



Australian Government  
Australian Trade and Investment Commission

# 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



# Acknowledgments

The Australian Government values the important contribution by all stakeholders in developing the THRIVE 2030 Strategy.

First and foremost, Austrade wishes to acknowledge the many individuals, businesses, industry bodies, government officials, and others who provided feedback and generously contributed their time and insights by making submissions and other contributions through the strategy development process.

The Strategy has also been informed by other research and reports that have been conducted over several years. The most recent of these was the [Reimagining the Visitor Economy Expert Panel Report](#), which provided recommendations to assist the development of the Strategy. We wish to acknowledge and thank all members of the Expert Panel, chaired by the Hon Martin Ferguson AM, who undertook extensive national stakeholder consultations to develop their report. The Strategy was also influenced by the [Opportunities for the Visitor Economy report](#), which examined trends and opportunities for the visitor economy in a post-COVID-19 world.

Prior to onset of the COVID-19 pandemic, Austrade had also consulted widely on the development of the draft strategy – [Tourism 2030: A strategy for Australia's visitor economy to 2030](#). That work, including the report of the [Beyond 2020 Steering Committee](#), provided an important foundation for development of THRIVE 2030. Thank you also to all those who contributed to this earlier body of work.

We look forward to implementing this Strategy with the continued collaboration and contribution by all visitor economy participants. To stay in touch with the progress of THRIVE 2030, you can subscribe to the [Visitor Economy Newsletter](#).

This Strategy was updated in 2023 to incorporate the Albanese Government's agenda and additional input from industry partners, stakeholders and state and territory ministers.

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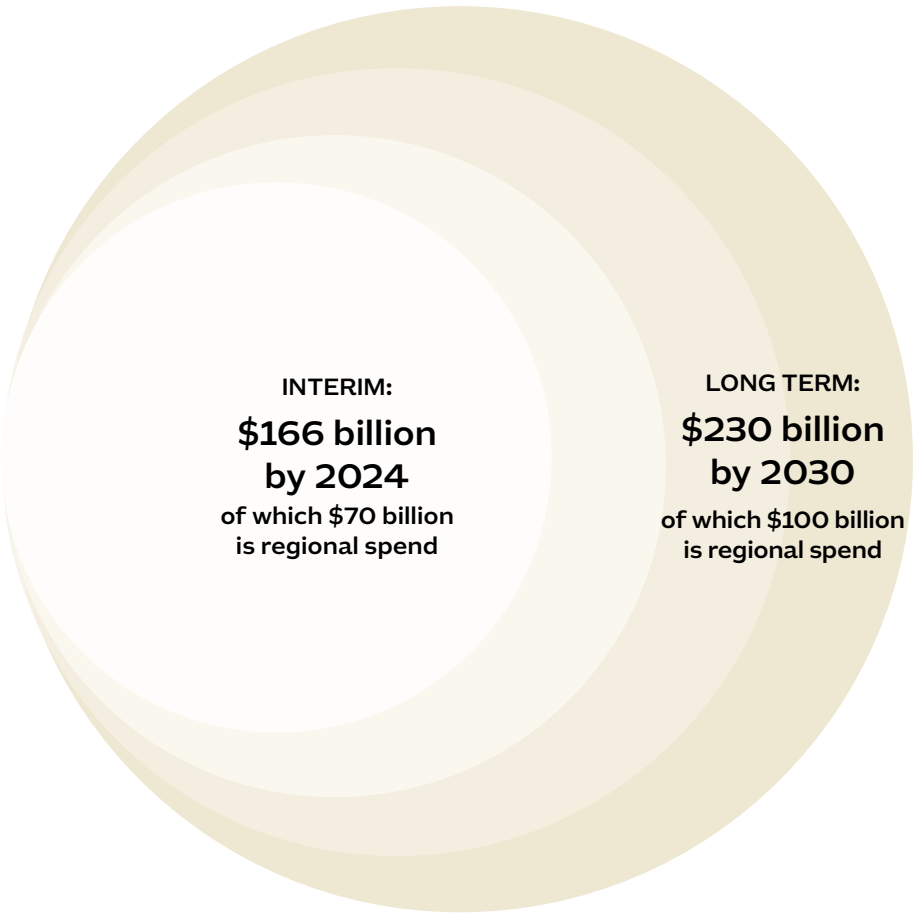
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# THRIVE 2030 Strategy at a glance

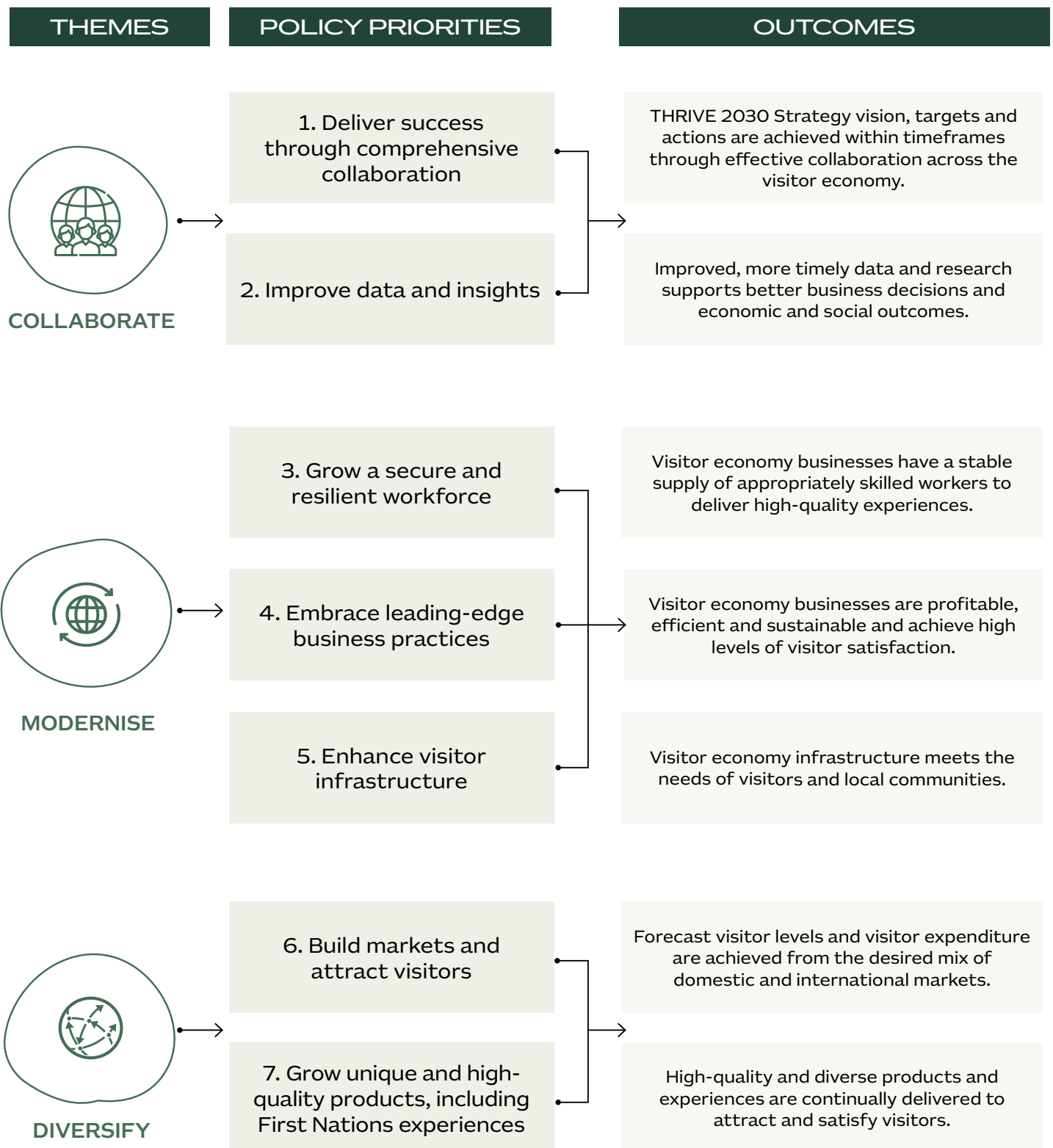
## VISION

Australia's visitor economy provides world-leading services and visitor experiences to consumers while delivering significant and sustainable benefits to the Australian community.

## TARGETS



Recovery phase  
2022–2024



## STRATEGY TIMELINE

Consolidation phase  
2025–2027

Acceleration phase  
2028–2030







# Acknowledgement of Country

Travel for leisure and tourism is more than an economy. It is a process of recreation, a process of spending time building or rebuilding relationships with ourselves, our family and friends and the loved ones we travel with. The real secret though is that it's really a process of relationship building with the places we visit – the landscapes we move through.



That relationship with the country is at the heart of how Indigenous Australians understand this landscape and it's at the heart of how we relate to this country. Our nation's tourism and leisure strategies have always centred on experiences and attractions linked to the land and sea and the underlying culture of this country. It is why we know that all tourism in this country is, at its heart, Indigenous Tourism.

And so it should be. Every beach, desert or forest vista, the very biodiversity, and the ecological wonders that we appreciate and share as a tourism experience are the direct product of Australian First Nations management. As the world's oldest continuous culture, our people have lived through time measured on a geological scale. We have nurtured the land, carved story in it, sung and danced and cared for every inch of its vast landscape over the life of our 100,000 year culture. We proudly live with the responsibility of being the world's first and best sustainable, experiential travellers – and we want others to enjoy it too. It is our responsibility as custodians of this landscape to help everyone – all visitors – to come into proper relationship with this land. As I am sure you've experienced yourself, it's only when that happens that the true act of relaxing, rebuilding and re-creating can begin.

Our culture is still alive, this land is still alive. It hums beneath our feet and echoes in the beat of our hearts, and it is still loved as our unceded land – and we want to share it with you. Which is why this report is an important first step in that journey. It is a first step because it necessarily

focuses on urgent economic initiatives to help us all respond to the challenges in the post pandemic environment – but it cannot stop there.

A future strategy must centre Indigenous landscape, Indigenous voice and Indigenous leadership. Not because it will close a gap but because it is the best way to build a relationship to the landscape and generate a successful, authentically Australian, tourism economy.

These are not my words alone but the words of generations of responsibility before me and I pay my respect to the elders (past and present) of the lands on which this report was conceived, the lands from which contributions to this strategy have emerged, and the land on which you are reading this report now. I honour their stories about this land, its attractions and wonders and truths, and acknowledge that all of us are only here today because of the sacrifice and curatorial responsibility they carried and continue to carry for these places. Wherever you travel and visit in this country, that place is held in the responsibility of Aboriginal and Torres Strait Islanders, and that land was never ceded. Remember that as you travel. Feel that as you learn, relax and re-create yourself. Know that as you stand anywhere on this country.

I also want to acknowledge any First Nations brothers, sisters and elders who pick this up because we shared our stories to build this idea and we share responsibility across the entire nation. This needs to be the start of a conversation about reimagining tourism in this country and we all need to be at the centre of that.

Marrungbu

**Former Chair of the National Indigenous  
Tourism Advisory Group  
Adj. Prof. Deen Sanders OAM (Worimi man)**





# From the Minister for Trade and Tourism

**A thriving visitor economy is at the heart of Australia's economy.**

Every part of our wonderful country benefits from a vibrant, dynamic and sustainable visitor economy.

Supporting nearly 670,000 tourism filled jobs across some 330,000 businesses, its success is critical to ensuring a strong national economy and a better future for all Australians.

As Minister for Trade and Tourism, I am deeply committed to the visitor economy's full recovery and return to sustainable growth after the difficult years of the COVID-19 pandemic, devastating bushfires and heart-breaking floods.

Prior to COVID-19, the visitor economy was worth \$166 billion to the national economy, with many jobs and businesses reliant on the sector. It contributed to the vibrancy of our cities and was the economic lifeblood of many regional communities across the country.

While local and global events have taken a significant toll on the visitor economy, those challenges did not diminish the commitment and dedication of Australian tourism businesses or our reputation as a world-class destination and a leading provider of quality tertiary education.

Australia remains a vast land of diverse and stunning natural beauty, with a wealth of unforgettable experiences. Whether visitors are taking in the sights of our capital cities, exploring our regional communities or learning from one of the oldest living cultures in the world, that of our First Nations peoples, there is a lifetime of experiences on offer.



The Albanese Government believes a better future relies on a stronger, broader, more inclusive, and more sustainable economy – powered by cleaner and cheaper energy, a better-trained workforce with higher participation, and key investments, including in the digital economy. All of these elements are integral to the vision of THRIVE 2030, the national strategy for the visitor economy.

THRIVE 2030 provides a clear pathway to build the visitor economy back to being an economic powerhouse. The national strategy was guided by a comprehensive report of the Reimagining the Visitor Economy expert panel, led by former Federal Tourism Minister, the Hon Martin Ferguson AM.

I thank Martin and his panel for the report and acknowledge the contribution of former Minister for Trade, Tourism and Investment, the Hon Dan Tehan MP.

This Strategy presents an opportunity to work together to address the challenges facing the industry. This includes investing in skills and training to create secure jobs in the visitor economy; working with First Nations communities to ensure our products and offerings include, reflect and respect our First Nations peoples and cultures; and enhancing the economic and environmental sustainability of the visitor economy, which contributes significantly to community wellbeing in our regions, towns and cities.

We must also diversify our markets, experiences and destinations; modernise our products and offerings; and collaborate across all stakeholders to deliver what modern climate-conscious travellers are seeking, to achieve success for the visitor economy. This includes recognising the significant contribution Australians make when we travel in our own special country.

THRIVE 2030 requires private sector leadership to be successful, with the full support of governments – Commonwealth, states and territories. Success will only be achieved through genuine partnerships and collaboration. As Minister, I have taken stewardship of this task, working together with my colleagues under the leadership of our Prime Minister,



the Hon Anthony Albanese MP, who I know has a deep understanding and appreciation of the importance of a thriving visitor economy.

The Albanese Government has wasted no time in addressing the visitor economy's immediate needs.

We have already pledged \$48 million to support the tourism and travel industry to return to its economic powerhouse status. This includes funding to attract and skill-up workers, support quality tourism products, and deliver infrastructure upgrades.

These targeted programs are further strengthened by the Government, in partnership with state and territory governments, providing fee-free TAFE places, including for tourism and hospitality as national priority sectors. This will grow a skilled and secure workforce, attract international students to study tourism, and strengthen the visitor economy.

By working together, we can grow the visitor economy sustainably for Australia's economic, social, environmental and cultural wellbeing now and into the future.

**Senator the Hon Don Farrell**  
**Minister for Trade and Tourism**





The visitor  
economy is a  
significant driver of  
growth, prosperity  
and wellbeing for  
Australia





# Introduction

The visitor economy is a significant driver of growth, prosperity and wellbeing for Australia. It supports jobs and businesses, generates trade and investment, and promotes regional growth. A robust national strategy that brings all stakeholders together is critical to ensure ongoing, sustainable success.

At the end of 2019, Australia's visitor economy was enjoying unprecedented success with visitor numbers and spending levels at record highs. In 2020, with many businesses already impacted by the 2019–20 bushfires, the COVID-19 pandemic delivered an unprecedented shock, disproportionately impacting the visitor economy due to the closure of international, state and territory borders, and restrictions on domestic movement. Challenges have continued in 2022 with unprecedented floods. The Re-Imagined Visitor Economy (THRIVE) Strategy 2030 (the Strategy) provides the national strategy for recovery and for restoring the visitor economy as the economic powerhouse we know it to be.

The Strategy and its Phase 1 Action Plan address the challenges and opportunities presented to the visitor economy. THRIVE 2030 prioritises early phase and urgent measures that are required to support the sector's recovery in the short term. However, it also focuses on the long term, addressing pre-existing challenges, opportunities, structural trends and community expectations to ensure Australia's visitor economy rebuilds to once again be competitive, vibrant, modern, resilient and sustainable. Success will be achieved through engagement and action from industry and all levels of government (local, state and territory, and Commonwealth). The Strategy reflects the recommendations of the independent Reimagining the Visitor Economy Expert Panel Report.<sup>1</sup>

The Strategy will be reviewed in 2024 to check progress against the targets set and the Action Plan; and to design the priority actions for the future Consolidation and Growth phases of the Strategy.

1. *Reimagining the Visitor Economy – Expert Panel Report*, A report from the Hon Martin Ferguson AM, September 2021.



# Defining the visitor economy

Australia's visitor economy comprises the wide range of industries that provide goods and services to visitors who travel to a destination for a variety of purposes, including leisure, education, business and employment.

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*After two years of fighting the COVID-19 pandemic, it is critical that we now 'reimagine' and rebuild Australia's visitor economy. A long-term strategy that addresses structural issues within the tourism industry and initiatives that will help the nation capitalise on the opportunities that will also emerge is a critical step in achieving a full recovery. We also need to think big and not just strive to get back to pre-COVID visitation but to enhance and increase the tourism offering in this wonderful country. The development of the THRIVE 2030 Strategy is a great first step in ensuring we continue to have a vibrant, successful and sustainable industry into the future.*



**Margy Osmond, CEO,  
Tourism & Transport Forum**

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To capture and promote the full picture of what has traditionally been described as the tourism industry, this Strategy embraces a broader perspective of the visitor economy that reflects the full scope of visitor types and range of businesses that provide services as part of the visitor's end-to-end experience. This acknowledges that there are many reasons people travel, including beyond leisure, and there are many individuals and businesses servicing those visitors.

The visitor economy system is more than facilitating visitors to come to Australia, and includes the outbound travel sector, which is an integral part of Australia's visitor economy. Outbound travel by Australians visiting overseas is a natural complement to inbound travel, and underpins the air and sea connectivity that Australia needs to sustain a vibrant visitor economy. Australians travelling overseas also, directly or implicitly, promote Australia as a travel destination to those with whom they interact.

## Visitors are diverse

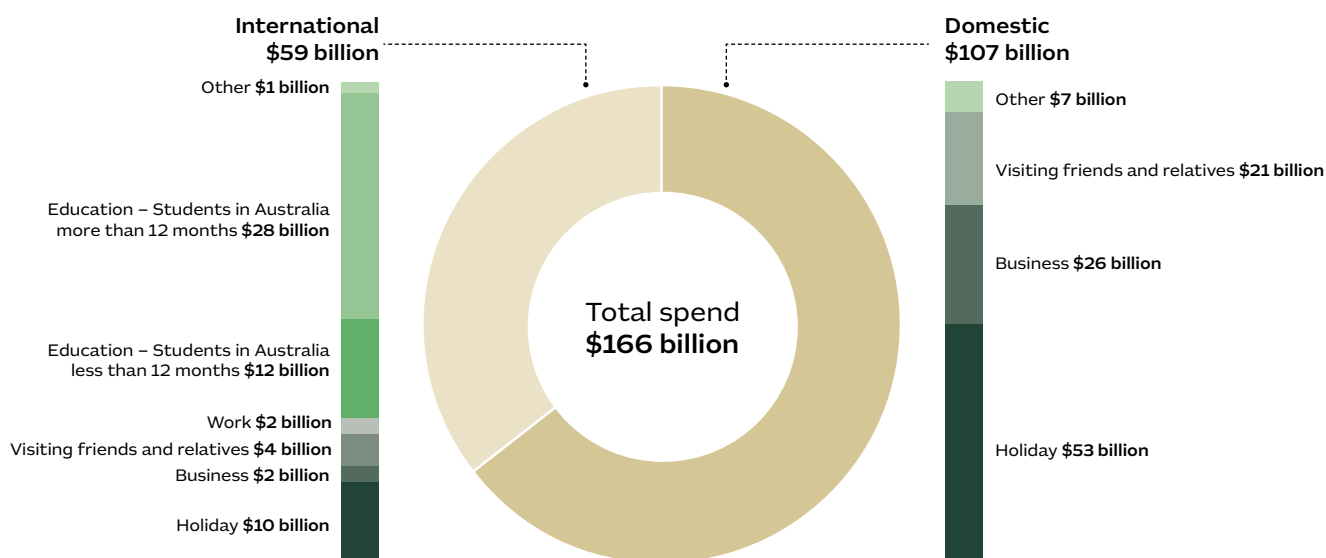
Visitors can be either domestic visitors (Australians or residents who travel away from their home for more than a certain time and distance, including those who are travelling internally as part of an outbound international trip) or international visitors (non-residents who visit Australia for less than a year). For the purposes of this Strategy, international visitors also include international students, regardless of their length of stay, reflecting their statistical likelihood to behave more like visitors rather than residents.

Visitors can make day trips or overnight trips. The purpose of the trip could be for:

- **Holiday:** For rest and recreation, participating in or attending sport, cultural events, festivals, or shopping.
- **Visiting friends and relatives (VFR):** For the primary purpose of visiting friends and relatives, including attending events like weddings.
- **Business:** Travel for purposes related to employment (including fly-in-fly-out work, meetings, conferences, conventions and training).
- **Work (International travellers only):** Travel for purposes related to employment (including fly-in-fly-out work, meetings, conferences, conventions and training).
- **Education (International travellers only):** International education including training visitors through higher and vocational (tertiary) education, schools, language colleges, and institutional or work-based training.



**Figure 1: Visitor types and value, year ended December 2019<sup>2</sup>**



The size of each segment measured by total visitor expenditure for the 2019 calendar year is shown in Figure 1.

## Domestic visitors dominate Australia's visitor economy

**Domestic visitors** – Australians travelling in their own country are the backbone of the visitor economy and will be key to its recovery and resurgence. In 2019 pre-COVID domestic visitation accounted for the majority (64 per cent) of total visitor expenditure of \$166 billion – see Figure 1.

In the **international sector**, it is significant to note that international education contributed \$40 billion (or 69 per cent) of total international spend (when all international students are included), with international leisure (holiday and VFR) and business travellers contributing 27 per cent. If students in Australia for more than 12 months were excluded, total annual visitor spend would be \$138 billion, and international students would account for 39 per cent of total international spend.<sup>3</sup>

## Providers of services are equally diverse

A 'provider' in the visitor economy is anyone who provides or promotes services to create any part of a visitor's end-to-end experience and includes those who facilitate outbound travel. Given the diversity of visitors, it is not surprising that the providers who cater to them are equally diverse (see Figure 2). Within these sub-sectors, there are a wide range of businesses, from global businesses to sole operators.

*I particularly acknowledge and support the THRIVE 2030 priorities to increase employment opportunities and to develop assets, infrastructure, and experiences that make Australia more accessible for people with disability. Making progress against these priorities is greatly important to all people with disability and improving outcomes under Australia's Disability Strategy 2021-2031.*



**The Hon Bill Shorten MP,  
Minister for the National  
Disability Insurance Scheme**

2. Tourism Research Australia (TRA), International and National Visitor Surveys, 2020; Australian Bureau of Statistics (ABS), *Australian System of National Accounts*, 2020.





3. This is the approach taken in the TRA International Visitor Survey consistent with international definitions.

**Figure 2: Sub-sectors participating wholly or partially in the visitor economy**

These sub-sectors are drawn initially from the Australia New Zealand Standard Industry Classifications (ANZSIC), but, due to the complexity of the visitor economy ecosystem, they have been supplemented based on advice from stakeholders.

 <p><b>Accommodation</b></p>	<p>Places travellers stay, including:</p> <ul style="list-style-type: none"> <li>• Hotels and resorts</li> <li>• Motels and serviced apartments</li> <li>• Caravan parks and campgrounds</li> <li>• B&amp;Bs, farm stays, and sharing economy providers (e.g. Airbnb)</li> <li>• Agritourism</li> <li>• Private rentals.</li> </ul>
 <p><b>Transport</b></p>	<p>Includes:</p> <ul style="list-style-type: none"> <li>• All aviation carriers and airport services</li> <li>• Water transport and travel, including cruising, and other boat travel or recreation</li> <li>• Ground transport, including urban, interurban and rural bus transport, taxis, limousines and rideshare services</li> <li>• Public transport services</li> <li>• Commercial and heritage rail</li> <li>• Hire vehicles, including bikes, motorbikes, passenger car rental, motorhome/campervan and other mobile accommodation hire, and scenic and sightseeing transport</li> <li>• Vehicle and motor vehicle parts retailing, fuel retailing, and road freight transport.</li> </ul>
 <p><b>Culture, arts and recreation</b></p>	<p>Includes:</p> <ul style="list-style-type: none"> <li>• Tourist attractions, zoos and aquariums</li> <li>• National parks, nature reserves and hiking trails</li> <li>• Sports and recreation services</li> <li>• Arts and cultural services, including galleries, museums and other collecting institutions, creative and performing arts activities, and heritage activities</li> <li>• Function and event centres</li> <li>• Casinos and other gambling services.</li> </ul>
 <p><b>Tourism services</b></p>	<p>All businesses and individuals acting as agents in selling travel, tour and accommodation services, and providing travel arrangement and reservation services for airlines, cars, hotels, restaurants and experiences, including:</p> <ul style="list-style-type: none"> <li>• Travel agents</li> <li>• Tour operators, including inbound tour operators</li> <li>• Tour guides</li> <li>• Information centres.</li> </ul>



 <p><b>Education and training</b></p>	<p>All education services that are attributable to the visitor economy, including:</p> <ul style="list-style-type: none"> <li>• Secondary and tertiary education</li> <li>• Adult, community and vocational education</li> <li>• Specific tourism and hospitality training services including on-the-job training, apprenticeships etc.</li> </ul>
 <p><b>Business events</b></p>	<p>Includes:</p> <ul style="list-style-type: none"> <li>• Large off-site meetings</li> <li>• Incentive events</li> <li>• Conventions and conferences</li> <li>• Exhibitions and trade shows</li> <li>• Convention centres</li> <li>• Professional convention organisers, destination management companies and event support services, including audio-visual, staging, event hire and ancillary services.</li> </ul>
 <p><b>Food services</b></p>	<p>Places that serve food and drinks, including:</p> <ul style="list-style-type: none"> <li>• Cafes, restaurants and takeaway food services (including catering and food trucks, delivery services)</li> <li>• Pubs, bars, taverns and clubs.</li> </ul>
 <p><b>Retail</b></p>	<p>All retail trade that is consumed or purchased in the course of a trip, including relating to:</p> <ul style="list-style-type: none"> <li>• Motor vehicles and fuel retailing</li> <li>• Food retailing including delivery services</li> <li>• Other store-based retailing like luggage and souvenirs, including ‘high-end’ retail.</li> </ul>

There are more than 330,000 businesses<sup>4</sup> in the visitor economy, accounting for about 1 in 7 of Australia’s 2.4 million businesses.<sup>5</sup> Almost 95 per cent of visitor economy businesses in Australia have fewer than 20 employees.<sup>6</sup> The prevalence of small operators has important implications for the Strategy, including for capability development and innovation.

Businesses in the visitor economy are an important part of local economies and communities, especially in regional Australia, generating jobs and regional growth and providing important amenities to local residents. There are more than 100,000 tourism-related businesses in regional Australia (30 per cent of the national total), which is where around 44 cents in every visitor dollar is spent in Australia.<sup>7</sup>

4. TRA, *Tourism businesses in Australia: June 2016 to 2021*, 2022.

5. TRA analysis.

6. TRA analysis.

7. TRA analysis.

*Australia's visitor economy plays a critical role in enhancing our prosperity, wellbeing and sense of identity as a modern nation, enriched by diversity and international engagement. The visitor economy generates jobs, trade and investment and creates opportunities in cities and regions. Importantly, it helps showcase Australia to the world, building vital links among people, businesses, institutions and governments in our region and beyond.*

*As Minister for Foreign Affairs, I am pleased to support the revitalised THRIVE 2030 and the programs underpinning it. This Strategy reflects Australia's full identity: our modern diversity and the rich heritage of First Nations people.*

*The Department of Foreign Affairs and Trade (DFAT) will continue to work with Austrade and Tourism Australia to embed First Nations experiences, highlight the unique offerings of First Nations businesses and enhance their ability to benefit from the opportunities created by international trade and investment. I look forward to working closely with Minister Farrell and across government and industry to achieve the actions set out in THRIVE 2030. This includes DFAT's work to increase participation of visitor economy businesses in the Pacific Australia Labour Mobility scheme.*



**Senator the Hon Penny Wong,  
Minister for Foreign Affairs**

# The importance of the visitor economy

Australia's visitor economy plays a critical role in driving our economy, wellbeing and sense of national identity. It generates jobs, trade, investment, and creates opportunities in cities and regions. It also contributes to communities by driving socioeconomic development and inclusive growth – providing diversity in employment, opportunities for innovation, supporting the arts, culture and sport, and delivering amenities that benefit local populations as well as visitors.

Beyond this immediate impact, the experience delivered by the visitor economy influences travellers' impressions of Australia, which can underpin future spending and investment decisions, drive demand for Australian products and services, and create lasting networks. The visitor economy fosters cultural exchange and international cooperation, with positive visitor experiences invaluable to Australia's 'soft power'<sup>8</sup> overseas.

## Economic contribution

In the ten years to 2020, Australia had a strong and dynamic visitor economy which was growing faster than the national economy. Under the previous long-term strategy, *Tourism 2020*, overnight visitor expenditure increased 78 per cent to \$126.1 billion in the ten years to December 2019<sup>9</sup>, and international visitor arrivals reached a record 9.5 million, up 70 per cent over the same period.<sup>10</sup>

In 2019 the visitor economy generated an unprecedented \$166 billion in expenditure, had become Australia's fourth largest export earner, and was employing directly and indirectly more than 1 million Australians (in 2018–19).<sup>11</sup> It was a key driver of the overall economy, with every dollar spent in the visitor economy generating a further 81 cents for other parts of the economy.<sup>12</sup> The visitor economy is also important for regional communities, generating jobs and providing services and infrastructure. It contributes 3.4 per cent to gross domestic product (GDP) in the regions, compared to a 1.6 per cent contribution to GDP in capital cities.<sup>13</sup>

8. 'Soft power' refers to an ability to subtly influence through things such as positive economic, social, cultural and geographic attributes.
9. Overnight visitor expenditure was the headline performance target for the *Tourism 2020* strategy.
10. TRA analysis.
11. TRA analysis.
12. TRA analysis.
13. TRA, *Regional Tourism Satellite Account 2019–20*.





Image Credit: Austrade.

## Economic impact of COVID-19

COVID-19 was an unprecedented shock to the visitor economy. International visitation dropped 98 per cent, GDP contribution was down almost 50 per cent, and jobs losses of 25 per cent (over 190,000 jobs) were sustained.<sup>14</sup> Fewer visitors meant lower business revenue, with total expenditure lost to the visitor economy from March 2020 to June 2021 of \$102 billion.<sup>15</sup>

During the COVID-19 pandemic, industry has had to rely on domestic visitation for leisure travel, which was also hampered by state and territory border closures, travel restrictions and low traveller confidence. In other areas of the visitor economy, international student enrolments fell 18 per cent in the third quarter of 2021, compared to the same period in 2020.<sup>16</sup>

However, the recovery of the visitor economy to date has been encouraging. The removal of travel restrictions has been seen as a critical step in allowing for a boost in domestic visitation and return of international visitors. As the recovery continues, the industry is seeing significant pressures on the supply side, with the loss of tourism businesses and a severe shortage of skilled and unskilled labour.

14. ABS data released on 22 December 2021 comparing September 2021 with December 2019 jobs figures.

15. TRA, *National Visitor Survey results June 2021*, 2021.

16. Department of Education, Skills and Employment, *International Student Data 2021*, accessed online 27 January 2022.

*THRIVE 2030 provides a turning point for Australia's visitor economy as we navigate changing consumer and societal expectations and build a new tourism future for our nation. This Strategy presents an opportunity to explore new ideas and markets and enhance Australia's international destination competitiveness. It provides an impetus to improve our tourism data to make better, more informed decisions and create thriving business opportunities to supercharge the recovery. It can also help to build our future workforce and drive long-term sustainable growth that creates a prosperous and balanced approach to the next exciting era for tourism in Australia.*



**Associate Professor Sarah Gardiner, Director, Griffith Institute for Tourism**

Figure 3: Economic contribution of Australia's visitor economy to 2019<sup>17</sup>



### Faster growth than national economy

**66% tourism GDP growth**  
versus 55%  
(between 2008–09  
and 2018–19)



### 1 in 12 workers

**Employed more than  
1 million**  
Australians directly  
and indirectly  
(2018–19)



### Domestic driven

**77 cents of every dollar**  
spent came from Australians  
seeing Australia (2019) and  
12 cents of every dollar spent by  
Australians travelling overseas  
was spent domestically



### Helped drive regional growth

**44 cents in every dollar**  
spent went to regional areas  
(2018–19); now 57 cents  
(year ending September 2022)



### 1 in 8 businesses

**95% of tourism-related**  
businesses employ fewer than  
20 employees (June 2019);  
now 1 in 7 (June 2021)



### International student travel increasingly important

Grew from \$4.7 billion in 2009  
to **\$12.4 billion in 2019**  
Increases to \$40.3 billion  
when including international  
students beyond Year 1<sup>18</sup>



### \$45 billion investment pipeline

Across accommodation,  
transport, arts, recreation, and  
business services (2018–19)



### Comprised 12 separate industries

Such as arts, recreation,  
transport, hospitality  
and retail



### Contributed to GDP

**\$61.1 billion in GDP (3.1% share),**  
another \$63.7 billion in indirect  
GDP (2018–19)

17. TRA analysis.

18. While students who were in Australia less than 12 months were previously counted as part of the visitor economy, their spending continues throughout their time here. Therefore, it is more appropriate to include all international students in the visitor economy.



# Challenges and opportunities for the visitor economy

## Constraints on the visitor economy's sustainable growth

While the visitor economy was enjoying significant growth in the 10-year period to 2019, several factors were constraining the sustainability of this growth:

- **Limited available Australian workforce** and a reliance on skilled migrant workers and temporary visitors (such as working holiday makers), particularly in sectors with casualised seasonal operations.
- **Volume, quality and age of connective and destination infrastructure** to meet demand.
- **Changing composition of international visitors**, notably a significant increase in the number of visitors from China, which may not be sustained, combined with slowing growth from traditional long-haul markets such as Europe and the Americas.
- Micro and small businesses' ability to adapt to **disruptive technologies and increased consumer expectations** driven by the ongoing technology revolution, particularly the ability of consumers to instantly compare prices and demand a seamless booking and travel experience online.
- **Weather, financial and health shocks** that impact insurance markets, crisis planning and the resilience of operators.
- **Climate change and impacts of visitors and operators on the natural environment**, including on geography, nature and biodiversity.
- **Increasing consumer focus on the environment** which is driving demand for more sustainable tourism options.
- **Increased international competition** including in relation to hosting large events, and airline routes, adding further pressure on national tourism organisations to attract international visitors.
- **Demand for accessibility options to meet consumers' needs**, including from those with linguistically diverse backgrounds, those with disability, families and the aged.
- **Social licence challenges** in communities, with some locals questioning the net benefits of having visitors in their region.

As Australia emerges from the COVID-19 pandemic, the visitor economy must address these pre-existing challenges, many of which have been exacerbated by the pandemic, and also additional challenges arising from the pandemic itself.

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*The visitor economy plays a key role in showcasing Australia's rich arts and culture and generating employment opportunities for many Australians. As Minister for Employment and Workplace Relations, and Minister for the Arts, I am pleased to support THRIVE 2030 and look forward to working with Minister Farrell, government and industry.*

*I am committed to growing a secure and resilient visitor economy workforce and supporting our nation's vibrant arts, entertainment and cultural sector. The Australian Government wants to see more workers in good jobs: jobs with security, fair pay and proper protections for all workers contributing to the visitor economy. Employment programs, including Workforce Australia services, connect people to jobs in visitor economy industries. Alongside the work I am leading to deliver a new National Cultural Policy, THRIVE 2030 will help rebuild and grow Australia's visitor economy, with First Nations stories at its centre.*



**The Hon Tony Burke MP, Minister for Employment and Workplace Relations; Minister for the Arts**

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*Australia is home to the world's oldest continuous living culture and it is important to promote a deeper understanding of this culture for visitors across the country and the globe.*

*The THRIVE 2030 Strategy recognises the critical role Aboriginal and Torres Strait Islander peoples play in Australia's visitor economy, and I'm pleased to support its implementation and vision for a diversified market.*

*When tourism experiences are led by Aboriginal and Torres Strait Islander peoples, there are positive benefits for everyone involved. These include visitors learning about Australia's First Nations peoples and cultures as well as capacity building for First Nations businesses and entrepreneurs delivering the experiences.*

*I look forward to working with Minister Farrell to centre Aboriginal and Torres Strait Islander peoples, cultures and experiences through this national strategy. It can potentially make a significant contribution to broader aims of the National Agreement on Closing the Gap such as Target 8 for strong economic participation and development of Aboriginal and Torres Strait Islander people and communities. There is no better time to recognise and celebrate First Nations cultures as a key part of Australia's national identity.*



**The Hon Linda Burney MP, Minister for Indigenous Australians**

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While there are many challenges, there are also significant opportunities to be seized. These opportunities, accompanied by an extensive range of actions to respond to these challenges, are detailed in the Phase 1 Action Plan that accompanies this Strategy (see page 59).

## **Recovering from the COVID-19 pandemic**

In the immediate term, there is an opportunity to grow the already significant contribution of the domestic market by encouraging Australians to explore more of their own country and engage in local experiences they never knew existed or had not seriously considered visiting. By building greater awareness and demand for Australia's unique offerings, there is an opportunity to expand the market for Australians travelling domestically and maintain it over the longer term.

Now that international borders have re-opened, there is also an opportunity to rebuild Australia's core markets and diversify into emerging markets, such as in Asia, where growing wealth is anticipated to drive demand for international travel and where we have the benefit of proximity. Building visitor confidence to travel will be a challenge across all visitor segments, as consumers weigh the potential health and financial considerations of booking and undertaking travel. In response, flexible booking arrangements, travel insurance and health protection/mitigation measures should be implemented and promoted to build confidence. There is also an opportunity for government and industry to work together to unlock emerging markets.

With our natural assets and unique culture, Australia has the opportunity to expand our First Nations tourism offerings, and further develop our vibrant cities and distinctive regions. There is also opportunity to grow by creating new products and experiences, for example in luxury, high-yield and environmentally conscious travel.

Aviation is vital for connecting domestic and international visitors with Australia's world-leading visitor experiences and businesses. Aviation continues to be severely affected globally and locally by the pandemic. The full recovery of aviation will take some years, particularly for the international sector. The Australian Government delivered a range of COVID-19 crisis support programs to the aviation sector to maintain essential air connectivity, preserve critical aviation capacity and protect supply chains. This assistance also provided stability to the sector to drive recovery beyond the crisis. There is a significant challenge ahead to rebuild connectivity.

There is also an opportunity to encourage greater spend by domestic and international visitors, meaning a renewed focus on high-yield travellers. Australia can also continue to grow as a world leader in international education – attracting thousands of students, and yielding the flow-on benefits of visiting family and friends, return visits over time, as well as students' vital contribution to the workforce.



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*Australia is home to the two oldest living cultures on earth, yet we have barely scratched the surface of the potential of First Nations tourism. Now is the time to realise this opportunity and embrace our storytelling, arts, culture and festivals. THRIVE 2030 acknowledges this moment and outlines actions to empower, collaborate and invest with First Nations people to not only deliver authentic tourism experiences that align with caring for Country but also create powerful drivers of positive social, cultural and economic outcomes.*



**Cameron Costello, Chair,  
Queensland First Nations  
Tourism Council; Brisbane 2032  
Olympic and Paralympic Games  
Committee Member**

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*I am pleased to provide my full support for the Government's THRIVE 2030 strategy. THRIVE 2030 – The Re-Imagined Visitor Economy is a critical part of promoting growth in economic productivity and social wellbeing through access to quality skills and training to address skilled and unskilled labour shortages throughout Australia.*

*My department is contributing to the outcomes from the Jobs and Skills Summit by collaborating with state and territory governments, unions, employers, training providers and civil society to support a trusted, high-quality and accessible education and training sector. The additional \$1 billion in joint federal-state funding for Fee Free TAFE in 2023, delivering 180,000 TAFE and vocational education places, will contribute directly to the visitor economy workforce so learners and workers can get the skills they need to thrive now and in the future.*

*I look forward to working to deliver the policy priorities and outcomes in THRIVE 2030 to ensure its success.*



**The Hon Brendan O'Connor MP,  
Minister for Skills and Training**

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Quickly restoring confidence in domestic business travel and events will also support the visitor economy supply chain, especially given the greater per day spend in this sub-sector. Prior to the pandemic, Australia was recognised as a global business events leader, holding 12th position in the global ranking of international association meetings held in 2019.<sup>19</sup> Australia should strive to retain and better this performance by continuing to grow as an appealing business event destination.

## Rebuilding the visitor economy workforce

Workforce shortages are a particular challenge after the dramatic job losses caused by the COVID-19 pandemic, exacerbated by the short-term absence of permanent and temporary migrant workers who had been an important supplement to the visitor economy workforce.

This challenge can be countered by the opportunities to explore strategies with people who are underrepresented in the workforce, including people with disability, women, parents returning to the workforce, older Australians, young Australians, culturally diverse peoples, and First Nations peoples. This could be complemented by reviewing visa settings to expand the pool of people recruited from overseas, and better use of technology to better support customer needs and improve business operations. Over the longer term, enhancing the reputation of the visitor economy as a career of choice will increase the number of Australians choosing a career in the sector. This will necessitate employers being competitive, with good working conditions, training and career opportunities.

## Evolving consumer trends

Global population demographics are shifting rapidly, and visitor economies must adapt to address the changing needs of different traveller cohorts. Increasing focus on the impact of travel on climate change and the environment will increase visitor demand for more eco-friendly and sustainable destinations. Younger travellers are demanding authentic experiences delivered onsite by local experts, and also want their interactions digitally enabled throughout the journey. Meanwhile, a growing cohort of older travellers, multi-generational families, and people with disability means there must be a focus on accessible infrastructure, quality experiences, and a safe environment. Australia's quality infrastructure and reputation for safe and secure travel positions us well to attract these growing markets. Post-COVID-19, the reputation of our health care system is a significant asset to the reputation of our visitor economy.

## Better infrastructure to satisfy visitor needs

As the visitor economy recovers, there is a need (and opportunities) for investment in new and refreshed assets/infrastructure, especially in regional Australia. This need is applicable to major infrastructure such as aviation, port, and hotel facilities, and also to smaller scale developments, including new competitive visitor

19. International Congress and Convention Association, *ICCA Annual Statistics Study 2020*, 2020.

experiences. Regional accommodation, attractions and supporting infrastructure that improve experiences in regional areas will be vital to building back a stronger, more resilient industry. Governments and industry play an important role in investment attraction and facilitation, including by working to reduce or remove impediments to investment and ensuring infrastructure is accessible to a changing mix of visitors.

### **Embracing technology and new service delivery platforms**

Advances in technology and integration of digital tools into all aspects of the traveller journey provide businesses with opportunities to improve productivity and enhance the consumer experience. This means businesses must embrace technology, continue to adapt, and be equipped with appropriately qualified staff. With a predominantly micro and small business constituency, improving and maintaining business capability is an ongoing challenge. The global explosion of the sharing economy has had an enormous impact on the visitor economy. These business models, and others yet unimagined, are expected to expand and innovate as they gain increasing levels of acceptance. Real-time access, artificial intelligence, augmented reality, and data personalisation strategies are becoming necessities and will require continuous development to enhance the visitor experience.

### **Climate adaptation and managing disruptive forces**

The continued growth of the visitor economy is influenced by a range of external forces, including economic, climate change, security and health considerations. While the COVID-19 pandemic has been a landmark event and will influence the immediate direction of the Strategy, other disruptive forces will continue to challenge the industry.

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*There has never been a more critical time to deliver a focused national long-term strategy for the visitor economy which recognises the challenges of our industry, severely impacted by COVID-19. The need to repair and regrow the export component of the visitor economy following the closure of international borders for two years will be no easy task, but a critical one for the Australian economy. ATEC is committed to working with all governments in partnership with our industry colleagues to build back the tourism export sector guided by the THRIVE 2030 Strategy – collaboration will be the key.*



**Peter Shelley, Managing Director, Australian Tourism Export Council**

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*Australia's beautiful natural environment and unique cultural heritage make it a wonderful country to visit. From Ningaloo Reef to historic Port Arthur, from Kakadu National Park to the Great Barrier Reef, our World, National and Commonwealth Heritage places attract millions of visitors every year. Many of our heritage places are also of deep significance to First Nations peoples and important sites of their living culture – the oldest continuous cultures in the world.*

*As Minister for Environment and Water I am delighted to support THRIVE 2030. I'm proud to share our special places with visitors, and I'm pleased to support the jobs that tourism brings, especially to regional communities. Income generated by tourism can also support the conservation of our outstanding heritage places.*

*Nature and culture are great reasons to visit Australia, and THRIVE 2030 is a great plan to ensure visitors enjoy their visit, becoming Ambassadors for Australia. Congratulations Minister Farrell – I'm looking forward to working with you to promote Australia to the world.*



**The Hon Tanya Plibersek MP,  
Minister for the Environment  
and Water**

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The climate emergency is already directly affecting communities and ecosystems across Australia and around the world, with events such as floods, rising temperatures, warming oceans, droughts and bushfires. These events are impacting the natural environment, biodiversity and business and traveller confidence. Tourism businesses are being directly affected, including through the availability and affordability of insurance and the costs involved in enhancing their resilience and implementing new business practices.

The *Climate Change Act 2022* (Cth) has legislated Australia's commitment to a 43 per cent emissions reduction against 2005 levels by 2030, and net zero emissions by 2050. It represents an ambitious, yet achievable goal that requires the visitor economy to play its part. Businesses in the visitor economy are encouraged to embrace climate action by adapting to and/or reducing emissions and improving energy efficiency to mitigate climate change impacts and other environmental degradation. Businesses reliant on nature-based attractions, such as those in the Great Barrier Reef or national parks, play an important role in educating visitors on the importance of conservation and sustainable practices. With travellers increasingly expecting and preferencing sustainable and eco-friendly travel options, it is crucial that Australia delivers on these expectations to remain a desirable destination.

### **First Nations cultures**

First Nations owned businesses are active across all parts of the visitor economy, sharing the intrinsic connection with the land, sea and sky. First Nations tourism businesses have the opportunity to share cultural practices, protocols and artefacts. With a large proportion of businesses operating in regional and remote locations, successful First Nations-led tourism ventures can drive employment and economic development opportunities outside capital cities. The sector also has a range of First Nations-led businesses that are actively involved in land management or carbon economy initiatives, often through the Native Title and Land Rights frameworks in Australia.

There is an increasing traveller awareness of, and appetite for, authentic First Nations cultural tours and experiences. Increasing the inclusion of First Nations tourism experiences across the visitor economy presents an opportunity to highlight Australia's unique visitor experience and celebrate the world's oldest living continuous cultures, both domestically and internationally.

### **Engaging the community**

As visitor numbers grow there is potential for pressure on the environment and communities through 'over-tourism'. This is a phenomenon observed overseas and at some locations in Australia. If not managed properly, the natural environment and sites of cultural significance can be degraded and communities may see disadvantages from participating in the visitor economy. Visitor economy businesses must continue to adopt more sustainable practices and make ongoing efforts to engage with communities by acknowledging their needs, and businesses and communities must work together to achieve shared benefits. A fully engaged and supportive community will be more welcoming and support the amenity brought by the visitor economy, thereby adding to a location's reputation for a positive visitor experience.

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*Business events are a significant component of the visitor economy and have a substantial role to play in the global competition for consumers, talent, business and investment, and delivering positive outcomes for Australian communities. THRIVE 2030 has the very important role of bringing together an industry that has been hardest hit during the coronavirus pandemic by setting an inclusive long-term strategic vision with targets that will drive our success through the decade ahead.*

*The comprehensive Strategy will elevate the standing of business events and the visitor economy through a whole-of-government approach as a key driver of Australia's economic, diplomatic and regional prosperity agenda, and set a framework that encourages positive policies and investment to achieve sustainable growth across recovery, consolidation and acceleration phases.*



**Andrew Hiebl, CEO, Association of Australian Convention Bureaux**

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*THRIVE 2030 is the perfect teammate for our green and gold decade of major sporting events being hosted in Australia, culminating in the Brisbane 2032 Olympic and Paralympic Games. Together with Minister Farrell, we want to help the major sporting events secured by Australia to create opportunities that encourage new and returning visitors to participate in events across our regional areas, further driving our recovery from the COVID-19 pandemic.*

***The Hon Anika Wells MP, Minister for Sport***

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# The vision for Australia's visitor economy

*Australia's visitor economy provides world-leading services and visitor experiences to consumers while delivering significant and sustainable benefits to the Australian community. This will be accomplished by collaborating across all stakeholders to achieve success, modernising supply side enablers and diversifying markets, experiences and destinations.*

The Strategy's vision for 2030 is focused on providing world-leading services while simultaneously delivering benefits to the Australian community, achieved in a sustainable way through a focus on diversification, modernisation and collaboration. It incorporates 3 key groups – visitors who seek a quality experience; businesses which are globally competitive and pursue sustainable growth; and Australian communities which benefit from and are enriched by the jobs, growth and amenities the visitor economy provides.



## Visitors

Visitors experience innovative, high-quality products and exceptional services and experiences.



## Businesses

Businesses are globally competitive, are profitable and pursue sustainable growth by diversifying markets and products and embracing modern business practices.



## Communities

Communities, including First Nations communities, enjoy the benefits of a sustainable visitor economy through economic opportunity and amenity provided by visitor infrastructure.

## Principles guiding the vision

Six THRIVE principles inform and guide the vision and overall direction of the Strategy. They embody a focus on delivering high-quality visitor experiences through innovation, and doing so in a sustainable way that engages and respects local communities and their environments. The principles are:

- T** **The visitor comes first** – we put the traveller at the centre of the Strategy – by understanding their needs and providing high-quality infrastructure and services, we can deliver world-leading visitor experiences.
- H** **Head for sustainable growth** – we pursue sustainable growth by balancing social and environmental factors with economic ones in framing and implementing strategy actions.
- R** **Research guides decisions** – we rely on relevant, robust and timely research to guide decisions and actions.
- I** **Improve capability and increase innovation** – we embrace opportunities to secure and maintain a high-quality workforce and innovative businesses to meet the demands of the modern traveller.
- V** **Visitor assets that meet expectations** – we develop visitor assets that are accessible, high-quality, and developed and managed sustainably to meet the expectations of visitors.
- E** **Expand visitor markets** – we pursue high-yield visitors from a more diversified and less concentrated spread of international markets, and encourage Australians to experience and spend more domestically, to secure growth and reduce risk.



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*Our cities and regions offer a wealth of unique experiences, world-class destinations and attractions for visitors, who, in turn, enrich communities by supporting local jobs, business, arts, culture and education. The enduring benefits of the visitor economy, particularly in regional and rural Australia, cannot be understated.*

*As travel returns to pre-pandemic levels, we can take advantage of the opportunity to further unlock the potential of this important sector. It's exactly what THRIVE 2030 seeks to do. This national strategy sets out a pathway for regional Australia to better share the unique experiences and cultures we offer with the world, as well as capturing \$100 billion or 4.4 per cent of visitor expenditure by 2030.*

*The Strategy calls on us to modernise and enhance infrastructure to make the visitor experience even better. It will take further investment in our airports, ports, transport links and freight connections to maintain world leading standards in transportation. THRIVE 2030 is the opportunity for governments of all levels, industry and other stakeholders to plan investments that benefit visitors and communities alike.*

*The Albanese Government is working with partners to support regional development by investing in infrastructure, services, people and local economies. I look forward to collaborating on further projects to ensure the visitor economy thrives towards 2030 and beyond.*



**The Hon Catherine King MP, Minister for Infrastructure, Transport, Regional Development and Local Government**

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## **A strategy for growing sustainably**

Changing visitor and community expectations in the last decade have shifted the perspective on growth from one focused purely on economic return to one of sustainable growth. Growing sustainably means appropriately balancing economic, social and environmental factors in pursuing industry growth and other objectives. This means achieving economic growth and financial return and simultaneously protecting our environment and culture, which are central to our competitiveness, and avoiding risks associated with 'over-tourism' and a 'growth at all costs' model that can negatively affect both the visitor experience, local population's quality of life and potentially the longer-term sustainability of businesses. Policies and actions under this Strategy will be framed and implemented consistent with this sustainable growth approach.

## **Respectfully embedding First Nations cultures into the visitor economy**

Underpinning this Strategy is the recognition that Australia is a product of its diverse geographic and cultural heritage. Australia's First Nations peoples have the world's oldest continuous cultures and are central to our national identity, our rich history and our bright future. With significant diversity, our First Nations cultures place great value in respect for the land, sea and sky.

Respectfully embedding First Nations cultures enriches Australia's visitor economy experiences. Consistent with the Uluru Statement from the Heart, this Strategy aims to foster genuine and collaborative partnerships between government and industry to ensure the perspectives of First Nations peoples are incorporated. Doing so will support the engagement of all voices across the sector and promote the universal respect for First Nations ownership and cultural knowledge.

Increasing the participation of First Nations peoples across the visitor economy can also support our country's journey of truth-telling, providing a platform for First Nations peoples to share cultures and heritage with the broader community. Truth-telling is pivotal to the ongoing process of healing and reconciliation in Australia. By joining a locally led cultural activity, visitors will leave with a richer understanding of the natural beauty and cultures of our continent. These benefits for both visitors and First Nations peoples can be achieved where our country's unique cultural heritage is respectfully embedded in the visitor economy.



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*As Minister for Education, I am pleased to support THRIVE 2030. International education isn't just about education. It builds a bridge between Australia and the rest of the world. It is a crucial part of our visitor economy, bringing many economic, cultural, and social benefits to Australia. I look forward to delivering on the Strategy's Action Plan, which includes supporting the diversification of international student markets and rebuilding our world-class international education sector.*

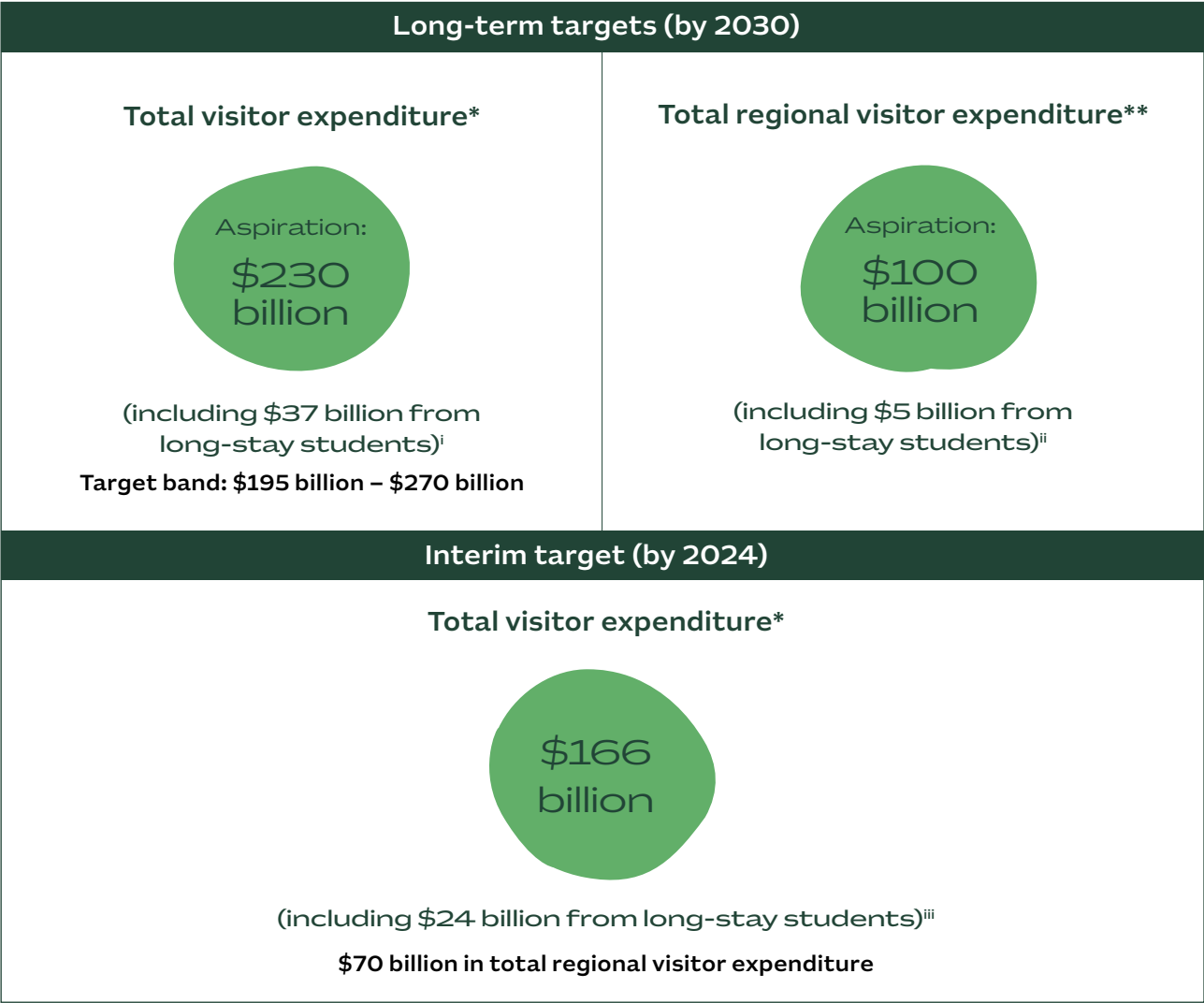
**The Hon Jason Clare MP, Minister for Education**

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# Strategy targets



\* Total visitor expenditure includes expenditure as measured by the National and International Visitor Surveys, including domestic day trip expenditure, plus expenditure on international education services by visitors staying more than 12 months. International overnight visitor expenditure, and therefore total visitor expenditure, includes only expenditure received in Australia. Figures have also been provided excluding long-term education visitors to permit comparison with previous targets, which excluded this group.

\*\* Total regional visitor expenditure is total visitor expenditure per above, excluding expenditure in all capital city tourism regions and the Gold Coast tourism region.

i    \$193 billion if excluding of long-term (>12 months) international students  
 ii    \$95 billion if excluding expenditure of long-term (>12 months) international students  
 iii    \$142 billion is excluding expenditure of long-term (>12 months) international students

This Strategy has included visitor expenditure targets as a ‘rallying call’ for all in the industry to work towards, alongside government and community stakeholders. Given current uncertainties, the Strategy initially set interim (by December 2024) and also long-term (by December 2030) targets for total visitor expenditure and

regional total visitor expenditure (see Figure 4). The new Industry Data and Expert Analysis (IDEA) Working Group will be tasked as a priority to review these targets and recommend additional visitor economy performance indicators, including on the supply side of the visitor economy.

The Strategy target totals contain expenditure by both short-term (less than 12 months) and long-term (more than 12 months) international students. Short-term students are included because they are defined as visitors in the relevant international definitions for tourism (that is, UN World Tourism Organization definitions). Long-term students are included because their behaviours are similar to short-term students. In all cases, targets are expressed both with and without the long-term student contribution to allow direct comparison.

### Interim target by 2024







The interim target of \$166 billion has been set by reference to the pre-COVID-19 levels of visitor expenditure as at December 2019.

*Tasmania looks forward to working with the Australian Government and state and territory counterparts, to progress a unified vision for the long-term sustainable management of Australia's visitor economy. While acknowledging there are continued challenges for the recovery of Australia's tourism industry, there are also great opportunities to shape the future of our industry for the benefit of our communities. In developing Tasmania's T21 visitor economy strategy through to 2030, it is clear that we have many shared objectives, and we look forward to the successful implementation of the THRIVE 2030 Strategy.*



**The Hon Jeremy Rockliff MP, Premier; Minister for Tourism, Tasmania**

Figure 5: THRIVE 2030 interim target

Total visitor expenditure by December 2024 = \$166 billion*		
 <p><b>Total Domestic</b> Day trip expenditure <b>\$29 billion</b></p>	 <p><b>Total Domestic</b> Overnight expenditure <b>\$91 billion</b></p>	 <p><b>Total International</b> Overnight expenditure <b>\$46 billion<sup>iv</sup></b></p>
Total regional visitor expenditure by December 2024 = \$70 billion**		
 <p><b>Regional Domestic</b> Day trip expenditure <b>\$16 billion</b></p>	 <p><b>Regional Domestic</b> Overnight expenditure <b>\$49 billion</b></p>	 <p><b>Regional International</b> Overnight expenditure <b>\$5 billion<sup>v</sup></b></p>

\* Total visitor expenditure \$142 billion excluding long-term (>12 months) international students

\*\* Total regional expenditure \$68 billion excluding long-term (>12 months) international students

<sup>iv</sup> \$22 billion if excluding expenditure of long-term (>12 months) international students

<sup>v</sup> \$3 billion if excluding expenditure of long-term (>12 months) international students





*The Australian visitor economy is a vital pillar of Australia's prosperity and one that continues to face unprecedented challenges.*

*ATIC supports the THRIVE 2030 Strategy and its intent to develop a sustainable, engaging and reputable visitor economy. Through the Quality Tourism Framework, ATIC aims to support THRIVE 2030 to develop quality tourism products and support SMEs to access new product pathways and expand their markets, leading to a robust and resilient visitor economy.*

**Evan Hall, Chair, Australian Tourism Industry Council**

## Long-term target by 2030







The Strategy aims to achieve, by 2030, total visitor expenditure in the range of \$195 billion to \$270 billion, with a focus on achieving \$230 billion. The aim is to have regional Australia capture \$100 billion, or 44 per cent of this spend. As a sustainable target, this needs to be achieved through a balanced approach that weighs up economic, social and environmental issues.

Supply side requirements to achieve these levels of expenditure will be measured and monitored over the lifetime of the Strategy. This will be done through the new Longitudinal Indicators for the Visitor Economy (LIVE) framework.

This will:

- provide a more detailed picture of demand and supply side performance
- incorporate leading and lagging indicators of performance
- identify emerging challenges and opportunities for the industry
- have clear lines of accountability to address challenges and leverage off new opportunities.

**Figure 6: THRIVE 2030 long-term target**

Total visitor expenditure by December 2030 = \$230 billion*		
 <p><b>Total Domestic</b> Day trip expenditure <b>\$36 billion</b></p>	 <p><b>Total Domestic</b> Overnight expenditure <b>\$113 billion</b></p>	 <p><b>Total International</b> Overnight expenditure <b>\$81 billion<sup>vi</sup></b></p>
This includes \$100 billion in visitor expenditure in regional Australia**		
 <p><b>Regional Domestic</b> Day trip expenditure <b>\$22 billion</b></p>	 <p><b>Regional Domestic</b> Overnight expenditure <b>\$68 billion</b></p>	 <p><b>Regional International</b> Overnight expenditure <b>\$10 billion<sup>vii</sup></b></p>

\* Total visitor expenditure \$193 billion excluding long-term (>12 months) international students

\*\* Total regional expenditure \$98 billion excluding long-term (>12 months) international students

vi \$44 billion if excluding expenditure of long-term (>12 months) international students

vii \$8 billion if excluding expenditure of long-term (>12 months) international students

## Note on targets

The targets have been prepared by Tourism Research Australia (TRA) and are based on the latest available data and information as at October 2021. Setting long-term targets is always challenging, and the challenge is exacerbated by unknown pandemic implications for travel types and travel habits. As such, it is proposed that targets are periodically reviewed and amended as appropriate. The first review is proposed to be conducted in conjunction with implementing the Longitudinal Indicators, and subsequent reviews would be conducted annually or as needed.

**Domestic targets** were based on the TRA *Domestic Tourism Forecasts, 2021–22 to 2025–26* report (2021), which were the latest available forecasts at the time of first publishing the Strategy.<sup>20</sup> The report outlines the risks and limitations of the forecasts, notably that there may be changes to key influences such as health advice, border policies, and economic forecasts that could impact the forecasts.

The main risks to the forecasts and therefore the targets are:

- (i) major deviations from the National Plan to transition Australia's COVID-19 response
- (ii) the rate at which outbound travel recovers
- (iii) uncontrollable outbreaks of the virus or other health crises which could reduce traveller confidence and desire/ability to travel.

**International targets** were based on TRA analysis of market intelligence, publicly available research, and subscribed analysis by Oxford Economics. Different and more contemporary data sources will be applied as targets are reviewed in future.



20. TRA, *Domestic Tourism Forecasts, 2021–22 to 2025–26*, 2021.

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*As the international cruise industry emerges from the global pandemic, Australia is in an ideal position to capitalise on a resurgent cruise sector as part of an integrated tourism strategy.*

*Being a maritime nation and one of the world's most passionate cruise markets, we have an opportunity through the THRIVE 2030 Strategy to further develop domestic and international cruising in a way that disperses economic benefits around our coasts from cities and towns to remote communities.*

*Cruising delivers multi-billion-dollar benefits throughout many other areas of the wider tourism economy, but it also draws from a complex supply chain that benefits numerous other Australian industries, from farming and food production through to engineering and maritime services.*



**Joel Katz, Managing Director,  
Australasia, Cruise Lines  
International Association**

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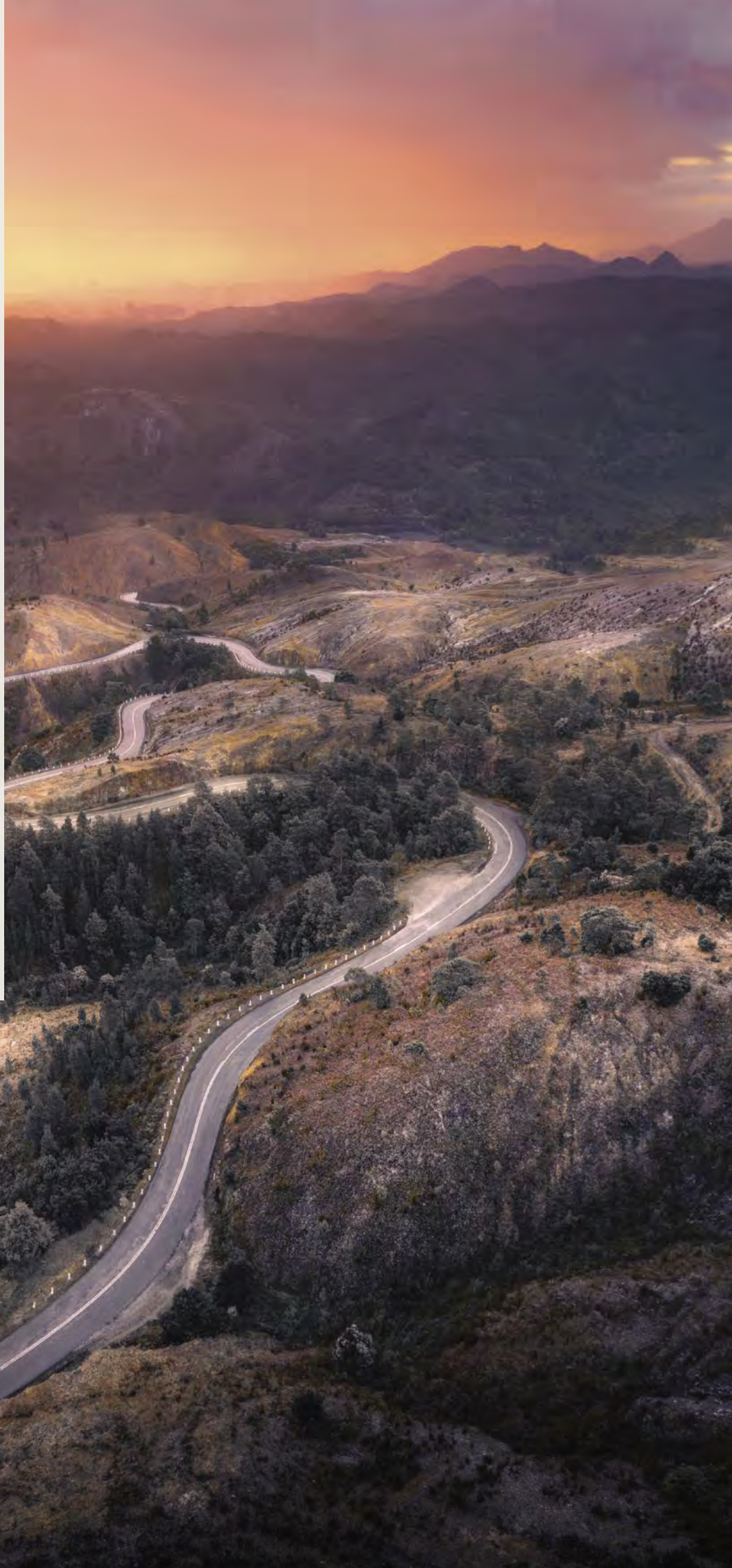
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*As Treasurer, I am pleased to offer my support for THRIVE 2030. The visitor economy plays a critical role in the Australian economy. This strategy will help rebuild and diversify our visitor economy industry, an industry that was severely impacted by the COVID-19 pandemic. The strategy will support economic development and employment across our cities and regions. I look forward to working with my colleagues and with industry to implement the vision set out in THRIVE 2030. There is so much opportunity here for our country, let's take full advantage of it.*



***The Hon Jim Chalmers MP,  
Treasurer***

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# Strategy phases

The Strategy takes a three-phased approach to implementation. The phased approach is appropriate given the need to prioritise recovery activities in the first phase to rebuild the industry and place it on a sound footing for sustainable and accelerated growth in the second and third phases. The phased approach also recognises that it is not feasible to fully address all needs under each strategy priority in Phase 1 given significant uncertainties across the globe.

**Figure 7: THRIVE 2030 phases**

<b>Phase 1: Recovery – 2022–2024</b>	Maintain efforts on recovery as the Australian economy continues to open up and international markets return. Focus on rebuilding the visitor economy by driving domestic and targeted international visitation and addressing priority supply issues, including workforce shortages, destination development and improved data. By the end of 2024, achieve pre-COVID-19 levels of visitor expenditure of \$166 billion.
<b>Phase 2: Consolidation – 2025–2027</b>	Maintain a consistent growth trajectory by pursuing a diverse but targeted portfolio of markets based on data and market recovery, investing in new products and destinations, improving business practices, and continuing to build workforce capability to improve the quality of service, including through the new Visitor Economy Workforce and Skills Strategy.
<b>Phase 3: Acceleration phase 2028–2030</b>	Accelerate growth by leveraging investment from earlier phases, including new products and infrastructure, improvements in business processes and technology, increased service quality and increased visitation from emerging markets. Achieve total visitor expenditure of between \$195 billion and \$270 billion by 2030, with a target figure of \$230 billion.

## Strategy action plans

Activities to achieve each of the Strategy’s priorities will be detailed in Strategy action plans for each phase and will be identified in consultation across governments and with industry (see Figure 7). Actions will identify the party responsible to lead the action item and those with a supporting role.

The Action Plan for Phase 1: Recovery accompanies this Strategy (see page 59).

Ahead of finalising action plans for the Phase 2: Consolidation and Phase 3: Acceleration, the targets and actions set in Phase 1 will be reviewed.

Figure 8 lists factors that will guide development of actions for Phase 2: Consolidation and Phase 3: Acceleration. In addition, the Longitudinal Indicators for the Visitor Economy (LIVE) framework, developed in Phase 1, will be used to set targets and measure progress against activities in future action plans.



**Figure 8: Developing actions for strategy phases 2 and 3**

The following factors will be considered in developing action plans for phases 2 and 3.

<b>Current context</b>	What is the current economic context and the industry's performance against the Strategy's targets for the prior phase?
<b>Segment assessment</b>	What has been the performance in each of the visitor segments and what are the emerging trends to be considered in developing the next action plan?
<b>Prior phase actions assessment</b>	Have participants delivered against all actions in the prior period action plan; assess lessons learned and any shortfalls to carry forward into the next phase.
<b>Apply THRIVE strategy guiding principles</b>	In developing actions for the next phase, apply the 6 THRIVE Strategy guiding principles.
<b>Geographic market assessment</b>	Assess past performance and emerging trends of international markets to appropriately prioritise market selection and direction of marketing effort, balancing the performance, contribution and value of the domestic market.
<b>Consultation</b>	The Strategy's action plans will be developed in consultation with industry, governments and other stakeholders.



*THRIVE 2030 acknowledges the climate emergency facing Australia, our communities and industries and the need for businesses that cater to the visitor economy to play their part.*

*Australia's natural beauty is a key selling point to international visitors. We have so much to gain from a vibrant visitor economy, and so much to lose from unchecked climate change.*

*Visitor economy businesses have a key role to play in Australian action on climate change. The renewed focus on climate impacts and the links outlined in this document between the visitor economy and climate change make an important contribution.*

*The Albanese Government's ambitious action on climate change is important for the future of Australia's visitor economy, and is committed to working with the sector. Guided by the Powering Australia plan, the government is reducing emissions and improving energy efficiency across sectors crucial to the visitor economy, including transport and accommodation.*

*Under this plan, Australia is undergoing a transformation to a clean energy future, powered by renewable energy – the cheapest form of energy, meaning lower energy costs for households and businesses.*

*Our targeted investments in climate adaptation will also help communities and businesses build resilience, reduce risks and avoid significant costs.*

*In the face of a global climate emergency, Australia can and must take advantage of the incredible economic opportunities that climate action and adaptation provides.*

**The Hon Chris Bowen MP, Minister for Climate Change and Energy**

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*Tourism is one of the most significant sectors in South Australia, and it's arguably been hit harder than any other by the pandemic. As Minister for Tourism, I am working hard to deliver a strong, robust visitor economy – and that means more investment in tourism, more events, supporting career paths in the industry, and attracting more business to South Australia. We have incredibly diverse, talented, skilled and passionate operators in South Australia, committed to delivering world-class experiences and memories for visitors to, and within, our state. THRIVE 2030 provides us all with a clear direction for sustainably growing the visitor economy, and a strategic framework to make it happen. This greater collaboration and connectivity will help drive confidence in our sector, support further growth and stimulate employment in SA.*



**The Hon Zoe Bettison MP,  
Minister for Tourism and  
Multicultural Affairs, South  
Australia**




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# Strategy priorities

The Strategy identifies 7 priorities that industry and governments will work on together to deliver its vision. The priorities align with the Strategy's vision elements of collaborate, modernise and diversify.

**Figure 9: THRIVE 2030 strategy priorities**

1. Deliver success through comprehensive collaboration	COLLABORATE 
2. Improve data and insights	
3. Grow a secure and resilient workforce	MODERNISE 
4. Embrace leading-edge business practices	
5. Enhance visitor infrastructure	DIVERSIFY 
6. Build markets and attract visitors	
7. Grow unique and high-quality products, including First Nations experiences	

Below is a description of each Strategy priority, along with an overview of the goal of each priority and the types of activities that will support the priorities. Indicative success measures that will be developed through the LIVE framework are also provided. These measures will allow monitoring of progress against each Strategy priority.



*The visitor economy is a key demonstration of our commitment to people with disability. Tourism and other visitor economy employment pathways should be accessible; and tourism itself as a practice should be inclusive. People with disabilities deserve the same opportunities for employment and enjoyment as everyone else. The aims and actions of THRIVE 2030 accordingly align with Australia's Disability Strategy 2021-2031 (the Strategy), and I am proud to be the lead Commonwealth Minister for the Strategy, driving tangible change for people with disability. I am greatly supportive of the actions of THRIVE 2030 including to:*

- Increase workforce participation from people with disability
- Conduct a pilot program to facilitate people with disability into the visitor economy workforce
- Develop assets, infrastructure and experiences that are accessible to all people, regardless of disability.

*The work of the pilot program is underway and I am sure its development will contribute to THRIVE 2030's ambition. I look forward to working with Minister Farrell and across Government as THRIVE 2030 is implemented. I know the actions the Albanese Government takes under THRIVE 2030 will contribute to improving outcomes under the Strategy, including seeing people with disability enjoy the benefits of increased employment and accessibility.*

**The Hon Amanda Rishworth MP, Minister for Social Services**

## 1. Deliver success through comprehensive collaboration

Governments (at all levels) and industry collaborate across and within stakeholder groups to deliver the Strategy and grow a stronger and more resilient visitor economy.

**Indicative success measures:** 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.

The visitor economy is a complex ecosystem of many stakeholders. It therefore requires comprehensive and effective collaboration to ensure stakeholders act in concert to support achievement of industry goals. The COVID-19 pandemic has been a catalyst for increasing levels of collaboration across the visitor economy and calls for ongoing national leadership in cooperative approaches to address a host of complex and interconnected issues across both demand and supply side factors.

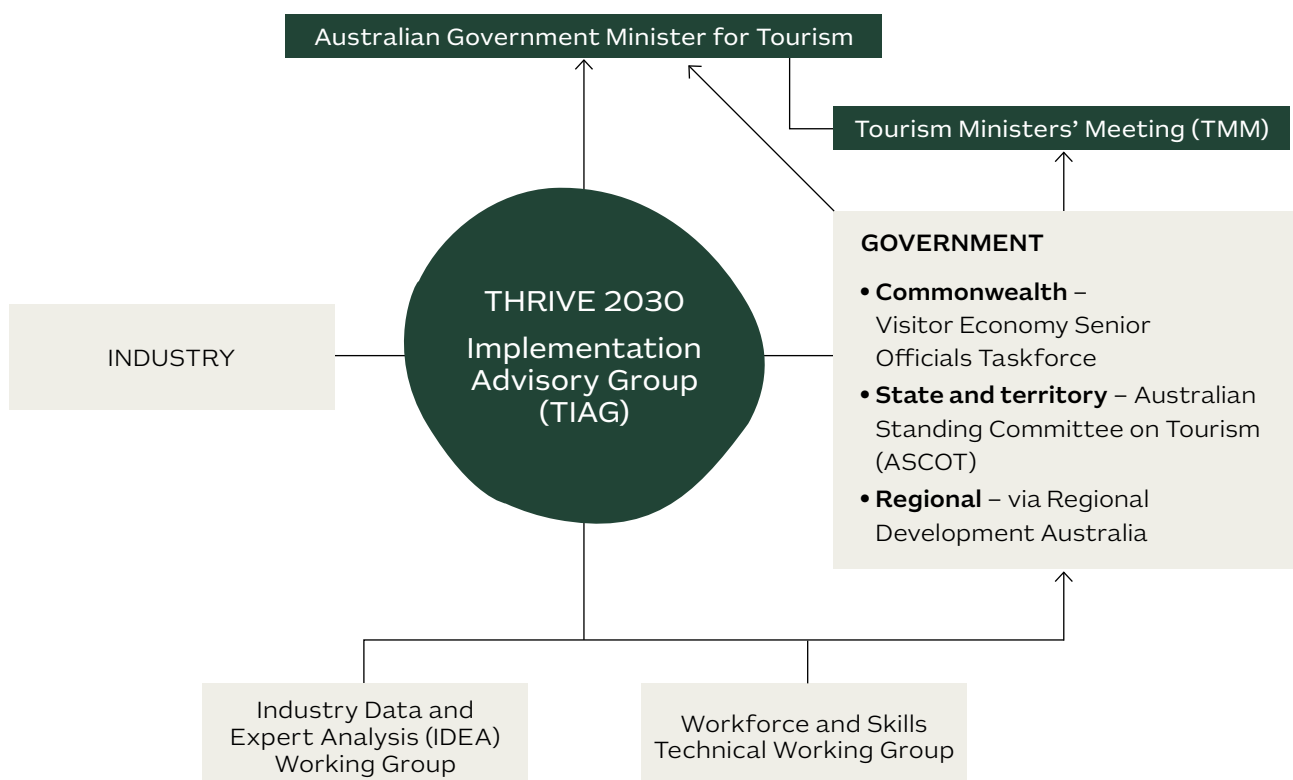
A key to the success of the Strategy will be a framework for effective collaboration in which industry leads and governments enable, and different levels of government cooperatively exercise levers available to them to create conditions in which industry can thrive (see Figure 10).

*The visitor economy requires confidence in the Australian health system and the measures in place to protect new and returning visitors. It is also equally important to protect the Australian community. I support the health measures prioritised in THRIVE 2030 and look forward to working across government to strengthen our future and harness all that THRIVE 2030 can achieve.*



**The Hon Mark Butler MP, Minister for Health and Aged Care**

**Figure 10: THRIVE 2030 collaboration framework**





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*Strengthening our domestic offering, whilst rebuilding our international capacity, will be the key driver for the visitor economy for the decade ahead. The THRIVE 2030 Strategy provides a roadmap to achieve this. As the largest provider of holiday nights in the country, the caravan and camping industry will form an integral part of achieving the objectives outlined in the THRIVE 2030 Strategy. We look forward to collaborating with government to achieve the 2030 vision for the industry.*



**Stuart Lamont, CEO, Caravan Industry Association of Australia**

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The framework recognises and incorporates existing collaborative engagement mechanisms throughout the jurisdictions while enhancing it with new and improved activities.

At the centre of the framework is the **THRIVE 2030 Implementation Advisory Group (TIAG)**, comprising a mix of industry leaders and government officials who will review progress and provide advice to the Australian Government Minister for Tourism to achieve recovery and long-term sustainable growth. The Advisory Group will consider implementation of the Strategy and report progress periodically to the Minister. The Advisory Group will be supported by a **Workforce and Skills Technical Working Group** and an **IDEA Working Group** (see Figure 10) to tackle the big, immediate challenges faced by the sector. Further working groups on specific projects can be established as priorities are assessed through the life of the Strategy.

This governance framework complements existing government forums such as the **Tourism Ministers' Meeting (TMM)** and the **Australian Standing Committee on Tourism (ASCOT)**, which will continue to operate to progress policy reform and ensure collaboration across governments. Both vertical and horizontal collaboration will be needed by industry and governments at all levels, including all jurisdictions, industries, businesses, local communities and First Nations peoples, to ensure the visitor economy achieves recovery and growth through coordinated marketing, destination development and business capacity building.

Collaboration and engagement at the local government level is also critical, as local governments intersect with the visitor economy in many ways, including visitor attraction, service delivery, and facilitation and regulation of infrastructure development.





Collaboration at this level is complex due to the large number of local government agencies across Australia so the Strategy seeks to leverage the existing Regional Development Australia (RDA) mechanism to facilitate engagement and active participation. RDA is an established national network of local leaders that works with all levels of government to support economic and community development. The Strategy will leverage a productive engagement of the RDA as part of its collaborative framework.

The Strategy will also see establishment of an ongoing Australian Government Visitor Economy Senior Officials Taskforce to maximise the benefits of good coordination across the wide range of agencies with visitor economy impacts. Austrade will continue its regular senior stakeholder forums as a valuable channel for engagement and collaboration.

An important centrepiece of both collaboration and destination development in this Strategy is the request to all states and territories to create new, or refresh existing, iconic destinations to attract new domestic and then international visitation. This will need an ongoing coordinated approach to investment, planning, development, workforce attraction and marketing. A more cooperative approach to creating experience-based reasons for people to travel will also be encouraged. For example, cultural and sporting events could be scheduled and marketed in a collaborative way that encourages regional dispersal and repeat visitation. We also need a stronger collaborative approach to tourism investment involving industry and governments at all levels to achieve investment in new tourism assets. Austrade will continue to work through existing inter-governmental forums to drive this. Other collaborative priorities include removal of planning barriers and innovative solutions to workforce shortages.

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*Recognising the importance of the visitor economy for Australia's growth and prosperity, I am pleased to provide my full support for the reissued THRIVE 2030 Strategy. As the Minister for Home Affairs and Minister for Cyber Security, I look forward to delivering the actions in the Strategy Action Plan relevant to my portfolio.*

*Modernising passenger facilitation and border clearance processes, including through the deployment of new generation SmartGates at major international airports, remains a key commitment. The Australian Border Force and the Department of Home Affairs are continuing efforts with partner agencies and industry on new and redeveloping air and sea ports; delivering on opportunities to co-design, coordinate and deliver the facilitation of travellers and cargo whilst protecting our border from current and future security risks.*

*I look forward to working together on the reissued THRIVE 2030, recognising opportunities for alignment with the comprehensive review of Australia's migration system and development of the Strategy: A Migration System for Australia's Future.*



**The Hon Clare O'Neil MP,  
Minister for Home Affairs**

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Image Credit: The Tourism CoLab.

## Regenerative tourism gives communities greater involvement

Regenerative tourism is a way for the visitor economy and local communities to work together to create authentic, respectful tourism experiences.

The Tourism CoLab is a social enterprise that helps visitor economies better balance social, environmental and economic factors.

Founder Dr Dianne Dredge says many destinations have become enthusiastic about regenerative tourism.

‘They can see that community support and social licence has been eroded,’ Dr Dredge says.

International destinations such as Flanders, Bay of Plenty, Hawaii and Iceland have adopted regenerative tourism. It allows them to take care of communities, nature and cultural heritage while staying profitable and resilient.

### An Australian first in regenerative tourism

The Tourism CoLab and Designing Tourism are currently applying regenerative tourism principles to Flinders Island.

In the past 2 years, Flinders Island has been popular with visitors wanting to get away from it all. But the island’s isolation means the influx of tourists has caused issues. These include food security issues, campsite overcrowding and other disruptions.

The local community believes tourism is part of their future. However, they want tourism to fit in with their way of life.

### Working with the community to create tourism experiences

The Tourism CoLab and Designing Tourism are co-designing the island’s future tourism with the local community and other stakeholders.

Over a 4-month period, it has engaged with businesses, tourism operators and individuals.

The process closely involves the islanders. This ensures outcomes reflect their view of who they are and how they want tourism to evolve.

A number of community, nature-based and local business projects will then be developed. This approach will provide new, authentic experiences that show the true nature of the island and its community.

‘It’s about finding a clear value proposition that balances the needs of communities, visitors and operators,’ Dr Dredge says.



## Working together to increase visitors to the nation's capital

Canberra occupies a unique position among Australia's tourism destinations. As the nation's capital, it is home to the Federal Parliament and government departments and agencies. It is also home to many of its national monuments, collections and attractions.

The National Capital Attractions Association (NCAA) represents tourist attractions and businesses across the Canberra region. Its members include:

- more than 20 Commonwealth agency attractions, such as the Australian War Memorial, Questacon, National Gallery of Australia and the Royal Australian Mint
- private sector attractions, such as GoBoat and the National Zoo and Aquarium
- tourism services
- accommodation providers
- organisers of events like Enlighten, Floriade and the National Balloon Festival.

NCAA General Manager, Debra Beetham, says Canberra is shaking off the perception that it is purely a public service town.

'We've got such a beautiful city with so much to offer,' Beetham says.

'Beyond the attractions, we have the restaurants, the bars, the vibe, the cafes by the lake and more that makes the Canberra region an attractive tourism destination. We're trying to build on that.'

### An opportunity to grow 'bleisure' tourism

Tourism Research Australia data shows that business travellers make up a larger share of domestic overnight visitors to the Canberra region than nationally.

This means that business-leisure, or the so-called 'bleisure', travel is a valuable opportunity for the region. With a wealth of iconic attractions, fine dining and exclusive exhibitions, business travellers could be encouraged to extend their trips. Tourism Research Australia estimates that increasing the average visit by a single day could increase annual visitor spend by 40 per cent.

'We're seeing a positive return to visitation,' Beetham says. 'The aim is for them to increase those nights – going from 2 nights to possibly 3 or 4 nights. So people are seeing the region as more of a destination.'

### Collaborating to attract more visitors

Beetham believes it is both possible and necessary for government and private attractions to collaborate to support increased visitation.

NCAA recently hosted a dinner for the directors of all the major attractions in the Canberra region. Beetham sees it as the beginning of stronger collaboration across the sector.

'It's an area that we are very aware that we have to continue to work on,' Beetham says.



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*As Minister for Communications, I offer my full support for THRIVE 2030.*

*The Albanese Government is delivering on commitments that support the reliable, high-quality and accessible connectivity needed to support the visitor economy.*

*Connectivity in regional and remote areas is particularly important for the visitor economy, and the investments being made through the Better Connectivity Plan for Regional and Rural Australia will improve mobile coverage, increase resilience and bridge the digital divide.*

*The visitor economy will benefit from upgrades being made to the National Broadband Network (NBN) that will give around 90 per cent of the NBN fixed line footprint access to speeds of up to 1 Gigabit per second by 2025, and enhance speeds and service on the NBN fixed wireless and satellite networks. NBN Co is also supporting increased access to business grade services, including in regional areas.*



**The Hon Michelle Rowland MP,  
Minister for Communications**

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## 2. Improve data and insights

Produce relevant, robust and timely data and insights that underpin business improvement, industry growth and investor confidence.

**Indicative success measures:** High stakeholder satisfaction with statistical reports and research in terms of quality and timeliness.

Relevant, robust and timely data and insights that are easily accessible, discoverable and cost-effective are critical tools that underpin decision-making, business growth and investor confidence. They are also 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.

The National Visitor Survey (NVS) and International Visitor Survey (IVS) are two national research sources that provide foundation data and insights to the industry. These data sets need to be maintained, and supplemented by additional data that provides more timely and comprehensive information to guide product development, business decisions, investment attraction, and policy making. Better quality and more granular data provided more quickly will help the visitor economy respond and capture opportunities to drive growth.

The ‘big data’ landscape is growing rapidly and has the potential to inform strategies for business improvement and visitor economy growth. Analysing these vast data sources can assist businesses and government bodies to better target markets and implement appropriate policy. Improvements in granularity and timeliness will help operators adapt their product to meet visitors’ expectations.

A critical part of this Strategy will be Commonwealth and state and territory governments collaborating to leverage and share existing data and develop and deliver the improved data that is needed to better inform decision-making and respond quickly to emerging trends. A short-term, rigorous investigative process to define data requirements and explore mechanisms to collate and usefully report this data will be prioritised in the early phase of the Strategy. The Government has established the IDEA Working Group to commence this work.

Governments will also need to collaborate with industry to develop a comprehensive set of visitor economy indicators which can be used to monitor and report on the performance of a range of measures that will indicate the success of this Strategy in revitalising the visitor economy.

The Strategy will also investigate and deliver data relevant for small and medium enterprise (SME) and micro-SME users and particular market segments (for example, First Nations tourism operators and the business events sector). Data providers will continually review and revise their communications and outreach strategies to ensure users are aware of the full suite of information available and how it can be used.

## Real-time tourism data that can influence the visitor experience

An Australian tourism tracking app is helping visitor economies to better understand visitor behaviour.

The University of Tasmania's Tourism Tracer app collects data on tourist behaviours. Insights include where they go, how long they stay, how many stops they make and even how fast they drive.

### How visitors can benefit

The app can also benefit visitors. In Tasmania's busy Wineglass Bay, you might receive a push notification that the car park is full. The app also has the ability to suggest nearby attractions or local lunch spots to visit while you wait. This reduces overcrowding and improves the experience for tourists and the local community.

### The tourism data evolution

Tourism data usually relies on people self-reporting where they went and when.

Tourism Tracer was a world first when it launched in 2016. It tracked tourists (with consent) every 2 seconds, to within about 10 metres of their location.

It has since been used throughout Australia, Sweden and Italy. The data provides insights into tourism activities, such as:

- how tourists are using a new cycling trail
- the value tourists bring to a port city after a cruise.

### Easy-to-understand data resonates with users

Tourism Tracer has been successful because the data can be easily understood and interpreted.

'We visualised the data with dots going around Tassie. People really loved it because it brought the data alive,' says Dr Anne Hardy, Project Lead at the University of Tasmania.

'We can get any data we want these days through technology. But unless we make the data resonate it's not going to be of any interest to people.'

### Improving the visitor experience

Tourism Tracer has a bright future.

'Over the last two years, the general population has changed their attitudes towards tracking,' says Dr Hardy.

'We know a lot more about the ethics of it, but we also know as a population that it can sometimes help.'

'You could use it as a one-stop-shop for destination management to improve the visitor experience but also bring back data for tourism authorities.'

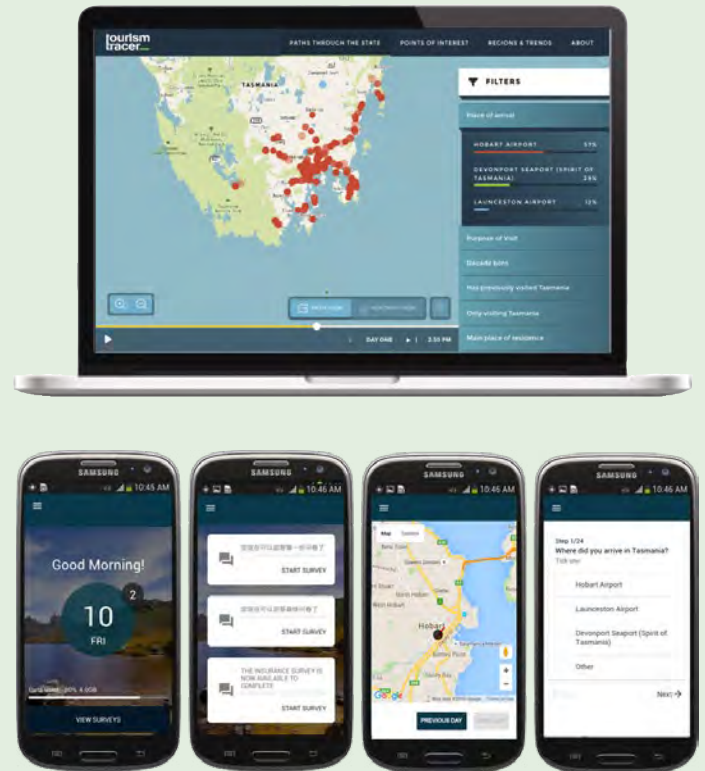


Image Credit: University of Tasmania.



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*I am pleased to support the reissued THRIVE 2030 Strategy. Australia's immigration function is critical to supporting the visitor economy. Our commitment to this function is demonstrated by an additional \$36.1 million provided to the Department of Home Affairs for 500 visa-processing staff to support the delivery of both temporary and migration programs.*

*We have also increased the migration planning program planning level to 195,000 for 2022-23, with a return of focus to skilled migration and commissioned a comprehensive review of Australia's migration system. The reissued THRIVE 2030 Strategy will help inform the development of the strategy A Migration System for Australia's Future.*



**The Hon Andrew Giles MP,  
Minister for Immigration,  
Citizenship and Multicultural  
Affairs**

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### 3. Grow a secure and resilient workforce

The sector has a world-class workforce with the right skills to address the needs of a diverse and evolving mix of visitors, and grow the sector's competitiveness, while maintaining a stable supply pipeline that can withstand changing market forces.

**Indicative success measures:** Workforce numbers; increase in workers from specific demographics (First Nations, apprentices, older Australians etc.); visitor and business operator satisfaction with workforce skill levels.

A well skilled, high-quality workforce of sufficient size to support visitation and service standard levels is required to deliver a world-leading visitor experience. For many years, the visitor economy has faced workforce shortages and challenges in attracting and retaining staff due to perceptions about poor industry conditions and concerns about the lack of long-term career opportunities. This has led to reliance on overseas workers and short-term, casual staff to address ongoing workforce shortages. This was exacerbated during the pandemic as the sector lost participation and foreign nationals returned overseas. The visitor economy has an urgent and immediate need to address shortages in the short term, while at the same time working on a strategy to address inherent historical structural challenges over the longer term.

Addressing workforce volume challenges requires striking the right balance between an expanded domestic workforce and an internationally sourced workforce. Immediate steps can be taken by attracting workers from under-represented cohorts on the local side while investing in visa processing and prioritising the return of temporary workers such as working holiday makers, international students and people recruited under programs like the Working Holiday Maker program and Pacific Australia Labour Mobility (PALM) scheme on the international side.

In the longer term, more needs to be done to elevate the sector as a career of choice by developing career paths and improving the industry's reputation on workplace conditions. Proactivity by industry to show leadership on workforce conditions and improving standards will help give industry an improved reputation.

The Government is developing an Employment White Paper to provide a roadmap for Australia to build a bigger, better-trained and more productive workforce – to boost incomes and living standards and create more opportunities for more Australians. Achieving these objectives should support the visitor economy. The Government will also develop *A Migration System for Australia's Future*, a strategy that will ensure the migration system serves Australia's national interests and complements the skills and capabilities of Australian workers.

Building on the Employment White Paper and the *A Migration System for Australia's Future* strategy, the Visitor Economy Workforce and Skills Strategy will drill down into the needs and challenges of the sector and develop relevant and targeted responses. It will deliver recommendations to address the long-term structural challenges of the sector and look at ways to elevate the industry as a career of choice.

To grow a secure and resilient workforce, the Government will invest in 'The Hub', run by the Accommodation Association of Australia, to become an employment and training portal; and also work with industry to develop marketing strategies to attract workers to our vibrant and dynamic visitor economy.

Improving workforce capability through better, more relevant education and training is critical. Providing fee-free TAFE places for tourism and hospitality, reforming vocational education and training to better align to industry needs, improving access to micro-credentials, and improving qualification portability will all help improve quality over the long term. Skilled migration can also support workforce capability, which can be used to strengthen our ability to offer quality visitor experiences.

A range of actions pursued in the Strategy will aim to increase job opportunities, enhance skills and create opportunities in collaboration with First Nations peoples. These will help drive and reinforce relevant aims of the *National Agreement on Closing the Gap*.

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*The interests of Australia's visitor economy are best served by a strong aligned strategy that defines the sector's potential and how it will be achieved. It is vital that industry and governments work together to return tourism activity in Australia to its previous growth trajectory. This collaboration needs to be informed by accurate, timely data and underpinned by a commitment to serving the needs of our visitors.*



**John Hart OAM, Executive  
Chair, Australian Chamber –  
Tourism**

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## Fostering business success for First Nations tourism

An innovative program is helping First Nations peoples enter and succeed in the tourism industry.

The Aboriginal Tourism Academy helps tourism operators develop and grow unique cultural experiences. It evolved from the Aboriginal Tourism Development Program (ATDP), which ran from 2016 to 2019.

### Ngalang Wongi Tours – Passion for Country underpins business

The ATDP helped Troy Bennell establish his cultural walking tour business, Ngalang Wongi Tours. Mr Bennell is a proud Noongar man. He has channelled his passion for Country into a successful business venture in the Bunbury region. Many of Ngalang Wongi's tour guides are Bennell's family members. They share the culture, knowledge and beliefs of their people through:

- storytelling
- art
- song
- dance
- bush foods.

This gives visitors a deeper, more authentic insight into the Noongar culture and the local area. They learn to:

- identify bush foods
- identify plants used in traditional bush remedies
- experience the natural bounties of the land, river and ocean.

The business is also benefiting younger family members. They are learning from their Elders and honing their skills as future cultural guides.

### Mentoring and financial support

The ATDP paired participating businesses with mentors who advised them about:

- starting a business
- marketing
- building capacity
- developing and delivering tourism products.

The program also provided funding for:

- training
- business establishment
- tourism industry distribution activities.

The ATDP ran for 4 years. Support was reduced over the duration of the program until each business was self-sufficient. The program helped 14 businesses become market ready. Another 7 were export ready. Some are now progressing into Tourism Australia's 'Discover Aboriginal Experiences' collective. The ATDP was developed by Tourism WA and the WA Indigenous Tourism Operators Council (WAITOC). It continues to operate as the Aboriginal Tourism Academy.

## 4. Embrace leading-edge business practices

Improve business capability to create competitive, resilient, and sustainable businesses that deliver high-quality products and services. Optimise uptake of technology to improve service delivery and business efficiency.

**Indicative success measures:** 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.

Business capability drives product quality, improves efficiency and enables innovation. The Strategy will encourage industry to embrace the latest business practices to create competitive, more resilient and sustainable businesses – for example, by adopting technologies to enhance the visitor experience and improve business efficiencies. The whole visitor journey is increasingly reliant on technology and digital applications. The modern traveller expects a seamless digital experience across their journey – from research to booking, concluding transactions, and undertaking the experience itself. Technology has the powerful ability to simultaneously enhance the travel experience, increase competitiveness and foster innovation. At the same time, industry must be alert to potential disruption and risks that technology can cause, for example, business dislocation and privacy and cyber security threats. Industry must be ready to embrace and address these challenges.

The COVID-19 pandemic has caused significant disruption to sales and distribution networks within the travel distribution system. This disruption, and ongoing uncertainties about how consumers and industry will manage risks associated with the new travel environments, will impact the nature and speed of recovery. Changes to the distribution system could also provide an opportunity to introduce new and more efficient systems and processes. The Australian Government, through Tourism Australia and Austrade, will work with industry to examine possible changes and help it facilitate adaptation and improve efficiencies. For example, the Australian Government is examining opportunities to support accommodation and tourism providers to set their own prices when guests contact them directly to book.

Governments need to work closely with industry to deliver capability support to those who need it most and in a manner that suits the micro and SME make-up of the visitor economy. This includes more effective promotion of existing support measures. Support should include practical assistance for resilience planning and implementing sustainability practices, as these are two significant contemporary challenges.

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*NSW is a strong advocate for a collaborative national approach to strengthening Australia's visitor economy.*

*THRIVE 2030 is aligned closely with the NSW Government's NSW Visitor Economy Strategy 2030, with a focus on workforce and skills, insurance, sustainability, aviation, Aboriginal experiences, nature-based tourism in national parks, accessible tourism and investment attraction, including in developing and sustaining cultural assets.*

*The NSW Government is committed to delivering the endorsed workplan for the State and Territory and Commonwealth Government and sees it as an important mechanism in maintaining constructive dialogue and coordinated responses to issues that are significant at the national and state level.*

*Our State is already enjoying the benefits that are being delivered through the cooperative development and implementation of THRIVE 2030 as well as the promotion of businesses engaged in the NSW visitor economy in international markets.*



***The Hon Ben Franklin MLC,  
Minister for Tourism, New  
South Wales***

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*Ecotourism Australia's new Corporate Strategy builds on our 30-year legacy as leaders in eco and sustainable tourism, accelerating the implementation of sustainability initiatives industry-wide. Our strategy supports THRIVE 2030 targets, increasing visitor expenditure and responding to visitor demand for quality sustainable practices. Supporting THRIVE 2030 will benefit our community as we continue to recognise and celebrate our certified operators and destinations in upholding the highest standards for ecotourism and sustainable tourism.*



**Elissa Keenan, CEO, Ecotourism Australia**

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The Australian Government is supporting this by partnering with the Australian Tourism Industry Council to enhance their Quality Tourism Framework, which will help businesses modernise and enhance product offerings.

Rising temperatures and climate change will continue to impact Australia's communities and industries, even with emissions reductions. Under the existing *National Climate Resilience and Adaptation Strategy 2021-2025*, governments will work collaboratively with industry to better anticipate, manage and adapt to the impacts of climate change, driving investment and innovation, providing information and services, including with resilience planning, and tracking progress. Industry and governments will also work together to develop and implement a tailored sustainability framework for the industry to provide practical assistance and tools to implement sustainability practices expected by consumers and local communities.

Another issue affecting the survival of many businesses in the visitor economy is the availability and affordability of public liability insurance. Some businesses, particularly SMEs, are finding it difficult to access affordable public liability insurance which is affecting their ongoing viability. Government and industry will continue to work together to monitor and support the accessibility and affordability of public liability insurance for visitor economy businesses.

Adopting quality standards and participating in quality accreditation schemes are effective ways to maintain and improve product and service standards. Industry should continue to pursue and improve quality accreditation schemes relevant to their markets and SME characteristics, and encourage maximum uptake of these schemes. Quality programs and operator success stories that simultaneously inspire best practice for all the industry can be leveraged in industry, government and business product promotion.







Image Credit: Currumbin Wildlife Sanctuary.

## Breathing new life into a Gold Coast tourism icon

Currumbin Wildlife Sanctuary is one of Queensland's oldest tourist attractions. It has been welcoming visitors and conserving local native wildlife since 1947.

After more than 70 years, the Sanctuary continues to educate visitors about conserving wildlife species and habitats.

Extinction Trail brings the park's conservation message into sharp focus. It uses state-of-the-art technology to link past extinction events with environmental risks for today's wildlife.

'Australia has many endangered and threatened species. Every person – no matter who they are – has the opportunity to help stop these animals becoming extinct,' says Michael Kelly, Currumbin Wildlife Sanctuary's General Manager.

### Technology brings dinosaurs back to life

The Sanctuary wanted to tell the story of extinction in an interactive, engaging way.

Extinction Trail lets visitors travel back to when dinosaurs and megafauna roamed the earth. It shows how they lived, how the earth changed and what caused the mass extinction event that wiped them out.

Visitors can interact with the experience through an augmented reality app. Using their phones, visitors can scan 'spotters' as they walk along the trail. This brings virtual dinosaurs back to life and triggers the sounds they would have made.

'The spotters help create an experience of walking through prehistoric times,' says Kelly. 'They also give some of our guests a little fright.'

### A popular new attraction

Extinction Trail opened in December 2021, just in time for the summer peak visitor period. Visitor feedback has been positive.

'Guests are loving the new Extinction Trail and are re-visiting regularly,' Kelly says.

The development of Extinction Trail was funded by the Australian Government under the *Recovery for Regional Tourism Program*, an initiative of the \$1 billion *COVID-19 Relief and Recovery Fund*.



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*The Northern Territory Government commends the Albanese Government on the work underway as part of THRIVE 2030 implementation, Australia's national strategy for tourism and the wider visitor economy launched in March 2022. National collaboration on expediting the removal of COVID-19 restrictions on the tourism sector has been instrumental to our recovery, including influencing the return of the \$60 million cruise sector to the Northern Territory.*

*THRIVE 2030 has already delivered key initiatives to address tourism and hospitality workforce shortages, vital to the recovery of the sector in the Northern Territory, including revisions to the Working Holiday Maker visa program, international student working hours, changes to the income means test for pensioners and seasonal workforce attraction programs.*

*We look forward to continuing to work with the rollout of THRIVE 2030, aligned to our Northern Territory Tourism Industry Strategy 2030, as we work towards our target of delivering \$3 billion in visitor expenditure in the Northern Territory by 2030.*



**The Hon Nicole Manison MLA,  
Deputy Chief Minister; Minister  
for Tourism and Hospitality,  
Northern Territory**

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## 5. Enhance visitor infrastructure

Deliver the right amount and quality of infrastructure to satisfy visitor needs, including accessibility requirements, and ensure it is developed and managed sustainably.

**Indicative success measures:** 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.

Visitor economy infrastructure needs and development should be considered in three dimensions – volume, quality and community needs. Infrastructure, which includes facilities at destinations, ports, and transport connections between ports and destinations, must be well planned and implemented ahead of demand to ensure that we have the scale of assets to meet demand. It is equally important that assets be high-quality and maintained so that they deliver a positive visitor experience. Recognising the important role caravan parks play in providing accommodation options, particularly in regional areas, the Government is providing \$10 million in grant funding to upgrade caravan parks across Australia.

Asset development must be planned, designed, constructed, managed and decommissioned in a sustainable manner which takes into account community expectations, environmental concerns, climate resilience and the wishes and priorities of traditional custodians. Visitor economy infrastructure provides amenity to communities as well as visitors and, when done well, will earn the support of, and improve the benefit to, local communities.

Forecasts of visitation, understanding the needs of visitors, and planning are key to meeting infrastructure needs and supporting visitor economy growth. If done correctly, the right infrastructure can be established in the right place at the right time to meet visitor needs. Through collaboration the Strategy will prioritise destination development around the country to continually offer new products to both domestic and international visitors. The Strategy calls for targeted destination development in each state and territory, with governments at all levels co-operating to attract and facilitate investment, including through regulatory reform and reducing red tape.

Both city and regional destinations require attention to maximise visitation as we recover from the pandemic. Cities have been devastated by the lack of international visitors and business travellers during the pandemic. Focused attention is needed in Phase 1 of the Strategy to revitalise city precincts and implement comprehensive strategies, including using events, to attract visitors back. Regions also need attention to unlock the potential of destinations that have the desire, capacity and capability to service visitors. This is important to enhance product offerings, encourage visitor dispersal and spread the economic and other benefits of the visitor economy.

To earn and maintain a ‘social licence’ to operate and avoid risks of ‘over-tourism’, visitor economy businesses, investors and developers must consider a broader range of issues beyond pure financial return. Investors must also consider consumer needs as demographics change, including accessibility and inclusion for all types of consumers. Governments must continue to work with industry to educate operators and investors regarding these new factors and encourage them to work more closely with local communities to deliver infrastructure that meets the needs of communities as well as visitors. Through the Government’s *Local Roads and Community Infrastructure Program*, the Government is working with local councils across Australia in delivering priority local infrastructure projects, such as roads and parks, which benefit both local communities and visitors.

Transport needs must be carefully planned for in order to accommodate demand ahead of growth, minimising strains on infrastructure. For regional locations, cooperation across levels of government is critical to ensure appropriate destinations can be opened up through provision of new or enhanced transport links. The Australian Government’s Aviation White Paper will set the long-term policies to guide the next generation of growth and innovation in the aviation sector. The White Paper will examine issues across the aviation sector, including how to maximise the aviation sector’s contribution to achieving net zero carbon emissions and how to support and regenerate Australia’s general aviation sector.

There is considerable opportunity to grow the cruise market in Australia. There is an ongoing challenge to convert cruise participation into domestic spend. To unlock this potential, Governments and industry will work together to address issues, notably border management and port infrastructure. Converting visitation into yield for regional communities that are increasingly visited by cruise passengers will be examined and addressed.

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*THRIVE 2030 provides true national leadership in highlighting the tremendous opportunities for the visitor economy by promoting accessible and inclusive travel, tourism, hospitality and leisure activities. People with mobility, vision, hearing or other accessibility needs are extraordinarily underserved with money to spend for activities that cater to their needs. GetAboutAble whole-heartedly endorses THRIVE 2030 and its initiatives that promote an accessible and inclusive visitor economy.*



**Yasmine Gray, Founding Director, GetAboutAble**

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Vision-impaired travellers on the top of Mount Kosciuszko, NSW.  
Image Credit: Cocky Guides.



## Case study

### Accessible features help the Eagle soar

People with disability can soar above Arthurs Seat State Park, thanks to the Eagle.

The Eagle is an aerial gondola system. It carries visitors from Dromana up to Arthurs Seat, 314 metres above Mornington Peninsula's beaches. Visitors enjoy views across Port Phillip Bay towards the skyline of Melbourne and beyond.



Image Credit: Arthurs Seat Eagle.

#### Making the Eagle accessible to all

The operators wanted the Eagle to be accessible to all visitors. They worked with the builder so the gondolas would slow as they approach stations.

The gondolas also detach from their cable at the stations. This allows step-free access for people using wheelchairs, walkers, canes or prams. The gondola doors are wide enough for wheelchairs to pass through easily.

#### Designed to accommodate people with disability

All aspects of the Eagle experience were designed to accommodate people with disability. This includes:

- ramps for access to the Base and Summit stations
- accessible Observation Deck and café
- clear signage at a height suitable for wheelchair users
- accessible toilets
- a Changing Places facility for people with complex disability.

The Eagle welcomes assistance dogs, and holders of Carer and Companion Cards travel free.

#### A warm welcome for all visitors

The Eagle trains all its staff to be aware and considerate of visitors' varying needs.

As part of their specialised training, gondola operators learn how to:

- load and unload motorised and non-motorised wheelchairs
- work with assistance dogs.

#### The importance of accessible destinations

A 2017 study by Tourism Research Australia revealed 3 of 4 people living with disability regularly travel. They spend about \$3.2 billion each year. The study showed others would travel if they were better supported.

With an ageing population, the need for accessible destinations is likely to increase.

Making the Eagle fully accessible ensures it appeals to the broadest possible market. This includes:

- people with disability
- older people with diminished mobility
- parents with babies or toddlers.



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*As Minister for Agriculture, Fisheries and Forestry, and Minister for Emergency Management, I am pleased to give my full support for the Government's THRIVE 2030 Strategy. The visitor economy is at the core of so many Australian communities.*

*Building strong, diversified, innovative and resilient economies is vital to reducing the impact of future disaster events and supporting the ongoing recovery of communities from natural disasters. I am pleased that the THRIVE 2030 Strategy includes initiatives to improve digital literacy and systems so that businesses can be better prepared for future disasters, and improvements to regional infrastructure to ensure communities are connected.*

*The visitor economy is also crucial to the success of Australia's agriculture sector, and I am committed to ensuring visitors have opportunities to experience Australia while supporting our workforce. Australian agriculture is vibrant and working in the sector provides immense rewards for visitors, including practical skills, firsthand experience of Australian life and making lifelong connections.*

*The THRIVE 2030 Strategy closely aligns with my portfolios' policies, initiatives and future workplan, and I look forward to supporting THRIVE 2030 to deliver fulfilling experiences for Australian visitors and high-quality outcomes for the agriculture, fisheries and forestry sector, while supporting a more prosperous and resilient visitor economy for communities across Australia.*



**Senator the Hon Murray Watt, Minister for Agriculture, Fisheries and Forestry; Minister for Emergency Management**

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*Tourism is vital to Australia's economy – creating jobs, attracting investment and sustaining communities. The Queensland Government welcomes the THRIVE 2030 national visitor economy strategy and is committed to working with the Australian Government in a collective effort to grow the nation's tourism industry. Tourism always benefits when we work in partnership, and through this collaboration we can cement Australia's position as a world-leading tourism destination. With changing dynamics around domestic and international visitation, this collaboration is even more important. In Queensland, industry and government have pledged a joint approach to driving growth of the visitor economy guided by the Towards Tourism 2032 tourism industry strategy and making the most of the opportunity for our state from hosting the Brisbane 2032 Olympic and Paralympic Games. The THRIVE 2030 national strategy confirms our shared vision and determination to make the most of all the opportunities.*



**The Hon Stirling Hinchliffe  
MP, Minister for Tourism,  
Innovation and Sport,  
Queensland**

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## 6. Build markets and attract visitors

Attract high-value visitors through coordinated innovative, focused and personalised visitor attraction strategies that are targeted at a re-balanced mix of domestic and strategic international markets in alignment with the Australian Government's intention to deepen engagement with the Indo-Pacific region.

**Indicative success measures:** 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.

Emerging trends and pressures on traditional long-haul markets mean we must adopt a unique and targeted approach to market development. As international borders have re-opened, we will be swift and agile to attract international visitation from these markets. Targeted and nuanced marketing appropriate for different markets, and developing appropriate product, will be needed. In the longer term, improved data, market research and strengthened bilateral relationships will support a strategy to build a diversified portfolio of markets, incorporating historical core markets as well as new and emerging markets that present growth opportunities.

### Domestic market

The importance of the domestic market to Australia's visitor economy is acknowledged and can be leveraged further. It accounted for 64 per cent of total visitor spend in 2019 and is critical to sustaining regional economies.<sup>21</sup> Accordingly, the Strategy will maintain a long-term focus on sustaining and growing the domestic market. Improved consumer awareness of domestic options and product adaptation by providers observed during the COVID-19 pandemic should be continued and leveraged to accelerate growth further. To be successful in the long-term, visitors (both domestic and international) will need a reason and motivation to visit and spend. This will be secured through ongoing product development, experience and asset enhancement, improving the workforce across the country, and better connectivity to drive dispersal.

21. TRA analysis; 48 per cent of domestic visitor spend is in the regions (2019 calendar year).



## Queensland winemakers unite to attract visitors away from the coast

Despite a 160-year history, Queensland often flies under the radar as a wine tourism destination. This is because the industry is smaller and more diverse than better known wine regions.

In 2019, the Queensland Wine Industry Association (QWIA) decided to take on the larger regions. It created an agritourism experience that is much greater than the sum of its parts.

Former QWIA President Mike Hayes says Queensland winegrowers had not previously thought of themselves as a single region.

‘We needed to come together behind a single cause – to promote Queensland wine,’ Hayes says.

### Forging the Vine and Shine Trail

The ‘Vine and Shine Trail’ winds from the Gold Coast through south-western Queensland and up to the Sunshine Coast hinterland. The trail connects more than 70 wineries and cellar doors. It showcases the individuality, personal touch, terroirs and emerging grape varieties that characterise the Queensland industry.

QWIA secured \$460,000 in funding from Wine Australia and the Queensland Government for product development and collaborative marketing. To make the most of the funding, the campaign was mostly digital. It included an interactive website and trail map, and public relations and social media activations.

### Digital campaign reaches local and international audiences

The campaign reached more than 49 million people. This included over 4,200 website visits and 1.8 million social media views.

The digital format reached a broad international audience while also targeting the domestic market. This has proven invaluable during the disruption caused by COVID-19.

‘Our wines have been a well kept secret for too long,’ Hayes says.

‘The Vine and Shine Trail was – and still is – an excellent way to encourage visitors to explore what we have to offer.’

‘After a 160-year journey, Queensland wine has come of age. It is being taken seriously on both a national and international level. Key to this success was the industry working together across Queensland.’



*In my capacity as Chair of the Council of Australasian Tourism and Hospitality Education (CAUTHE), which represents 32 tertiary institutions in teaching and researching tourism, hospitality and events in Australia and New Zealand, I would like to congratulate everyone involved in putting together this national Strategy. We agree with and support the goals of the Strategy. Universities and tertiary education institutions can play an active part in informing and implementing this Strategy, including in relation to international education, workforce development, and data and research. We are acutely aware of the value of international students to the Australian workforce, and as advocates and partners for Australia internationally. While studying in Australia, international students also make an important socio-economic contribution.*



**Professor Kirsten Holmes,**  
immediate past Chair, Council  
for Australasian Tourism and  
Hospitality Education

## International market

Tourism Australia's existing 15 core markets historically account for approximately 80 per cent of international visitor expenditure pre-pandemic and will continue to be a key focus under the Strategy. Forecasting suggests they will continue to make up the bulk of inbound expenditure into the future. However, given COVID-19 impacts, differences in markets re-opening, and evolving travel trends, there are imperatives and opportunities to reassess, diversify and modify the focus on different international markets.

**Figure 11: Australia's core international visitor markets**

Core Markets		
• Canada	• China	• France
• Germany	• Hong Kong SAR	• India
• Indonesia	• Italy	• Japan
• Malaysia	• New Zealand	• Singapore
• South Korea	• United Kingdom	• United States

## Market diversification and expansion opportunities

Governments and industry will work together to develop market diversification strategies and ensure our products and services are attracting a more diverse range of travellers.

Australia will need to continue to focus on 'traditional' markets such the United States, United Kingdom, Europe, Japan and China given historical performance, ongoing market growth potential, latent demand and regional dispersal opportunities.

Consistent with the Australian Government's ambition to deepen engagement with the Indo-Pacific region, greater focus will also be required on taking advantage of opportunities to attract more visitors from India and Southeast Asia (Singapore, Vietnam, Indonesia and Malaysia), including through building new strategic partnerships. Governments and industry will work together to deepen engagement in the region, including on the development of the Southeast Asia Economic Strategy to 2040, which will set out a pathway to strengthen Australia's economic engagement with the region.

Emphasis within markets will shift as the world recovers from the pandemic and adjusts to new travel behaviours, with resultant changes in global demand. In the medium term, it is expected that the highest yielding travellers will continue to come from Western and North Asian regions, with Southeast Asia growing in importance towards the end of the decade.

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*Bushfires and COVID-19 will not be the last crises to impact regional Australia. To enable resilience in the regions, we need strong leadership from the Federal Government along with a well-resourced national long-term tourism strategy that is bold, is brave, and sets regional specific targets that are not only achievable, but measurable. When you live in the regions, you see the direct impact the visitor economy has on entire communities and so I look forward to the release of THRIVE 2030 in the hope that it will adequately support the rebuilding of the regional visitor economy.*



**Coralie Bell, Chair, Australian Regional Tourism**

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*Despite the adversity of the last few years, enormous opportunities lie ahead for the national tourism sector, as outlined in the THRIVE 2030 visitor economy Strategy.*

*In Western Australia alone, in 2019 the tourism industry contributed nearly 100,000 jobs and \$13.5 billion in visitor spend to the state's economy, including nearly \$6 billion in our regions. The WA Government has committed historic levels of funding to the WA tourism industry to ensure the sector returns to – and then exceeds – these activity levels.*

*In doing so, we have affirmed our commitment to both diversifying the WA economy, and to driving long-term sustainable growth in the national tourism sector, in line with the THRIVE 2030 Strategy.*

*The WA Government is committed to working collaboratively with the Australian Government and all states and territories to deliver the vision outlined in the THRIVE 2030 Strategy, to reignite the national visitor economy.*



**The Hon Roger Cook MLA,  
Deputy Premier; Minister for  
Tourism, Western Australia**

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Diversification is not only about markets but also about segments. Opportunities exist in growing our market share of high-yield visitors seeking luxury experiences who have a strongly positive impact on the economy. Events can attract a diverse range of high-yield visitors. The Green and Gold Decade of major sporting events, culminating in the Brisbane 2032 Olympic and Paralympic games, will provide Australia's visitor economy with significant opportunities to leverage the expected benefits of increased visitation that these international events will provide. We can also be looking to attract growing traveller segments – such as people living with disability and multi-generational family groups – as well as capitalising on the ongoing dominance of Baby Boomers and the proportional rise of the Millennial traveller, increased traveller demand for sustainable tourism, and opportunities to combine leisure travel with business through flexible working arrangements.

## **Visitor attraction**

### **Domestic**

Innovative approaches will be needed to motivate Australians to travel more in Australia, undertake more activities and spend more. Successful domestic strategies will continue to sustain a greater contribution from the domestic market into the future.

### **International**

Competition for the international visitor will be fierce and travel costs unpredictable, so we will need to be prepared with unique and attractive visitor propositions. Marketing must include demand generation as well as conversion activities. The business, events, education and corporate travel markets will need focused attention to adapt to changed circumstances brought about by the pandemic. Innovative approaches will be needed to highlight Australia's quality products and competitive advantages that appeal to the consumers in these markets. This includes recognising a growing consumer demand for sustainable tourism, and the need to reduce carbon emissions across the sector.

Across the board, visitor attraction strategies for the international market will be directed at high-yield visitors that drive economic growth, in accordance with Australia's status as a long-distance, relatively expensive destination.

Across segments, businesses will need to implement and effectively promote appropriate mechanisms to provide consumers with the confidence to travel. This extends to having in place appropriate health and safety measures and also adjusting and adapting to flexible booking arrangements and promoting availability of appropriate travel insurance products.



## GoBoat changes tack during the pandemic and doubles in size

Based in Canberra, GoBoat offers European-style electric picnic boats that customers don't need a boat licence to operate. The company has doubled in size in two years, thanks to smart investments and savvy marketing.

It wasn't all smooth sailing. In early 2020, GoBoat opened a location on the Gold Coast. The company wanted to tap into the international visitor market. But overseas visitors vanished when bushfires and COVID-19 hit.

'We decided to cut our losses,' says Founder and Managing Director Nick Tyrrell. 'Luckily our assets are portable, so we started looking for another location.'

### Making investments that would pay off

Seeing the opportunity in domestic tourism, GoBoat looked for a new location with:

- high population density
- plenty of 20 to 40-year-olds
- an under-used waterway.

'We had to work out whether the downturn was transitory or systemic,' says Tyrrell. 'I realised the growth trajectory would continue after COVID-19 so we made investments that would pay off when the market recovered.'

GoBoat's market research paid off. It opened 3 new sites in Brisbane and Sydney in 2021 to great success.

### Preparing early and looking for growth opportunities

With a 12-month lead-time on boats made overseas, GoBoat ordered early. The company advertised to a domestic market and limited in-person group crossover, so customers felt COVID-safe.

GoBoat also moved much of its guest onboarding online, including familiarisation videos and waivers. 'These small things reduced face-time for staff, and improved efficiency,' Tyrrell says.

'It was about doing as much as we could to stay open. We increased our capacity so we could take advantage of demand when it returned. Knowing our markets and constantly looking for growth opportunities has paid off.'



## 7. Grow unique and high-quality products, including First Nations experiences

*As the global visitor economy becomes more complex, the role of Australia's travel businesses and their professionals that power our outbound travel sector will be crucial. Prior to the pandemic, international travel was Australia's largest import contributing greatly to the stability in the Pacific as well as being the foundation of our aviation connectivity. Having Australia's largest import recognised in the THRIVE 2030 Strategy is a critical step in the next evolution in Australia's visitor economy.*



**Dean Long, CEO, Australian Federation of Travel Agents**

Provide high-quality products and services that showcase Australia's competitive advantages such as our natural, built and cultural attributes, including our First Nations cultures, vibrant cities and authentic regions.

**Indicative success measures:** Number of new visitor economy businesses/experiences; increase in the number of businesses participating in quality accreditation schemes; visitor satisfaction/quality measure indexes.

Australia offers many outstanding, unique cultural and natural attractions that are sought after by international and domestic visitors. Chief among our unique offerings is the ability to experience the world's oldest enduring culture – that of Australia's First Nations peoples. This Strategy will drive the respectful embedding of First Nations cultures into Australia's brand positioning and support related product development. Through a range of actions, developed in collaboration with First Nations peoples, the Strategy will help drive and reinforce relevant aims of the *National Agreement on Closing the Gap*, including Target 8 on economic participation.

Australia is renowned for its wide range of natural attributes, both coastal and inland, that are extraordinarily attractive to visitors and which we should continue to leverage. Equally, we should continue to promote our strong reputation of being a welcoming, easy-going people, as this provides a further unique point of difference that can make visitors choose an Australian destination over an alternative.

Tailored approaches will be required to address issues that are unique to visitor economies in both city/metropolitan and regional destinations.

Cities were hit hard by the pandemic, partly due to their reliance on international and business visitation. To recover and grow, cities need to reassess and offer compelling new experiences, and continue to work on strategies that deliver infrastructure in a way that benefits visitors and residents alike.



## Victoria's silo art trail brings tourists to regional townships

Grain silos dot the landscape in the Wimmera Mallee region, the heart of Victoria's wheat belt. Once purely functional, 11 used and disused silos are now part of a 200-kilometre open-air art experience.

In 2016, the first Victorian silo artwork was completed as a community project in Brim. Like a previous silo artwork in Western Australia, it brought new visitors to the area.

Yarriambiack Shire Council, the Victorian and Australian governments, GrainCorp and an international street art agency collaborated to create the Wimmera Mallee Silo Art Trail.

Art murals now connect towns across Yarriambiack, Buloke, Hindmarsh and West Wimmera shires.

The silo art trail winds through:

- Brim
- Kaniva
- Nullawil
- Sea Lake.
- Gorokey
- Patchewollock
- Rupanyup

A unique silo experience is also being developed in Rainbow, at the edge of Victoria's Big Desert.

The Trail celebrates regional people and themes in artworks by renowned local and international artists. Each mural tells a unique story about its host town.

### A tourism drawcard for regional towns

Silo art throughout Australia attracts visitors to townships that haven't had a traditional tourism offering. However, the challenge for the Wimmera Mallee Trail was how to get visitors to stay longer and spend more locally.

With funding from the Victorian Government, the 4 councils and the Barenji Gadjin Land Council are now working to expand the visitor experience. This includes:

- a unique brand to differentiate the trail from other public art throughout the state
- connecting the Trail to Country by celebrating First Nations heritage
- a program of events including street art festivals and after-dark activities
- piloting online booking and accommodation
- local business support.

This approach offers visitors a unique experience in places they may not otherwise go. It is strengthening the region's tourism offering and creating jobs in the visitor economy.



Image Credit: Buloke Shire Council.



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*After more than two devastating years the accommodation sector is still finding its way back to prosperity. It is going to be a long road to anything like the success we enjoyed pre-pandemic, but the best way to speed recovery is to have a solid plan. The THRIVE 2030 Strategy is a great example of industry and government working hand in hand. We still have huge challenges ahead, but if we continue to collaborate, listen to each other and act towards a common goal we are already halfway there.*



**Michael Johnson, CEO, Tourism Accommodation Australia**

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There has been disparity in how regions benefit from, and participate in, the visitor economy, both before and during the pandemic. Many regional visitor economy businesses only attract visitors at certain times of the year due to their seasonal nature. There is more work to do to spread more equitably the economic and community benefits of the visitor economy. For example, the events sector can help drive a greater regional spread of benefits by locating events outside of traditional city locations. Likewise, education visitors offer potential through greater enrolment at regional institutions. Offering greater opportunities to experience First Nations cultures, history and traditions will also help to increase visitor numbers to regions and provide visitors with a memorable connection to the region.

To be successful, regions must be identified and prioritised according to their readiness and ability to support visitation. Regions require adequate infrastructure to support visitor needs and must have businesses capable of delivering services, including through availability of a skilled workforce. The Strategy recognises the importance of regional visitation by establishing a regional visitor expenditure target that will monitor activity in regional Australia and help determine if Strategy actions are successful. A stronger specific focus in Austrade on the regional visitor economy through focused regular engagement with key stakeholders will drive attention and focus for this important sector, along with strong promotion of innovative collaborative approaches within locations and regions.

We must develop new and innovative products and experiences, and refresh existing ones, to attract first time and repeat visitors. We can do this by leveraging the factors that we know drive destination choice for high value travellers and which align to our unique offerings. These include nature and wildlife, food and wine, aquatic and coastal experiences, history and heritage, and friendly and welcoming locals. We will also explore new product segments where they align with our offering, such as the high-yield segment of travellers seeking luxury experiences.







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*As the Victorian Minister for Tourism, Sport and Major Events, I look forward to working with fellow ministers and leaders from across the nation to deliver THRIVE 2030's action plan, ensuring our national tourism industry remains vibrant and sustainable.*

*Victoria is back and open to the world, offering a packed calendar of major events and breathtaking natural attractions, providing significant benefits to the state's economy.*

*The Victorian Government is committed to ensuring our tourism, events and hospitality sectors continue to grow and prosper. This sentiment is backed by our Visitor Economy Recovery and Reform Plan, which is a roadmap for how we are strengthening the state's tourism offering through the development of new experiences, products and infrastructure, and, most importantly, our people.*



**Steve Dimopoulos MP, Minister for Tourism, Sport and Major Events, Victoria**

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*Our native wildlife and ecosystems are incredible and the national tourism offering provides unique opportunities to connect visitors with Australian nature. The THRIVE 2030 Strategy clearly articulates opportunities and actions to reach sustainable outcomes via diversity, collaboration and modernisation; and speaks to evolving concerns for environment and pro-sustainable practices. Aspiring to a reformed approach, this Strategy is a welcome asset for our tourism industry's ongoing development, resilience and future success.*



**Nicola Craddock, Executive Director, Zoo and Aquarium Association**

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Events will also be a critical part of our product portfolio to maximise visitation. Sporting, artistic, cultural and especially business events are all effective at driving high-yield visitation. Events can also play an important part in kick-starting recovery, with new and innovative events providing the catalyst to drive visitation. Mass participation events are also particularly important in driving new business and investment, including in regional locations. A coordinated approach to planning and implementing events at a national, state and local level should be taken to optimise the event opportunities and align them with business, trade and investment benefits. This will be particularly important in the lead up to major events such as the 2032 Olympic and Paralympic Games in Brisbane, where a strong focus on pre-games preparation and lead up events will bring strong visitor economy benefits.

The business events industry has the potential to be a key catalyst for post-pandemic recovery through the role events play in building and re-establishing networks within and across numerous sectors, building business confidence, attracting trade and investment (including in the tourism industry), fostering innovation and supporting the knowledge economy. Event delegates (and often their families) contribute further to visitor economy businesses through their local spend on accommodation, food and drink, and experiences. Additionally, business travel, which has historically been a cornerstone of aviation and metropolitan accommodation, was thoroughly disrupted by COVID-19. It represents an opportunity to entice business people to travel again for work. The Australian Government is updating the International Visitor Survey and National Visitor Survey to measure the important economic and social contribution of business events to the Australian economy over the long-term.

Like many areas within the visitor economy, recovery and growth for the business events industry will need to be underpinned by collaboration between governments and industry (including the role of the public sector as a client, in developing improved data to underpin decision-making, and exploration of future incentives programs) and cooperation across jurisdictions to prevent unproductive competition to attract events in a new and uncertain environment.

Sustainability practices must also be embedded into all products and experiences, and businesses need to effectively promote their sustainability credentials to maximise market penetration and conversion.

In the business and international education markets, we know that quality of product, customer service and infrastructure are key drivers for visitation, as is a safe and welcoming environment. We must continue to excel on these points including by innovating product and encouraging longer and repeat stays.

## Case study

### Geotourism puts Glen Innes Highlands on the map

In the Northern Inland region of New South Wales, Glen Innes Highlands is embracing an emerging global trend: geotourism.

Geotourism is a nature-based experience that describes how geology shapes the character of a region. It uses storytelling to connect:

- landscapes, landforms and the night sky
- flora and fauna
- First Nations and European cultural heritage.

Geotourism helps communities develop experiences that protect and explain the natural and cultural heritage of important regions. This ensures tourism has community acceptance and delivers socio-economic opportunities.

#### A region rich in natural and cultural heritage

The Glen Innes Highlands region boasts major landforms, waterways, vegetation, wildlife and cultural heritage. It aims to become a model geotourism destination in line with the National Geotourism Strategy.

Local First Nations peoples, state government agencies, local councils and other interest groups are working together to develop 'geotrails'. These will connect the region's:

- Australian Standing Stones monument
- local mining heritage sites
- World Heritage national parks
- museums
- festivals and events.

The geotrails being developed include:

- New England Rail Trail
- Glen Innes Highlands Skywalk
- Stonehenge Recreational Reserve
- World Heritage Way
- World Heritage Walk
- State Tourist Drive 11.

The geotrails will be brought to life through interactive visual and sound experiences and digital interpretations.

UNESCO recognises 177 Global Geoparks in 46 countries. Glen Innes aims to be 1 of 3 Australian georegions nominated as an Aspiring UNESCO Global Geopark. The others are:

- the Ku-ring-gai Chase National Park and Northern Beaches coastline of New South Wales
- the Murchison region of Western Australia.



Image Credit: Glen Innes Severn Council.



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*I am pleased to provide my full support for the revised THRIVE 2030. While we have seen promising signs of recovery in the ACT visitor economy, tourism businesses continue to be affected by many of the challenges faced nationally, including skills shortages and connectivity to international markets. A thriving national visitor economy benefits all states and territories and a coordinated national approach to the biggest challenges facing tourism will strengthen recovery. I look forward to working with other Tourism Ministers and with industry to achieve the ambitions set out in the revised THRIVE 2030 strategy.*



**Andrew Barr MLA, Chief Minister; Minister for Tourism, Australian Capital Territory**

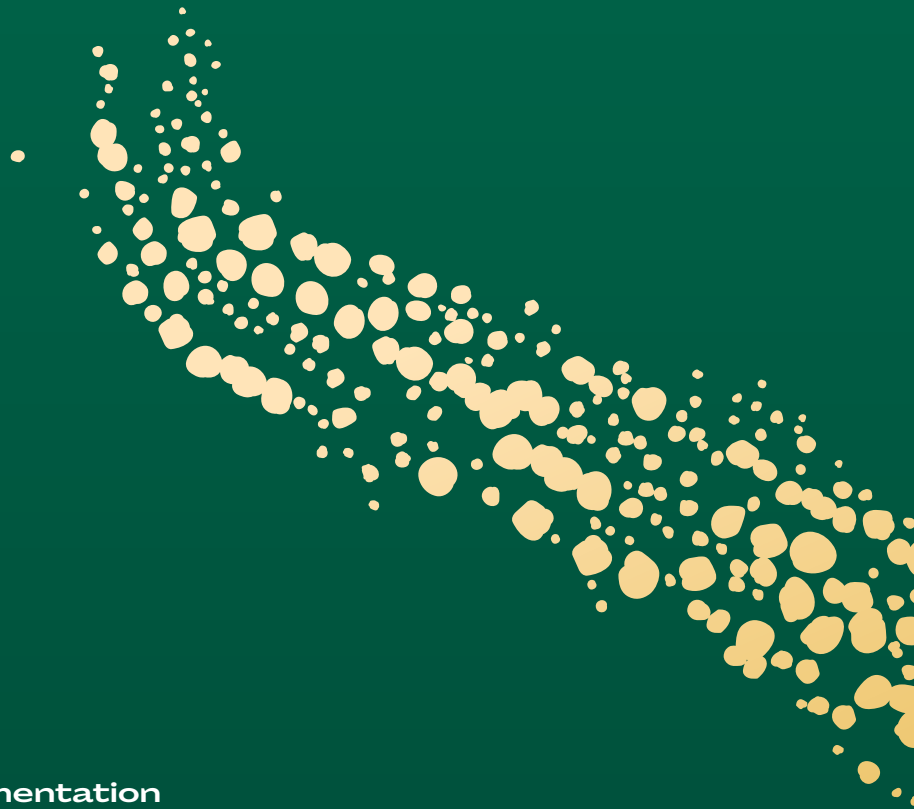
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# THRIVE 2030 Strategy Action Plan

## Phase 1: Recovery 2022–2024



### **The Strategy in action – implementation**

While the challenges ahead are significant, and delivering a re-imagined visitor economy will be demanding, by working together in pursuit of the THRIVE 2030 vision and actions we are confident we can achieve the vibrant, competitive and resilient visitor economy that this Strategy aspires to.

Achieving this in practice will come through working together to deliver on action plans that are aligned to the Strategy's guiding principles and priorities. The Action Plan for Phase 1: Recovery has been prepared and it sets out clearly a series of actions for each Strategy priority and who is responsible to lead each action. We look forward to working on these actions together to achieve our goal to return the visitor economy back to sustainable growth, delivering benefits, prosperity and opportunities for all.



# Introduction

The Action Plan for Phase 1: Recovery sets out clear actions for each strategy priority and which entities are responsible for leading those actions. Many actions require multiple entities and jurisdictions working together to return the visitor economy to sustainable growth.

List of shortened forms	
AAoA	Accommodation Association of Australia
ABF	Australian Border Force
ABS	Australian Bureau of Statistics
Austrade	Australian Trade and Investment Commission
ATO	Australian Taxation Office
DAFF	Department of Agriculture, Fisheries and Forestry
DCCEEW	Department of Climate Change, Energy, the Environment and Water
DoE	Department of Education
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
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
RDA	Regional Development Australia
RTOS	Regional tourism organisations
S&TG	State and territory governments
SWA	Safe Work Australia
TA	Tourism Australia
Treasury	Department of the Treasury
VE industry	Visitor economy industry

# Priority 1:

## Comprehensive collaboration

**Governments (at all levels) and industry collaborate across and within stakeholder groups to deliver the Strategy and grow a stronger and more resilient visitor economy.**

Central to this will be establishing a framework for effective collaboration in which industry leads and governments enable, and equally where different levels of government cooperatively exercise levers available to them to create the conditions in which industry can thrive.

To help deliver this priority, the THRIVE 2030 Implementation Advisory Group has been appointed to oversee implementation of the Strategy and report periodically to the Australian Government Minister for Tourism on progress.

**Indicative success measures:** 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.

No	Action	Action lead (Partners)
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)

Actions marked \* are complete.



## Priority 2: Improve data and insights

**Produce relevant, robust and timely data and insights that underpin business improvement, industry growth and investor confidence.**

Research and development will be prioritised in the first phase of the Strategy through the creation of an Industry Data and Expert Analysis (IDEA) Working Group. An early action will be the development of visitor economy performance indicators that will be used to monitor and measure the success of this Strategy in revitalising the visitor economy.

**Indicative success measures:** High stakeholder satisfaction with statistical reports and research in terms of quality and timeliness.

No	Action	Action lead (Partners)
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	Develop new products aimed at the needs of particular segments of the sector. <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	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).	Austrade (S&TG, VE industry)
2.5*	Implement a visitor expenditure target specifically for regional Australia to help drive and monitor visitor economy growth in regional Australia.	Austrade
2.6	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.	Austrade

*Actions marked \* are complete.*

## Priority 3: Grow a secure and resilient workforce

**The sector has a world-class workforce with the right skills to address visitor needs and grow the sector’s competitiveness, while maintaining a stable supply pipeline that can withstand changing market forces.**

Addressing workforce challenges will be an early priority. Building on the Government’s Employment White Paper, a Visitor Economy Workforce and Skills Strategy will strike the right balance between an expanded domestic workforce and an internationally sourced workforce.

A range of actions pursued in the Strategy will aim to increase job opportunities, enhance skills and create opportunities for First Nations peoples. These will help drive and reinforce relevant aims of the *National Agreement on Closing the Gap*. Immediate steps can also be taken by attracting workers from underrepresented cohorts on the local side, while prioritising the return of temporary workers such as working holiday makers and international students on the international side.

**Indicative success measures:** Workforce numbers; increase in workers from specific demographics (First Nations, apprentices, older Australians etc.); visitor and business operator satisfaction with workforce skill levels.

No	Action	Action lead (Partners)
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	<p>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, 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 <i>Australian and New Zealand Standard Classification of Occupations</i> 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>Austrade (S&amp;TG), ABS</p> <p>ABS</p> <p>Australian Chamber – Tourism</p>

Actions marked \* are complete.



No	Action	Action lead (Partners)
3.3	<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, <i>Transition to Work</i>, and <i>Launch into Work</i> employment programs.</li> <li>• Maintain services that connect people wishing to work in regions with job vacancies, reskilling support, and relocation advice including through the <i>Local Jobs Program</i>.</li> <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 Association of 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, DSS, Austrade (S&amp;TG, NIAA, VE industry including AAoA)</p> <p>NIAA</p> <p>DSS (Austrade, DEWR), Clubs Australia</p> <p>DEWR</p> <p>DEWR</p> <p>DEWR</p> <p>VE industry, including AAoA 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 Australian Chamber – Tourism</p> <p>Home Affairs</p>

No	Action	Action lead (Partners)
3.5	Home Affairs is prioritising the processing of student visa applications, along with other priority economic migrants, particularly from those who are offshore to enable them to enter Australia and contribute to Australia's economic recovery.	Home Affairs
3.6	<p>Improve access by SMEs 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>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	<p>Encourage mutual recognition for foundational credentials (such as the <i>Responsible Service of Alcohol (RSA)</i>) to support mobility of workers across jurisdictions, especially in relation to seasonal hospitality work.</p> <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



No	Action	Action lead (Partners)
3.11	<p>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> <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, SWA, VE industry, (DEWR)
3.12	<p>Encourage larger industry operators to implement formal in-house training and diversity programs.</p> <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 develop micro-credential training that is linked to the formal training system.</li> </ul>	<p>VE industry</p> <p>VE industry, including Australian Chamber – Tourism</p>

# Priority 4: Embrace leading-edge business practices

**Improve business capability to create competitive, resilient and sustainable businesses which deliver high-quality products and services. Optimise uptake of technology to improve service delivery and business efficiency.**

Governments will work closely with industry to deliver capability support to those who need it most and in a manner that suits the micro and SME make-up of the visitor economy. This includes more effective promotion of existing support measures, industry championing the adoption of quality standards, reducing emissions and improving energy efficiency, and participation in quality and sustainability accreditation schemes. Support should also include practical assistance for resilience planning and implementing sustainability practices in response to climate change as these are two significant contemporary challenges.

Aligning closely with collaboration, effective delivery of this priority cannot happen in isolation. Quality programs and operator success stories can be leveraged in industry, government and business product promotion that simultaneously inspire best practice for all the industry.

**Indicative success measures:** 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.

No	Action	Action lead (Partners)
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> <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>	<p>Treasury, ATO, S&amp;TG, LG, VE industry</p> <p>Treasury</p> <p>ATO</p>



No	Action	Action lead (Partners)
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>	<p>VE industry, S&amp;TG, (NEMA)</p> <p>Council of Australia Tour Operators</p> <p>Australian Regional Tourism</p>
4.4	<p>Implement an industry sustainability framework and education tools to assist businesses to implement and further improve sustainability practices.</p>	<p>Austrade, DCCEEW, VE industry, S&amp;TG</p>
4.5	<p>Develop, promote and encourage businesses to improve quality through industry-led programs and celebrate exceptional visitor economy businesses.</p>	<p>VE industry, Austrade, TA, S&amp;TG</p>
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>	<p>Treasury, VE industry</p> <p>Australian Chamber – Tourism</p>
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 <i>Better Connectivity Plan for Regional and Rural Australia</i></li> <li>• the <i>Regional Connectivity Program</i></li> <li>• the <i>Mobile Black Spot Program</i></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 <i>Regional Co-Investment Fund</i> and the <i>Business Fibre Initiative</i>.</li> </ul>	<p>DITRDCA, VE industry</p>
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>	<p>DCCEEW, S&amp;TG, VE industry</p>

No	Action	Action lead (Partners)
4.9	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.)	TA, Austrade (S&TG, VE industry)
4.10	Support tourism and accommodation providers to set their own prices when guests contact them directly to book.	Austrade, Treasury, VE industry



# Priority 5: Enhance visitor infrastructure

**Deliver the right amount and quality of infrastructure to satisfy visitor needs, including accessibility requirements, and ensure it is developed and managed sustainably.**

Australia's capacity to service domestic and international visitors is determined, in part, by transport infrastructure including airports, seaports, roads and rail stock. It is equally important that assets be high-quality and maintained so that they deliver a positive visitor experience.

Infrastructure supporting visitors upon arrival (i.e. airports and ports), facilitating transit to and at destinations, must be planned and implemented ahead of demand to ensure that we have the scale of assets that meet demand. In addition, asset development and management must align with broader destination development principles and be conducted in a sustainable way that takes into account community expectations, environmental concerns and the wishes and priorities of Traditional Owners.

**Indicative success measures:** 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.

No	Action	Action lead (Partners)
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	<p>Develop assets, infrastructure and experiences that are accessible to all people, regardless of physical limitations, disability or age.</p>	<p>VE industry, Austrade, S&amp;TG, LG</p>

No	Action	Action lead (Partners)
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>• <i>City Deals</i> with Darwin, Hobart, Perth, Townsville and Geelong, and <i>Regional Deals</i> 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 \$2.5 billion <i>Local Roads and Community Infrastructure Program</i> 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 <i>Remote Airstrip Upgrade Program</i> (RAU), which supports improved aviation safety and accessibility at remote aerodromes.</li> </ul>	DITRDCA, LG, VE industry
5.9	Continue to upgrade passenger facilitation methods and infrastructure consistent with approaches to modernise traveller facilitation and border clearance.	ABF, VE industry
5.10	Deliver an Aviation White Paper to set the long-term policies to guide the next generation of growth and innovation in the aviation sector.	DITRDCA (VE industry)
5.11	Work cooperatively to maximise the return of inbound aviation capacity.	S&TG, Tourism Australia, Austrade, VE industry



No	Action	Action lead (Partners)
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>	<p>Austrade, Home Affairs, TA, S&amp;TG, VE industry</p>

# Priority 6: Build markets and attract visitors

**Attract high-value visitors through coordinated, innovative, focused and personalised visitor attraction strategies that are targeted at a re-balanced mix of domestic and international markets.**

Unique circumstances mean we must adopt a unique and targeted approach to market development. Targeted and nuanced marketing appropriate for different markets, and developing appropriate product, will be needed. In the longer term, improved data and market research will support a strategy to build a diversified portfolio of core markets, balanced by new and emerging markets.

**Indicative success measures:** Increase in visitor spend (yield) from selected geographic markets and visitor segments; increase in visitor dispersal; changes in market share; return on investment from new marketing strategies.

No	Action	Action lead (Partners)
6.1	<p>Implement health measures to protect visitors and communities and which will provide traveller confidence and community protection.</p> <p>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.</p>	DoH, S&TG, SWA, 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 noting that potential funding mechanisms already exist such as the <i>Regional Arts Fund</i>, <i>Festivals Australia</i> and the <i>Indigenous Visual Arts Industry Support Program</i>.</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>	Austrade, DITRDCA, TA, S&TG, VE industry



No	Action	Action lead (Partners)
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 and 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 Association of 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, AAoA</p>
6.9	Improve promotion, marketing and provision of information about accessible infrastructure available at destinations, accommodation, venues and experiences and business sustainability practices.	VE industry

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

**Provide high-quality products and services that leverage Australia's competitive advantages such as our natural, built and cultural attributes, including our First Nations cultures, vibrant cities and authentic regions.**

THRIVE 2030 will drive the respectful embedding of First Nations cultures into Australia's brand positioning and support related product development. Through a range of actions, developed in collaboration with First Nations peoples, the Strategy will help drive and reinforce relevant aims of the *National Agreement on Closing the Gap*, including Target 8 on economic participation.

Tailored approaches will be required to champion the unique reasons to visit both city/metropolitan and regional destinations. This will involve destination development, growing and fostering events and developing high-quality products and experiences that both cater for and attract current, new and emerging markets.

**Indicative success measures:** Number of new visitor economy businesses/experiences; increase in businesses participating in quality accreditation schemes; visitor satisfaction/quality measure indexes.

No	Action	Action lead (Partners)
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	<p>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:</p> <ul style="list-style-type: none"> <li>• Leverage and support the <i>Green and Gold Decade</i> 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 <i>Business Events Australia Bid Fund Program</i>.</li> <li>• Incorporate creative/cultural assets into destination marketing to maximise contribution of the creative economy, including to support the delivery of <i>Revive: a place for every story, a story for every place</i>, Australia's National Cultural Policy.</li> </ul>	VE industry, DoH, DITRDCA, NIAA, Australia Council for the Arts, (TA, S&TG, LG)



No	Action	Action lead (Partners)
<b>7.3 cont.</b>	<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' <i>Major Festivals</i> initiative fund for 7 major international arts festivals, supporting regional festivals through the <i>Festivals Australia</i> program and supporting regional collecting institutions through programs such as <i>Visions of Australia</i>, the <i>National Collecting Institutions Touring and Outreach Program</i>, the <i>Australian Government International Exhibitions Insurance Program</i>, and the <i>National Cultural Heritage Account</i>.</li> </ul>	
<b>7.4</b>	Cities develop and offer a compelling differentiated offering for both the domestic and international markets to revitalise visitation.	S&TG, LG
<b>7.5</b>	<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>
<b>7.6</b>	Encourage the creation of new and expansion of existing First Nations-owned and operated tourism enterprises.	VE industry, NIAA (Austrade, S&TG)
<b>7.7</b>	Enhance the visitor experience through use and availability of technology.	VE industry

A photograph of a man in a dark suit standing at a wooden podium in a lecture hall, gesturing towards a large projection screen. The screen displays a presentation with the word 'Thrive' and '2030' visible. The audience, consisting of several people, is seated at long wooden tables arranged in a semi-circle, facing the presenter. Some audience members are using laptops. The room has a modern design with a high, vaulted wooden ceiling and recessed lighting. A circular logo with a blue-to-purple gradient is positioned in the upper center of the image.

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2030

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AUSTRALIA