
AUSTRALIA
THRIVE 2030 – Action Plan to 2030
THRIVE 2030

Acknowledgement of Country

We acknowledge the Traditional Custodians of lands throughout Australia and pay our respects to their Elders past and present. We recognise the enduring connection of First Nations people to land, sea and waters, and their deep care for Country over 65,000 years. We honour the enormous contribution First Nations cultures and traditions make to the visitor experience in Australia, and commit to protecting and nurturing these cultures in partnership with First Nations communities.

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Contact

Office of Tourism and Visitor Economy
Austrade
Levels 1-2, Nishi Building
2 Phillip Law Street
Canberra ACT
VisitorEconomy@austrade.gov.au

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Cover image: Walking in the Northern Territory's Watarrka National Park, near Kings Canyon. © Tourism Australia

Inside back cover image: Children and an instructor snorkelling at Frankland Islands, Great Barrier Reef © Tourism Australia.

Foreword by Senator the Hon Don Farrell, Minister for Trade and Tourism

I am pleased to release the next action plan for THRIVE 2030. With 360,000 businesses and 696,000 people employed across Australia in the travel and tourism industry, the sector's importance to the national economy cannot be underestimated. Beyond the economic contribution to Australia, this sector is part of Australia's national identity and way of life. This action plan outlines how the full breadth of the Albanese Government will continue to support the travel and tourism industry as we work towards our ambitious target of $230 billion in visitor expenditure by 2030. My ambition is for a tourism industry that provides world-leading services and experiences, while generating well paid jobs and benefits across Australia, including First Nations, regional and rural communities.

The Albanese Government's investment in the travel and tourism industry includes $130 million in the next phase of Tourism Australia's Come and Say G'day campaign, $18.5 million to energise Australia's iconic destinations in Central Australia and the Great Barrier Reef, and $8 million to support the Chinese group travel market. We drive event visitation to both cities and regional areas through Revive Live funding for festivals and Tourism Australia's Business Events bid fund, alongside the Green and Gold Decade of sporting events in the lead up to the Brisbane 2032 Olympic and Paralympic Games.

The tourism industry will benefit from the Government's commitment of $3.4 billion to support infrastructure for the Brisbane 2032 Olympic and Paralympic Games; the range of initiatives under the Aviation White Paper, including $250 million investment to accelerate Australia's low carbon liquid fuel industry under the Future Made in Australia plan; and $17.1 million for accessible infrastructure in national parks, beaches and play spaces.

Our ability to meet visitor expectations and deliver exceptional experiences is underpinned by workers and businesses having the right skills and being able to keep up with changing technologies.



The Government's investment of $414 million in Fee-Free TAFE places, and $18.6 million in the Australian Small Business Advisory Services – Digital Solutions program will help meet these needs. The Government will also continue to build resilience to and support recovery from natural disasters through the $1 billion Disaster Ready Fund, as well as the Cyclone Reinsurance Pool, which is backed by a $10 billion Government guarantee.

While the Albanese Government's ambition for our travel and tourism industry is far reaching, and opportunities are real, there are challenges to overcome which can only be achieved through collaboration. I look forward to working with my colleagues across government, with state and territory governments and with the industry, to sustainably grow Australia's travel and tourism industry.



Senator the Hon Don Farrell,
Minister for Trade and Tourism

Introduction

THRIVE 2030 is Australia's national strategy for the long-term sustainable growth of the travel and tourism industry. Our vision under THRIVE 2030 is for Australia to provide world leading services and experiences to visitors while delivering significant and sustainable benefits to the Australian community. Work to implement THRIVE 2030 is delivered under 7 policy pillars:

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

Recovery Phase

The Recovery Phase focused on rebuilding the visitor economy following the challenges of the COVID-19 pandemic. Actions supported the return of domestic and international visitation and addressed priority supply issues, including workforce challenges, as well as destination development and improved data, including development of the Longitudinal Indicators for the Visitor Economy (LIVE) Framework and a new business events dashboard. The final year of the Recovery Phase saw high visitor spend, record numbers of tourism jobs and businesses and more domestic overnight trips.

Nevertheless, challenges remain. Natural disasters continue to test the resilience of tourism businesses, particularly in our regions. Improved business and worker capability could enhance the competitiveness of Australia's tourism industry and ensure a world-class visitor experience is delivered to visitors from Australia and abroad. And there is an imperative to continue to grow international visitation from established and emerging international markets, and to increase dispersal and travel throughout Australia.

Moving forward to sustainably grow the visitor economy

All visitors, both Australians and those from overseas, want to experience the best of our country and know that they have done so in a sustainable and respectful way that supports local communities and protects Australia's unique environment. We want both international and domestic visitors to enjoy the best of Australia, with Australians to holiday at home as they do overseas and international visitors to disperse across Australia.

This action plan will cover the period through to 2030 allowing a longer runway to deliver cross-cutting priorities, taking time to assess their impact, derive value and ensure sustainable growth for the visitor economy. This action plan has a sharp focus, outlining 5 priority areas. Actions cut across the 7 established THRIVE 2030 policy priorities, with the action plan including all major visitor economy-specific Australian Government activities at the national level.

Recognising that THRIVE 2030 is a visitor economy strategy, this action plan focuses on Australian Government activities that are directly focused on tourism and the visitor economy. Many of the activities proposed are designed to be sector agnostic. For example, investing in low carbon fuels will directly benefit the aviation and cruise sectors, as well as supporting Australia's long haul international visitor markets, whether they visit for a holiday or a business event. Beyond this action plan, the visitor economy requires a range of enablers relevant to a high-quality Australian way of life. These include infrastructure (including roads and telecommunications) and housing. Government investment in these continues.

Collaboration remains at the heart of THRIVE 2030

State and territory governments also play critical roles in Australia's visitor economy, underpinned by their own visitor economy or tourism strategies, which are tailored to the needs of each jurisdiction and aligned with THRIVE 2030. The Australian Government looks forward to collaborating with states and territories on delivery of this action plan.

And underpinning it all is the industry, and its partnership with all levels of government. Working together is fundamental to achieving the objectives of THRIVE 2030, and understanding opportunities and challenges as they emerge. We will continue to collaborate across all industry segments and all levels of government to achieve THRIVE 2030's objectives.

Revisiting the THRIVE 2030 target for 2030

The original THRIVE 2030 target focused on achieving an ambitious visitor expenditure of $230 billion by 2030, within a range of $210 billion to $250 billion. This was supported by an aspirational sub-target for the regional share of visitor expenditure of $100 billion by 2030. Included in the target was spending from both domestic visitation (including for the purpose of holidays, business, and visiting friends and relatives) and international visitation (including people who holiday, visit friends and relatives, or travel for business, work, international education for less than 12 months, and long-stay international education of greater than 12 months).

The development of the new THRIVE 2030 action plan has provided the opportunity to consider progress against the target, the level of aspiration it represents and whether any adjustment to the composition of the target is warranted.

Updated official tourism forecasts by Austrade's Tourism Research Australia (TRA) suggest the original expenditure target will now be significantly exceeded by 2030, and that some adjustment would be warranted to preserve an appropriate degree of aspiration. At the same time, the Australian Government's move towards a more carefully managed system for international education provides the opportunity to revisit the inclusion of expenditure by long-stay international students in the THRIVE 2030 target measure.

Accordingly, the THRIVE 2030 target has been updated for the next stage of the strategy to no longer include spending by long-stay international students, while at the same time retaining a total expenditure target of $230 billion by 2030. This revised approach increases the level of aspiration[1], while also aligning the target composition more closely to international standards for measuring tourism activity. As a result of the change to the headline target measure, the sub-target for regional share of visitor spend has been amended to $95 billion by 2030.

Activities such as Tourism Australia's Come and Say G'day campaign and development of international diversification and demand strategies, will be critical in driving growth in international visitation and expenditure to support achievement of this ambitious target.

Reporting on the action plan

The Office of Tourism and the Visitor Economy within Austrade will work closely with Australian Government partners, states and territories and industry stakeholders in the delivery of this action plan.

Annual reporting against the THRIVE 2030 action plan will be provided to the Minister for Trade and Tourism and published on the Austrade website.

Reporting will provide an update on progress against the visitor spend target, progress towards the policy outcomes outlined in the 5 focus areas, and measurements of success indicators drawn from the Longitudinal Indicators for the Visitor Economy (LIVE) Framework and other measures. LIVE was developed by TRA during the Recovery Phase to measure the economic, social, environmental and institutional performance of the visitor economy. Each of the 5 focus areas identify the LIVE indicators or other measures that will be used.

1. The estimated share of expenditure from long-stay international students at the time the original target was set was $37 billion per annum in 2030. This therefore approximates the increase in aspiration for the target.

Actions

1. Grow international visitation and expenditure from established and emerging inbound markets, including in Southeast Asia and India, by:

	Lead Agency (Partner)
1.1 Delivering the Tourism Australia Demand Strategy 2035 and the next stage of Tourism Australia's Come and Say G'day campaign, with $130 million invested to encourage international travellers to book an Australian holiday.	Tourism Australia
1.2 Developing and then implementing an International Diversification Strategy for the visitor economy to build industry's resilience, capability and understanding of new markets, capture new growth opportunities and broaden the spread of valuable visitor markets.	Austrade, Tourism Australia
1.3 Delivering a competitive and fit-for-purpose Approved Destination Status (ADS) scheme for Chinese group travel through an $8 million investment over 4 years and ongoing funding.	Austrade (Home Affairs)
1.4 Supporting and enabling international visitation and market growth through balanced, agile and efficient management of the visitor visa program.	Home Affairs
1.5 Modernising and streamlining traveller border clearances for air and cruise travellers, including through trialling digital incoming passenger cards, while maintaining strong security and biosecurity protections for Australia.	ABF, DAFF

Aligned to THRIVE 2030 Priorities 5 and 6



Indicators to assess international visitation

- Expenditure; visitors and trip nights from international markets, including India and target Southeast Asian markets.
- International desirability of Australia as a holiday destination and positive international visitor sentiment (LIVE indicators).

2. Develop and promote new experiences and events that facilitate greater visitor dispersal, including to regional destinations, by:

	Lead Agency (Partner)
2.1 Supporting visitation to Australia's iconic destinations with investment into Central Australia and the Great Barrier Reef, by investing $18.5 million in experiences to attract visitors, supporting small businesses and upgrading tourism infrastructure.	Austrade
2.2 Leveraging the power of events visitation and cultural tourism, through: the Revive Live and Festivals Australia programs; business events including those supported by Tourism Australia's Business Events Bid Fund; and sporting events with the Green and Gold Decade in the lead up to the Brisbane 2032 Olympic and Paralympic Games, to improve awareness of the diverse opportunities Australia has to offer and encourage greater dispersal, including to regional destinations.	DITRDCSA (Tourism Australia)
2.3 Preparing an analysis of factors underpinning greater domestic and international visitation to regional destinations.	Austrade, Tourism Australia
2.4 Supporting the development of the agritourism sector, in partnership with industry, including by creating a strategic marketing development plan to drive international visitation, and through national guidelines for measuring and evaluating agritourism.	Austrade, Tourism Australia (DAFF)
2.5 Delivering a competitive and efficient aviation sector through Aviation White Paper initiatives, such as: • establishing an aviation consumer protection framework with an aviation consumer ombudsperson • developing aviation specific disability standards • continuing to support regional and remote aviation through the Regional Airports and Remote Airstrip Upgrade Programs • pursuing capacity ahead of demand in bilateral air services agreements.	DITRDCSA

Aligned to THRIVE 2030 Priorities 1, 5, 6 and 7



Indicators to assess regional dispersal

- Visitor expenditure and number of trip nights to regional areas.
- The number of domestic overnight visitors attending events in regional areas.
- Satisfaction levels among visitors who visit regional Australia.

3. Support businesses to modernise, build resilience, and be more competitive while attracting and retaining a skilled workforce, by:

	Lead Agency (Partner)
3.1 Strengthening employment pathways and supports for career progression through: • the Vocational Education and Training system • support for students and apprentices through the Australian Apprenticeship Support Services and Fee-Free TAFE programs • targeted research by the Jobs and Skills Council into visitor economy occupation shortages • investigation of a more joined-up tertiary system and improved labour mobility.	DEWR
3.2 Providing a streamlined migration system to achieve better targeted temporary skilled migration, more tailored regional visa settings and a reshaped permanent skilled migration system to help meet tourism industry skills needs and support productivity growth.	Home Affairs
3.3 Building business resilience through: • enhancing disaster readiness and providing support before, during and after disasters by fostering partnerships to strengthen Australia's capacity for disaster resilience and support communities • services such as the Small Business Debt Helpline and the NewAccess for Small Business owners program.	NEMA, Treasury
3.4 Encouraging tourism businesses to modernise, improve digital literacy and embrace emerging technologies, including AI, through programs such as the Australian Small Business Advisory Services – Digital Solutions program and utilising the eeger platform for visitor economy jobseekers.	Austrade, Treasury
3.5 Continuing to work with governments and industry to examine insurance accessibility and affordability challenges to inform government policy consideration and business strategies.	Treasury (Austrade)

Aligned to THRIVE 2030 Priorities 3 and 4



Indicators to assess business and workforce capability

- The tourism industry's Gross Value Add to Australia's Gross Domestic Product (LIVE indicator).
- The number of tourism filled jobs (LIVE indicator).
- Internet vacancy index (the number of tourism related vacancies).
- Tourism related innovation and digital capability rates (LIVE indicators).

4. The visitor economy to become more sustainable and accessible; and embedding Australia's First Nations cultural heritage by:

	Lead Agency (Partner)
4.1 Engaging with the First Nations Visitor Economy Partnership as it provides leadership in embedding First Nations tourism in the visitor economy and creates a permanent First Nations national tourism peak body.	Austrade, Tourism Australia, NIAA
4.2 Embedding the National Sustainability Framework and Sustainable Tourism Toolkit principles in tourism industry practices, encouraging eligible tourism operators to bolster their ecotourism credentials, and promoting Australia's sustainable tourism credentials.	Austrade, Tourism Australia
4.3 Supporting the visitor economy to decarbonise by drawing on the Australian Government's Net Zero Plan, leveraging the sectoral emissions reduction plans, and the First Nations Clean Energy Strategy; and to monitor the visitor economy's emissions profile, including an agreed definition and measurement of national tourism net greenhouse gas emissions.	Austrade, ABS, DCCEEW
4.4 Investing in low carbon fuels and clean energy technology, including through the Future Made in Australia Innovation Fund, complemented by work to promote and facilitate foreign direct investment to develop low carbon fuels in Australia.	DCCEEW, DITRDSCA, Austrade
4.5 Embedding the WELCOME Framework principles[2] into tourism industry practices, enhancing accessibility in aviation and increasing opportunities for people with disability to access national parks, beaches and play spaces through the $17.1 million investment in the Accessible Australia program.	Austrade, Tourism Australia, DHDA, DITRDCSA
4.6 Working across government on opportunities to adjust policy and program settings to increase First Nations peoples' participation in the visitor economy; enhance First Nations tourism product and experiences; and improve data on First Nations tourism.	Austrade, (NIAA)

Aligned to THRIVE 2030 Priorities 1, 4 and 5



Indicators to assess sustainability, accessibility and engagement with First Nations culture

- The number of visitors undertaking a First Nations experience (LIVE indicator).
- Australia's international sustainable destination ranking in the World Economic Forum Travel and Tourism Development Index (LIVE indicator).
- Perceptions of Australia as an accessible destination (LIVE indicator).
- Expenditure and trip nights by visitors with accessibility needs.

2. The WELCOME Framework, developed during the Recovery Phase, is a guide to help tourism businesses start their journey to becoming more accessible and inclusive. The Framework's principles are Welcome, Environment, Links, Communication, Operations, Marketing and Experience.

5. Continue to evolve and modernise data and insights to provide a holistic view of the growth of the visitor economy, and guide government policy and industry investment decisions.

	Lead Agency (Partner)
5.1 Continue to modernise the Government's official tourism statistics, including by adopting new data sources.	Austrade
5.2 Deliver research and insights that are focused, relevant and based on priorities informed by consultation with stakeholders.	Austrade, ABS, Tourism Australia

Aligned to THRIVE 2030 Priority 2



Indicators to assess data and insights

- Successful modernisation and innovation in data collection and reporting, including the assessment of new and emerging data sources.
- Availability of relevant, robust, granular, timely data and analytics.

List of shortened forms

ABF	Australian Border Force
ABS	Australian Bureau of Statistics
Austrade	Australian Trade and Investment Commission
DAFF	Department of Agriculture, Fisheries and Forestry
DCCEEW	Department of Climate Change, Energy, the Environment and Water
DEWR	Department of Employment and Workplace Relations
DHDA	Department of Health, Disability and Ageing
DITRDCSA	Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts
Home Affairs	Department of Home Affairs
LIVE Framework	Longitudinal Indicators for the Visitor Economy Framework
NEMA	National Emergency Management Agency
NIAA	National Indigenous Australians Agency
TRA	Tourism Research Australia
Treasury	Department of the Treasury





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