



# THRIVE 2030 Implementation Reporting (November 2023)

**TARGETS:** THRIVE 2030 aims to achieve total visitor expenditure<sup>1</sup> of **\$166 billion** by 2024 (Phase 1) and **\$230 billion** by 2030. The Strategy also aims to achieve visitor expenditure in regional Australia of **\$70 billion** by 2024 and **\$100 billion** by 2030.

As of the year ending June 2023, THRIVE 2030's visitor expenditure target for Phase 1 has been exceeded. The total visitor economy spend (including long-term international students) has reached **\$191.4 billion**, of which **\$79.9 billion** has been spent in regional Australia. However, it is important to recognise that factors such as widespread price increases have contributed to achievement of these targets.




This report tracks implementation of the THRIVE 2030 Strategy Phase 1 (2022-2024). Implementation to date has focussed on strengthening collaboration, improving data and insights, activities to address workforce challenges and building and diversifying international markets. Key activities include:

- The Australian Government Visitor Economy Taskforce continues to meet to monitor progress of Australian Government actions under THRIVE 2030.
- Progress the co-design of a national First Nations Visitor Economy Partnership.
- Completed the work of the Industry Data and Expert Analysis (IDEA) Working Group, including recommendations for new long-term indicators to measure the visitor economy.
- Developed guidelines for the Longitudinal Indicators for the Visitor Economy (LIVE) framework and trialled new research and data products.
- Released the Employment White Paper, the *Visitor Economy Workforce and Skills Interim Action Plan*, and delivered a communications campaign to attract mature Australians to work in tourism and the Choose Tourism program with States and Territories to attract young people to tourism.
- Rolled out fee-free TAFE places for tourism and hospitality and reduced on-hand visa applications.
- Tourism Ministers launched the *National Sustainability Framework*, complemented by a practical toolkit to support businesses become more sustainable.
- Industry-led, Government-supported collaboration in response to insurance accessibility and affordability, including the Caravan Industry releasing action plans to assist their members.
- Investment in tourism infrastructure, including airports, regional assets and the Caravan Parks Grant Program.
- Tourism Australia's *Come and Say G'Day international marketing campaign* and Australian Government grants to help tourism businesses attract overseas visitors and \$15 million in support to increase international visitation to Tropical North Queensland and the Great Barrier Reef.

The Dashboard on page 2 outlines progress against each of the **seven policy priorities**. On the following pages progress against all the 64 Phase 1 Actions is noted as either completed, ongoing or pending. In summary **ten** strategic actions have been completed, **51** are underway with **three** pending.

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<sup>1</sup> THRIVE 2030 target is for the visitor economy, comprising tourism and long stay international students.


THEMES	POLICY PRIORITIES	THRIVE 2030's SUCCESS MEASURES	PROGRESS
 <p><b>Collaborate</b></p>	<p>8 Actions</p> <p><b>Priority 1:</b> Comprehensive collaboration – See page 3</p> <p>6 Actions</p> <p><b>Priority 2:</b> Improve data and insights – See page 5</p>	<p>Action plans are delivered collaboratively, with efficiency and on time; forums deliver against their terms of reference and follow good governance principles; stakeholders are satisfied with engagement and collaboration.</p> <p>High stakeholder satisfaction with statistical reports and research in terms of quality and timeliness.</p>	<p><b>8 of 8</b> actions completed or underway</p> <p><b>5 of 6</b> actions completed or underway</p>
 <p><b>Modernise</b></p>	<p>12 Actions</p> <p><b>Priority 3:</b> Grow a secure and resilient workforce – See page 7</p> <p>10 Actions</p> <p><b>Priority 4:</b> Embrace leading-edge business practices – See page 13</p> <p>12 Actions</p> <p><b>Priority 5:</b> Enhance visitor infrastructure – See page 16</p>	<p>Workforce numbers; increase in workers from specific demographics (First Nations, apprentices, older Australians etc.); visitor and business operator satisfaction with workforce skill levels.</p> <p>Increased level of innovation in visitor economy businesses, which could include measures of technology adaptation, new product development, business process improvement, and participation in and compliance with quality accreditation programs.</p> <p>Increase in volume and quality of relevant visitor economy assets and infrastructure, including monitoring for particular features such as accessibility, environmental friendliness, and use of sustainable development practices; number of airline routes/seats; communications connectivity levels and quality.</p>	<p><b>12 of 12</b> actions completed or underway</p> <p><b>9 of 10</b> actions completed or underway</p> <p><b>12 of 12</b> actions completed or underway</p>
 <p><b>Diversify</b></p>	<p>9 Actions</p> <p><b>Priority 6:</b> Build markets and attract visitors – See page 19</p> <p>7 Actions</p> <p><b>Priority 7:</b> Grow unique and high-quality products, including First Nation experiences – See page 22</p>	<p>Increase in visitor spend (yield) from selected geographic markets and visitor segments; increase in visitor dispersal; changes in market share; strengthened bilateral tourism and education cooperation with strategic regional partners; return on investment from new marketing strategies.</p> <p>Number of new visitor economy businesses/experiences; increase in the number of businesses participating in quality accreditation schemes; visitor satisfaction/quality measure indexes.</p>	<p><b>8 of 9</b> actions completed or underway</p> <p><b>7 of 7</b> actions completed or underway</p>





# Priority 1: Comprehensive collaboration




Comprehensive collaboration between the Australian Government, states and territories, local governments, industry bodies and businesses is key to delivering THRIVE 2030 and growing a strong and resilient visitor economy. The THRIVE 2030 Strategy collaboration framework has been established, utilising both new and existing mechanisms (action items 1.1 - 1.4). Since the last implementation report, engagement and collaboration between visitor economy stakeholders both within and outside of these formal mechanisms continues to strengthen.

The THRIVE 2030 Implementation Advisory Group continues to monitor the progress of THRIVE 2030 implementation and provide advice on setting priorities for forward progress, including for the development of Phase 2 (Consolidation – 2025-2027). The Australian Government Task Force continues to meet regularly to monitor implementation. The Visitor Economy Industry Stakeholder forum continues to meet regularly. Members share insights and report on industry-led activity to support delivery of the Phase 1 Action Plan, including the establishment of new cooperative mechanisms, like the Australian Travel Industry Association’s Australian Travel Accreditation Scheme advisory committee.

Outcomes of effective collaboration across the visitor economy industry, State and Territory governments and the Australian Government are listed under the relevant priorities throughout this report – for example on insurance affordability. Of note under Priority 1, significant progress has been made on the co-design of a First Nations Visitor Economy Partnership with several workshops held in 2023 and engagement set to continue in 2024. At state level, the South Australian Aboriginal Tourism Operators Council is also being established.

No.	Action	Action Lead (Partners)	Status
1.1	Appoint a THRIVE 2030 Implementation Advisory Group, representing a cross-section of industry, and governments, to guide, oversee and monitor progress of the Strategy.	Austrade	
1.2	Establish advisory working groups to accelerate consideration of complex policy issues.	Austrade	
1.3	Maintain and enhance existing collaboration mechanisms such as the Tourism Ministers’ Meeting and the Australian Standing Committee on Tourism.	Austrade, S&TG	
1.4	Establish a cross Australian Government Visitor Economy Taskforce comprising all agencies that contribute to the Strategy that will meet regularly to ensure delivery	Austrade (all relevant agencies)	

1.5	Identify how to use existing cooperative mechanisms better or establish new mechanisms to plan and implement interregional marketing and development activities.	TA (S&TG, RTOs, VE industry)	
1.6	Ensure that the visitor economy is considered and integrated into state and local crisis management and recovery plans.	S&TG (LG, NEMA)	
1.7	Establish an effective partnership of experienced appropriate parties to support the greater participation of First Nations cultures, interpretation and businesses into the visitor economy.	Austrade, NIAA (VE industry, TA, S&TG)	
1.8	Integrate Regional Development Australia, the local government sector and other appropriate existing mechanisms into the Strategy's collaborative architecture to ensure a stronger engagement with the visitor economy at the regional and local level.	DITRDCA (RDA, LG, RTOs)	



 Complete
  Underway
  Pending





# Priority 2: Improve data and insights

THRIVE 2030 Phase 1 prioritises research and development to improve data and insights and produce relevant, robust, and timely data and insights that are easily accessible, discoverable and cost-effective, critical tools that underpin decision-making, business growth and investor confidence. This includes the establishment of an Industry Data and Expert Analysis (IDEA) Working Group, which was tasked with developing a set of progress indicators by which THRIVE 2030 and the Australian visitor economy could be monitored over time. The IDEA Working Group has now completed developed guidelines for the Longitudinal Indicators for the Visitor Economy (LIVE) framework.

Data is important for measuring industry performance, monitoring trends and informing government policy development. In some cases, more granular data is needed to guide specific business activity or for decisions regarding particular geographic locations. Tourism Research Australia, in partnership with industry and state and territory governments, to date under Phase 1 of THRIVE 2030 has:

- Aligned the Roy Morgan’s Helix Personas marketing profiles with the National Visitor Survey to allow marketing entities to have greater insights into visitor spend and activities.
- Initiated a 3-phase business events measurement project. Phase 1 is complete – new questions were added to the National Visitor Survey and the International Visitor Survey from January 2023.
- Released the first of its mobility data products in September 2023. The interactive dashboard allows users to see the change in the latest movements for domestic tourism across both Australia and for each state and territory.
- Released a monthly visitor economy facts and figures output which brings together several tourism outputs to provide an easy to access aggregate picture of the visitor economy.

No.	Action	Action Lead (Partners)	Status
2.1	Establish an IDEA Working Group to identify the information needs of visitor economy participants which are not being met and potential methods to respond to those needs, assess those methods according to cost, contribution, capability, and potential yield, and, based on that analysis, make recommendations to Austrade.	Austrade (S&TG, VE industry)	
2.2	Tourism Research Australia (TRA) to provide world-class relevant, robust, granular, and timely data and analytics.	Austrade	

2.3	<p>Develop new products aimed at the needs of particular segments of the sector.</p> <ul style="list-style-type: none"> <li>• Leverage existing data and ABS integration capabilities to support the production of research products.</li> <li>• Leverage new and existing data sets to measure the important economic contribution of business events to the visitor economy.</li> </ul>	Austrade, ABS	
2.4	<p>Build a deeper understanding of the supply side requirements of the visitor economy through the development of a Longitudinal Indicators for the Visitor Economy (LIVE) framework to provide a more detailed picture of demand and supply side performance, incorporating leading and lagging performance indicators, and identify emerging challenges and opportunities for the industry (developed in partnership with IDEA Working Group).</p>	Austrade (S&TG, VE industry)	
2.5	<p>Implement a visitor expenditure target specifically for regional Australia to help drive and monitor visitor economy growth in regional Australia.</p>	Austrade	
2.6	<p>Conduct a study of the architecture of the visitor economy to better understand its structures, systems and supply chain components, and make recommendations for improvements within industry's and governments' control that will support improved resilience and sustainable growth.</p>	Austrade	



 Complete
  Underway
  Pending




# Priority 3: Grow a secure and resilient workforce



Workforce and skills shortages were identified by industry and noted in THRIVE 2030 as one of the significant barriers to visitor economy recovery and long-term growth for businesses to meet demand from international and domestic travellers. The Australian Government is continuing to build visitor economy workforce capability in the short term by a communications campaign and \$8.1 million Choose Tourism program with States and Territories to attract people back to working in tourism, increasing work rights of pensioners, and providing faster visa processing. Long-term improvements underway include funding a tourism-wide employment and development platform, expansion of the Pacific Australia Labour Mobility (PALM) visa scheme, supporting small tourism businesses to employ people with a disability (with 12 providers across 8 regions delivering the \$3.3 million Disability Employment Local Tourism Navigators Pilot), funding of fee-free tourism and hospitality TAFE courses, broader skills reform work, as well as investing \$10 million for Accommodation Australia’s online skills and training platform.



Workforce issues are being examined across Government through the Employment White Paper process (led by Treasury) and a review of Australia’s Migration System (led by the Department of Home Affairs (Home Affairs)). In light of these reviews, the Workforce and Skills Technical Working Group has overseen the development of the *Visitor Economy Workforce and Skills Interim Action Plan*, which captures activities by Governments and industry to build workforce capacity as a bridging document towards the development of a long-term *Visitor Economy Workforce and Skills Strategy*. The long-term Strategy will be aligned with the policy direction of the Employment White Paper, *Working Future* (released September 2023), and the Migration Strategy (due for release late 2023). State and Territory Governments, as well as industry, also have a range of initiatives designed to attract, build and retain a secure, resilient and world-class workforce.






No.	Action		Action Lead (Partners)	Status
3.1	Establish a Workforce and Skills Working Group comprising key policy agencies, industry experts and relevant representatives to identify gaps and provide practical immediate solutions to address the current workforce challenges and support the development of the future needs of the visitor economy workforce.		Austrade (S&TG, VE industry)	
3.2	Develop a Visitor Economy Workforce and Skills strategy in response to ongoing workforce pressures exacerbated by the COVID-19 pandemic to strengthen the visitor economy’s workforce, drawing on research to better understand the gaps,		Austrade (S&TG), ABS	

	<p>barriers and future needs of the visitor economy workforce, and related initiatives being implemented by state and territory governments.</p> <ul style="list-style-type: none"> <li>• ABS will deliver a comprehensive update to the Australian and New Zealand Standard Classification of Occupations by December 2024, and then commence a rolling program of work to maintain the currency of this classification. Over time this will assist in better identifying visitor economy occupations and their skill levels and assist training products and visa settings to better meet needs of the visitor economy.</li> <li>• Australian Chamber – Tourism, in conjunction with Tourism Training Australia, will continue to implement a Workforce Development Strategy that sets out the industry priorities for workforce development.</li> </ul>		<p>ABS</p> <p>Australian Chamber - Tourism</p>	
<p>3.3</p>	<p>Increase workforce participation from under-participating cohorts, including mature workers, First Nations peoples, people with disability, youth, and women, especially in regional areas.</p> <ul style="list-style-type: none"> <li>• Leverage Government employment programs to support pathways to employment for First Nations Australians.</li> <li>• Support people living with disability with employment opportunities in the visitor economy, including through a pilot program to facilitate people with disability into the visitor economy workforce.</li> <li>• Supports eligible job seekers with tailored assistance to find sustainable employment including through Workforce Australia Services, Transition to Work, and Launch into Work employment programs.</li> <li>• Maintain services that connect people wishing to work in regions with job vacancies, reskilling support, and</li> </ul>		<p>DEWR, DSS, Austrade (S&amp;TG, NIAA, VE industry including AA)</p> <p>NIAA</p> <p>DSS (Austrade, DEWR), Clubs Australia</p> <p>DEWR</p> <p>DEWR</p>	



	<p>relocation advice including through the Local Jobs Program.</p> <ul style="list-style-type: none"> <li>Encourage local job creation through business start-up and self-employment advisory services for new and existing small businesses through the <i>Entrepreneurship Facilitators</i> and <i>Self-Employment Assistance</i> program.</li> <li>Support tourism and hospitality employers to develop long-lasting workforce solutions through the Accommodation Australia's 'The Hub' and the Government's <i>Employer Liaison Officer</i>.</li> <li>Ensure policy settings are right and improve awareness of the Pension Work Bonus to encourage more retired workers to undertake part-time work in the visitor economy.</li> <li>Leverage the Fee Free TAFE initiative, which includes hospitality and tourism as an area of national priority for skills and development.</li> <li>Ensure access to the National Careers Institute, which assists people with careers information and support, whatever their age or career stage.</li> </ul>		<p>DEWR</p> <p>VE industry, including AA and Clubs Australia</p> <p>DSS</p> <p>DEWR</p> <p>DEWR</p>	
3.4	<p>Review the Working Holiday Maker scheme to increase the pool of potential workers.</p> <ul style="list-style-type: none"> <li>Undertake a promotional campaign to coordinate Australian employers to refund Working Holiday Maker Visa fees.</li> <li>Increase the number of working holiday makers through age increases in the uncapped Working Holiday (subclass 417) visa program and through new partner country arrangements and cap increases in the capped Work and Holiday (subclass 462) program.</li> </ul>		<p>Home Affairs</p> <p>VE industry, including Australia Chamber – Tourism</p> <p>Home Affairs</p>	
3.5	<p>Home Affairs is prioritising the processing of student visa applications, along with other priority economic migrants, particularly from those who are offshore to</p>		<p>Home Affairs</p>	

	enable them to enter Australia and contribute to Australia's economic recovery.			
3.6	<p>Improve access by small and medium sized enterprises to existing migration schemes such as the Pacific Australia Labour Mobility (PALM) scheme.</p> <ul style="list-style-type: none"> <li>Implement the Migrant Worker Taskforce report recommendations and refinements to the PALM scheme, including improving working conditions for PALM participants.</li> </ul>		DFAT, DEWR, Home Affairs, Jobs and Skills Australia	
3.7	<p>Progress the <i>Government's Skills Reform</i> agenda for a high-quality, relevant and accessible vocational education and training sector in which funding arrangements improve consistency and are linked to skills needs; micro-credentials are supported; and apprenticeships and other forms of work-based training are promoted.</p> <ul style="list-style-type: none"> <li>Jobs and Skills Australia has been established as a statutory body to provide independent advice on current, emerging and future workforce, skills and training needs.</li> <li>Industry clusters will be established from January 2023 to identify and respond to current and emerging skills needs and workforce challenges, including for those in the visitor economy.</li> <li>Provide on-the-job-training opportunities for people by connecting them with tour operators, and a pathway to accreditation as a professional tour guide, through Tour Guides Australia's micro-credential training course.</li> </ul>		<p>DEWR (S&amp;TG, VE industry)</p> <p>Jobs and Skills Australia</p> <p>Jobs and Skills Australia</p> <p>Tour Guides Australia</p>	

3.8	Promote the visitor economy as an attractive career choice including through communication strategies, incentives and awards to promote best practice by employers.		Austrade, S&TG, VE industry	
3.9	Encourage the uptake of training programs for First Nations peoples that create opportunities for participants to further enhance industry knowledge, equip participants to advance their careers and to develop new products or experiences in the sector.		NIAA, VE industry, (S&TG)	
3.10	Encourage mutual recognition for foundational credentials (such as the Responsible Service of Alcohol (RSA)) to support mobility of workers across jurisdictions, especially in relation to seasonal hospitality work. <ul style="list-style-type: none"> <li>Increase acceptance across all states and territories of micro-credentialing as a recognised and valued form of training and accreditation in visitor economy occupations, including for tour guides.</li> </ul>		S&TG	
3.11	Promote employment standards of employers including compliance with workplace obligations such as modern awards and superannuation requirements, including through the Fair Work Ombudsman’s education tools and advice services. <p>Promote understanding and awareness of work, health and safety duties through Safe Work Australia’s education and communication tools.</p>		FWO, ATO, S&TG, VE industry, (DEWR)	
3.12	Encourage larger industry operators to implement formal in-house training and diversity programs. <ul style="list-style-type: none"> <li>Tourism Training Australia (in conjunction with the travel, tourism, hospitality, accommodation and events sector groups) has a project supported by the Victorian Government, to</li> </ul>		VE industry, including Australian Chamber – Tourism	

	develop micro-credential training that is linked to the formal training system.			
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 Complete
  Underway
  Pending

# Priority 4: Embrace leading-edge business practices




One theme of THRIVE 2030 is to modernise – by improving business capability and creating competitive, resilient, and sustainable businesses which deliver high-quality products and services to visitors. Collaboration is essential to achieving this. Governments at all levels have been working closely with industry to drive innovation, improve sustainability, reduce emissions, and promote awareness of existing government and industry support measures.



Industry and Government have been working individually and collaboratively to assist business capability. Tourism Ministers released the National Sustainability Framework in November 2023, accompanied by a practical toolkit to support businesses. Industry and Government have worked to improve accessibility and affordability of insurance products, including through tools developed for industry, by industry, such as the Caravan Park Industry Association of Australia’s industry roadmap and five-point plan. Programs to lift the capability of small and medium tourism businesses continue to be provided under the Quality Tourism Framework, with \$8 million in grant funding to support the enhancement of this framework provided by the Australian Government. The Australian Government has also committed \$9 million through the Reviving International Tourism Grant Program (RITG) to support tourism exporters and travel wholesalers to undertake demand driving activities including business development.

No.	Action	Action Lead (Partners)	Status
4.1	<p>Build business capability programs that help drive product innovation, diversification and product quality to deliver world-class visitor experiences including micro-credentialing and accreditation for tour guiding.</p> <ul style="list-style-type: none"> <li>Enhance the Quality Tourism Framework, in partnership with the Australian Tourism Industry Council (ATIC), to help small tourism businesses.</li> <li>Promote the adoption of sustainable tourism practices and pathways to certification with the new <i>Strive 4 Sustainability Scorecard</i> program, founded in partnership with Tourism Australia, a new entry level program for all tourism businesses wishing to start their sustainability journey in an efficient and affordable way.</li> </ul>	<p>VE industry, DEWR, S&amp;TG</p> <p>ATIC (VE industry, Austrade, NIAA)</p> <p>EcoTourism Australia</p>	
4.2	<p>Streamline and target information about government resources assisting businesses to modernise and diversify, and to build resilience and capability. Including through programs such as:</p>	<p>Treasury, ATO, S&amp;TG, LG, VE industry</p>	

	<ul style="list-style-type: none"> <li>The <i>Digital Solutions – Australian Small Business Advisory Services (ASBAS)</i> Program to assist small businesses to improve their digital capability and adopt digital tools and processes.</li> <li>eInvoicing – to assist small businesses to digitise their processes, widen trade connectivity and improve productivity.</li> </ul>	Treasury  ATO	
4.3	<p>Encourage businesses to implement resilience and crisis management plans.</p> <ul style="list-style-type: none"> <li>Work with Australian travel and tourism stakeholders to upskill travel industry personnel on crisis management, risk planning and mitigation and resilience.</li> <li>Develop an updated <i>Destination Management Planning – Best Practice Guide</i>, in collaboration with local council work units, that will include advice on crisis management, crisis communications for visitors and resilience to align with THRIVE 2030.</li> </ul>	VE industry, S&TG, (NEMA)  Council of Australia Tour Operators  Australian Regional Tourism	
4.4	<p>Implement an industry sustainability framework and education tools to assist businesses to implement and further improve sustainability practices.</p>	Austrade, DCCEEW, VE industry, S&TG	
4.5	<p>Develop, promote and encourage businesses to improve quality through industry-led programs and celebrate exceptional visitor economy businesses.</p>	VE industry, Austrade, TA, S&TG	
4.6	<p>Monitor the accessibility and affordability of public liability insurance for visitor economy businesses and continue to support improved access and affordability including through Government and industry cooperation.</p> <ul style="list-style-type: none"> <li>Australian Chamber – Tourism is working with Business NSW, the Insurance Council of Australia and the Australian Small Business and Family Enterprise Ombudsman on insurance solutions for the tourism and hospitality industries.</li> </ul>	Treasury, VE industry  Australian Chamber – Tourism	
4.7	<p>Ensure that visitor economy businesses, especially those in the regions, have access to suitable internet products, services and infrastructure, including through:</p> <ul style="list-style-type: none"> <li>the Better Connectivity Plan for Regional and Rural Australia</li> <li>the Regional Connectivity Program</li> </ul>	DITRDCA, VE industry	





	<ul style="list-style-type: none"> <li>the Mobile Black Spot Program</li> <li>access to the National Broadband Network which is being enhanced by initiatives including upgrades providing full-fibre access, fixed wireless and satellite upgrades, the Regional Co-Investment Fund and the Business Fibre Initiative.</li> </ul>		
4.8	<p>Implement measures to deliver on Australia’s international commitments to achieve net zero emissions by 2050, and to halt and reverse biodiversity loss by 2030.</p> <ul style="list-style-type: none"> <li>Improve sustainability practices in visitor economy businesses in line with international commitments, including by making use of available government programs and through industry-led initiatives.</li> </ul>	DCCEEW, S&TG, VE industry	
4.9	<p>Examine the impacts on the travel distribution system brought about by the COVID-19 pandemic, including how businesses and consumers will respond to new and different travelling arrangements, and provide suggestions as to how travel and tourism businesses can change and adapt their sales, marketing and business practices to cater to and embrace the new environment. (To be conducted in association with Action 2.6 to study the architecture of the visitor economy.)</p>	TA, Austrade (S&TG, VE industry)	
4.10	<p>Support tourism and accommodation providers to set their own prices when guests contact them directly to book.</p>	Austrade, Treasury, VE industry	






 Complete
  Underway
  Pending






# Priority 5: Enhance visitor infrastructure

Government, industry and investors are actively driving investment into tourism infrastructure and assets. Private sector investment remains buoyant, with strong interest in both metropolitan and regional accommodation assets pointing to investor confidence in the sector. Governments continue to invest in affiliated infrastructure, including at the Commonwealth-level through airport infrastructure investment, road renewal, the City and Regional Deals programs, Commonwealth-managed National Parks, and new regional infrastructure programs. The Government also continues its investment in upgrading passenger processing technology at international airports. Significant return on Government investment is being seen under the \$10 million Caravan Park Grant Program (part of the \$48 million Australian Government Tourism and Travel Support package), with 112 parks undergoing facility upgrades and close to half of these undertaking projects to improve accessibility.

Key regulatory reforms to encourage and streamline investment are also underway. Examples include the Government’s Aviation White Paper and the Nature Positive Plan, which will improve trust, transparency and efficiency for environmental approvals. Governments and the visitor economy industry are also taking steps to provide accessible visitor infrastructure and improve information to offer more inclusive experiences.

No.	Action	Action Lead (Partners)	Status
5.1	<p>The Commonwealth, state and territory governments and industry will work together to ensure that infrastructure best meets the needs of the visitor economy. This includes the well-planned delivery of safe land transport infrastructure to support the wellbeing of communities and visitors.</p> <ul style="list-style-type: none"> <li>Stimulate domestic accommodation, travel and attractions for both regions and metropolitan visitor economies through voucher programs in partnership with state and territory governments.</li> </ul>	<p>DITRDCA, Austrade, S&amp;TG, LG, VE industry</p> <p>VE industry, including Tourism Accommodation Australia and the Australian Hotels Association</p>	
5.2	<p>Facilitate investment, including through appropriate foreign direct investment programs, to create new and refreshed offerings, for example by governments working to reduce regulatory barriers to appropriate development of visitor infrastructure such as luxury accommodation in natural environments.</p> <ul style="list-style-type: none"> <li>Support upgrades to caravan parks, which deliver affordable accommodation options for travellers, particularly families.</li> </ul>	<p>VE industry, Austrade, S&amp;TG, LG, DCCEEW</p>	

5.3	Develop assets, infrastructure and experiences that are accessible to all people, regardless of physical limitations, disability or age.	VE industry, Austrade, S&TG, LG	
5.4	Prioritise new destination development through use of holistic destination development plans, community and stakeholder collaboration, and streamlined regulatory approvals.	VE industry, S&TG, LG	
5.5	<p>Improve tourism infrastructure in regional areas, including through the rollout of regional infrastructure programs, noting the importance of good-quality roads to connect visitors and communities to attractions and services.</p> <ul style="list-style-type: none"> <li>• City Deals with Darwin, Hobart, Perth, Townsville and Geelong, and Regional Deals with Hinkler and Barkly, will continue to deliver improved visitor economy infrastructure, including sporting and cultural facilities, airports, attractions and public realm amenity.</li> <li>• The \$3.25 billion Local Roads and Community Infrastructure Program will support local councils across Australia to deliver priority local infrastructure projects to support local communities including roads, parks and sports facilities, and bike paths.</li> </ul>	DITRDCA, S&TG, LG (NEMA)	
5.6	<p>Improve and maintain public infrastructure in national parks and World Heritage Areas, according to master planning and destination management planning developed alongside Traditional Owners, including through the following programs:</p> <ul style="list-style-type: none"> <li>• \$233 million investment in infrastructure updates across Commonwealth-managed national parks.</li> <li>• \$216 million to grow tourism in Kakadu National Park, including through improved road access, new visitor infrastructure and improved telecommunications.</li> </ul>	Director of National Parks (DCCEEW), Traditional Owners, S&TG	
5.7	Identify and deliver improved visitor assets and resources at culturally significant sites.	VE industry, Traditional Owners, NIAA, Director of National Parks (DCCEEW), S&TG, LG	

5.8	<p>Ensure that regional airport facilities meet the needs of visitors and communities.</p> <ul style="list-style-type: none"> <li>Continue to support regional and remote aviation, for example, through the Remote Airstrip Upgrade Program (RAU), which supports improved aviation safety and accessibility at remote aerodromes.</li> </ul>	DITRDCA, LG, VE industry	
5.9	<p>Continue to upgrade passenger facilitation methods and infrastructure consistent with approaches to modernise traveller facilitation and border clearance.</p>	ABF, VE industry	
5.10	<p>Deliver an Aviation White Paper to set the long-term policies to guide the next generation of growth and innovation in the aviation sector.</p>	DITRDCA (VE industry)	
5.11	<p>Work cooperatively to maximise the return of inbound aviation capacity.</p>	S&TG, TA, Austrade, VE industry	
5.12	<p>Work collaboratively to address barriers to maximising the contribution from the cruise sector and managing associated community expectations.</p> <ul style="list-style-type: none"> <li>Grow the cruise market in Australia with the goal of converting cruise participation into domestic spend, including through the tripartite MOU between TA, Cruise Lines International Association (CLIA) and Australian Cruise Association (ACA).</li> <li>Collaborate to ensure consistent and effective border management.</li> <li>Improve port infrastructure.</li> <li>Increase benefit to regional communities from cruise visitation.</li> </ul>	Austrade, Home Affairs, TA, S&TG, VE industry	

 Complete
  Underway
  Pending


# Priority 6: Build markets and attract visitors






Following the re-opening of international and domestic borders there has been a strong focus on activities to attract international visitors back to Australia. This includes through demand driving marketing initiatives, State aviation attraction funding and supply-side capability, and government to government initiatives that position Australia to better take advantage of new and higher yield traveller cohorts from emerging markets. Development of an International Diversification Strategy is progressing in alignment with Nicholas Moore’s Southeast Asia Economic Strategy, released in September 2023, which includes the visitor economy as a priority sector of the Strategy. This work has complemented the strong domestic visitation both interstate and intrastate that grew over the pandemic period.

The Government has also committed to funding programs to assist industry to re-engage with the international market, including the \$15 million grant to Tropical North Queensland and \$9 million Reviving International Tourism Grant Program to attract and drive visitation from key international markets to Australia, including regional areas. This includes support for wholesalers and exporters to undertake demand driving activities such as expos, business development and marketing to rebuild and strengthen international supply chains. Funding has also continued in programs for festivals, arts, and music, which contribute to attracting visitors.



Tourism Australia and State and Territory governments have invested in marketing and aviation attraction, while Home Affairs continues to address the challenges of the visa system in a bid to increase competitiveness for a range of visitors including international students.




Most measures are ongoing and will continue to evolve to meet the challenges and opportunities of the market as it moves from recovery to consolidation.

No.	Action	Action Lead (Partners)	Status
6.1	<p>Implement health measures to protect visitors and communities and which will provide traveller confidence and community protection.</p> <ul style="list-style-type: none"> <li>Implement health and safety measures to provide visitors, workers and the community with a safe environment and to provide consumers with the confidence to travel.</li> </ul>	DoH, S&TG, VE industry	
6.2	<p>Encourage Australians to spend on the domestic visitor economy as they would overseas, including through targeted offerings and marketing.</p> <p>Apply behavioural economic research to develop product and marketing approaches to attract greater domestic visitation and spend.</p> <p>Attract domestic and international visitors to Australia’s regional events and heritage offerings</p>	Austrade, DITRDCA, TA, S&TG, VE industry	

	<p>noting that potential funding mechanisms already exist such as the Regional Arts Fund, Festivals Australia and the Indigenous Visual Arts Industry Support Program.</p> <p>Targeted offerings and marketing to visitors should include disclosure about the impact of purchasing First Nations 'style' arts and crafts (or inauthentic First Nations arts and crafts), as these products have no connection with and provide no economic benefit to First Nations peoples.</p>		
6.3	<p>Develop an International Diversification Strategy for the visitor economy to identify emerging markets for travel and education; and strengthen key bilateral relationships in the Indo-Pacific region and beyond through the growth of people-to-people links and Brand Australia marketing.</p> <ul style="list-style-type: none"> <li>The diversification strategy will also look at attraction of certain growing (and higher yield) traveller cohorts including people seeking luxury, nature and cultural experiences.</li> </ul>	Austrade, TA (S&TG)	
6.4	Implement a coordinated marketing strategy to re-establish core markets and grow emerging international markets.	TA, S&TG	
6.5	Develop and implement a coordinated approach for direct, affordable, long-haul flights to Australia.	VE industry	
6.6	Ensure Australia has a safe, affordable, and competitive visitor visa system to maintain and grow market share.	Home Affairs	
6.7	<p>Continue to support Australia's international education sector to attract students from diverse markets, grow offshore and online delivery and help meet Australia's future workforce needs, including through competitive policy and visa settings. The review of Australia's migration system will help inform the next steps to supporting the international education sector.</p> <ul style="list-style-type: none"> <li>Support diversification of international student cohorts, including by identifying new and emerging markets.</li> <li>Increase the duration of post-study work rights for certain international students eligible for a Temporary Graduate (subclass 485) visa, in select fields of study.</li> </ul>	DoE, Home Affairs, Austrade	






6.8	<p>Help tourism businesses to get back into the international market and attract more international visitors to Australia. Develop and implement innovative marketing approaches including partnership marketing, extending reach of marketing and conversion, greater personalisation and effective trade marketing.</p> <ul style="list-style-type: none"> <li>• Drive growth in international visitation to Tropical North Queensland and the Great Barrier Reef region.</li> <li>• Support tourism businesses through the Accommodation Australia’s ‘The Hub’ to attract and upskill workers and the Australian Tourism Export Council’s Tourism Training Hub.</li> </ul>	<p>TA, S&amp;TG, VE industry</p> <p>Tourism Tropical North Queensland</p> <p>Australian Tourism Export Council, AA</p>	
6.9	<p>Improve promotion, marketing and provision of information about accessible infrastructure available at destinations, accommodation, venues and experiences and business sustainability practices.</p>	<p>VE industry</p>	




 Complete
  Underway
  Pending


# Priority 7: Grow unique and high-quality products, including First Nation experiences




THRIVE 2030 has a strong focus on growing unique and high-quality products, as well as increasing the participation and success of First Nations businesses across the visitor economy. Industry and Government is working with First Nations organisations and leaders to progress actions in the Strategy. Good progress has been made, including multiple initiatives implemented by both the Australian Government and State and Territory Governments. This includes the roll out of Tourism Australia’s *Come and Say G’Day* international marketing campaign, grant funding programs and global campaigns that leverage Australia’s Nation Brand. This will be an area for continuous improvement and renewal. As such, the actions will remain ‘in progress’ for some time, particularly as work continues to establish an effective First Nations partnership (see Action 1.7).

Significant progress has been made in relation to the return of events and cultural festivals, with the FIFA Women’s World Cup a standout and Tourism Australia’s marketing featuring rising stars from Queensland Indigenous Football’s young women's team. Industry is also leading several initiatives in the agritourism and ecotourism sectors.

No.	Action	Action Lead (Partners)	Status
7.1	Expand target market offerings including for high yield/luxury visitors and business travellers.	VE Industry	
7.2	Respectfully embed First Nations cultures into the visitor economy and Australia’s brand positioning, supporting prioritised product development.	VE industry (NIAA, Austrade, TA, S&TG)	
7.3	Support return of events, including business, cultural and arts, regional and major events, and implement an annual coordinated calendar of events to encourage new and return visitors, including: <ul style="list-style-type: none"> <li>Leverage and support the Green and Gold Decade of major sporting events, culminating in the Brisbane 2032 Olympics and Paralympics.</li> <li>Governments and industry to collaborate to optimise the impact of the many existing event promotion and support programs including the Business Events Australia Bid Fund Program.</li> <li>Incorporate creative/cultural assets into destination marketing to maximise contribution of the creative economy, including to support the delivery of</li> </ul>	VE industry, DoH, DITRDCA, NIAA, Australia Council for the Arts (TA, S&TG, LG)	

	<p>Revive: a place for every story, a story for every place, Australia’s National Cultural Policy.</p> <ul style="list-style-type: none"> <li>Establish new mass participation events including in regional areas to encourage visitor dispersal, noting that potential funding mechanisms already exist such as the Australia Council for the Arts’ Major Festivals initiative fund for 7 major international arts festivals, supporting regional festivals through the Festivals Australia program and supporting regional collecting institutions through programs such as Visions of Australia, the National Collecting Institutions Touring and Outreach Program, the Australian Government International Exhibitions Insurance Program, and the National Cultural Heritage Account.</li> </ul>		
7.4	Cities develop and offer a compelling differentiated offering for both the domestic and international markets to revitalise visitation.	S&TG, LG	
7.5	<p>Grow and develop high-quality products and experiences around unique Australian locations and themes, including approaches which integrate sustainable nature tourism with economic opportunities in collaboration with Traditional Owners, and capitalising on emerging tourism trends such as geotourism.</p> <ul style="list-style-type: none"> <li>Leverage the \$10 million annual <i>Wine Tourism and Cellar Door Grants Program</i> to boost wine tourism and attract visitors to wine regions.</li> <li>Produce and promote suites of products that will assist tourism businesses to develop high-quality, distinctly Australian agritourism experiences and build business capability programs that drive innovation, diversification and regional product development.</li> <li>Encourage the industry to operate in ways that respect and reinforce Indigenous cultural heritage and the living cultures of First Nations communities through Ecotourism Australia’s <i>Respecting our Culture</i> program.</li> </ul>	<p>VE industry</p> <p>DAFF</p> <p>Australian Regional Tourism</p> <p>Ecotourism Australia</p>	
7.6	Encourage the creation of new and expansion of existing First Nations-owned and operated tourism enterprises.	VE industry, NIAA (Austrade, S&TG)	

7.7	Enhance the visitor experience through use and availability of technology.	VE industry	
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# Attachment A: List of Acronyms

Acronym	Description
AA	Accommodation Australia
ABF	Australian Border Force
ABS	Australian Bureau of Statistics
ACA	Australian Cruise Association
ANZSCO	Australian and New Zealand Standard Classification of Occupations
ASCOT	Australian Standing Committee on Tourism
ATE	Australian Tourism Exchange
ATIC	Australian Tourism Industry Council
ATO	Australian Taxation Office
Austrade	Australian Trade and Investment Commission
CLIA	Cruise Lines International Australia
DAFF	Department of Agriculture, Fisheries and Forestry
DCCEEW	Department of Climate Change, Energy, the Environment and Water
DEWR	Department of Employment and Workplace Relations
DFAT	Department of Foreign Affairs and Trade
DITRDCA	Department of Infrastructure, Transport, Regional Development, Communications and the Arts
DoE	Department of Education
DoH	Department of Health and Aged Care
DSS	Department of Social Services
FWO	Fair Work Ombudsman
Home Affairs	Department of Home Affairs
LG	Local governments
NEMA	National Emergency Management Agency
NIAA	National Indigenous Australians Agency
PALM	Pacific Australia Labour Mobility
RDA	Regional Development Australia
RTOs	Regional tourism organisations
S&TG	State and territory governments
TA	Tourism Australia
TIAG	THRIVE 2030 Implementation Advisory Group
THRIVE	The Re-Imagined Visitor Economy

TRA	Tourism Research Australia
Treasury	Department of the Treasury
VE industry	Visitor economy industry
VTIC	Victorian Tourism Industry Council



# Attachment B: Stakeholders consulted in preparing this report

1. Accommodation Australia
2. Association of Australian Convention Bureaux
3. Australian Amusement, Leisure and Recreation Association
4. Australian Border Force
5. Australian Bureau of Statistics
6. Australian Business Events Association
7. Australian Chamber of Commerce and Industry – Tourism
8. Australian Cruise Association
9. Australian Regional Tourism
10. Australian Taxation Office
11. Australian Tourism Export Council
12. Australian Tourism Industry Council
13. Australian Travel Industry Association
14. Caravan Industry Association of Australia
15. Clubs Australia
16. Council for Australasian Tourism and Hospitality Education
17. Council of Australian Tour Operators
18. Cruise Lines International Association
19. Department of Agriculture, Fisheries and Forestry
20. Department of Climate Change, Energy, the Environment and Water
21. Department of Education
22. Department of Employment and Workplace Relations
23. Department of Foreign Affairs and Trade
24. Department of Health and Aged Care
25. Department of Home Affairs
26. Department of Industry, Tourism and Trade (Northern Territory Government)
27. Department of Infrastructure, Transport, Regional Development, Communications and the Arts
28. Department of Jobs, Skills, Industry and Regions (Victorian Government)
29. Department of Social Services
30. Department of the Treasury
31. Department of Tourism, Innovation and Sport (Queensland Government)
32. Destination NSW
33. Ecotourism Australia
34. Fair Work Ombudsman
35. GetAboutAble
36. National Emergency Management Agency
37. National Indigenous Australians Agency
38. Queensland First Nations Tourism Council
39. Safe Work Australia
40. South Australian Tourism Commission
41. Tour Guides Australia
42. Tourism & Transport Forum
43. Tourism Australia
44. Tourism Tasmania
45. Tourism Western Australia
46. VisitCanberra
47. Western Australian Indigenous Tourism Operators Council
48. Zoo and Aquarium Association