

Getting behind T2030 Phase 2

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Executive Branch Manager, Tourism and Investment

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



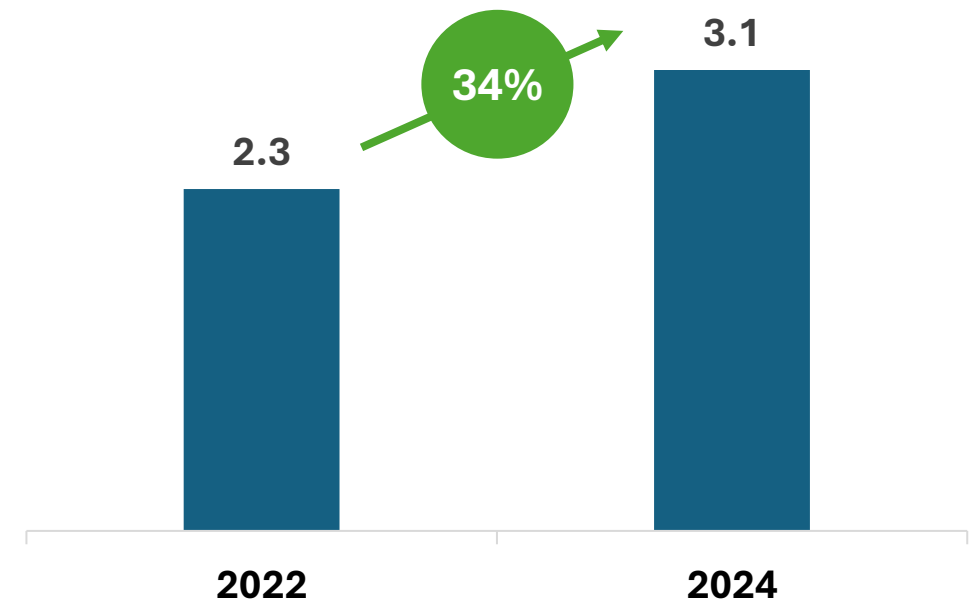
We acknowledge the Ngunnawal people as traditional custodians of the ACT and recognise any other people or families with connection to the lands of the ACT and region. We acknowledge and respect their continuing culture and the contribution they make to the life of this city and this region.

Why Tourism Matters Now

Tourism is more than just an economic driver.



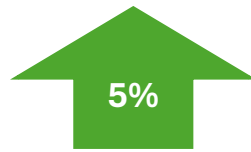
ACT Visitor Spend (\$B)



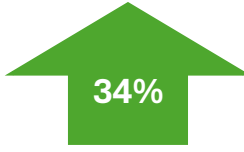
Visitor economy growth: our progress from 2022 to 2024

As visitor demand has grown, so too has the capacity and capability of the local tourism industry.

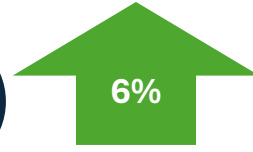
ACT Tourism Industry as at December 2024



4.5M visitors



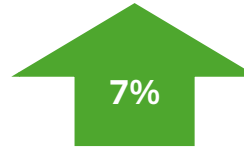
\$3.1 Billion Visitor Spend



4,804 Businesses



76 hotels, 7,861 rooms
1,601 entire STR places



19,351 inbound flights
2,013,000 inbound seats



22,200 total jobs
11,700 direct jobs



Growth since 2022

Growing the visitor economy by \$1 billion by 2030

We will get there with a 5% annual growth rate.

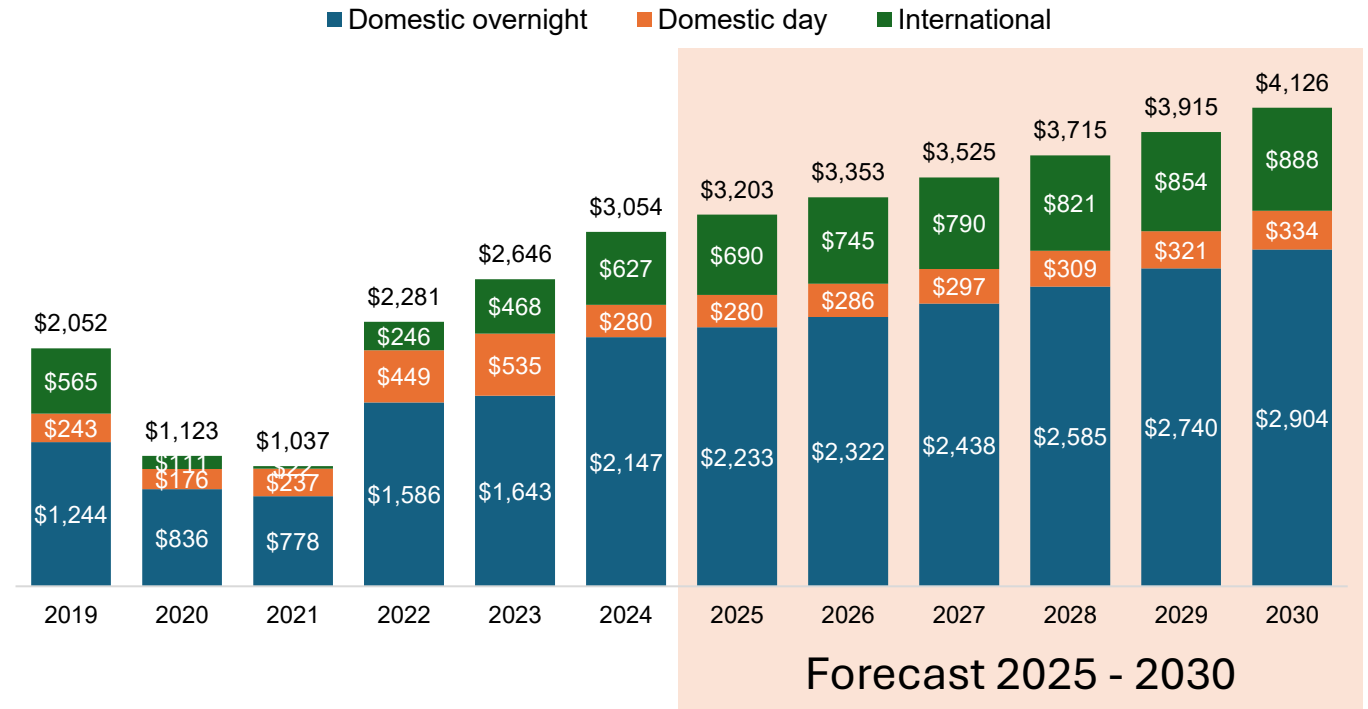
1. Grow the higher spending international visitors

- Grow spend 6% annually to \$888M (22% of total)

2. Increase visitation, spend and length of stay from the larger domestic overnight visitors

- Grow spend 5% annually to \$2.9 billion (70% of total)

ACT Visitor Economy Spend to 2030



T2030 Phase 2: Growing Demand, Strengthening Foundations

Four economic growth drivers to grow visitation and spend:



Increase domestic visitation and spend

Domestic overnight visitation contributes 66% of our total visitor spend.

1

Increase
domestic
visitation and
spend

By 2030:

- Grow domestic spend by 5% annually to \$2.9 billion
- Grow Canberra's Destination Brand Equity Index to 41

How we'll get there:

- Prioritise domestic target markets with the highest growth potential
- Showcase Canberra's value proposition
 - Time and space to immerse yourself
 - World-class cultural attractions
 - Food, wine and nature
 - Experiences you can't find anywhere else
- Position Canberra as a leading tourism destination for school groups



Prioritise domestic target markets with the highest growth potential

Drive spend. Drive visitation.

1
Increase domestic visitation and spend

Emerging markets (e.g. Adelaide)

DRIVE VISITATION	
Avg spend	\$1,027
Spend multiplier	1.44 times

South East Queensland

DRIVE VISITATION	
Avg spend	\$1,143
Spend multiplier	1.6 times

Sydney and Regional NSW

DRIVE SPEND	
SYDNEY	
O/N visitation share	33%
Visitation multiplier	2.23 times
REGIONAL NSW	
O/N visitation share	25%
Visitation multiplier	1.65 times

Metro Melbourne

DRIVE VISITATION	
Avg spend	\$921
Spend multiplier	1.29 times

Grow visitation generated by events

A diverse calendar of events creates reasons for different audiences to visit throughout the year – including those that may not have otherwise considered visiting Canberra.

2

Grow
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events

By 2030:

- Grow interstate visitors to events by 7% annually
- Grow business events visitor expenditure by 4% annually

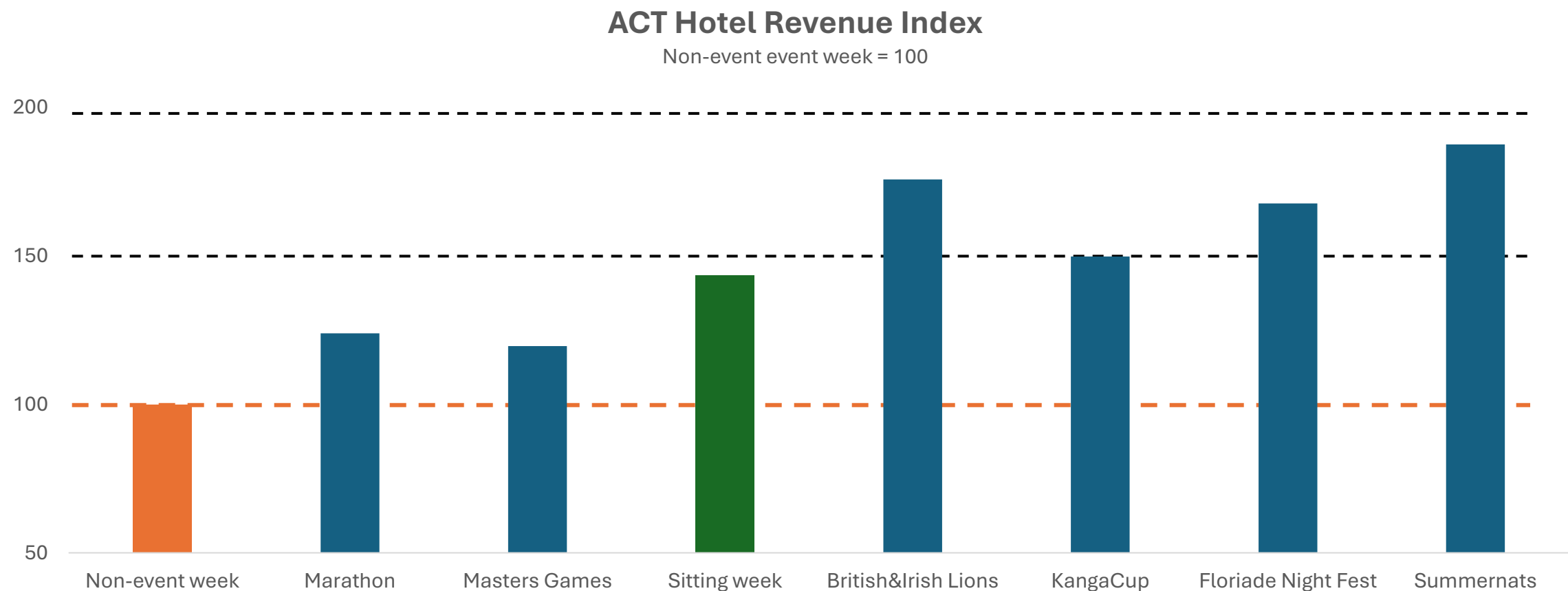
How we'll get there:

- Embed event promotion in destination marketing
- Work with industry to deliver a balance of events each year
- Help operators package experiences and promote events to extend visitor stays
- Grow business events and delegates to the ACT



Events drive visitation and spend

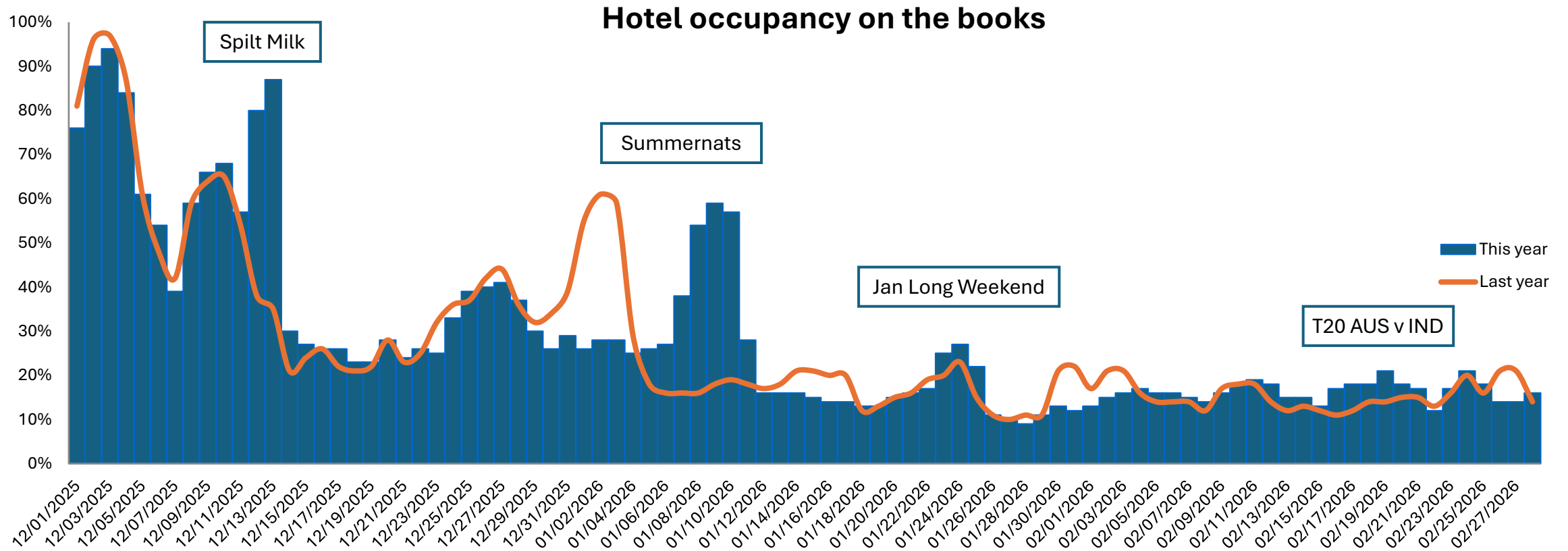
Hotel revenue shows the impact of having events of various durations at different times of the year.



Source: Co-Star, December 2025

And drive forward demand

Leverage forward demand through planning, setting availabilities and pricing accordingly.



Make it easier and more affordable to visit

Growth in domestic aviation routes and frequency of domestic air services. Greater international aviation connectivity to Canberra will significantly accelerate international visitor numbers and spend.

3

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By 2030:

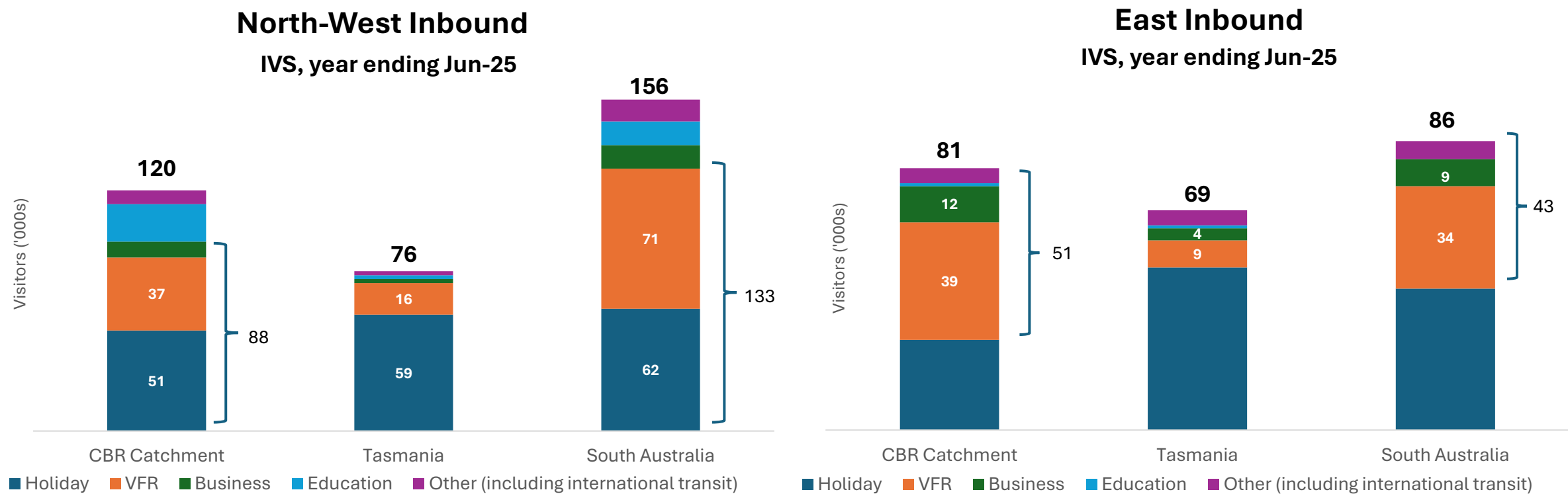
- Increase domestic and international inbound seats by 550,000
- Connect Canberra to international hubs

How we'll get there:

- Leverage **Qatar Airways daily flights** and **Fiji Airways services**
- Attract new international airlines (e.g. Singapore Airlines)
- With Canberra Airport, continue to demonstrate the regional market footprint
- Influence road and rail connectivity
 - Reducing travel time and improving the travel experience
 - Western Sydney International Airport to Canberra

CBR Airport catchment area is comparable to Adelaide

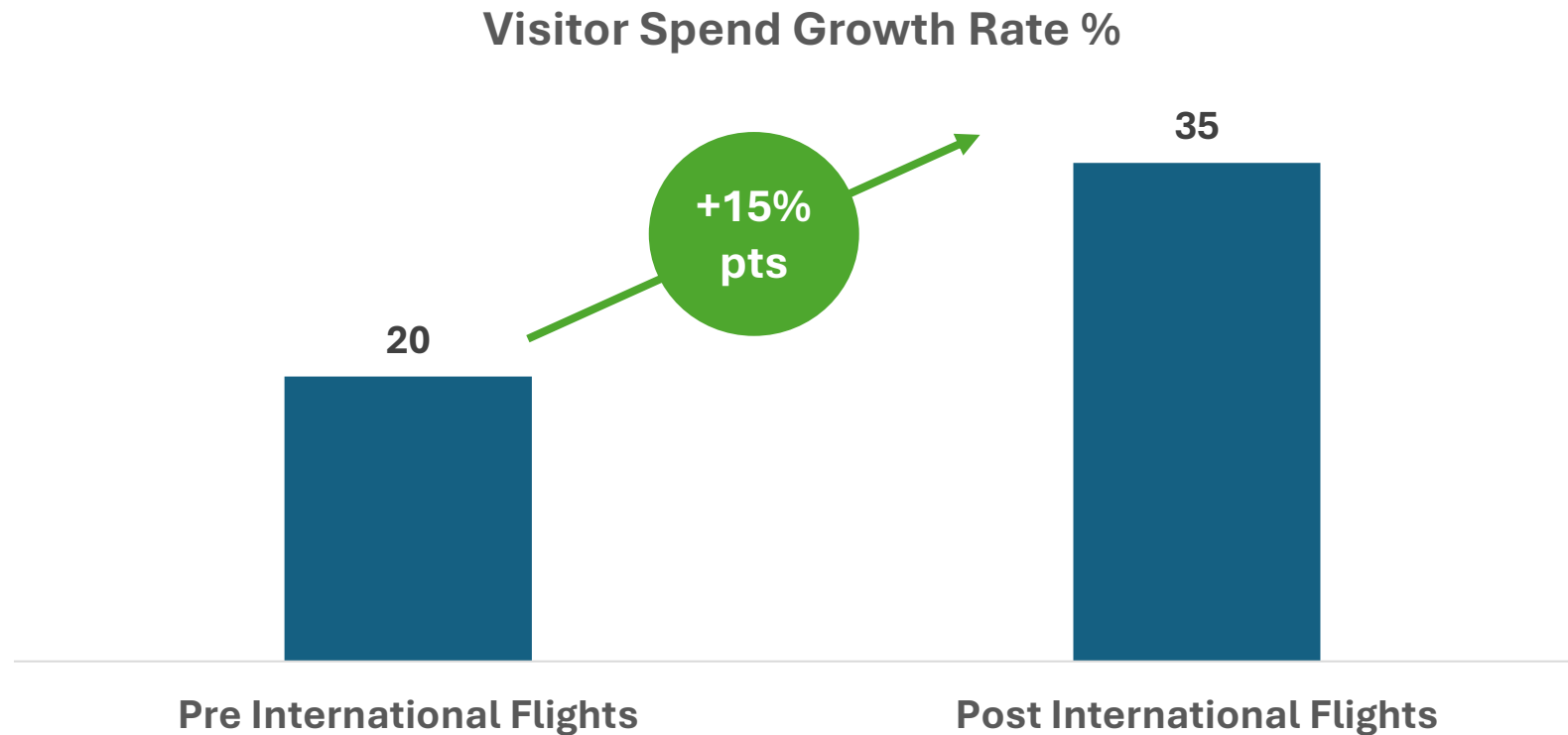
CBR Catchment profile more favorable to airlines with more business travel from East inbound and regular VFR and Student travel from North and West inbound direction.



Source: VisitCanberra, IVS Jun-25
North-West: Singapore, Malaysia, China, India, UK
East: US + NZ

Adding direct international flights drives growth

The international visitor spend growth rate increased by 15%pts after international flights commenced.



Realise Canberra's potential with international visitors

International visitors stay longer and do more while they're in Canberra. The Canberra region of the South Coast, Snowy Mountains and Southern Tablelands delivers a compelling and diverse set of experiences.

By 2030:

- Grow international spend to \$888 million – 22% of total visitor spend

How we'll get there:

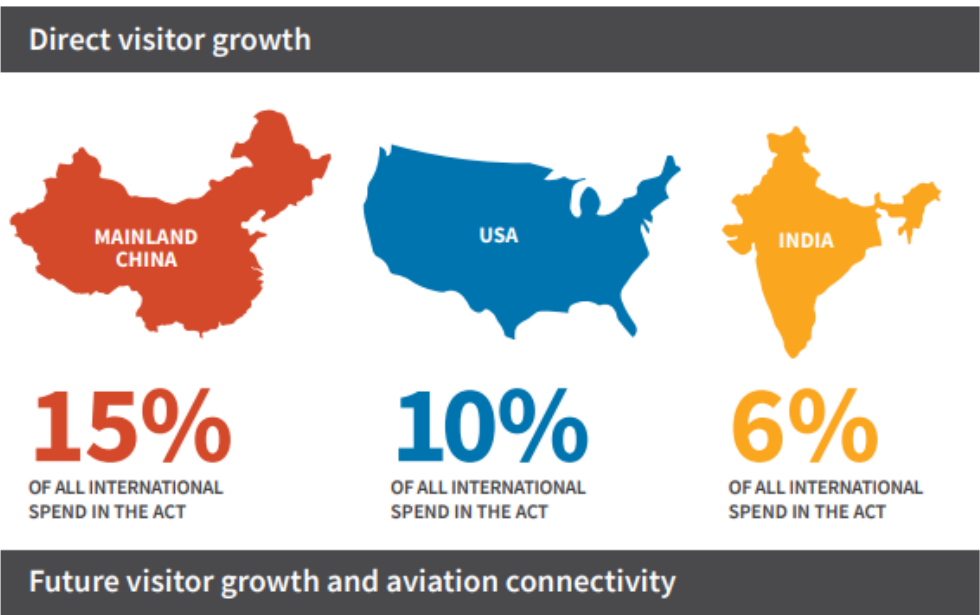
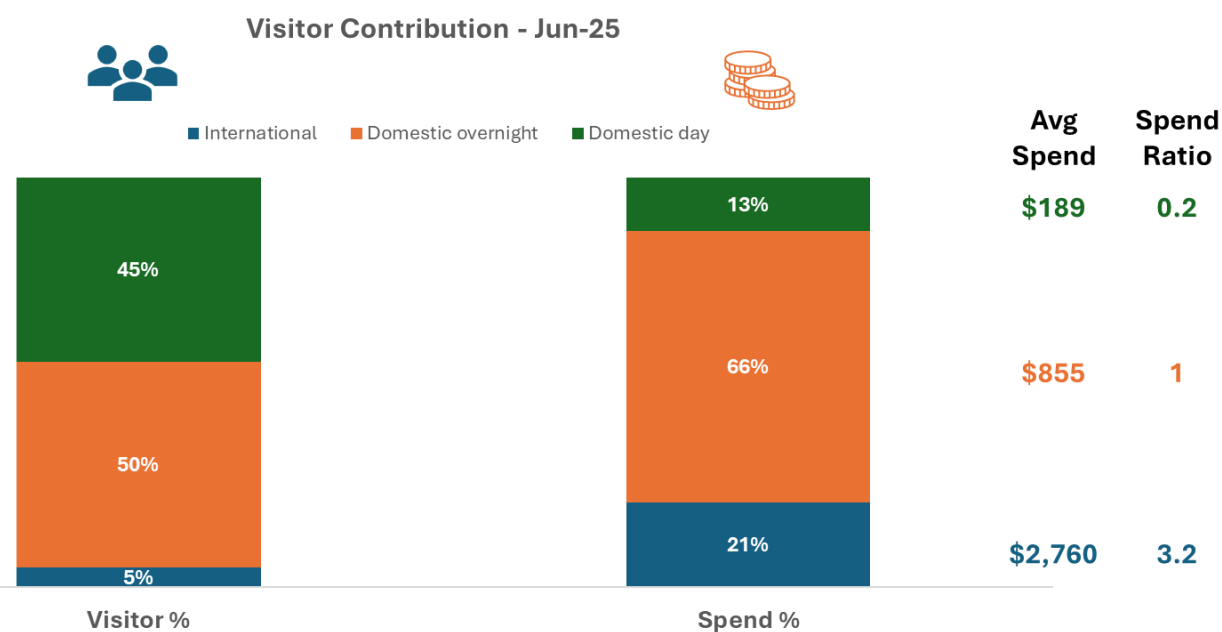
- Expand in-market representation
- Work with Tourism Australia on cooperative campaigns
- Develop trade-ready products and itineraries
- Assist in attracting international business events
- Support initiatives to promote Canberra as place to live and study

4

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International markets a growth driver

International visitors spend 3.2 times a domestic overnight visitor. Our top 3 markets drive one-third of international visitor spend.



Beyond demand - building industry capacity and capability

A coordinated approach to building capacity and capability is essential. VisitCanberra will partner with government teams/agencies and industry bodies to build supply in line with demand growth.

Skills and Employment

- Ensure learning and development is aligned to industry needs and career paths

Business Development and Support

- Insights, tools & resources
- Support inclusion diversity and sustainability

Industry Collaboration

- Create spaces and places that foster engagement and collaboration
- Cross border approach

Product Development

- Programs and platforms that support building experiences and trade ready products

Ease of Doing Business

- Reduce time and effort required to run your business

An industry approach

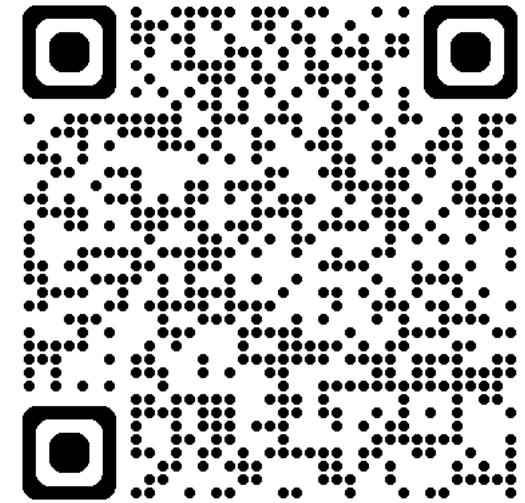
Achieving growth of \$1 billion by 2030 will require a **collective effort** across government, tourism businesses and other visitor economy stakeholders.

What next?

- Identify points of alignment between T2030 and your business strategy and plans
- Engage with VisitCanberra on marketing and trade opportunities

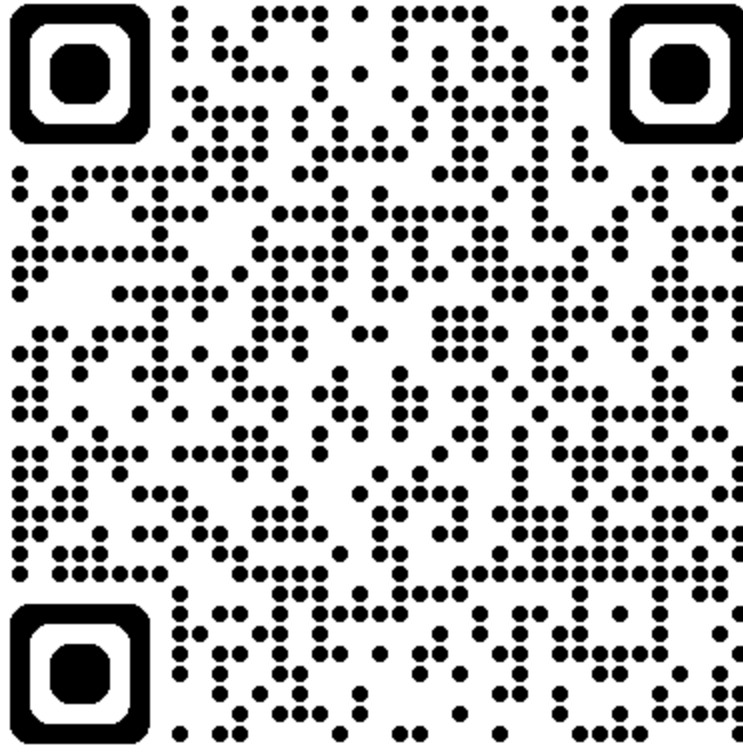
How can VisitCanberra help?

- Keep you updated on planned marketing activity
- Sharing visitation data, insights and market opportunities
- Supporting industry capability and capacity development
- Keep you informed via **Industry Link**, **LinkedIn** and other updates
- Provide the **Working with VisitCanberra guide** and Industry Resources.



**Access VisitCanberra
Industry Resources**

Download the T2030 Phase 2 Strategy document now



Thank you

Jonathan Kobus

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