CAMPAIGN %	% CHANGE
KARRATHA	ALL PEOPLE	68.09%	70.09%	2.94%
	WA	88.53%	91.57%	3.43%
	NSW	43.65%	46.23%	5.91%
	VIC	45.95%	43.72%	-4.85%
	SEEN CAMPAIGN	-	78.85%	
DAMPIER	ALL PEOPLE	58.31%	61.78%	5.95%
	WA	82.34%	82.69%	0.43%
	NSW	33.50%	32.66%	-2.51%
	VIC	28.11%	42.62%	51.62%
	SEEN CAMPAIGN	-	64.90%	
DAMPIER ARCHIPELAGO	ALL PEOPLE	32.27%	33.09%	2.54%
	WA	48.85%	49.89%	2.13%
	NSW	10.15%	12.56%	23.74%
	VIC	16.76%	14.75%	-11.99%
	SEEN CAMPAIGN	-	41.83%	
KARIJINI	ALL PEOPLE	44.74%	44.81%	0.16%
	WA	71.10%	71.30%	0.28%
	NSW	15.74%	14.57%	-7.43%
	VIC	13.51%	13.66%	1.11%
	SEEN CAMPAIGN	-	54.81%	
MILLSTREAM	ALL PEOPLE	21.03%	20.27%	-3.61%
	WA	31.65%	31.89%	0.76%
	NSW	9.64%	6.03%	-37.45%
	VIC	8.11%	7.65%	-5.67%
	SEEN CAMPAIGN	-	27.40%	

Which of the following places have you heard of before today? (cont.)

LOCATION	SAMPLE	AWARENESS BENCHMARK %	AWARENESS POST CAMPAIGN %	% CHANGE
MURUJUGA	ALL PEOPLE	20.42%	19.29%	-5.53%
	WA	26.38%	26.55%	0.64%
	NSW	16.24%	10.05%	-38.12%
	VIC	10.81%	11.48%	6.20%
	SEEN CAMPAIGN	-	30.29%	
HEARSON'S COVE	ALL PEOPLE	7.46%	7.33%	-1.74%
	WA	7.80%	9.34%	19.74%
	NSW	6.60%	4.02%	-39.09%
	VIC	7.57%	6.01%	-20.61%
	SEEN CAMPAIGN	-	13.46%	
COSSACK	ALL PEOPLE	22.13%	20.63%	-6.78%
	WA	35.32%	33.26%	-5.83%
	NSW	6.60%	5.53%	-16.21%
	VIC	7.57%	6.56%	-13.34%
	SEEN CAMPAIGN	-	28.37%	
POINT SAMSON	ALL PEOPLE	31.42%	32.72%	4.41%
	WA	51.15%	52.62%	2.87%
	NSW	9.64%	8.54%	-11.41%
	VIC	8.11%	10.93%	34.77%
	SEEN CAMPAIGN	-	40.87%	

In contrast, changes in the awareness of specific locations among the total sample were mixed. Slight increases were recorded for Dampier, Dampier Archipelago, Point Samson and Karijini; however decreases were recorded for Cossack, Murujuga, Millstream and Hearson’s Cove.

However, awareness levels for all locations were significantly higher among those who recalled seeing the campaign - indicating that it is doing its job in terms of promoting the broader City of Karratha region, not just the city itself.

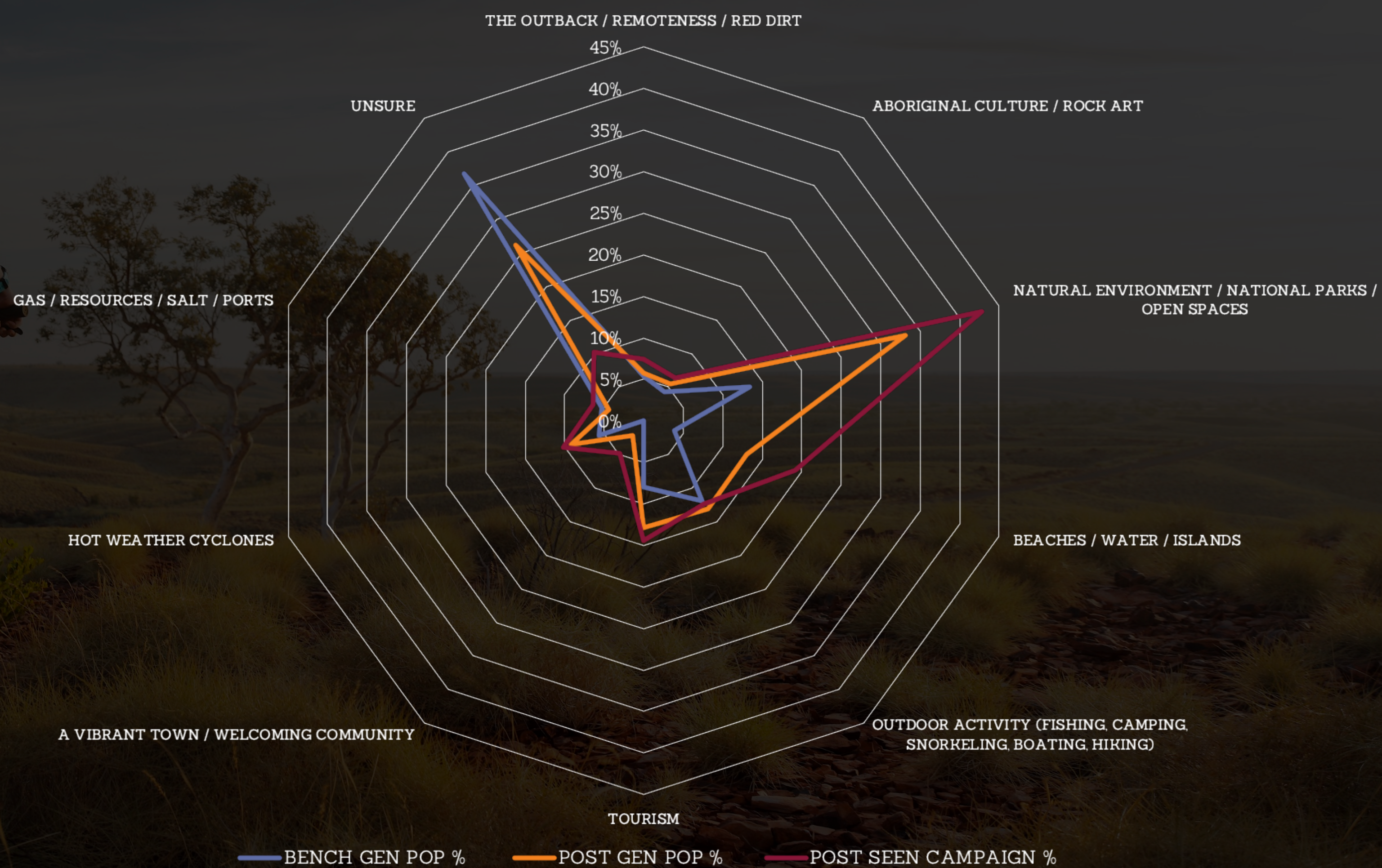
Beyond mining, what would you say Karratha and the surrounding region is best known for?

Prior to the campaign, research confirmed that the City of Karratha lacked a clear and compelling identity (or ‘brand image’) beyond mining. Underlining this fact was that over one third of those originally surveyed could not identify one thing beyond mining that the region was best known for.

However, the campaign - as well as broader communication - is having a significant impact on the City’s brand perception.

Post the campaign going live, the proportion of people unable to identify what Karratha is best known for beyond mining has dramatically reduced (from over 35% to just over 25%).

In line with campaign objectives, the City of Karratha is establishing a clear identity aligned to the ‘natural environment’ and ‘outdoor lifestyle / adventure’.



A person wearing a helmet and a backpack is riding a mountain bike on a dirt trail. The landscape is hilly and covered in dry grass, with a single tree in the distance. The scene is dimly lit, suggesting dusk or dawn.

Likelihood to travel or move to Karratha and the surrounding region.

Beyond increasing awareness and understanding, the campaign is also designed to increase the likelihood of people traveling to Karratha and the surrounding region - either for a holiday, to visit friends or for a more permanent lifestyle/career change.

To evaluate the campaign's effectiveness in this area, the following 12-month objectives were set:

- Increase likelihood to travel to Karratha and surrounding regional in the next 2 years from 27% to 30% (Stretch Target 33%)
- Increase openness to moving to Karratha and surrounding region (either for work or lifestyle) from 23.6% to 26% (Stretch 29%)

How likely are you to travel to Karratha or the surrounding region for a holiday or to visit friends/family in the next 2 years?

LIKELIHOOD TO VISIT	SAMPLE	BENCHMARK %	POST CAMPAIGN %	% CHANGE
EXTREMELY UNLIKELY / UNLIKELY	ALL PEOPLE	45.23%	40.78%	-9.84%
	WA	47.94%	43.71%	-8.82%
	NSW	38.07%	32.16%	-15.52%
	VIC	46.49%	43.17%	-7.14%
	SEEN CAMPAIGN	-	21.15%	
NEUTRAL	ALL PEOPLE	27.75%	30.77%	10.88%
	WA	24.08%	27.69%	14.99%
	NSW	31.98%	34.17%	6.85%
	VIC	31.89%	34.43%	7.96%
	SEEN CAMPAIGN	-	25.96%	
LIKELY / EXTREMELY LIKELY	ALL PEOPLE	27.02%	28.45%	5.29%
	WA	27.98%	28.60%	2.22%
	NSW	29.95%	33.67%	12.42%
	VIC	21.62%	22.40%	3.61%
	SEEN CAMPAIGN	-	52.88%	

After three months, the campaign is half-way towards its 12-month goal - having increased the percentage of people 'Likely or Extremely Likely' to visit Karratha and the surrounding region n the next 2 years from 27.02% to 28.45%.

Again, the research highlights the positive influence the campaign is having. More than half of those who recalled seeing the campaign stated that they were 'Likely or Extremely Likely' to visit in the next 2 years!

How open are you to moving to Karratha or the surrounding region - either for work or lifestyle?

OPENNESS TO MOVING	SAMPLE	BENCHMARK %	POST CAMPAIGN %	% CHANGE
I'D NEVER MOVE THERE / NOT VERY OPEN	ALL PEOPLE	56.23%	57.75%	2.70%
	WA	61.24%	64.53%	5.37%
	NSW	46.70%	45.23%	-3.15%
	VIC	54.59%	55.19%	1.10%
	SEEN CAMPAIGN	-	41.83%	
NEUTRAL	ALL PEOPLE	20.17%	19.05%	-5.55%
	WA	15.37%	16.02%	4.23%
	NSW	26.90%	26.63%	-1.00%
	VIC	24.32%	18.03%	-25.86%
	SEEN CAMPAIGN	-	22.12%	
I MAY CONSIDER IT / I'D DEFINITELY MOVE THERE FOR THE RIGHT OPPORTUNITY	ALL PEOPLE	23.59%	23.20%	-1.65%
	WA	23.39%	19.45%	-16.84%
	NSW	26.40%	28.14%	6.59%
	VIC	21.08%	26.78%	27.04%
	SEEN CAMPAIGN	-	36.09%	

Unfortunately, there hasn't yet been a significant shift in the percentage of people who are open to moving to Karratha in the near future. However, in line with the results on the previous slide, the campaign is positively influencing people in this regard. More than a third of those who have seen the campaign stated that they were open to a move to Karratha, compared to less than a quarter of the total survey sample.

These results reinforce what we already know - that it will take a much longer time to significantly shift peoples attitudes towards living in Karratha.

THANK YOU