# THRIVE 2030 Implementation Reporting (November 2023)

Targets: THRIVE 2030 aims to achieve total visitor expenditure[[1]](#footnote-2) of $166 billion by 2024 (Phase 1) and $230 billion by 2030. The Strategy also aims to achieve visitor expenditure in regional Australia of $70 billion by 2024 and $100 billion by 2030.

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

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

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

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

## Summary of THRIVE 2030 Phase 1 Implementation Progress

### Theme 1: Collaborate

#### Policy Priority 1: Comprehensive collaboration (8 Actions, see page 3)

THRIVE 2030’s 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.

Progress: 8 of 8 actions completed or underway.

#### Policy Priority 2: Improve data and insights (6 Actions, see page 6)

THRIVE 2030’s Success Measures: High stakeholder satisfaction with statistical reports and research in terms of quality and timeliness.

Progress: 5 of 6 actions complete or underway.

### Theme 2: Modernise

#### Policy Priority 3: Grow a secure and resilient workforce (12 Actions, see page 8)

THRIVE 2030’s 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.

Progress: 12 of 12 actions completed or underway.

#### Policy Priority 4: Embrace leading-edge business practices (10 Actions, see page 14)

THRIVE 2030’s 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.

Progress: 9 of 10 actions completed or underway.

#### Policy Priority 5: Enhance visitor infrastructure (12 Actions, see page 18)

THRIVE 2030’s 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 and quality.

Progress: 12 of 12 actions completed or underway.

### Theme 3: Diversify

#### Policy Priority 6: Build markets and attract visitors (9 Actions, see page 22)

THRIVE 2030’s 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.

Progress: 8 of 9 actions completed or underway.

#### Policy Priority 7: Grow unique and high-quality products, including First Nation experiences (7 Actions, see page 26)

THRIVE 2030’s 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.

Progress: 7 of 7 actions completed or underway.



## Priority 1: Comprehensive collaboration

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

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

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

### Action 1.1

Action item: Appoint a THRIVE 2030 Implementation Advisory Group, representing a cross-section of industry, and governments, to guide, oversee and monitor progress of the Strategy.

Action lead (partners): Austrade

Status: Complete

### Action 1.2

Action Item: Establish advisory working groups to accelerate consideration of complex policy issues.

Action lead (partners): Austrade

Status: Complete

### Action 1.3

Action Item: Maintain and enhance existing collaboration mechanisms such as the Tourism Ministers’ Meeting and the Australian Standing Committee on Tourism.

Action lead (partners): Austrade, S&TG

Status: Complete

### Action 1.4

Action Item: Establish a cross Australian Government Visitor Economy Taskforce comprising all agencies that contribute to the Strategy that will meet regularly to ensure delivery.

Action lead (partners): Austrade (all relevant agencies)

Status: Complete

### Action 1.5

Action Item: Identify how to use existing cooperative mechanisms better or establish new mechanisms to plan and implement interregional marketing and development activities.

Action lead (partners): TA (S&TG, RTOs, VE industry)

Status: Complete

### Action 1.6

Action Item: Ensure that the visitor economy is considered and integrated into state and local crisis management and recovery plans.

Action lead (partners): S&TG (LG, NEMA)

Status: Underway

### Action 1.7

Action Item: Establish an effective partnership of experienced appropriate parties to support the greater participation of First Nations cultures, interpretation and businesses into the visitor economy.

Action lead (partners): Austrade, NIAA (VE industry, TA, S&TG)

Status: Underway

### Action 1.8

Action Item: 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.

Action lead (partners): DITRDCA (RDA, LG, RTOs)

Status: Underway

## Priority 2: Improve data and insights

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

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

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

### Action 2.1

Action item: 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.

Action lead (Partners): Austrade (S&TG, VE industry)

Status: Complete

### Action 2.2

Action item: Tourism Research Australia (TRA) to provide world-class relevant, robust, granular, and timely data and analytics.

Action lead (Partners): Austrade

Status: Underway

### Action 2.3

Action item:

1. Develop new products aimed at the needs of particular segments of the sector.
2. Leverage existing data and ABS integration capabilities to support the production of research products.
3. Leverage new and existing data sets to measure the important economic contribution of business events to the visitor economy.

Action lead (Partners): Austrade, ABS

Status: Underway

### Action 2.4

Action item: 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).

Action lead (Partners): Austrade (S&TG, VE industry)

Status: Underway

### Action 2.5

Action item: Implement a visitor expenditure target specifically for regional Australia to help drive and monitor visitor economy growth in regional Australia.

Action lead (Partners): Austrade

Status: Complete

### Action 2.6

Action item: 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.

Action lead (Partners): Austrade

Status: Pending

## Priority 3: Grow a secure and resilient workforce

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

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

### Action 3.1

Action item: 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.

Action lead (Partners): Austrade (S&TG, VE industry)

Status: Complete

### Action 3.2

Action item:

1. 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.

Action lead (Partners): Austrade (S&TG), ABS

1. ABS will deliver a comprehensive update to the *Australian and* *New Zealand Standard Classification of Occupations* by December 2024, and then commence a rolling program of work to maintain the currency of this classification. Over time this will assist in better identifying visitor economy occupations and their skill levels and assist training products and visa settings to better meet needs of the visitor economy.

Action lead (Partners): ABS

1. 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.

Action lead (Partners): Australian Chamber – Tourism

Status: Underway

### Action 3.3

Action item:

1. Increase workforce participation from under-participating cohorts, including mature workers, First Nations peoples, people with disability, youth, and women, especially in regional areas.

Action Lead (Partners): DEWR, DSS, Austrade (S&TG, NIAA, VE industry including AA)

1. Leverage Government employment programs to support pathways to employment for First Nations Australians.

Action lead (Partners): NIAA

1. 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.

Action lead (Partners): DSS (Austrade, DEWR), Clubs Australia

1. Supports eligible job seekers with tailored assistance to find sustainable employment including through Workforce Australia Services, Transition to Work, and Launch into Work employment programs.
2. Maintain services that connect people wishing to work in regions with job vacancies, reskilling support, and relocation advice including through the Local Jobs Program.
3. Encourage local job creation through business start-up and self-employment advisory services for new and existing small businesses through the Entrepreneurship Facilitators and Self- Employment Assistance program.

Action lead (Partners): DEWR

1. Support tourism and hospitality employers to develop long-lasting workforce solutions through the Accommodation Australia’s ‘The Hub’ and the Government’s Employer Liaison Officer.

Action lead (Partners): VE industry, including AA and Clubs Australia

1. 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.

Action lead (Partners): DSS

1. Leverage the Fee Free TAFE initiative, which includes hospitality and tourism as an area of national priority for skills and development.

Action lead (Partners): DEWR

1. Ensure access to the National Careers Institute, which assists people with careers information and support, whatever their age or career stage.

Action lead (Partners): DEWR

Status: Underway

### Action 3.4

Action item:

1. Review the Working Holiday Maker scheme to increase the pool of potential workers.

Action lead (Partners): Home Affairs

1. Undertake a promotional campaign to coordinate Australian employers to refund Working Holiday Maker Visa fees.

Action lead (Partners): VE industry, including Australia Chamber – Tourism

1. 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.

Action lead (Partners): Home Affairs

Status: Underway

### Action 3.5

Action item: 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.

Action lead (Partners): Home Affairs

Status: Complete

### Action 3.6

Action item:

1. Improve access by small and medium sized enterprises to existing migration schemes such as the Pacific Australia Labour Mobility (PALM) scheme.
2. Implement the Migrant Worker Taskforce report recommendations and refinements to the PALM scheme, including improving working conditions for PALM participants.

Action lead (Partners): DFAT, DEWR, Home Affairs, Jobs and Skills Australia

Status: Underway

### Action 3.7

Action item:

1. Progress the Government’s Skills Reform 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.

Action lead (Partners): DEWR (S&TG, VE industry)

1. 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.
2. 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.

Action lead (Partners): Jobs and Skills Australia

1. 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.

Action lead (Partners): Tour Guides Australia

Status: Underway

### Action 3.8

Action item: Promote the visitor economy as an attractive career choice including through communication strategies, incentives and awards to promote best practice by employers.

Action lead (Partners): Austrade, S&TG, VE industry

Status: Underway

### Action 3.9

Action item: 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.

Action lead (Partners): NIAA, VE industry, (S&TG)

Status: Underway

### Action 3.10

Action item:

1. Encourage mutual recognition for foundational credentials (such as the Responsible Service of Alcohol (RSA)) to support mobility of workers across jurisdictions, especially in relation to seasonal hospitality work.
2. 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.

Action lead (Partners): S&TG

Status: Underway

### Action 3.11

Action item: 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.

Promote understanding and awareness of work, health and safety duties through Safe Work Australia’s education and communication tools.

Action lead (Partners): FWO, ATO, S&TG, VE industry, (DEWR)

Status: Underway

### Action 3.12

Action item:

1. Encourage larger industry operators to implement formal in-house training and diversity programs.

Action lead (Partners): VE industry

1. 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.

Action lead (Partners): VE industry, including Australian Chamber – Tourism

Status: Underway

## Priority 4: Embrace leading-edge business practices

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

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

### Action 4.1

Action item: 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.

Action lead (Partners): VE industry, DEWR, S&TG

* Enhance the Quality Tourism Framework, in partnership with the Australian Tourism Industry Council (ATIC), to help small tourism businesses.

Action lead (Partners): ATIC (VE industry, Austrade, NIAA)

* Promote the adoption of sustainable tourism practices and pathways to certification with the new Strive 4 Sustainability Scorecard 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.

Action lead (Partners): EcoTourism Australia

Status: Underway

### Action 4.2

Action item: Streamline and target information about government resources assisting businesses to modernise and diversify, and to build resilience and capability.

Action lead (Partners): Treasury, ATO, S&TG, LG, VE industry

Including through programs such as:

* The Digital Solutions – Australian Small Business Advisory Services (ASBAS) Program to assist small businesses to improve their digital capability and adopt digital tools and processes.

Action lead (Partners): Treasury

* eInvoicing – to assist small businesses to digitise their processes, widen trade connectivity and improve productivity.

Action lead (Partners): ATO

Status: Underway

### Action 4.3

Action item: Encourage businesses to implement resilience and crisis management plans.

Action lead (Partners): VE industry, S&TG, (NEMA)

* Work with Australian travel and tourism stakeholders to upskill travel industry personnel on crisis management, risk planning and mitigation and resilience.

Action lead (Partners): Council of Australia Tour Operators

* Develop an updated *Destination Management Planning – Best Practice Guide*, 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.

Action lead (Partners): Australian Regional Tourism

Status: Underway

### Action 4.4

Action item: Implement an industry sustainability framework and education tools to assist businesses to implement and further improve sustainability practices.

Action lead (Partners): Austrade, DCCEEW, VE industry, S&TG

Status: Underway

### Action 4.5

Action item: Develop, promote and encourage businesses to improve quality through industry-led programs and celebrate exceptional visitor economy businesses.

Action lead (Partners): VE industry, Austrade, TA, S&TG

Status: Underway

### Action 4.6

Action item: 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.

Action lead (Partners): Treasury, VE industry

* 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.

Action lead (Partners): Australian Chamber – Tourism

Status: Underway

### Action 4.7

Action item: Ensure that visitor economy businesses, especially those in the regions, have access to suitable internet products, services and infrastructure, including through:

* the Better Connectivity Plan for Regional and Rural Australia
* the Regional Connectivity Program
* the Mobile Black Spot Program
* access to the National Broadband Network which is being enhanced by initiatives including upgrades providing full-fibre access, fixed wireless and satellite upgrades, the Regional Co-Investment Fund and the Business Fibre Initiative.

Action lead (Partners): DITRDCA, VE industry

Status: Underway

### Action 4.8

Action item: 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.

* 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.

Action lead (Partners): DCCEEW, S&TG, VE industry

Status: Underway

### Action 4.9

Action item: 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.)

Action lead (Partners): TA, Austrade (S&TG, VE industry)

Status: Pending

### Action 4.10

Action item: Support tourism and accommodation providers to set their own prices when guests contact them directly to book.

Action lead (Partners): Austrade, Treasury, VE industry

Status: Underway

## Priority 5: Enhance visitor infrastructure

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

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

### Action 5.1

Action item:

1. 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.

Action lead (Partners): DITRDCA, Austrade, S&TG, LG, VE industry

1. Stimulate domestic accommodation, travel and attractions for both regions and metropolitan visitor economies through voucher programs in partnership with state and territory governments.

Action lead (Partners): VE industry, including Tourism Accommodation Australia and the Australian Hotels Association

Status: Underway

### Action 5.2

Action item:

1. 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.
2. Support upgrades to caravan parks, which deliver affordable accommodation options for travellers, particularly families.

Action lead (Partners): VE industry, Austrade, S&TG, LG, DCCEEW

Status: Underway

### Action 5.3

Action item: Develop assets, infrastructure and experiences that are accessible to all people, regardless of physical limitations, disability or age.

Action lead (Partners): VE industry, Austrade, S&TG, LG

Status: Underway

### Action 5.4

Action item: Prioritise new destination development through use of holistic destination development plans, community and stakeholder collaboration, and streamlined regulatory approvals.

Action lead (Partners): VE industry, S&TG, LG

Status: Underway

### Action 5.5

Action item:

1. 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.
2. City Deals with Darwin, Hobart, Perth, Townsville and Geelong, and Regional Deals with Hinkler and Barkly, will continue to deliver improved visitor economy infrastructure, including sporting and cultural facilities, airports, attractions and public realm amenity.
3. The $3.25 billion Local Roads and Community Infrastructure Program will support local councils across Australia to deliver priority local infrastructure projects to support local communities including roads, parks and sports facilities, and bike paths.

Action lead (Partners): DITRDCA, S&TG, LG (NEMA)

Status: Underway

### Action 5.6

Action item: 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:

* $233 million investment in infrastructure updates across Commonwealth-managed national parks.
* $216 million to grow tourism in Kakadu National Park, including through improved road access, new visitor infrastructure and improved telecommunications.

Action lead (Partners): Director of National Parks (DCCEEW), Traditional Owners, S&TG

Status: Underway

### Action 5.7

Action item: Identify and deliver improved visitor assets and resources at culturally significant sites.

Action lead (Partners): VE industry, Traditional Owners, NIAA, Director of National Parks (DCCEEW), S&TG, LG

Status: Underway

### Action 5.8

Action item:

1. Ensure that regional airport facilities meet the needs of visitors and communities.
2. Continue to support regional and remote aviation, for example, through the *Remote Airstrip Upgrade Program* (RAU), which supports improved aviation safety and accessibility at remote aerodromes.

Action lead (Partners): DITRDCA, LG, VE industry

Status: Underway

### Action 5.9

Action item: Continue to upgrade passenger facilitation methods and infrastructure consistent with approaches to modernise traveller facilitation and border clearance.

Action lead (Partners): ABF, VE industry

Status: Underway

### Action 5.10

Action item: Deliver an Aviation White Paper to set the long-term policies to guide the next generation of growth and innovation in the aviation sector.

Action lead (Partners): DITRDCA (VE industry)

Status: Underway

### Action 5.11

Action item: Work cooperatively to maximise the return of inbound aviation capacity.

Action lead (Partners): S&TG, Tourism Australia, Austrade, VE industry

Status: Underway

### Action 5.12

Action item:

1. Work collaboratively to address barriers to maximising the contribution from the cruise sector and managing associated community expectations.
2. 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).
3. Collaborate to ensure consistent and effective border management.
4. Improve port infrastructure.
5. Increase benefit to regional communities from cruise visitation.

Action lead (Partners): Austrade, Home Affairs, TA, S&TG, VE industry

Status: Underway

## Priority 6: Build markets and attract visitors

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

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

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

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

### Action 6.1

Action item:

1. Implement health measures to protect visitors and communities and which will provide traveller confidence and community protection.
2. 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.

Action lead (Partners): DoH, S&TG, VE industry

Status: Underway

### Action 6.2

Action item: Encourage Australians to spend on the domestic visitor economy as they would overseas, including through targeted offerings and marketing.

Apply behavioural economic research to develop product and marketing approaches to attract greater domestic visitation and spend.

Attract domestic and international visitors to Australia’s regional events and heritage offerings noting that potential funding mechanisms already exist such as the Regional Arts Fund, Festivals Australia and the Indigenous Visual Arts Industry Support Program.

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.

Action lead (Partners): Austrade, DITRDCA, TA, S&TG, VE industry

Status: Underway

### Action 6.3

Action item:

1. 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.
2. The diversification strategy will also look at attraction of certain growing (and higher yield) traveller cohorts including people seeking luxury, nature and cultural experiences.

Action lead (Partners): Austrade, TA (S&TG)

Status: Underway

### Action 6.4

Action item: Implement a coordinated marketing strategy to re-establish core markets and grow emerging international markets.

Action lead (Partners): TA, S&TG

Status: Complete

### Action 6.5

Action item: Develop and implement a coordinated approach for direct, affordable, long-haul flights to Australia.

Action lead (Partners): VE industry

Status: Pending

### Action 6.6

Action item: Ensure Australia has a safe, affordable, and competitive visitor visa system to maintain and grow market share.

Action lead (Partners): Home Affairs

Status: Underway

### Action 6.7

Action item:

1. 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.
2. Support diversification of international student cohorts, including by identifying new and emerging markets.
3. 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.

Action lead (Partners): DoE, Home Affairs, Austrade

Status: Underway

### Action 6.8

Action item:

1. 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.

Action lead (Partners): TA, S&TG, VE industry

1. Drive growth in international visitation to Tropical North Queensland and the Great Barrier Reef region.

Action lead (Partners): Tourism Tropical North Queensland

1. Support tourism businesses through the Accommodation Australia’s ‘The Hub’ to attract and upskill workers and the Australian Tourism Export Council’s Tourism Training Hub.

Action lead (Partners): Australian Tourism Export Council, AA

Status: Underway

### Action 6.9

Action item: Improve promotion, marketing and provision of information about accessible infrastructure available at destinations, accommodation, venues and experiences and business sustainability practices.

Action lead (Partners): VE industry

Status: Underway

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

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

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

### Action 7.1

Action item: Expand target market offerings including for high yield/luxury visitors and business travellers.

Action lead (Partners): VE industry

Status: Underway

### Action 7.2

Action item: Respectfully embed First Nations cultures into the visitor economy and Australia’s brand positioning, supporting prioritised product development.

Action lead (Partners): VE industry (NIAA, Austrade, TA, S&TG)

Status: Underway

### Action 7.3

Action item: 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:

* Leverage and support the Green and Gold Decade of major sporting events, culminating in the Brisbane 2032 Olympics and Paralympics.
* Governments and industry to collaborate to optimise the impact of the many existing event promotion and support programs including the Business Events Australia Bid Fund Program.
* Incorporate creative/cultural assets into destination marketing to maximise contribution of the creative economy, including to support the delivery of *Revive: a place for every story, a story for every place*, Australia’s National Cultural Policy.
* Establish new mass participation events including in regional areas to encourage visitor dispersal, noting that potential funding mechanisms already exist such as the Australia Council for the Arts’ Major Festivals initiative fund for 7 major international arts festivals, supporting regional festivals through the Festivals Australia program and supporting regional collecting institutions through programs such as Visions of Australia, the National Collecting Institutions Touring and Outreach Program, the Australian Government International Exhibitions Insurance Program, and the National Cultural Heritage Account.

Action lead (Partners): VE industry, DoH, DITRDCA, NIAA, Australia Council for the Arts (TA, S&TG, LG)

Status: Underway

### Action 7.4

Action item: Cities develop and offer a compelling differentiated offering for both the domestic and international markets to revitalise visitation.

Action lead (Partners): S&TG, LG

Status: Underway

### Action 7.5

Action item:

1. 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.

Action lead (Partners): VE industry

1. Leverage the $10 million annual Wine Tourism and Cellar Door Grants Program to boost wine tourism and attract visitors to wine regions.

Action lead (Partners): DAFF

1. 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.

Action lead (Partners): Australian Regional Tourism

1. 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 Respecting our Culture program.

Action lead (Partners): Ecotourism Australia

Status: Underway

### Action 7.6

Action item: Encourage the creation of new and expansion of existing First Nations-owned and operated tourism enterprises.

Action lead (Partners): VE industry, NIAA (Austrade, S&TG)

Status: Underway

### Action 7.7

Action item: Enhance the visitor experience through use and availability of technology.

Action lead (Partners): VE industry

Status: Underway

# Attachment A: List of Acronyms

AA Accommodation Australia

ABF Australian Border Force

ABS Australian Bureau of Statistics

ACA Australia Cruise Association

ANZSCO Australian and New Zealand Standard Classification of Occupations

ASCOT Australian Standing Committee on Tourism

ATE Australian Tourism Exchange

ATIC Australian Tourism Industry Council

ATO Australian Taxation Office

Austrade Australian Trade and Investment Commission

BECA Business Events Council of Australia

CLIA Cruise Lines International Australia

DAFF Department of Agriculture, Fisheries and Forestry

DCCEEW Department of Climate Change, Energy, the Environment and Water

DEWR Department of Employment and Workplace Relations

DFAT Department of Foreign Affairs and Trade

DITRDCA Department of Infrastructure, Transport, Regional Development, Communications and the Arts

DoE Department of Education

DoH Department of Health and Aged Care

DSS Department of Social Services

FWO Fair Work Ombudsman

Home Affairs Department of Home Affairs

LG Local governments

NEMA National Emergency Management Agency

NIAA National Indigenous Australians Agency

PALM Pacific Australia Labour Mobility

RDA Regional Development Australia

RTOs Regional tourism organisations

S&TG State and territory governments

STO State tourism organisations

TA Tourism Australia

TRA Tourism Research Australia

Treasury Department of the Treasury

VE industry Visitor economy industry

VTIC Victorian Tourism Industry Council

# Attachment B: Stakeholders consulted in preparing this report

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

1. THRIVE 2030 target is for the visitor economy, comprising tourism and long stay international students. [↑](#footnote-ref-2)