



Australian Government

Australian Trade and Investment Commission

Collaborating with the National Capital: Developing Tourism and Trade Opportunities

Canberra Region Tourism Advisory Forum 3 July 2025

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AUSTRALIA

Overview:

- What's next for THRIVE 2030
- Latest national tourism data
- Revitalising international tourism relationships



THRIVE 2030

The Re-Imagined Visitor Economy

A national strategy for Australia's visitor economy recovery
and return to sustainable growth, 2022 to 2030



AUSTRALIA

What's next for THRIVE 2030?

Recovery Phase (2022-2024)

Target for visitor spend for 2024:

\$166bn including \$70bn in regional Australia.



Exceeded: visitor spend reached **\$213.9bn**
with **\$79bn** in regional Australia

Recovery Phase action plan:



62 of 64 strategic action items actioned

Developing the next Action Plan



Streamlined action plan with specific focus areas



Reflecting Government priorities post-election
and industry voices

THRIVE 2030 & T2030

Shared focus on sustainable growth



DRIVING
DOMESTIC
DEMAND



BUILDING AND
ATTRACTING
INTERNATIONAL
MARKETS



AVIATION AND
ACCESS



VISITOR
INFRASTRUCTURE



LEVERAGING
EVENTS AND
EXPERIENCES

Data Modernisation: Domestic Tourism Statistics (DoTS)

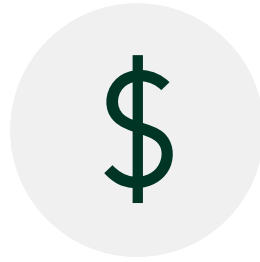
Why the approach to domestic tourism data collection is changing



Falling response rates with phone surveying

Changing respondent behavior,
increasing risk of bias

Demand for access to more
granular outputs



Escalating cost of phone survey collection

The National Visitor Survey
(NVS) sample had halved since
2019, but collection cost is
similar



New high quality data sources are now available

Future proofs the collection

Flexible solution that can
incorporate new data sources

Latest figures: Domestic Tourism (March 2025)

National results:

March quarter 2025 saw softer results compared to March quarter 2024



Overnight spend

\$27.1 billion | Down 7% (\$2.2 billion)



Overnight trips

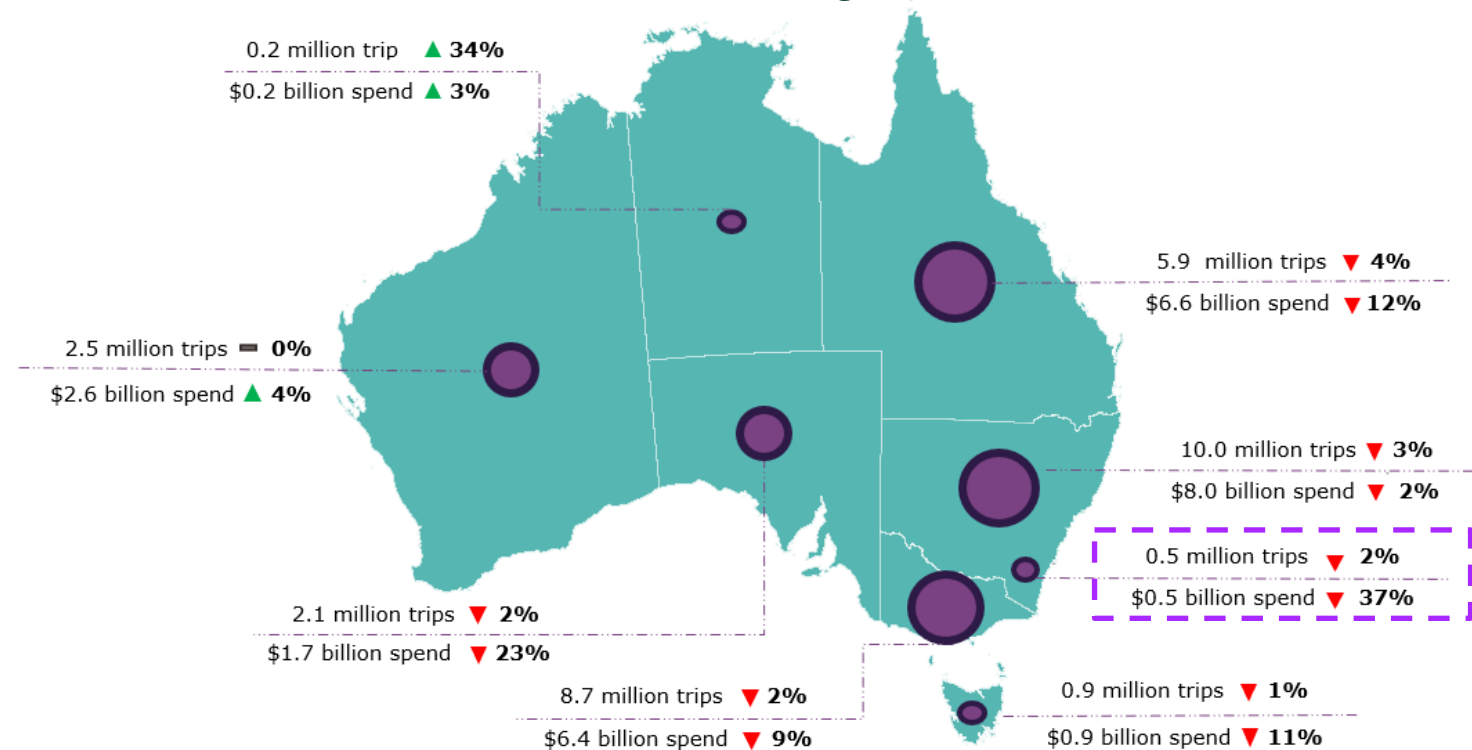
28.8 billion | Down 2% (717,000)



Nights on trip

105.1 million | Down 4% (4.4 million)

State and Territory results: Domestic overnight trips and spend March 2025 QTR vs March 2024 QTR



Under the new DoTS collection method, smaller jurisdictions (such as ACT) benefit from the larger sample size available in the mobility data, providing for a more accurate and less volatile measurement

Latest figures: International tourism (March 2025)

National results:

March quarter 2025 saw stronger results compared to March quarter 2024



Spend

\$12.8 billion | Up 25% (\$2.6 billion)



Trips

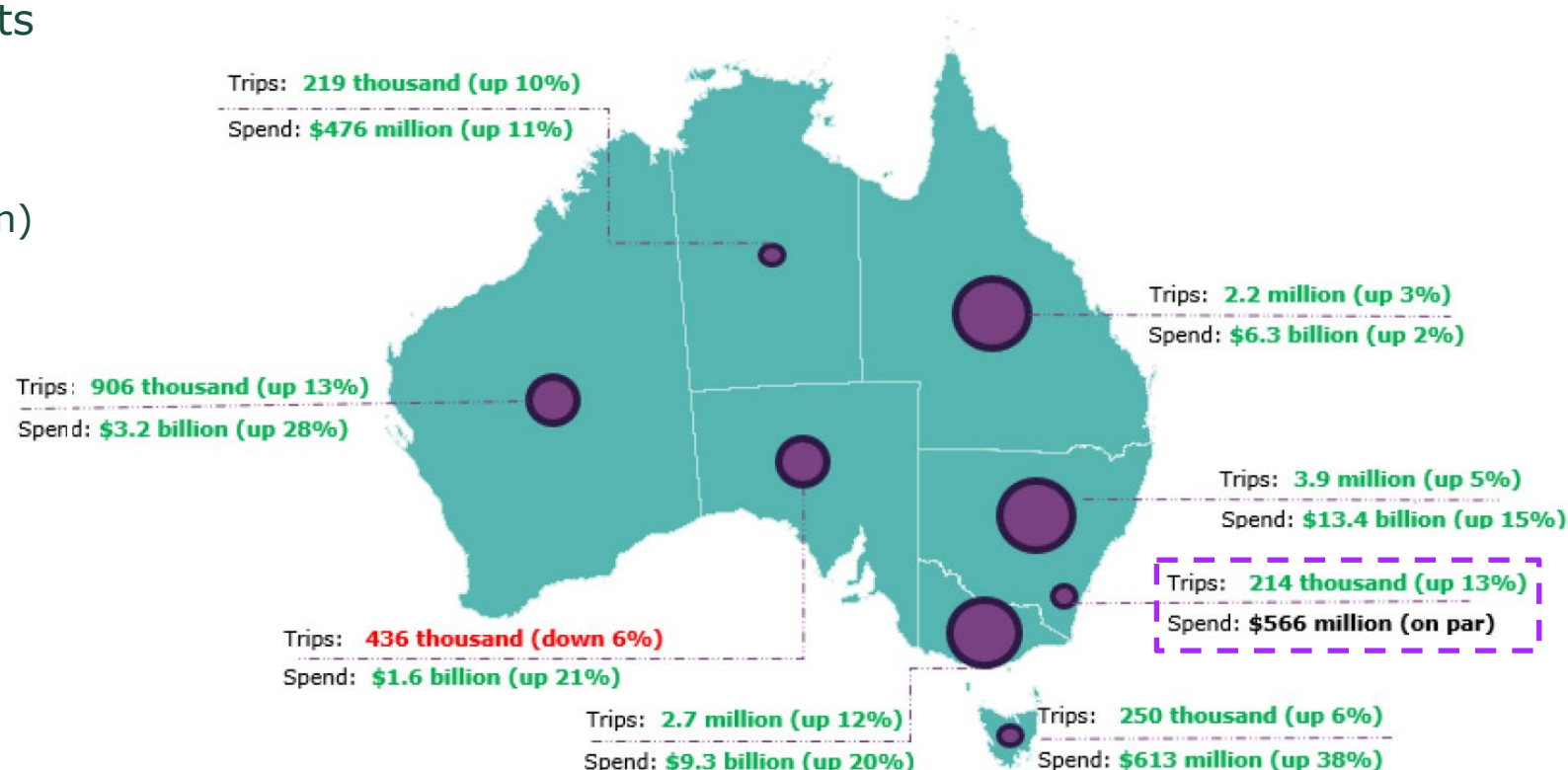
2.1 million | Up 2% (47,000)



Nights on trip

88.9 million | Up 2% (1.4 million)

State and Territory results: trips and spend year ending March 2025 vs year ending March 2024



International visitor spend was strong across most states and territories when compared with the year ending March 2024

Tourism is a critical part of the ACT's economy

In 2024, tourism represented:



1 in 7 businesses
(4,800 businesses)



1 in 13 jobs
(22,200 jobs)



5.8% of the ACT's GSP
(\$3.2 billion)

Positive signs for growth with \$1.5bn in the tourism investment pipeline across 10 projects

Revitalising the Approved Destination Status (ADS) scheme



The Approved Destination Status (ADS) scheme is a bilateral agreement allowing Chinese tourists to travel to Australia in guided groups conducted by approved Inbound Tour Operators (ITOs)

Since restarting in September 2023, over **4570 tour groups** have visited Australia, and **74 ITOs** have been approved.

Progress in 2024-25:

- **Rebuilt** Austrade's ADS team
- **Re-established** the scheme's prominence in market
- **Reconnected** with scheme participants



Focus in 2025-26:

- **Uplift** tour guide and ITO capabilities
- **Improve** research and data analysis
- **Develop** a new compliance framework to meet market demand and operational needs

Strengthening tourism relationships in new and emerging markets



The importance of tourism in strengthening Australia's strategic relationships in the region has been set out in the **Southeast Asia Economic Strategy** (Moore Report), and **A New Roadmap for Australia's Economic Engagement with India**

Key Austrade initiatives:

- Australia–Vietnam Tourism Cooperation
- Australian Tourism Export Council's 'ATEC Host' training
- Tourism Cooperation with India

Working hand-in-hand with ACT efforts to grow international visitation and sustainable aviation links

Thank you.

We are here to help,
please keep in touch.



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