

# Industry Briefing

26 June 2019



# Who is coming:

## In 2018...

- 2.7M domestic overnight visitors 33.6%
- 252K international overnight visitors 35.5%
- \$2.496B overnight spend 66.8%
  - \$1.8B domestic & \$686M international

Growth from commencement of  
T2020 Strategy (2013)

**Total overnight dollars spent in the ACT: \$2.496B**  
**Total jobs created by Tourism in the ACT: 16,800**



# How does the ACT compare?



## Overnight Visitors ...

### 5 Year Growth

- ACT 33.7%
- Queensland 36.8%
- NSW 35.2%
- Victoria 41.6%
- Tasmania 51.3%
- South Australia 25.7%



## Overnight Spend ...

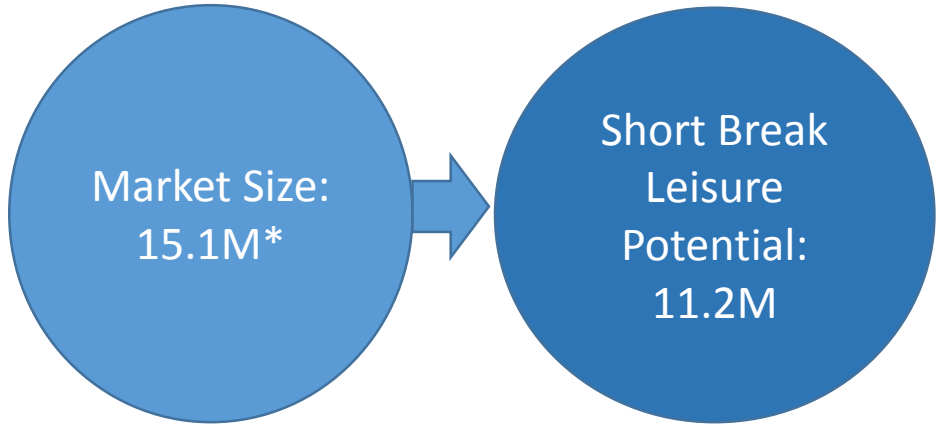
### 5 Year Growth

- ACT 66.8%
- Queensland 36.7%
- NSW 46.3%
- Victoria 57.9%
- Tasmania 67.6%
- South Australia 31.9%



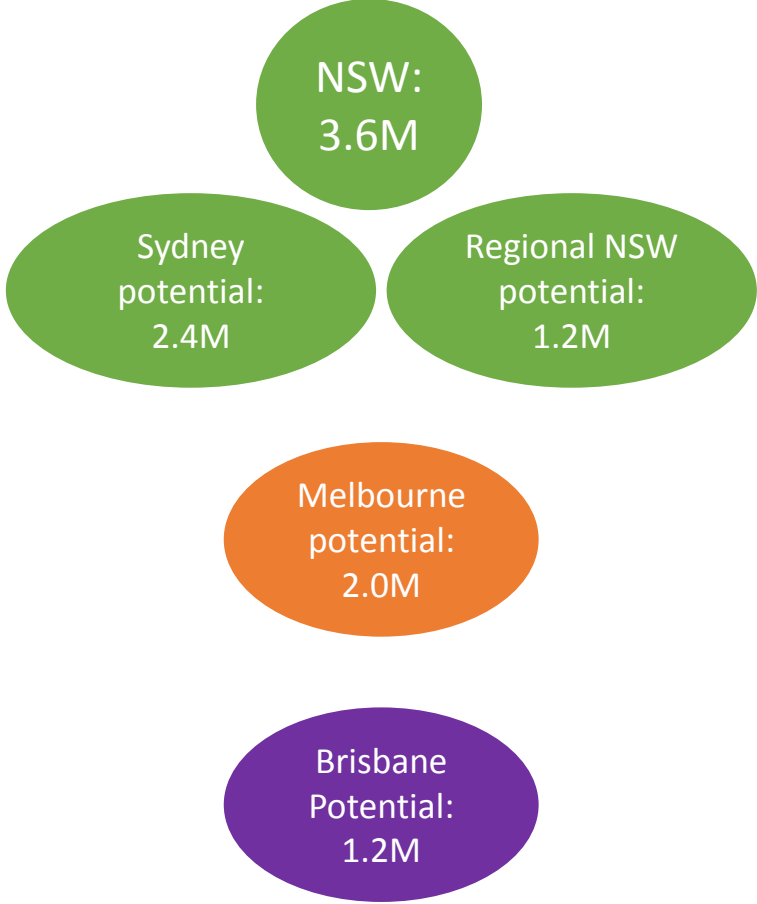
# Analysis: Short break leisure market potential

## Total National Potential

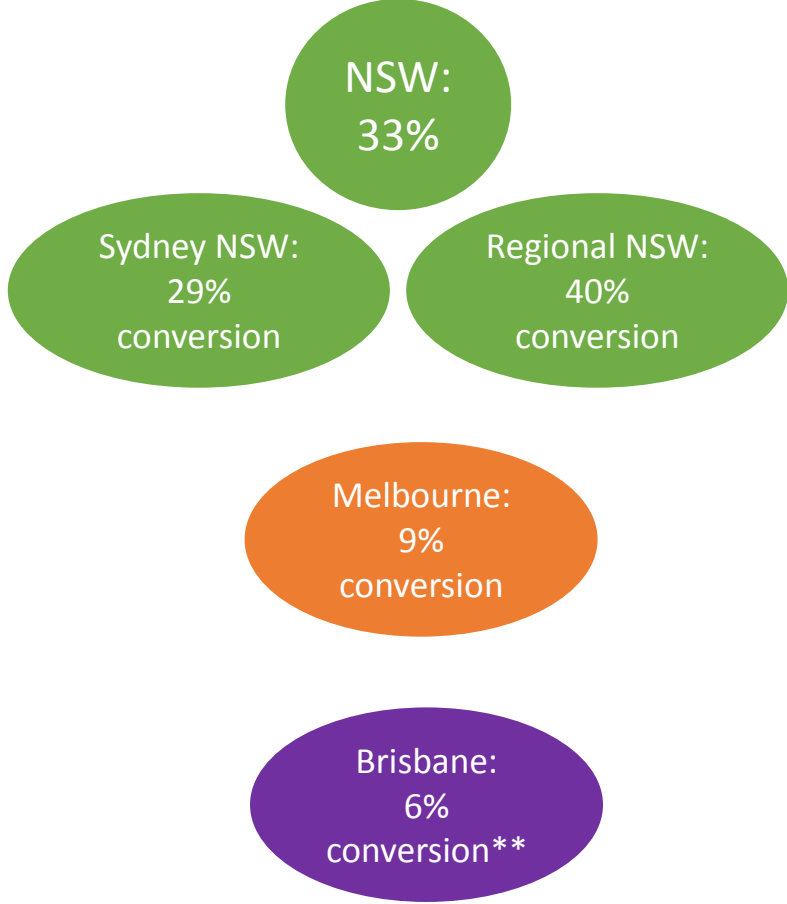


\*all visitors are aged 20-69 as at 2016 census

## NSW, Melbourne & Brisbane Potential



## NSW, Melbourne & Brisbane Conversion



\*\*low sample size/indication only

# International Tourism Update

1. Who are we, what do we do and why?
  2. Market insights
  3. Approach FY18/19
  4. Looking ahead



**Increase destination awareness, consideration and intent to visit Canberra amongst our target audience in key international markets**



**Marketing**



**Trade  
Engagement**



**Industry  
Development**



# VISITCANBERRA'S TARGET AUDIENCE: *HIGH VALUE TRAVELLER (HVT)*



**TRAVEL  
LONG HAUL**



**PREFERENCE FOR  
AUSTRALIA**



**KEY DRIVERS FOR  
DESTINATION CHOICE**

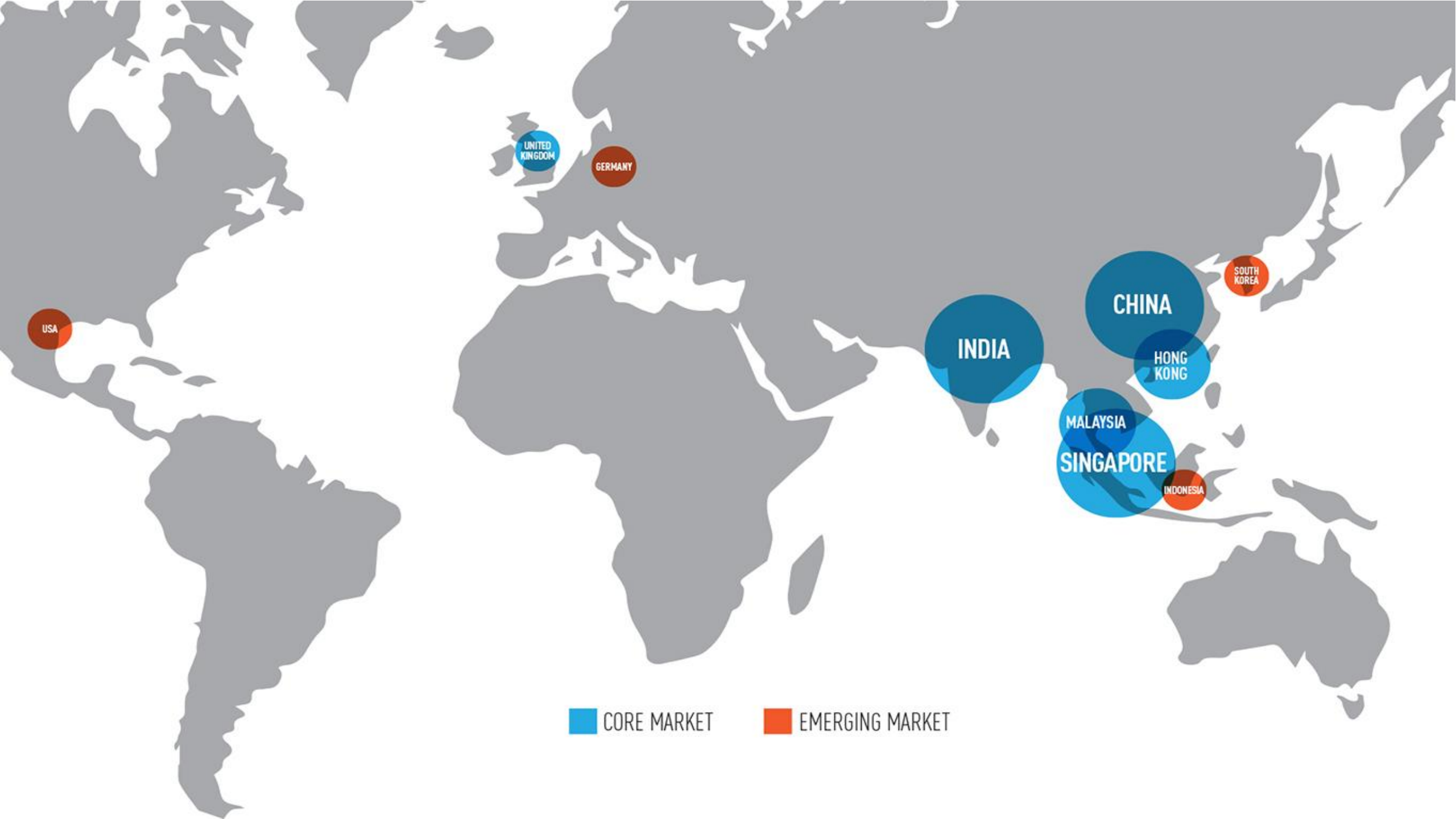


**REPRESENT  
HIGH VALUE**



**STAY LONGER, DISPERSE  
MORE REGIONALLY**





■ CORE MARKET

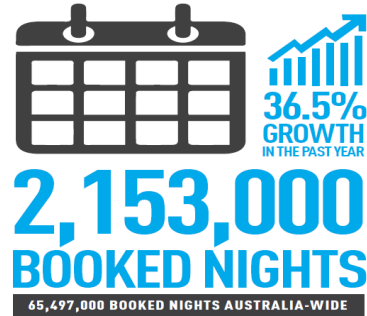
■ EMERGING MARKET

# Market Insights

Current state of play...



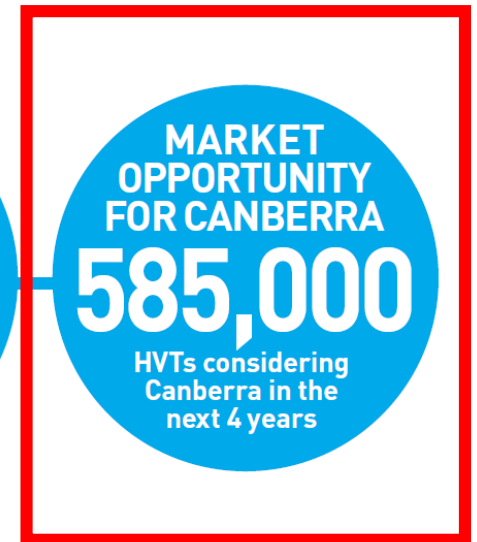
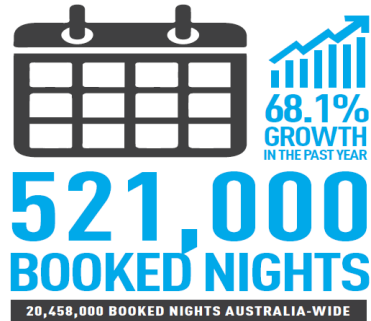
# Greater China



\* Refer to Market Profiles on [Tourism.act.gov.au](http://Tourism.act.gov.au)



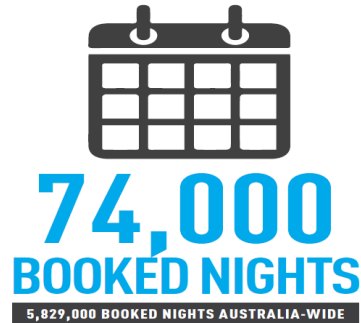
# India



\* Refer to Market Profiles on [Tourism.act.gov.au](http://Tourism.act.gov.au)



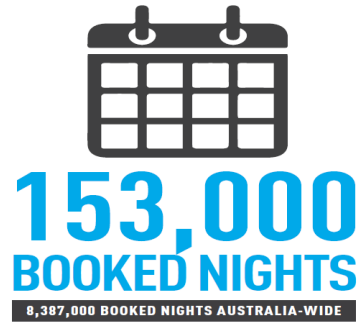
# Singapore



\* Refer to Market Profiles on [Tourism.act.gov.au](http://Tourism.act.gov.au)



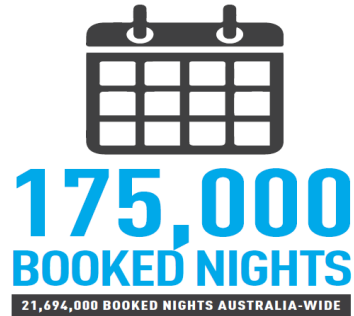
# Malaysia



\* Refer to Market Profiles on [Tourism.act.gov.au](http://Tourism.act.gov.au)



# United Kingdom



\* Refer to Market Profiles on [Tourism.act.gov.au](http://Tourism.act.gov.au)



# 5.8 Million

High Value Travellers considering Canberra in the next 4 years



# Approach

How we have been reaching High Value Travellers in 2018/19...

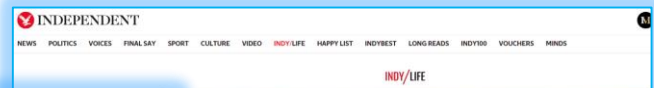
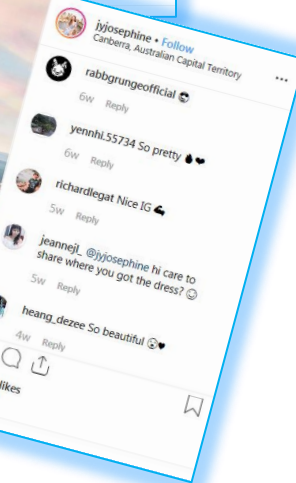




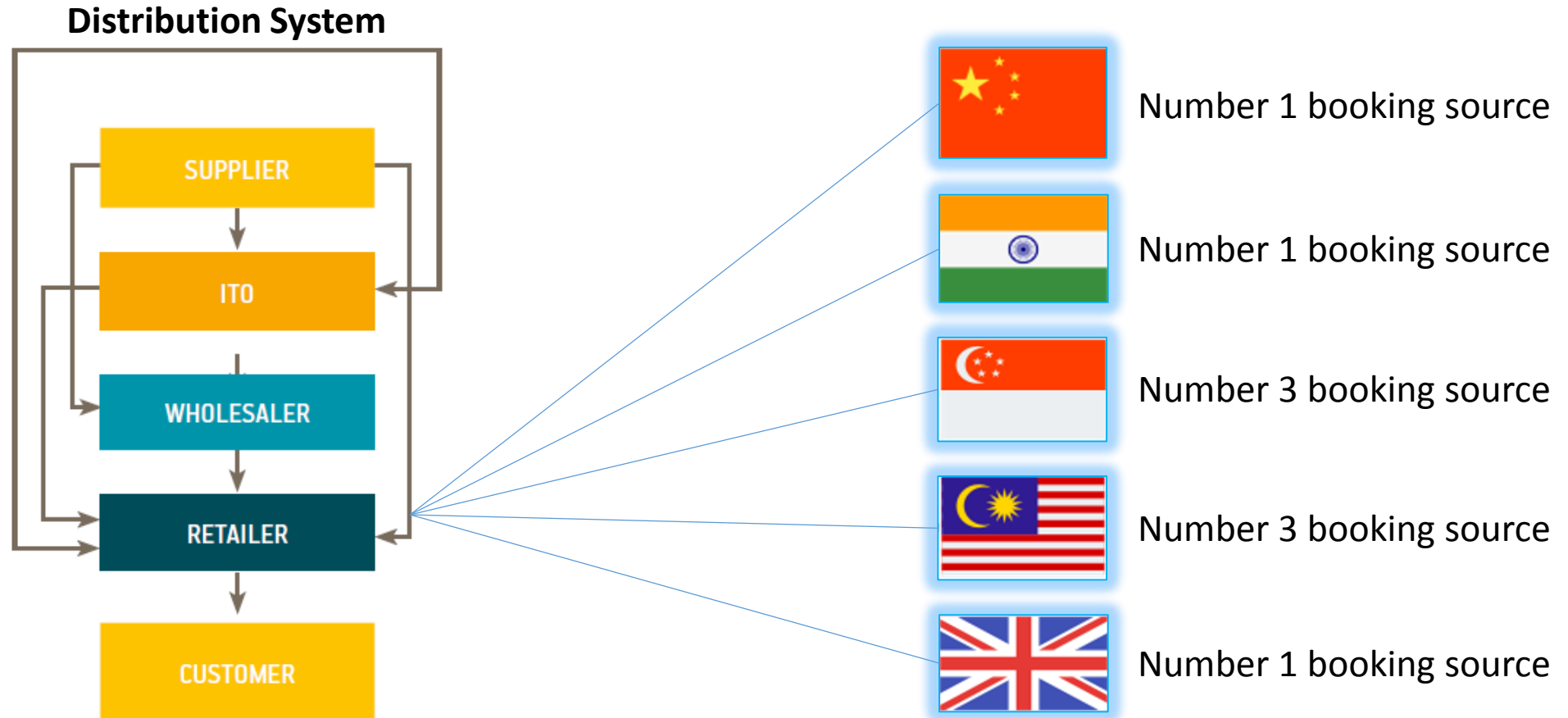
# Singapore Airlines KrisWorld in-flight campaign



# PR and Media



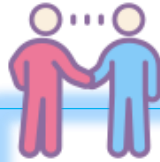
# Trade Engagement



# Trade Engagement Activity



**10 x trade events in key markets**



**650 x one-on-one trade appointments**



**10 x trade families with 95 x delegates from key markets**



**Over 9,000 Aussie Specialist Agents trained globally**



**2000 x recipients of quarterly trade newsletter**



**Dedicated Trade Hub website**



**Dedicated BDM for Singapore, Malaysia and India**



# Industry Development



**Internationally-ready Accelerator Program: 6 x new businesses**



**Signature Experiences of Australia Program: 4 x new businesses**



# Signature Experiences of Australia



Cultural Attractions of Australia and its iconic Australian arts, cultural heritage and sporting organisations offer a distinctive lens on what it means to be Australian.

ATTRACTIONS

EXPERIENCES

EVENTS

This screenshot shows the homepage of the Cultural Attractions of Australia website. It includes the logo, a navigation menu with items like "WELCOME", "ATTRACTIONS", "EXPERIENCES", "DESTINATIONS", "ITINERARIES", "EVENTS", "NEWS", and "TRADE + MEDIA", and three main content tiles for "ATTRACTIONS", "EXPERIENCES", and "EVENTS".

Discover Golf in Australia

A land of world class courses, untouched wilderness, exceptional food and wine and friendly hospitality; Australia is the ultimate golfing adventure.

COURSES EXPERIENCES ITINERARIES PLANNER CONTACT

This screenshot shows the homepage of the Great Golf Courses of Australia website. It features a large background image of a golf course at sunset. The navigation menu includes "COURSES", "EXPERIENCES", "ITINERARIES", "PLANNER", and "CONTACT". The main headline is "Discover Golf in Australia" with a sub-headline describing the experience.



# Looking Ahead

How will we continue to reach High Value Travellers in 2019/20...



# International activities 2019/20



**Partnership  
Campaigns**

**PR  
and  
Media**

**Trade  
Events**

**Accelerator  
Program**

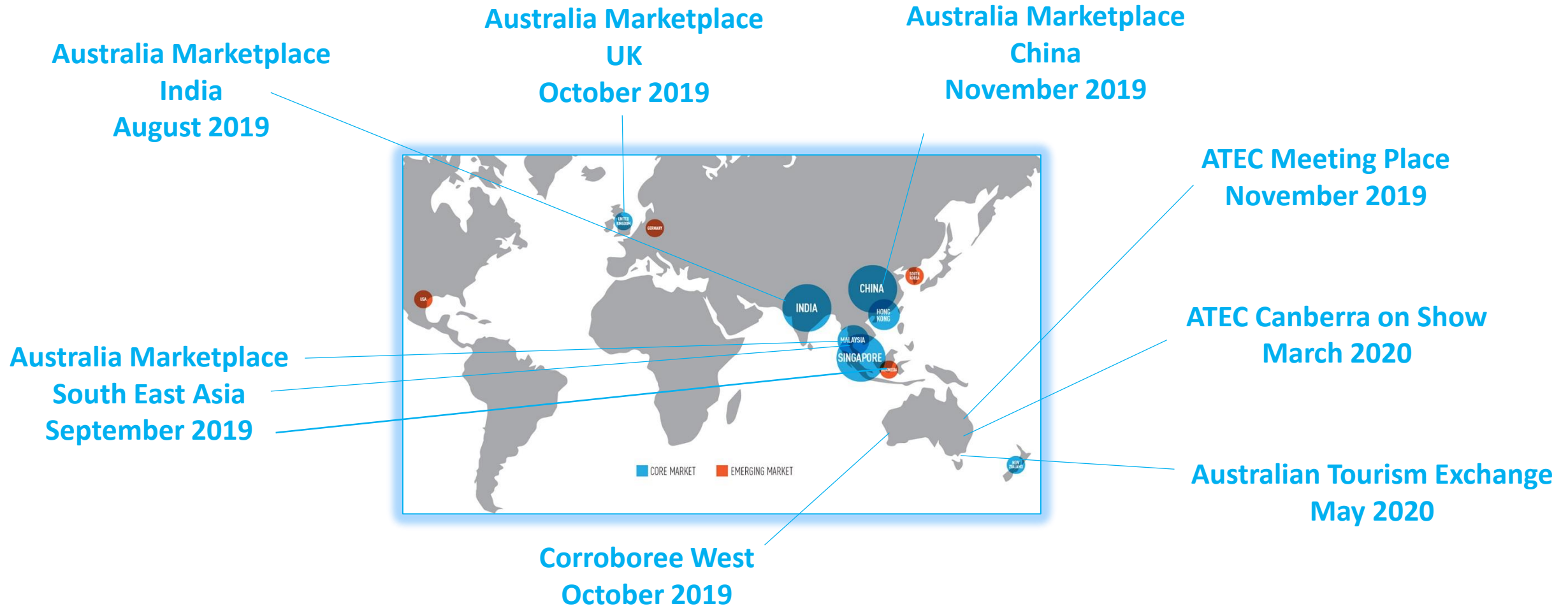
**Trade  
Hub**

**Aussie  
Specialist  
Program**

**Industry  
Development**



# Trade Events



# How can you get involved...

## ATDW LISTING

Things to consider

- Create**  
your listing on ATDW platform
- Manage**  
listing with well-written content and pictures
- Highlight**  
updates and when you have something new to talk about
- Share**  
with us for inclusion in our owned channels

## INTERNATIONAL MARKETS

How to be involved

- Market Profiles**  
download and read country market profiles
- Identify**  
key international markets for your business growth
- Calendar of events**  
attend international and domestic trade events

## EXPORT READY

Commissionable product

- Product development**  
commissionable products for trade
- Trade**  
relationships with trade
- Education**  
Accelerator Program, ATEC workshops

## INDUSTRY

Working with us

- Subscribe**  
to Industry Link newsletter to hear from us
- Attend**  
industry events including training & workshops
- Share**  
updates with us for inclusion in Trade EDM



# Thank you!

