

VisitCanberra

The ACT visitor economy insights

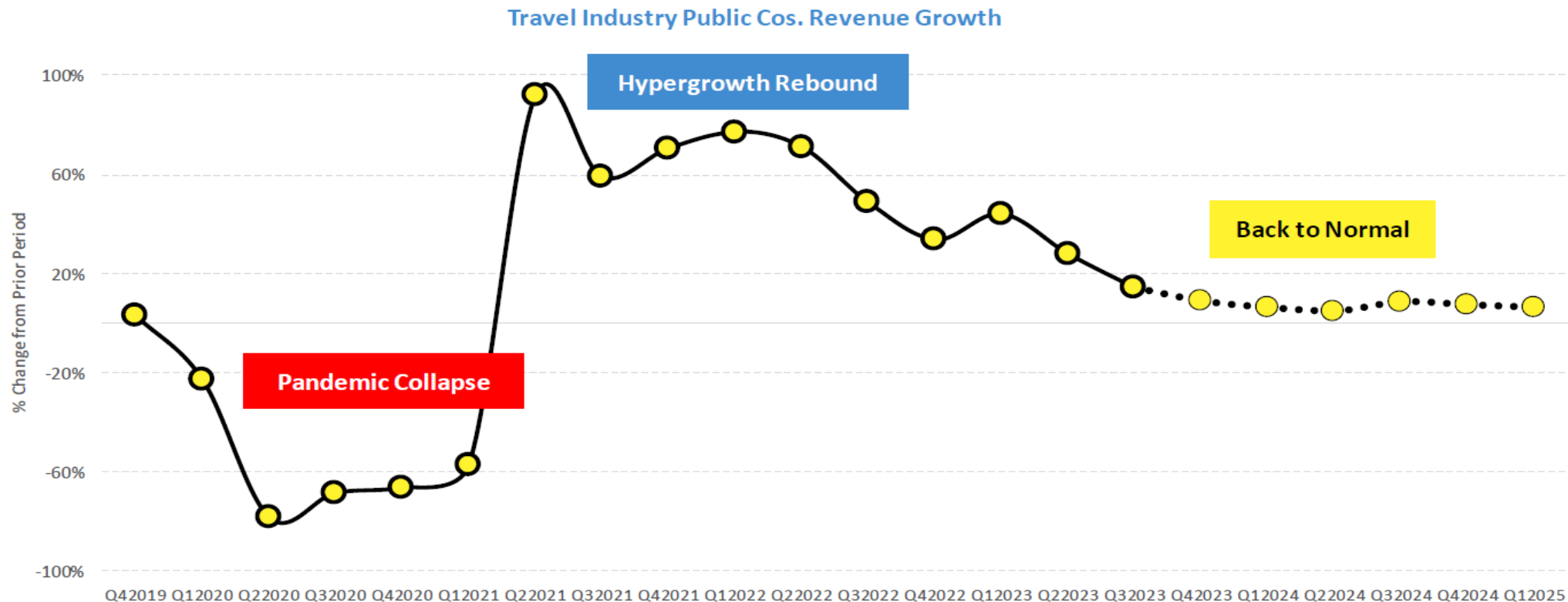
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Context: a sustainable, single-digit growth rate for the visitor economy

The “New Normal” Gives Way to “Normal” as tourism normalises and moves past the wild swings of the COVID era

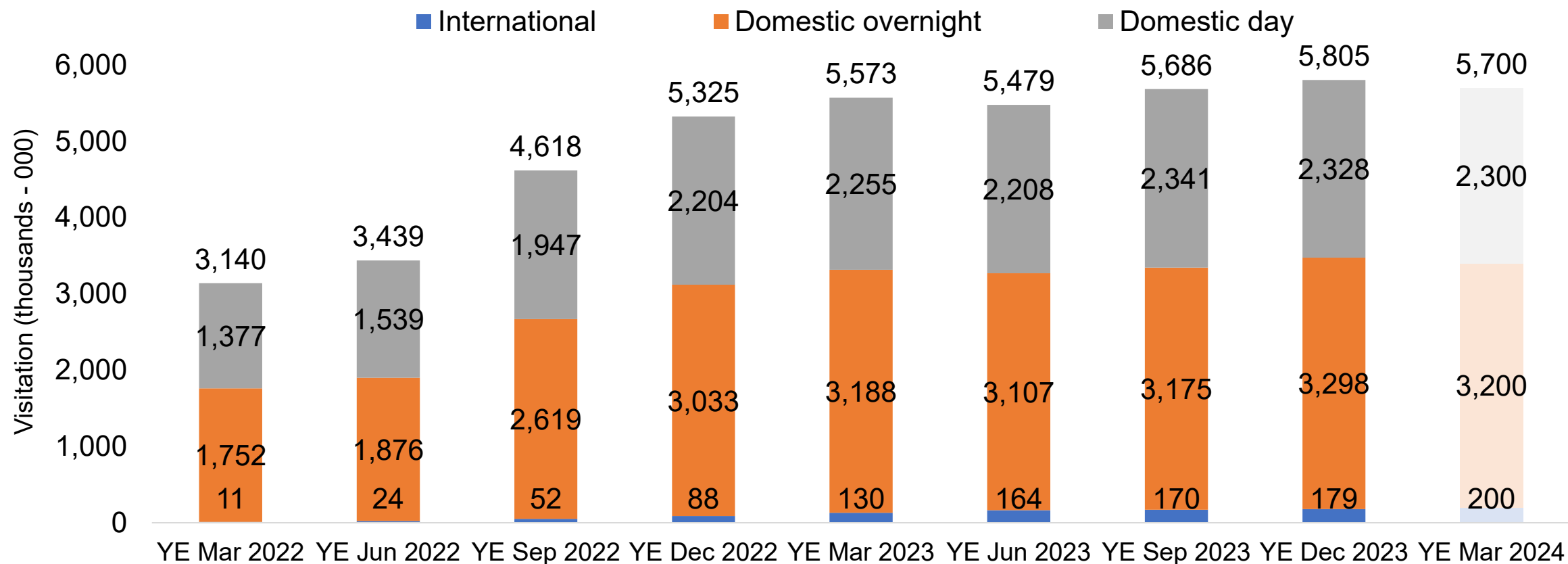


Source: Historical data from the Skift Travel 200.

Estimates from Skift Research and Capital IQ. Data as of December 2023.

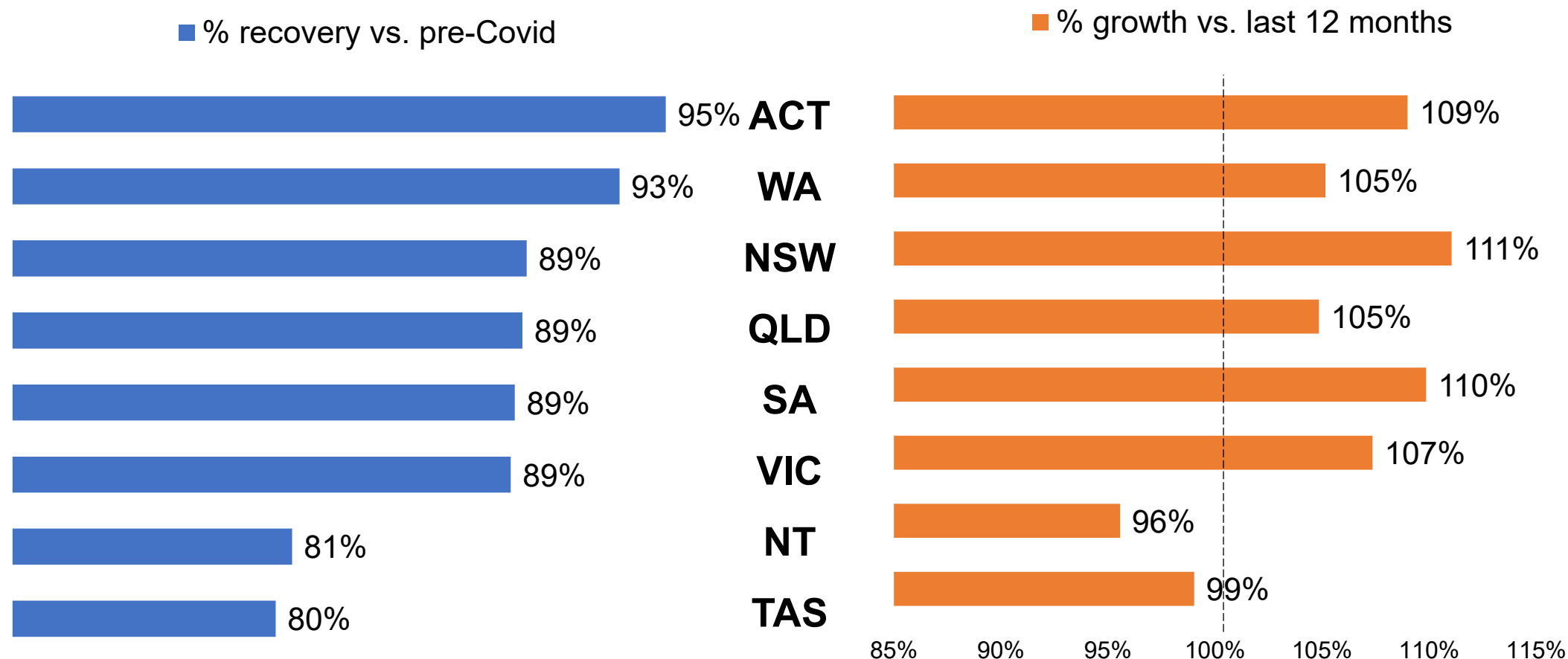
Visitor numbers to the ACT have grown to 5.8m

Visitation is normalising, expectation for visitation year ending Mar'24 is steady



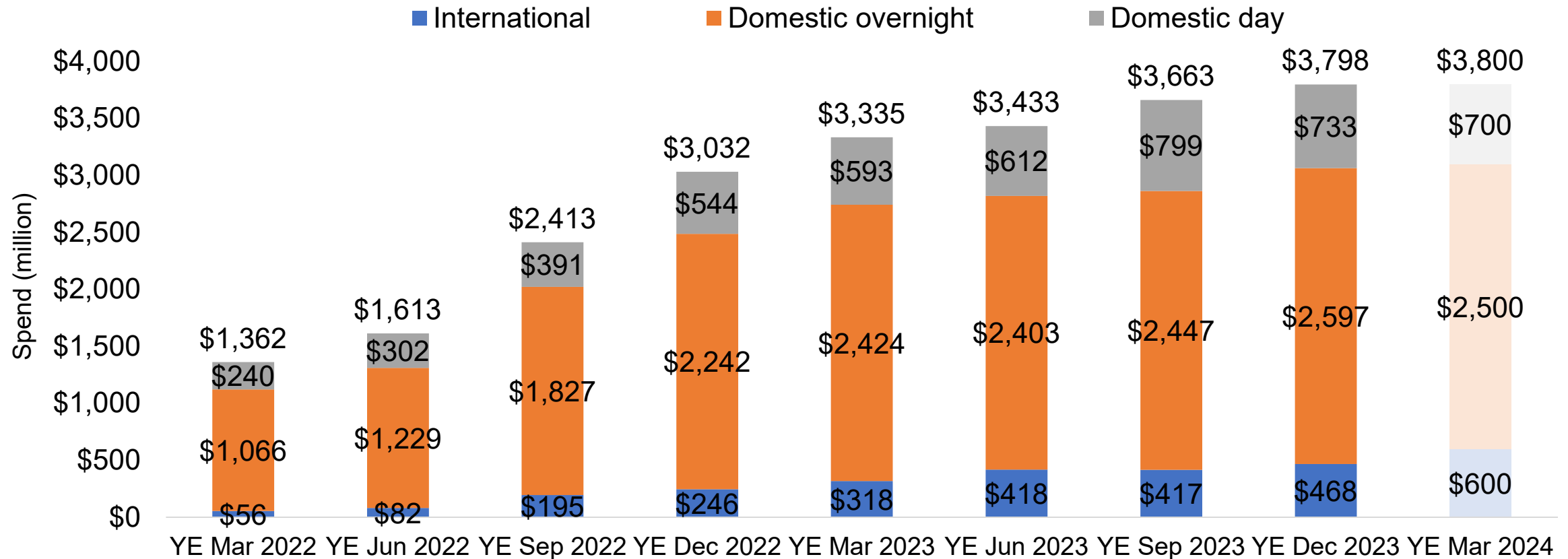
State & Territory comparison for visitation recovery:

ACT has the best recovery rate since Covid, and one of the best growth rates in visitation numbers over the past 12 months



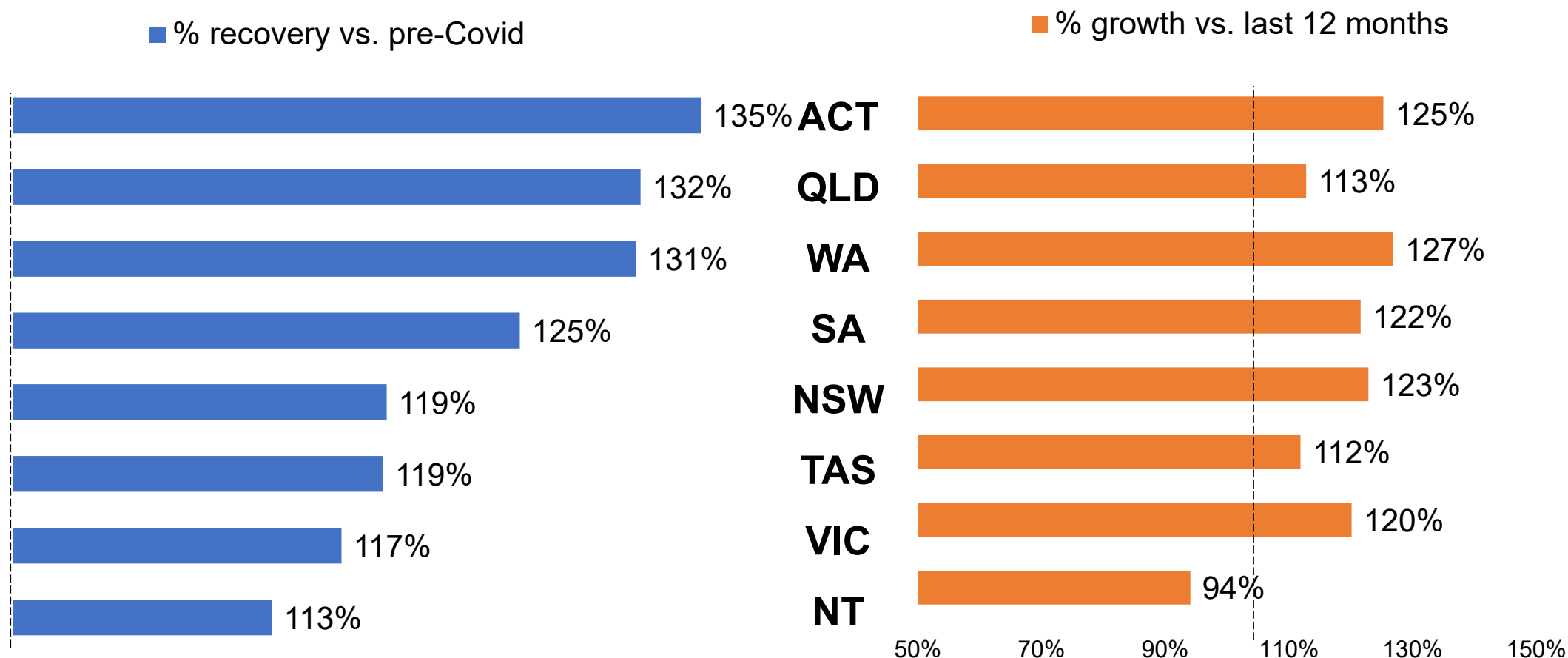
Expenditure is record-breaking for every report since year ending December'22

\$3.8 billion for year ending December 2023 – significantly above pre-Covid levels



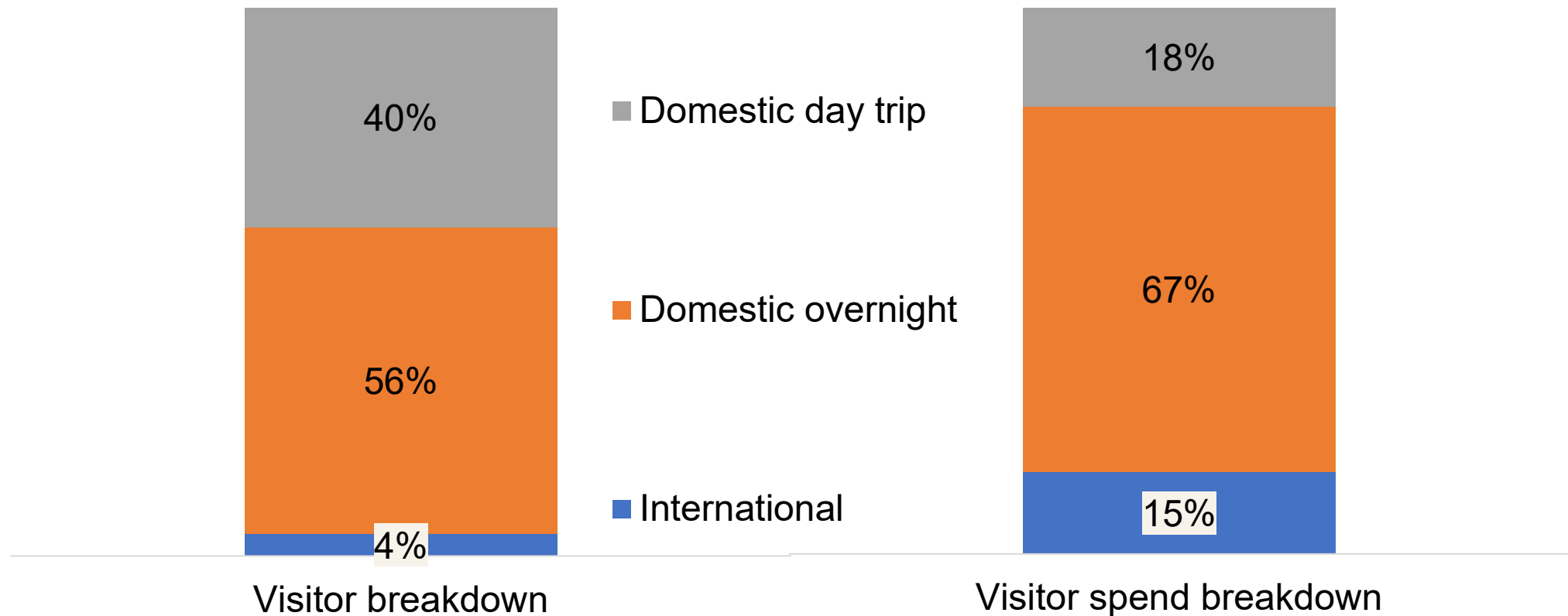
State & Territory comparison for visitor spend recovery:

ACT has the best recovery rate for expenditure,
and the 2nd highest year on year visitor spend growth rate



International = small group with a big spend

At 1 in every 25 visitors to the ACT, international spend accounts for \$1 in every \$7



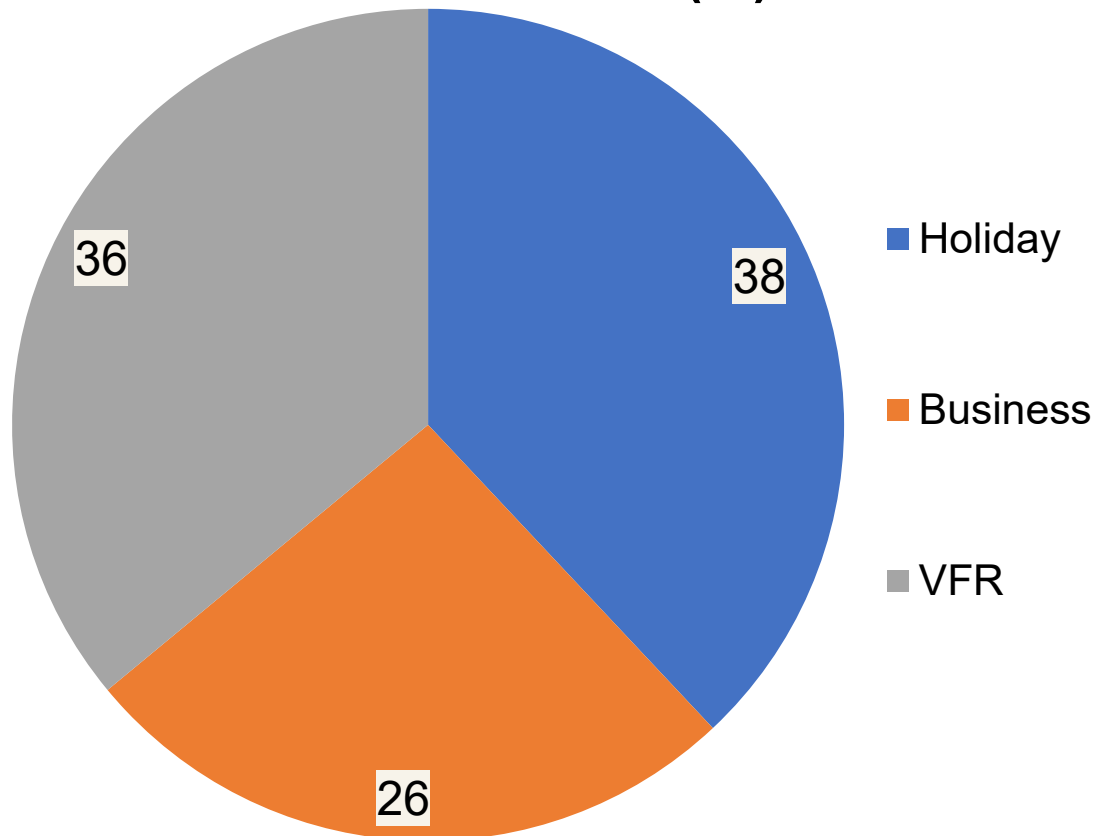
Top international markets are USA, UK, China & India

International visitation to the ACT is at two thirds of pre-Covid levels

ACT top 10 INT markets		Y.E. Dec-23	% recovery vs Y.E. Dec'19
1	USA	18,000	77%
2	United Kingdom	18,000	84%
3	China	18,000	32%
4	India	17,000	104%
5	New Zealand	15,000	76%
6	Germany	8,000	77%
7	Viet Nam	5,000	96%
8	Canada	5,000	55%
9	Indonesia	5,000	109%
10	Singapore	5,000	76%

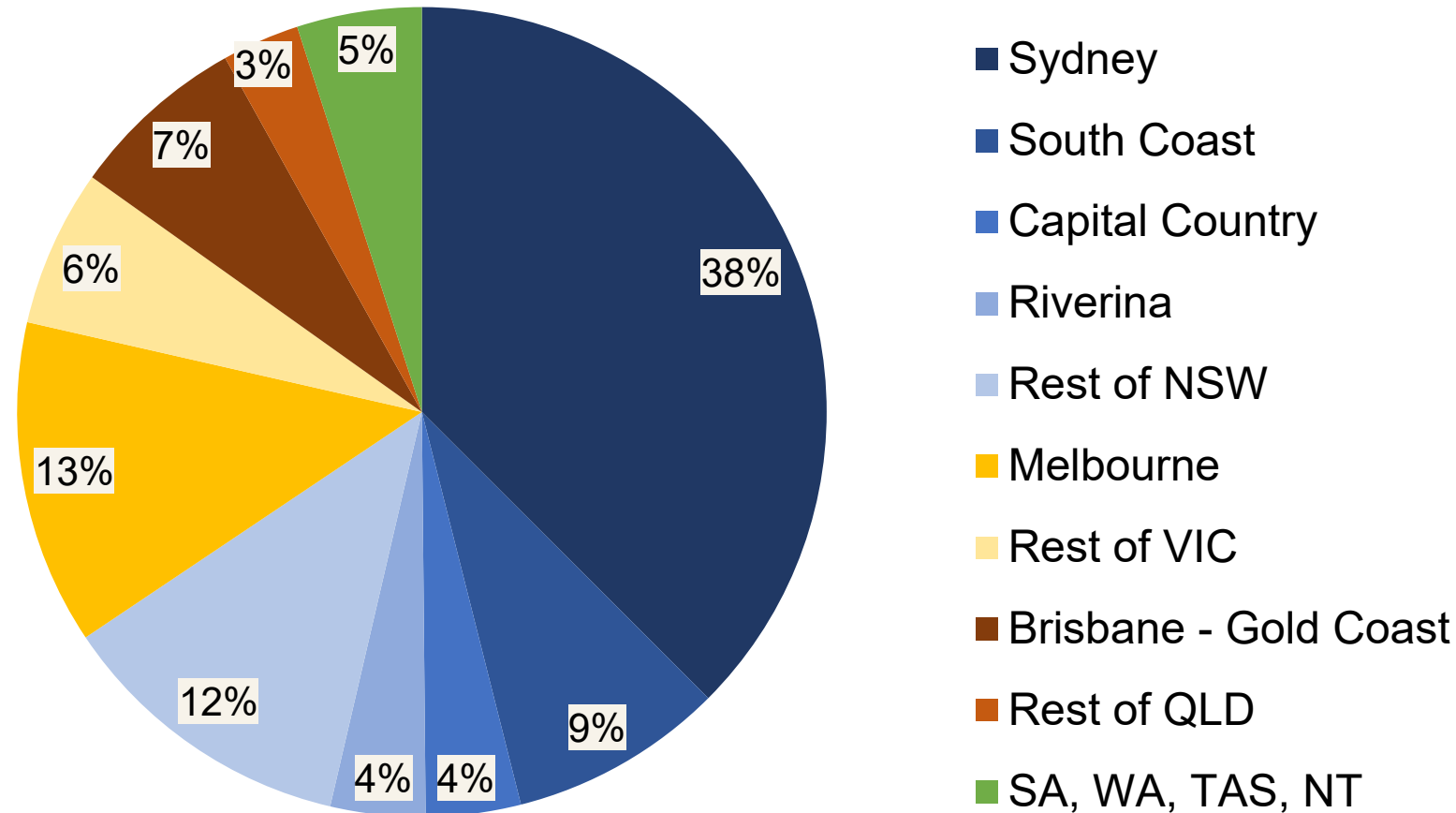
A diverse visitor base

Reason for visitation (%)



Domestically, 2 in 3 overnight domestic visitors are from NSW

About 60% of our visitors come from capital cities, 40% from regional Australia



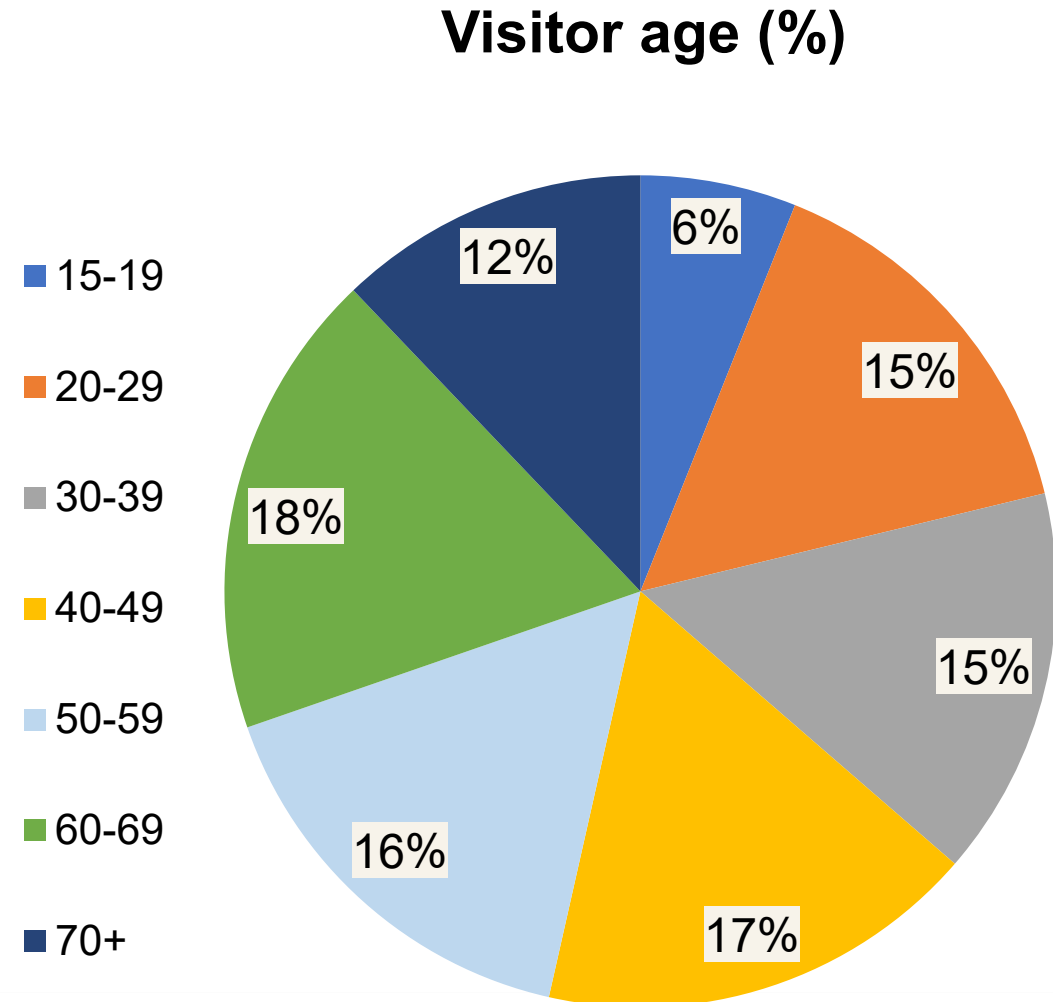
Social activities are top of the list

**A spread of activities,
providing multiple
opportunities for
engagement and
collaboration**

Top 12 activities		Activity classification
1	Eat out/ dine at a restaurant/ café	<i>Social</i>
2	Visit friends & relatives	<i>Social</i>
3	Visit museums or art galleries	<i>Arts/ Heritage</i>
4	Pubs, clubs etc	<i>Social</i>
5	Go shopping for pleasure	<i>Social</i>
6	Sightseeing/ looking around	<i>Social</i>
7	Visit national parks/ state parks	<i>Outdoor/ Nature</i>
8	Visit botanical or other public gardens	<i>Outdoor/ Nature</i>
9	Bushwalking/ rainforest walks	<i>Outdoor/ Nature</i>
10	Exercise, gym or swimming	<i>Active outdoor/ sports</i>
11	Visit history/ heritage buildings, sites or monuments	<i>Arts/ Heritage</i>
12	Go to markets	<i>Local attractions/ tourist activities</i>

A diverse visitor base regarding age

Presents different opportunities for audience targeting



Types of people coming to the ACT: Introducing Helix personas - A psychographic segmentation

Dividing Australians population into 6 communities and 54 mindsets, incorporating values, beliefs and attitudes, which are the best predictors of consumer behaviour

100 Leading Lifestyles



200 Metrotechs



300 Aspirational



400 Hearth and Home



500 Doing Fine

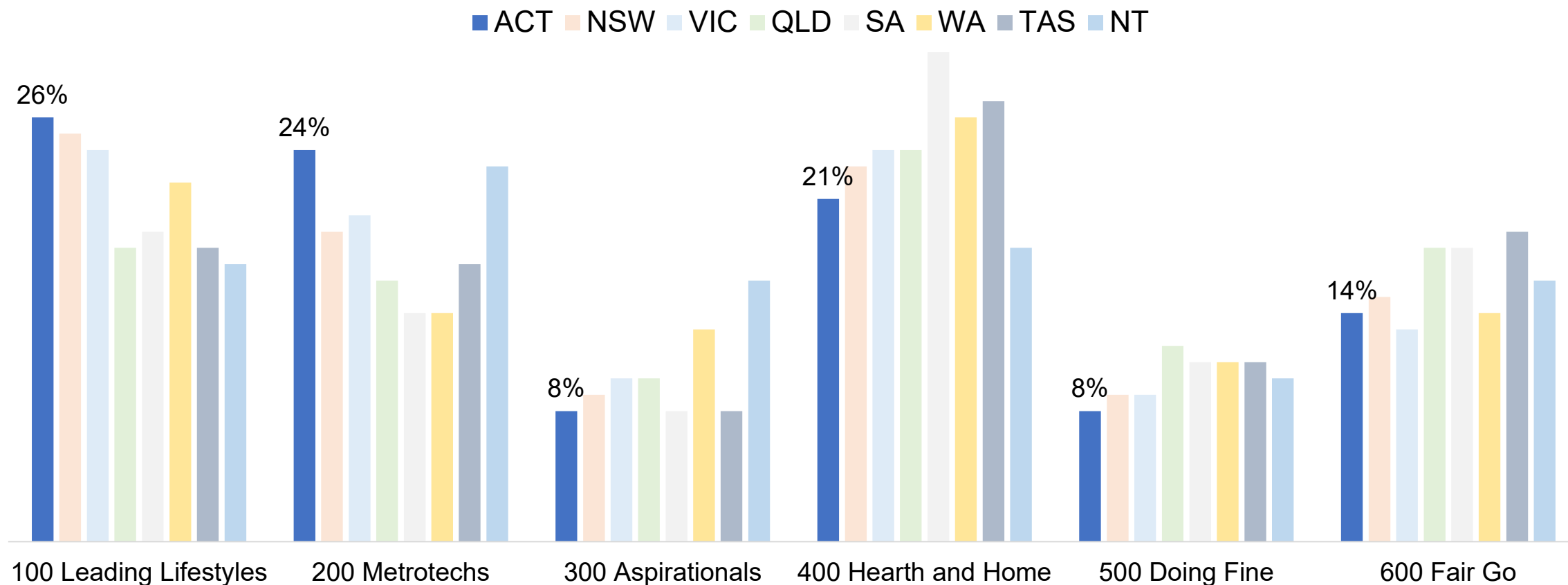


600 Fair Go



Which Helix communities visit Canberra the most?

Leading Lifestyles and Metrotechs visit more than other Helix communities, and more so than other states and territories



Metrotechs: further information

200: METROTECHS

-  Population: 2903k
-  Population Percentage: 12.0%
-  Average Household Income: \$97k

Highly educated, socially aware, hard-working, ambitious and culturally diverse. Introducing the Metrotech.

Their swanky rented apartments could be straight out of a premium beer commercial, while their action-packed social schedules are almost as demanding as their day jobs. No wonder Metrotechs take such good care of their health, exercising regularly — how else could they keep up the pace?

Sure, they plan to settle down and buy their own place one day, but there's plenty of time for that later. For now, they just want to enjoy the freedom that their upward mobility brings: the overseas travel, the fancy restaurants, the designer clothes, the techie toys. You could say they're a marketer's dream.

Unsurprisingly, Metrotechs don't have much time to watch TV, but when they do, they steer clear of commercial channels.

While you'll find Metrotechs packed with young singles and couples, you'll also find some 'young minded' midlife and older household among them, who embrace cultured city living to the max.

They are also the most culturally diverse of all the Helix communities — 1 in 4 was born in Asia.

THOUGHT CLOUD

I am in the 'Medium Spender' segment
I look for new experiences every day
I like to be with a crowd of people
I'm eating less red meat these days
I favour natural medicines and health products
'Environmentally friendly' products are overpriced
I'm not very good with mechanical things
It's important to look fashionable
It is important to have a full social life
I'm concerned about my sugar intake
I try to look stylish
I love to do as many sports as possible
Computers and technology give me more control over my life
I try to buy additive free food
Health food is not necessary if you eat properly
I'm security conscious
Success is important to me
I'm in the 'Big Spender' segment
I live a full and busy life
I consider myself a leader more than a follower
It is important that I have responsibility in my job
I try to get enough calcium in my diet
I find it difficult to switch off from work
I consider myself an Australian
I go out less now than I used to
I like tough physical activity
I'm a bit of an intellectual
A low fat diet is a way of life for me
I need to have security in my job
I would like to be able to lose weight
I believe in taking risks
There are not enough hours in the day
I'm concerned about my cholesterol level
I always think of the number of calories in the food I'm eating
My Technology Adoption Segment is 'Digital Life'
I'm more extrovert than introvert
I sometimes use force to get things done
My Technology Adoption Segment is 'Technology Early Adopters'
I regularly go to church or my place of worship
My Technology Adoption Segment is 'Professional Technology Whizzes'

LIKES



VALUE SEGMENTS*

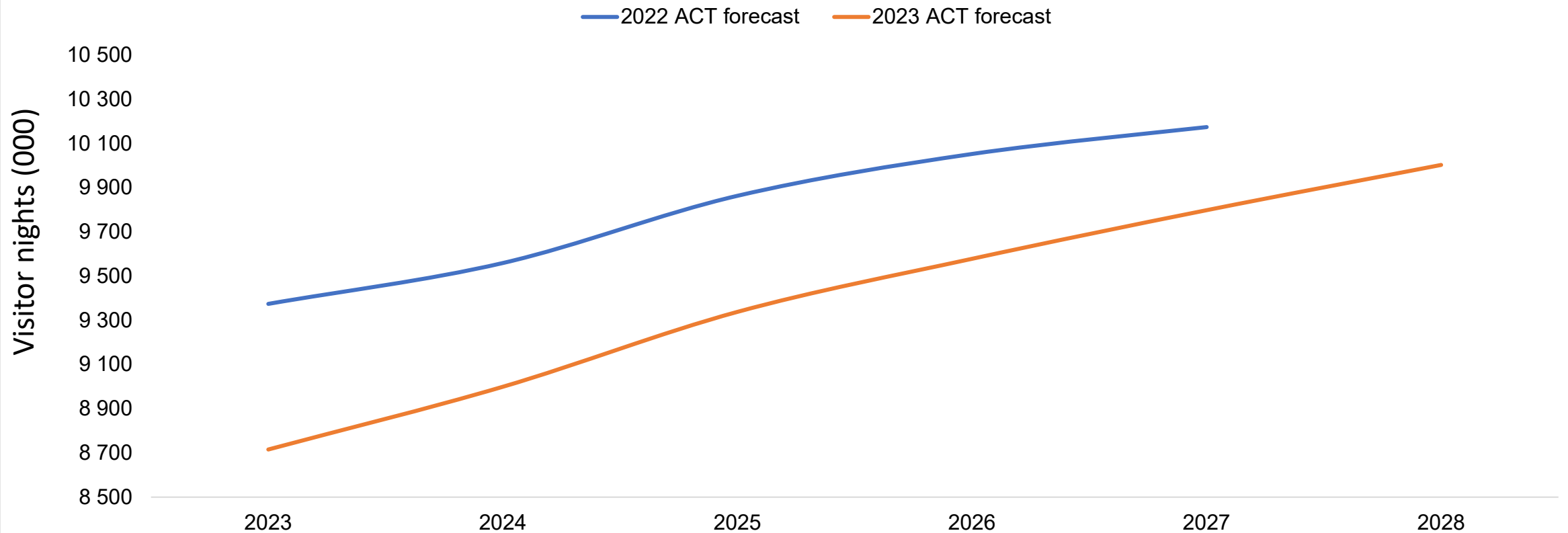


PROGRESSIVENESS



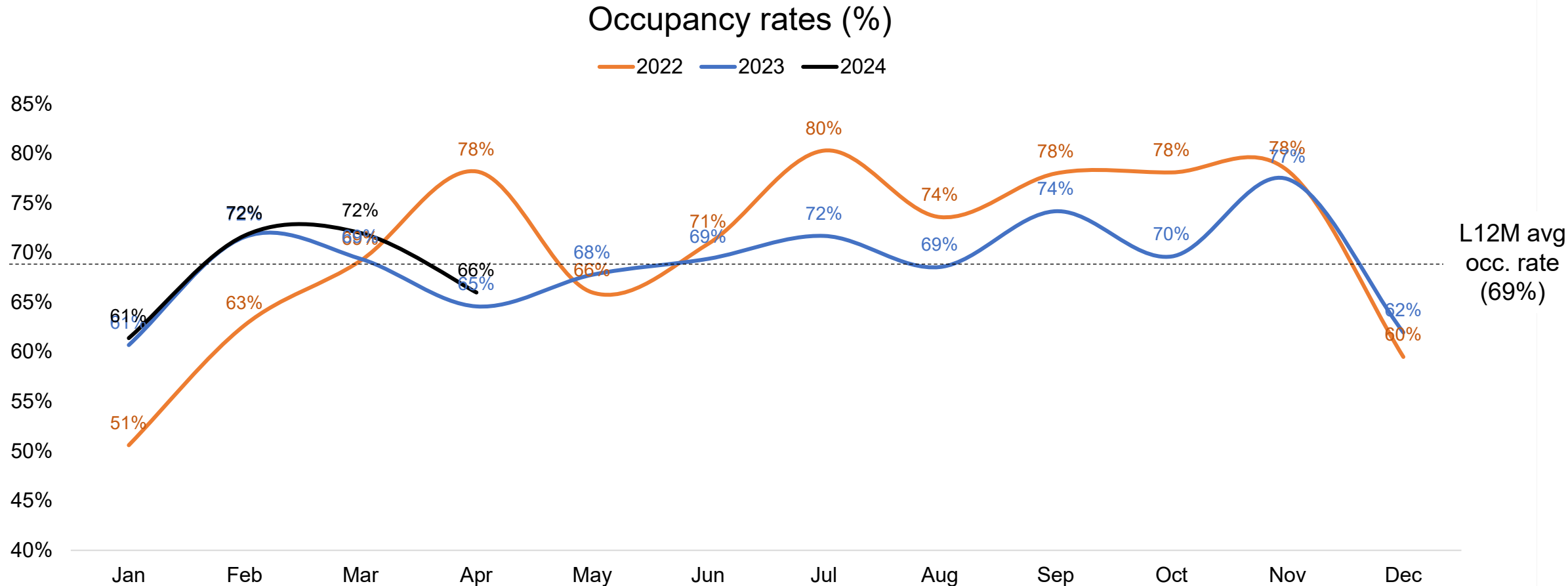
Tourism Research Australia forecast growth for ACT domestic visitor nights – but it has been reduced

Year on year growth rate of +3% over the next 5 years



2024 occupancy rates are tracking in line with 2023

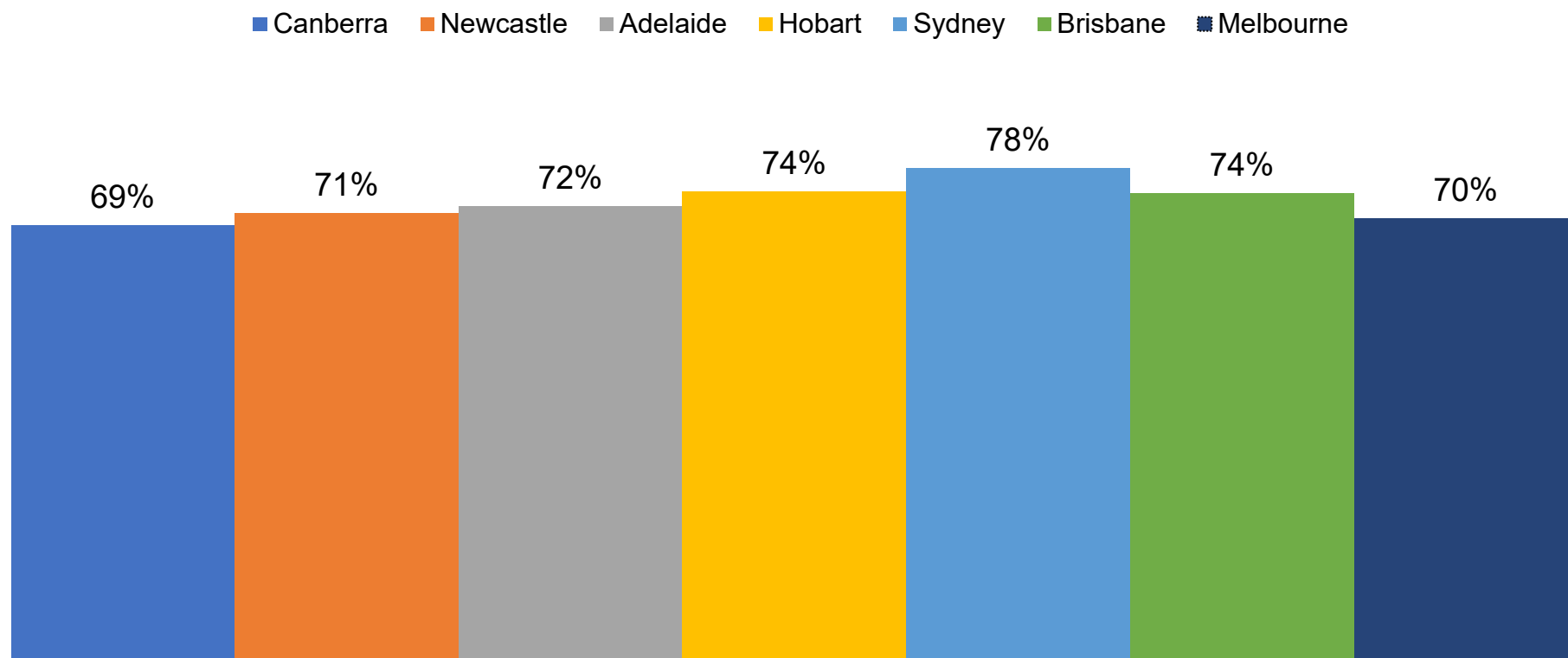
The normalising of tourism compared to the volatility of 2022



Canberra has similar occupancy levels to competitor cities over the past 12 months

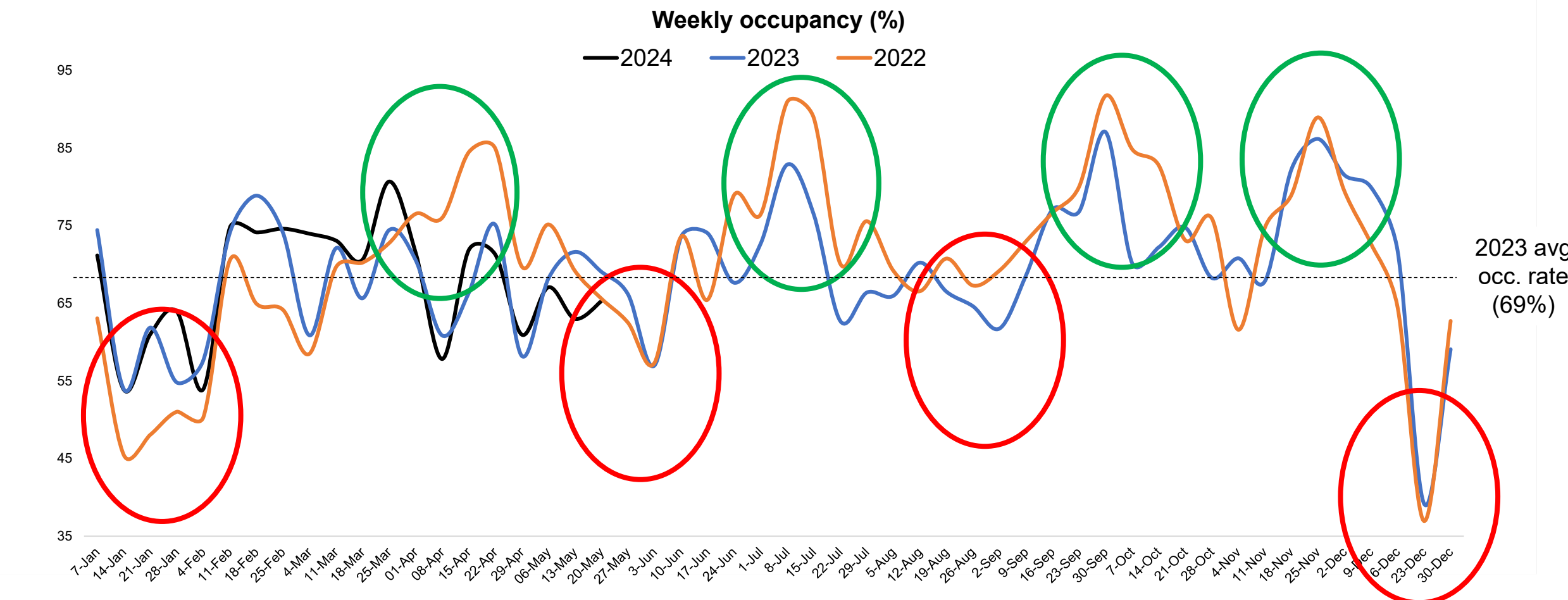
Sydney and Brisbane ahead, but not by a lot

Last 12 months average occupancy rates



Weekly: 4 peaks and 4 troughs throughout the year

Dec-Jan is tough, Feb-Mar is break even. Relief in Apr, slow in May. Average in June, positive July. Low in Aug, positive in Sep, Oct is average. Boost in Nov



Thank you!

For more information
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DESTINATION CANBERRA CONFERENCE

24 JULY 2024

There's **more than** they're telling us



VisitCanberra - ACT visitor economy insights

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