

ACT Visitor Economy Update

Results to year-ending June 2025

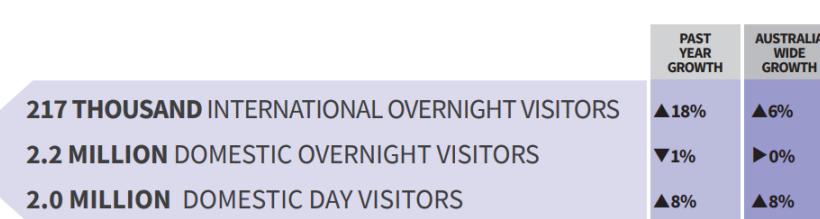


National Arboretum Canberra

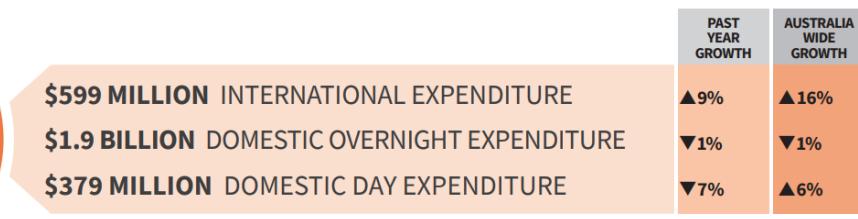
The ACT's visitor economy is holding steady year-on-year, with a flat domestic trend offset by a continuing growth trend for international.

International visits and spend are up 18% and 9% respectively. Domestic overnight visits and spend are flat, in line with the national trend. Domestic day visitors are up, however their spend has declined.

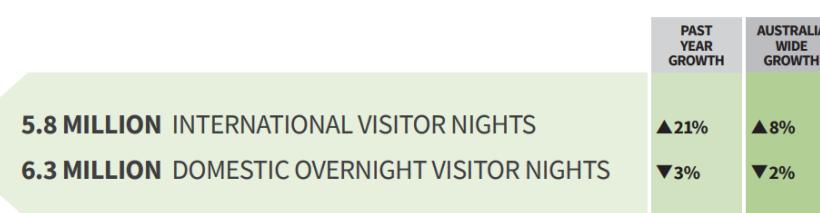
HOW MANY CAME TO VISIT?



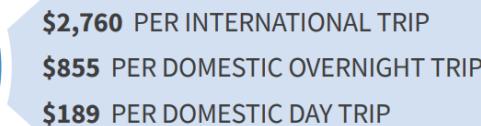
WHAT DID THEY SPEND?



HOW LONG DID THEY STAY?



WHAT THEY SPENT PER TRIP



ACT Visitor Economy Summary



	Jun 2025 \$M	Share	ACT Change Year-on-Year (YoY)	AUS Change Year-on-Year (YoY)	ACT Share of AUS
<u>TOTAL SPEND</u>	3,196		0%	3%	1.6%
Domestic day	379	◀ 12%	-7%	6%	0.9%
Domestic overnight	2227	● 70%	0%	0%	2.0%
International	589	▶ 18%	7%	6%	1.2%



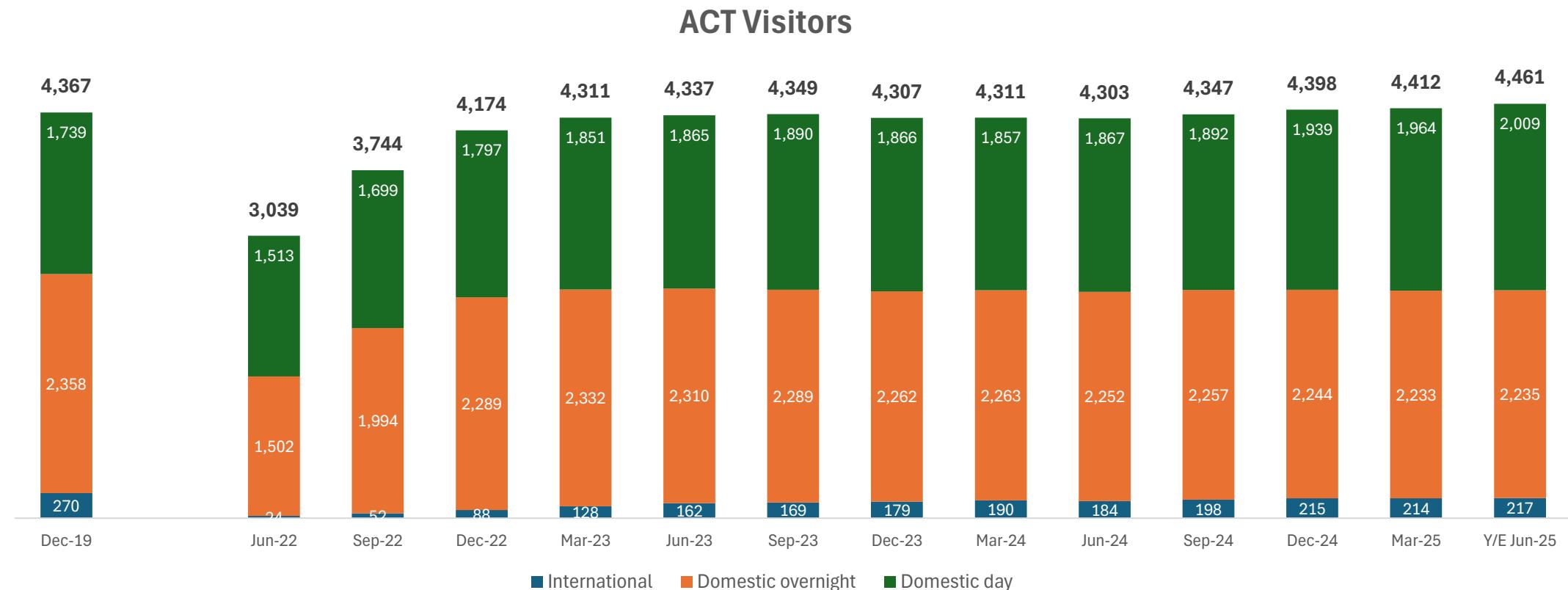
	Jun 2025 '000	Share	ACT Change Year-on-Year (YoY)	AUS Change Year-on-Year (YoY)	ACT Share of AUS
<u>TOTAL VISITORS</u>	4,461		4%	5%	1.2%
Domestic day	2,009	● 45%	8%	8%	0.8%
Domestic overnight	2,235	● 50%	-1%	0%	2.0%
International	217	▶ 5%	18%	6%	2.8%

Source: Visit Canberra analysis, TRA DoTS and IVS Jun-25



Visitor trends have stabilised over the past two years, with day trips growing whilst overnight trips remain flat.

Visitors making day trips in place of overnight trips.

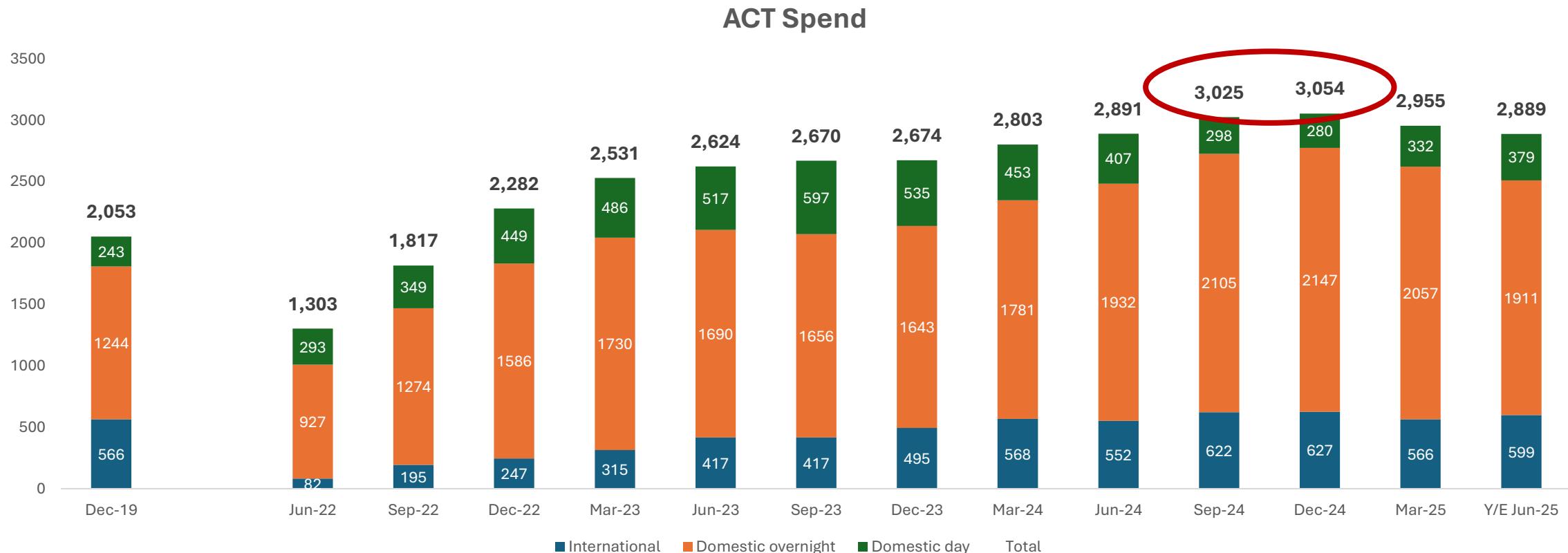


Source: Visit Canberra analysis, TRA DoTS and IVS Jun-25



Visitor spend peaked end of 2024, then contracted for overnight trips most recently with international spend flattening out.

Day trip spend is coming back from earlier decreases but is at the expense of overnight spend.

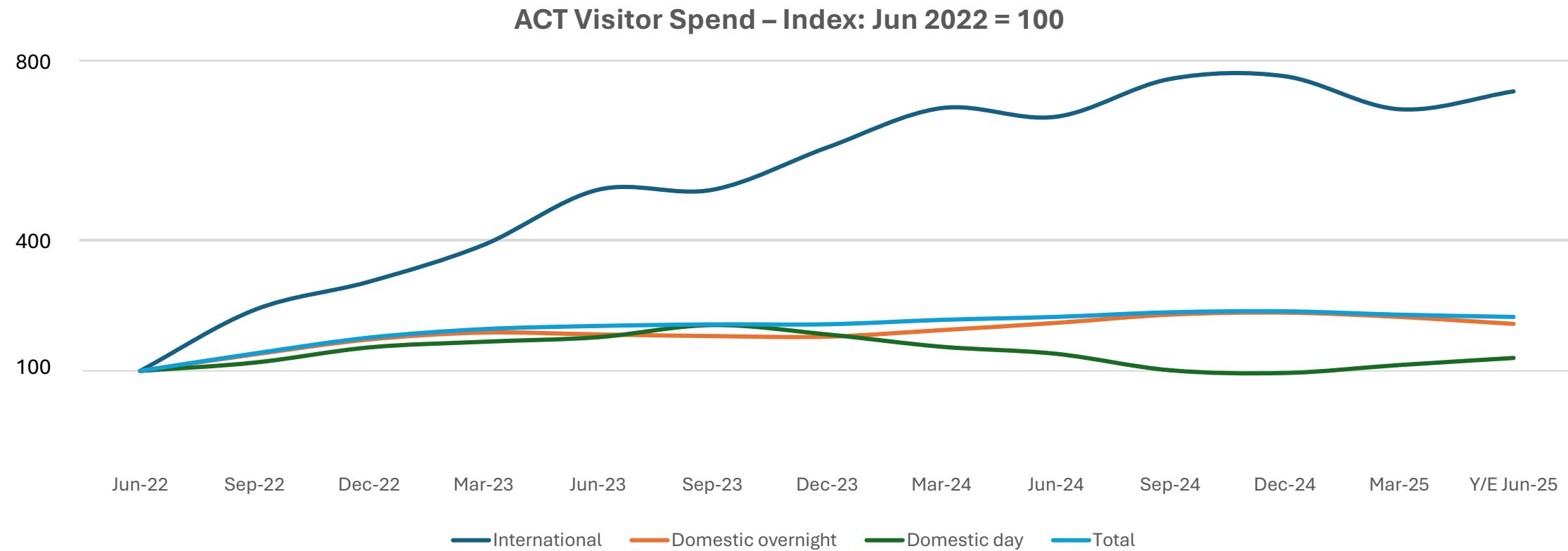


Source: Visit Canberra analysis, TRA DoTS and IVS Jun-25

Since June 2022, international spend has grown 7x, with further growth expected given international visitation at 80% of pre-pandemic levels



Domestic spends have peaked in 2024, with overnight spend declining as day trip spend increases.

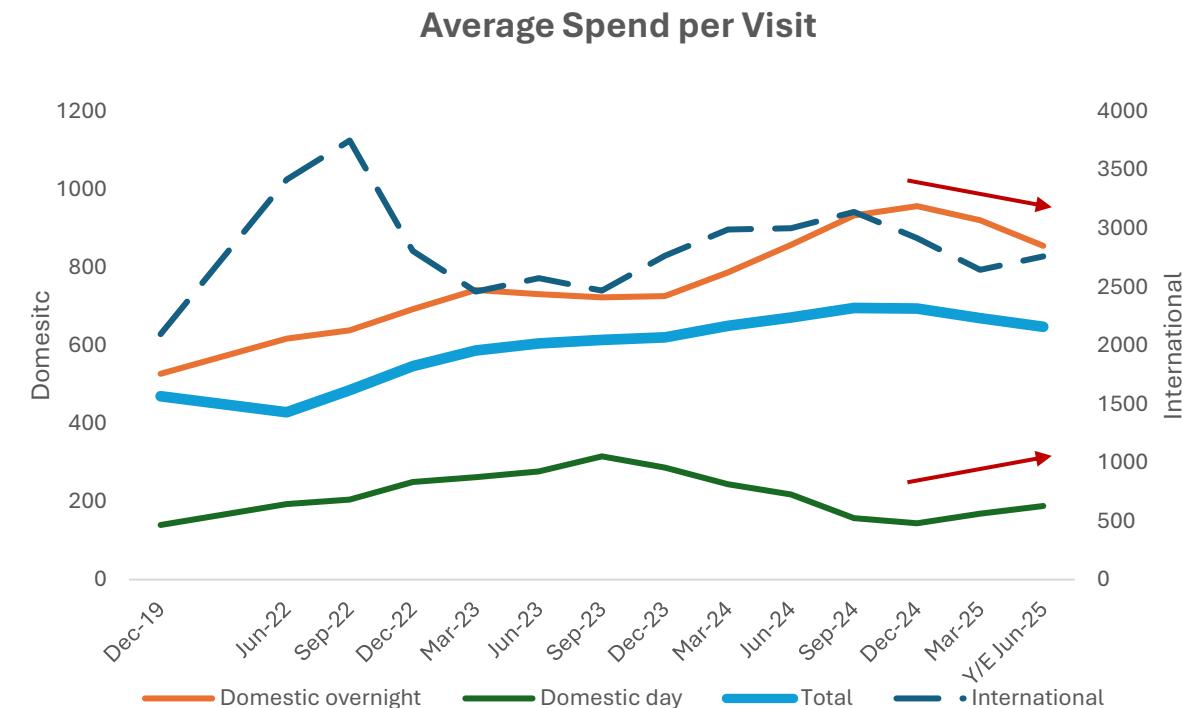
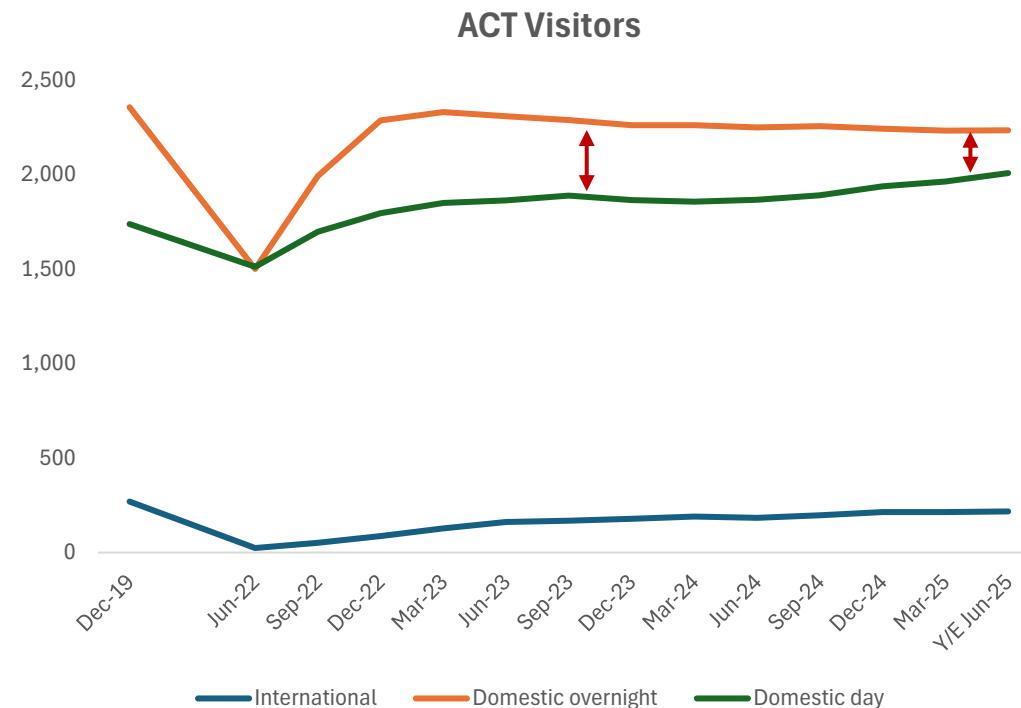


Source: Visit Canberra analysis, TRA, Jun-25



Notable increase in day trips with a decrease in overnight trips, as average spends have contracted in recent quarters.

International growth is incremental whilst day trip growth is cannibalising overnight trips.



Source: Visit Canberra analysis, TRA, Jun-25

Industry opportunities

Domestic

- Tie in with Destination Marketing to encourage overnight stays
 - More time means more opportunity for activities and experiences
 - A longer “to do” list will bring more operators into the mix
- Addressing value perceptions
 - Packaging/bundling
 - Value-add as a reward

International

- Majority of international visitors pre-book most activities before departing - little opportunity for walk-ins
- Multi-channel approach to capture pre-bookings
 - Direct and/or online travel agencies
 - Inbound tour operators
 - Travel agents/agencies bookable product
- Channel based pricing
 - Build-in commissions – consumer will pay more if there is value
 - Product and price differentiation