



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

Acknowledgment of Country

The Australian Government acknowledges the Traditional Owners and Custodians of Country throughout Australia and acknowledges their continuing connection to land, water and community. We pay our respects to them, their Elders past and present, and the continuation of cultural, spiritual and educational practices of Aboriginal and Torres Strait Islander peoples.

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 a number of years. The most recent of these was the [Reimagining the Visitor Economy Expert Panel Report](#), which provided a range of recommendations that assisted 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 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](#), also 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 delivering 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](#).

Disclaimer

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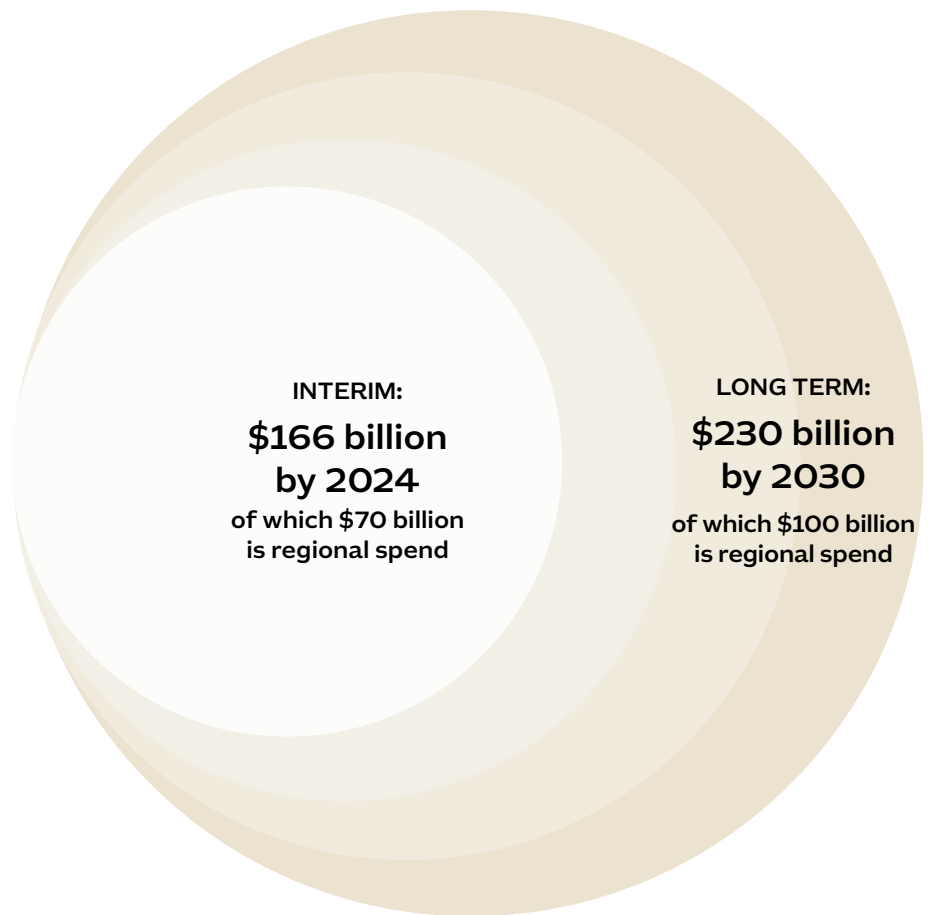
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THRIVE 2030 Strategy at a glance

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

THEMES

POLICY PRIORITIES

OUTCOMES



COLLABORATE

1. Deliver success through comprehensive collaboration

2. Improve data and insights

THRIVE 2030 Strategy vision, targets and actions are achieved within timeframes through effective collaboration across the visitor economy.

Improved, more timely data and research supports better business decisions and economic and social outcomes.



MODERNISE

3. Grow a secure and resilient workforce

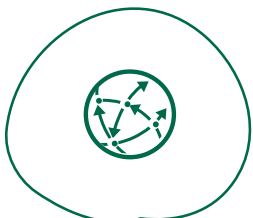
4. Embrace leading-edge business practices

5. Enhance visitor infrastructure

Visitor economy businesses have a stable supply of appropriately skilled workers to deliver high-quality experiences.

Visitor economy businesses are profitable, efficient and sustainable and achieve high levels of visitor satisfaction.

Visitor economy infrastructure meets the needs of visitors and local communities.



DIVERSIFY

6. Build markets and attract visitors

7. Grow unique and high-quality products, including Aboriginal and Torres Strait Islander experiences

Forecast visitor levels and visitor expenditure are achieved from the desired mix of domestic and international markets.

High-quality and diverse products and experiences are continually delivered to attract and satisfy visitors.

STRATEGY TIMELINE

Consolidation phase
2025–2027

Acceleration phase
2028–2030



From the Minister for Trade, Tourism and Investment

Australia's visitor economy is vital for Australia's national prosperity. Domestic and international visitation generates jobs, investment, and growth in communities throughout Australia. Prior to COVID-19, the visitor economy contributed over \$166 billion to our economy, was our fourth largest export sector and, directly and indirectly, supported over 1 million jobs. The experience visitors have in Australia influences their future spending and investment decisions, drives demand for Australian products and services, and creates lasting networks for Australia around the world.

COVID-19, and the necessary action taken to protect Australia, impacted the visitor economy.

Austrade has been working with industry and all levels of government on a long-term strategy for the sector to recover and sustainably grow. THRIVE 2030 is the industry-led and government-enabled plan through to 2030 and beyond.

As the Strategy makes clear, we need to address the short-term challenges caused by COVID-19, and also the long-term structural trends and issues to ensure Australia's visitor economy rebuilds and grows to be competitive and resilient. This will be achieved by diversifying markets, experiences and destinations, modernising our supply side enablers, like workforce and infrastructure, and collaborating to achieve success.



THRIVE 2030 has been borne out of extensive government and industry consultation. Thank you to everyone who has participated in the process, including through the Reimagining the Visitor Economy Expert Panel, led by former Tourism Minister the Hon Martin Ferguson AM. It is exciting to see the commitment and passion across the public and private sectors to meet and exceed the expectations of domestic and international visitors.

I look forward to working with all of you as we see our visitor economy thrive through to 2030 and beyond.

The Hon Dan Tehan MP

From Australian Government Ministers

The visitor economy is critical for regional Australia. Over 95,000 tourism-related businesses operate in regional Australia, and they will all have a role to play in re-building tourism in our regions. THRIVE 2030 recognises the importance of Australia's regions to the way we reimagine Australia's visitor economy. As Assistant Minister for Regional Tourism, I fully endorse the actions in THRIVE 2030 to support sustainable growth and job creation in regional Australia and am delighted to see ambitious targets for regional visitor expenditure. I will work with my Government colleagues and industry to ensure THRIVE 2030's regional visitor expenditure target of \$70 billion by 2024 and \$100 billion by 2030 is met.



The Hon Michelle Landry MP, Assistant Minister for Regional Tourism

I am proud to back THRIVE 2030 – the Commonwealth Government's national strategy for the Australian tourism industry's post COVID-19 recovery.

THRIVE 2030 recognises the importance of respectfully embedding Aboriginal and Torres Strait Islander people and cultures in the visitor economy.

Indigenous tourism is an integral part of Australia's visitor economy. It provides a platform for Aboriginal and Torres Strait Islander people to share the oldest continuous culture in the world, through authentic, immersive and life-changing experiences. It also provides a valuable source of economic opportunity and employment for Aboriginal and Torres Strait Islander people.

I look forward to working with Minister Tehan, across Government and with the National Indigenous Tourism Advisory Group, to deliver the key actions in the THRIVE 2030 Strategy's Action Plan. Together, we will ensure the Strategy's vision and policy priorities continue to align with the National Agreement on Closing the Gap and the new National Roadmap for Indigenous, Skills and Wealth Creation.



The Hon Ken Wyatt AM MP, Minister for Indigenous Australians

Recognising the importance of the visitor economy to Australia's wellbeing and national prosperity, in particular to Regional Australia, I am pleased to note my support for THRIVE 2030. I look forward to working to deliver the actions in the THRIVE 2030 Strategy's Action Plan relevant to my portfolio, Infrastructure, Transport and Regional Development, that will help ensure THRIVE's success.

My portfolio supports a number of actions within the Strategy, including the Aviation Recovery Framework to ensure connectivity of Australian and international visitors (Action 5.10) as well as the Regional Airports and Remote Airstrip Upgrade programs to improve the accessibility and safety of airports (Action 5.8).

Our cities and regions offer a great national diversity of experiences and attractions that extend from modern CBDs; harbour, beach and river front cities; arts, entertainment and sporting precincts; thriving regional cities and towns; and iconic native landscapes. In relation to Priority 7, my department works closely with state and local governments, and regional economic development organisations to develop new tourism and visitor economy offerings for our cities and regions through initiatives such as City Deals, Regional Deals and regional and community development programs.

I look forward to working with Minister Tehan, across the Government and with industry to achieve the vision and ambitions set out in THRIVE.

The Hon Barnaby Joyce MP, Deputy Prime Minister, Minister for Infrastructure, Transport and Regional Development



As Minister for Agriculture and Northern Australia I am pleased to note my full support for THRIVE 2030. I look forward to working to deliver the actions in the THRIVE 2030 Strategy's Action Plan relevant to my portfolio, the Department of Agriculture, Water and the Environment, that will help ensure THRIVE's success.

My department has already implemented, and supports, initiatives that promote great visitor experiences across the agricultural industry.

My department and I are also committed to ensuring that visitors have a great experience when they come to Australia or move to the regions to undertake short term and seasonal agricultural work. My department is delivering programs such as AgCAREERSTART, and is working with the Department of Foreign Affairs and Trade to deliver the 'Pacific Australia Labour Mobility program'.

I look forward to working with Minister Tehan to achieve the vision and ambitions in THRIVE 2030.



The Hon David Littleproud MP, Minister for Agriculture and Northern Australia

As Minister for Communications, Urban Infrastructure, Cities and the Arts I am pleased to note my full support for THRIVE 2030. I look forward to working to deliver the actions in the THRIVE 2030 Strategy's Action Plan relevant to my portfolio that will help ensure THRIVE's success.

There is strong alignment between the priorities outlined in THRIVE 2030 and those identified by my Creative Economy Taskforce.

The creative economy contributes to cultural exchange and Australia's international relationships and reputation. Australian arts are a highly influential and powerful tool for building our national brand. Many international visitors shape their understanding of Australian identity and our quality of life through arts and cultural experiences.

The visitor economy needs digital connectivity to modernise and underpin its capability to create more resilient and sustainable businesses that put the visitor at the centre of the experience. The Government's continued investment in the telecommunications sector will also support the whole-of-government commitment to grow the visitor economy. The Government has rolled out the National Broadband Network (NBN) which is delivering affordable high-speed broadband to all Australian homes and businesses.

The Government is also addressing mobile black spots and improving digital connectivity across regional, rural and remote Australia. The Government is committing \$380 million under the 'Mobile Black Spot Program' to invest in telecommunications infrastructure to improve mobile coverage and competition across Australia.

I look forward to working with Minister Tehan, across the Government and with industry to achieve the vision and ambitions set out in THRIVE.



The Hon Paul Fletcher MP, Minister for Communications, Urban Infrastructure, Cities and the Arts

Recognising the importance of the visitor economy to Australia's national prosperity, I am pleased to provide my support for the Government's THRIVE 2030 Strategy. With the sector being an important employer and making a substantial contribution to our economy, it will also have a key role to play in the continued economic recovery following the COVID-19 pandemic.

I look forward to working with Minister Tehan, in partnership with the industry, to achieve the vision and ambitions set out in THRIVE 2030. More specifically, I look forward to engaging on the actions in the Strategy's Action Plan relevant to the Treasury portfolio to help ensure the THRIVE Strategy's success.



The Hon Josh Frydenberg MP, Treasurer

The visitor economy is one of the key pillars of Australia's national prosperity, forming a vital link between Australia and over 190 countries around the world. As Minister for Foreign Affairs, I am pleased to express my full support for THRIVE 2030.

I look forward to working to deliver the actions in the THRIVE 2030 Strategy's Action Plan relevant to my portfolio. In particular, I highlight our efforts to gradually and safely reopen Australia's borders to international visitors, with all fully vaccinated international arrivals welcome in Australia since 21 February 2022. I would also highlight our work to position the Pacific Australia Labour Mobility (PALM) scheme for greater engagement in Australia's visitor economy.

I look forward to working closely with Minister Tehan, across the Government, and with industry to achieve the vision and ambitions set out in THRIVE 2030.

Senator the Hon Marise Payne, Minister for Foreign Affairs



As Minister for Industrial Relations I am pleased to advise my support for THRIVE 2030. I look forward to working to deliver those actions in the THRIVE 2030 Strategy's Action Plan relevant to my portfolio.

Strong industrial relations settings will be important for the sustainability of the Strategy, including by ensuring clear and effective avenues are available to give employers in the visitor economy the confidence to understand and meet their workplace obligations.

I look forward to working with Minister Tehan, across the Government and with industry to achieve the vision and ambitions set out in THRIVE.

Senator the Hon Michaelia Cash, Attorney-General, Minister for Industrial Relations



As Minister for Health and Aged Care, I am pleased to note my full support for THRIVE 2030. I look forward to working to deliver the actions in the THRIVE 2030 Strategy's Action Plan relevant to my department (recommendation 6.1) that will help ensure THRIVE's success. In particular we support the implementation of public health measures to protect visitors and communities and which will provide traveller confidence and community protection.

I look forward to working with you across the Government and with industry to achieve the vision and ambitions set out in THRIVE.

The Hon Greg Hunt MP, Minister for Health and Aged Care



As the Minister for Home Affairs, I am pleased to note my full support for THRIVE 2030. I look forward to working to deliver the actions in the THRIVE 2030 Strategy's Action Plan relevant to my portfolio that will help ensure THRIVE's success.

The Australian Border Force and the Department of Home Affairs will continue to work with partner agencies and industry to modernise passenger facilitation and border clearance processes, and supporting infrastructure, including at new and redevelopment airports and seaports.

The ongoing upgrade of arrival kiosks at major international airports will assist automated processing as passenger volumes gradually increase in the post-COVID-19 environment. The recently released Digital Passenger Declaration will, in the next few months, trial the digitisation of the current paper incoming card. Modernising border clearance and supporting legitimate travel, while maintaining our strong border controls, continues to be a key focus for Government.



The Hon Karen Andrews MP, Minister for Home Affairs

As the Minister for Immigration, Citizenship, Migrant Services and Multicultural Affairs, I am pleased to note my full support for THRIVE 2030. I look forward to working to deliver the actions in the THRIVE 2030 Strategy's Action Plan relevant to my portfolio that will help ensure THRIVE's success. In particular, the Australian Government has already announced a range of measures in relation to Recommendations 3.3, 3.4, 3.5, 6.9 and 6.10 to increase the pool of Working Holiday Makers (WHMs) and international students available to the visitor economy and encourage their return to Australia.



The Hon Alex Hawke MP, Minister for Immigration, Citizenship, Migrant Services and Multicultural Affairs



Comments from leaders in the visitor economy

Our culture is still alive, this land is still alive, and it is still loved as unceded Aboriginal and Torres Strait Islander 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.



Professor Deen Sanders OAM (Worimi man), Chair, National Indigenous Tourism Advisory Group

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

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 Strategy – collaboration will be the key.



Peter Shelley, Managing Director, Australian Tourism Export Council

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

Bushfires and COVID 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

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 super-charge 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.



Sarah Gardiner, Director, Griffith Institute for Tourism

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, Chair, Council for Australasian Tourism and Hospitality Education

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

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

As the global visitor economy becomes more complex, the role of Australia's travel businesses and their professionals that powers 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 THRIVE 2030 is a critical step in the next evolution in Australia's visitor economy.



Dean Long, CEO, Australian Federation of Travel Agents



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

An aerial photograph of a dirt path winding through a natural landscape. The path is reddish-brown and shows signs of being well-trodden. In the lower-left corner, two people are walking away from the camera, one slightly ahead of the other. The surrounding terrain is uneven with some sparse, dry vegetation and small trees. The overall scene suggests a rural or outdoor recreational setting.

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. The Re-Imagined Visitor Economy (THRIVE) Strategy 2030 (the Strategy) provides the national strategy for recovery and the return to sustainable growth for Australia's visitor economy.

The Strategy and its 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*.¹

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.

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 also 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

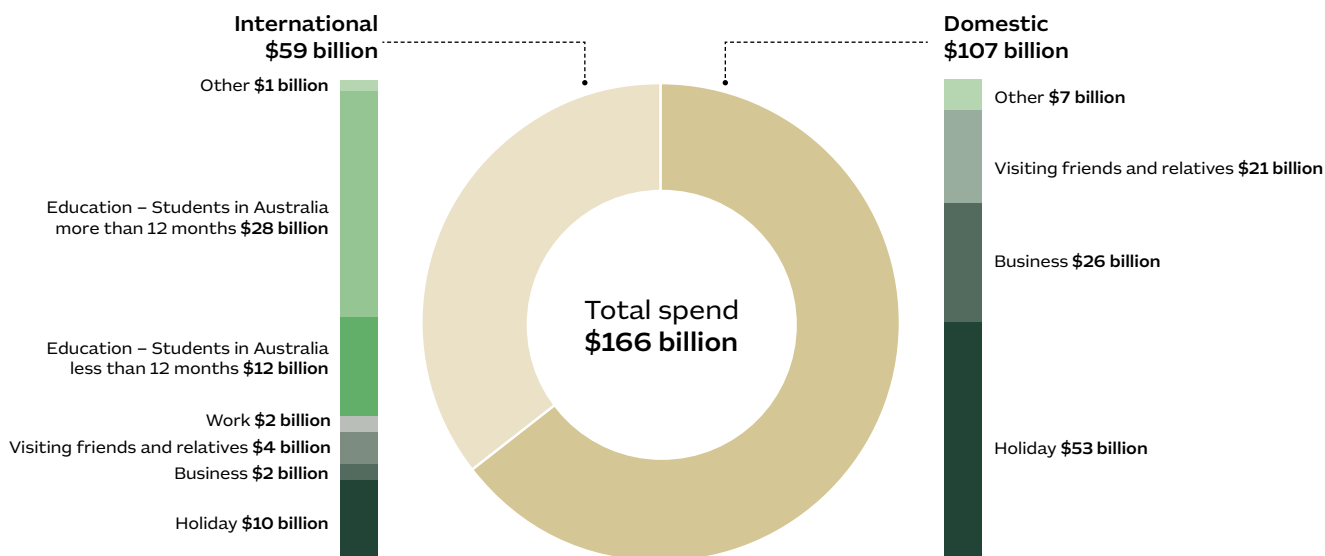
Visitors can be either domestic visitors (Australians or residents who travel away from their home for more than a certain time and distance, including those who are travelling internally as part of an outbound international trip) or international visitors (non-residents who visit Australia for less than a year). For the purposes of this strategy, international visitors also include any international student 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 the primary purpose of ongoing employment and work at the destination (not normal daily commute for work).
- **Education (International travellers only):** International education including training visitors through higher and vocational (tertiary) education, schools, language colleges, and institutional or work-based training.

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

Figure 1: Visitor types and value, year ended December 2019²



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 are excluded, total visitor spend is \$138 billion, and international students account for 39 per cent of total international spend.³

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.







Image Credit: Austrade.





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, have been supplemented based on advice from stakeholders.

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

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

There are over 300,000 businesses⁴ in the visitor economy, accounting for about 1-in-8 of Australia’s 2.4 million businesses⁵. 95 per cent of visitor economy businesses in Australia have fewer than 20 employees⁶. 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 over 95,000 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.⁷

4. Tourism Research Australia, *Tourism businesses in Australia: June 2015 to 2020, 2021*.

5. TRA analysis.

6. TRA analysis.

7. TRA analysis.

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'⁸ 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 2019⁹, and international visitor arrivals reached a record 9.5 million, up 70 per cent over the same period.¹⁰

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 over 1 million Australians (in 2018–19).¹¹ 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.¹² 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.¹³

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.¹⁴ Fewer visitors meant lower business revenue, with total expenditure lost to the visitor economy from March 2020 to June 2021 of \$102 billion.¹⁵

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 2020.¹⁶ 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.

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.

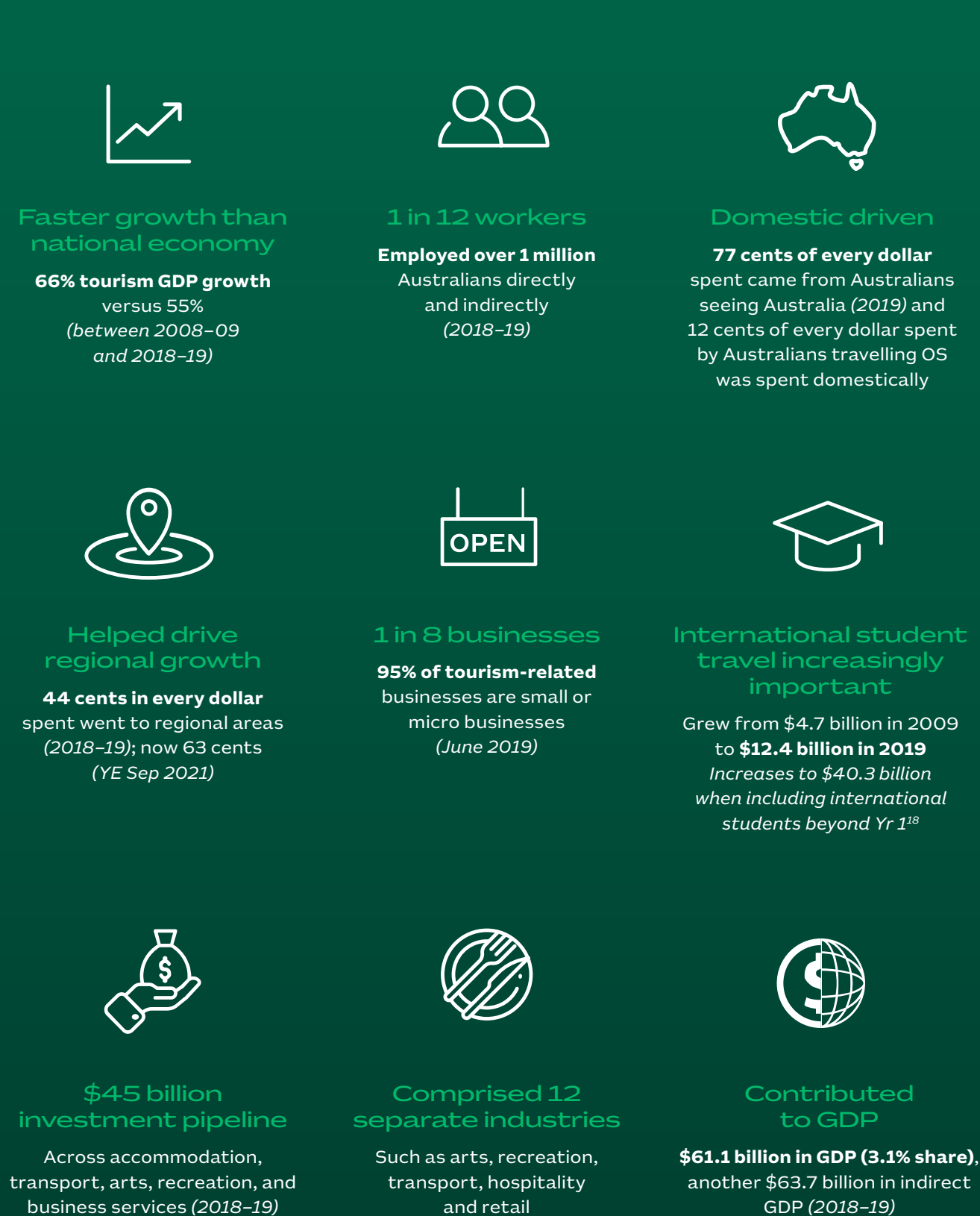
13. ABS, *Regional Tourism Satellite Account 2019–20*.

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.

Figure 3: Economic contribution of Australia's visitor economy to 2019¹⁷



17. TRA analysis.

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



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 visitors from China that may not be sustainable, combined with slowing growth from traditional 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 resilience of operators.
 - **Increased consumer focus on climate change and environmental sustainability** which is influencing travel preferences for more sustainable options, with negative implications for long haul travel.
 - **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 those who are linguistically diverse, 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 ones arising from the pandemic itself.

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 Action Plan that accompanies this Strategy (see page 45).

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.

With our natural assets and unique culture, Australia has the opportunity to expand our Aboriginal and Torres Strait Islander 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, particularly restoring domestic and international demand to support supply.

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.

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 2019.¹⁹ Australia should strive to retain and better this performance and 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 underutilised in the workforce, including people with disability, women, parents returning to the workforce, older Australians, young Australians, culturally diverse peoples, and Aboriginal and Torres Strait Islander 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 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, 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 smaller scale developments including new competitive visitor experiences. Regional accommodation, attractions, and supporting infrastructure that improves

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

experiences in regional areas will be vital to building back a stronger, more resilient industry. All governments play an important role in investment attraction and facilitation, including by working to reduce or remove impediments to investment.

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.

Managing disruptive forces

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

Extreme weather events, such as cyclones and bushfires, will impact on infrastructure and confidence to travel. With guidance from the updated *National Climate Resilience and Adaptation Strategy*, visitor economy businesses can build resilience by embracing methodologies that will help them prepare for future climate challenges. The visitor economy can make a virtue of utilising sustainable practices to engage visitors, help protect against future challenges, and leverage our natural assets to educate visitors about the importance of sustainable practices, and embrace regenerative tourism opportunities.

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 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.





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, profitable and pursue sustainable growth by diversifying markets and products, and embracing modern business practices.



Communities

Communities, including Aboriginal and Torres Strait Islander 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.

- 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.

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 and the local population’s quality of life. Policies and actions under this Strategy will be framed and implemented consistent with this sustainable growth approach.

Respectfully embedding Aboriginal and Torres Strait Islander peoples and cultures into the visitor economy

Underpinning this Strategy is the recognition that Australia is a product of its cultural heritage. The Aboriginal and Torres Strait Islander peoples have the world’s oldest continuous cultures and are a key part of Australia’s national identity. With significant diversity, these cultures are based on respect of the land, sea, sky, stories and Elders, as well as generosity and sharing.

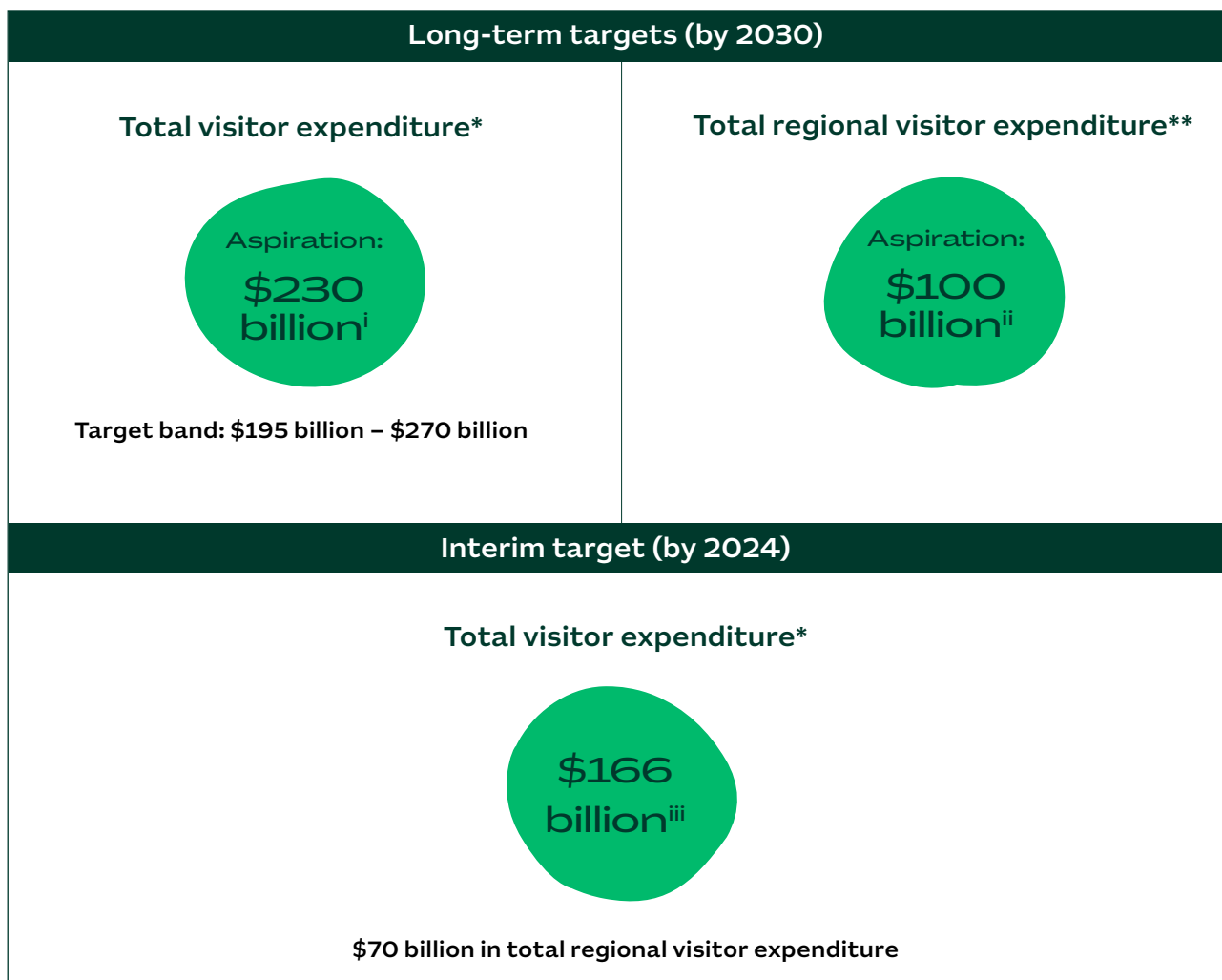
When embedded firmly (through initial partnerships and ongoing inclusion) within our visitor experience offering, these cultures present a point of pride and of difference that is authentic and unique. As part of this Strategy, Aboriginal and Torres Strait Islander cultures will continue to be universally respected by industry and government and included in offerings and decision-making, and supported to contribute more to the visitor economy through sharing with visitors an understanding and respect for the natural beauty and cultures of the Australian continent.





Strategy targets

Figure 4: THRIVE 2030 long-term and interim 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 expenditure of long-term international students

ii \$95 billion if excluding expenditure of long-term international students

iii \$142 billion if excluding expenditure of long-term international students

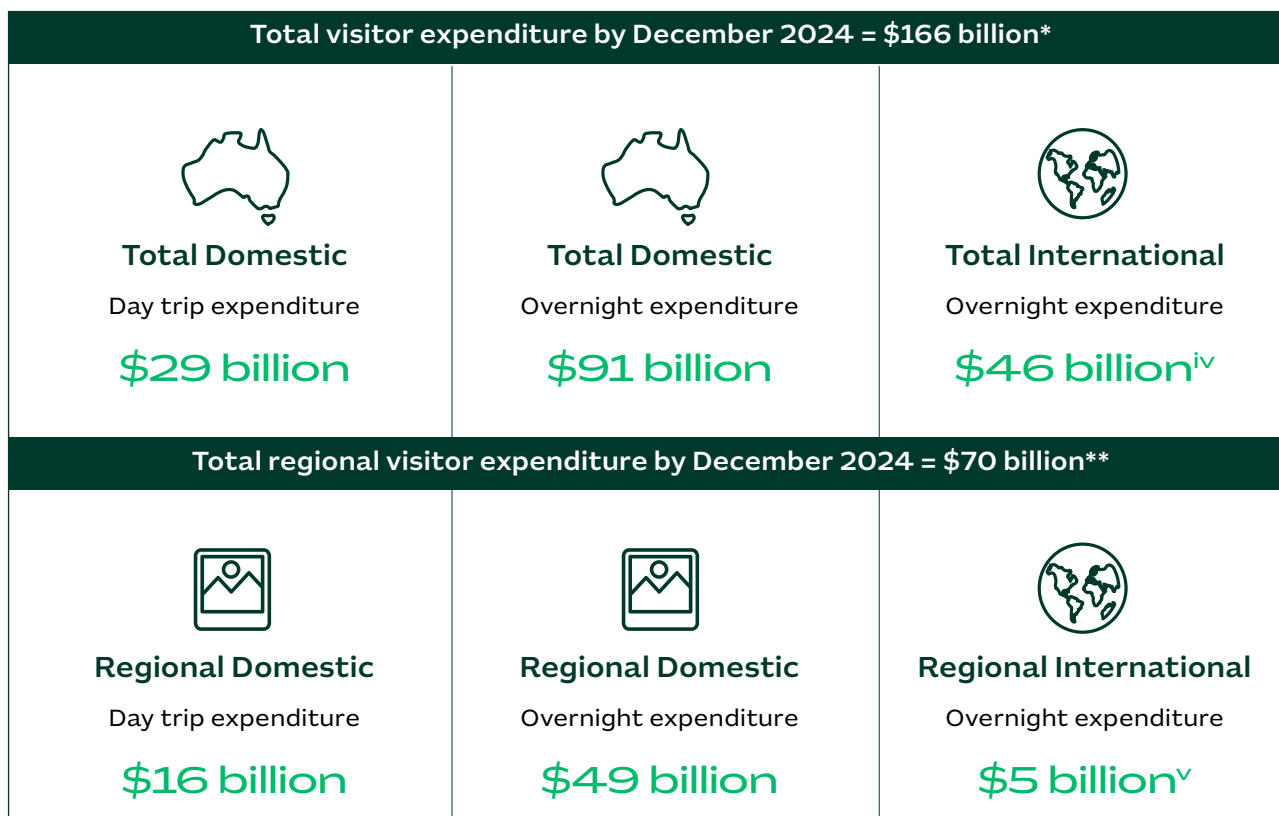
This Strategy has included visitor expenditure targets as a ‘rallying call’ for all in the industry to work towards, alongside government and community stakeholders. Given current uncertainties, the Strategy initially sets interim (by December 2024) and also long-term targets (by December 2030) for total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

Interim target by 2024

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

Figure 5: THRIVE 2030 interim target



* Total visitor expenditure \$142 billion excluding long-term international students

** Total regional expenditure \$68 billion excluding long-term international students

^{iv} \$22 billion if excluding expenditure of long-term international students

^v \$3 billion if excluding expenditure of long-term international students

Long-term target by 2030

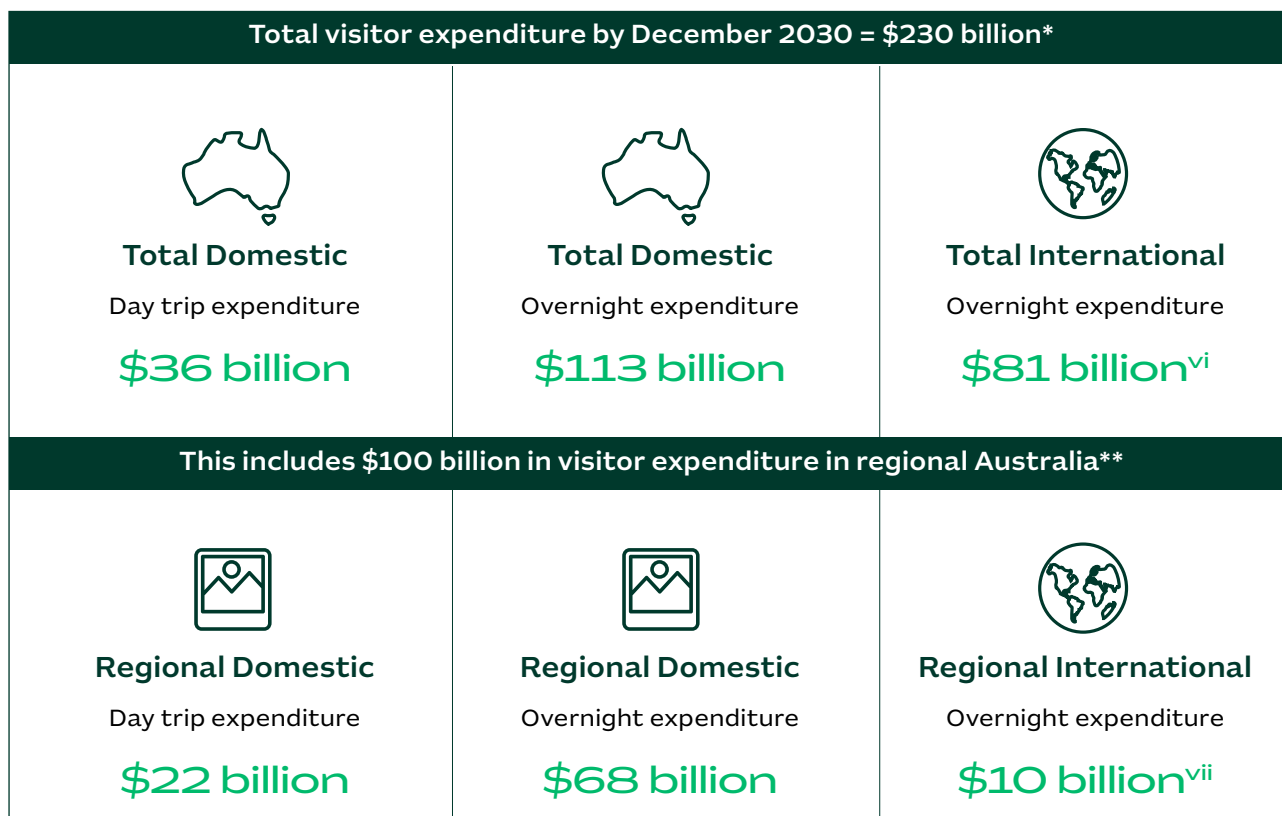
The Strategy aims to achieve, by 2030, total visitor expenditure in the range of \$195 billion to \$270 billion, with a focus on achieving \$230 billion. The aim is to have regional Australia capture \$100 billion, or 44 per cent of this spend. As a sustainable target, this needs to be achieved through 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 \$193 billion excluding long-term international students

** Total regional expenditure \$98 billion excluding long-term international students

vi \$44 billion if excluding expenditure of long-term international students

vii \$8 billion if excluding expenditure of long-term 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, a challenge exacerbated by unknown pandemic implications on 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 are based on TRA, Domestic Tourism Forecasts, 2021–22 to 2025–26, 2021 report.²⁰ The report outlines the risks and limitations of the forecasts, notably that there continue to be changes to key influencers 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; and (iii) uncontrollable outbreaks of the virus or other health crises which could reduce traveller confidence and desire/ability to travel.

International targets are based on TRA analysis of market intelligence, publicly available research, and subscribed analysis by Oxford Economics.

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



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

<p>Recovery phase 2022–2024</p>	<p>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. Achieve pre-COVID levels of visitor expenditure by the end of 2024 of \$166 billion.</p>
<p>Consolidation phase 2025–27</p>	<p>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 continue to build workforce capability to improve the quality of service, including through the new Visitor Economy Workforce and Skills Strategy.</p>
<p>Acceleration phase 2028–2030</p>	<p>Accelerate growth by leveraging investment from earlier phases including new products and infrastructure, improvements in business processes and technology, increase service quality and grow visitation from emerging markets. Achieve total visitor expenditure of between \$195 billion and \$270 billion by 2030, with target figure of \$230 billion.</p>

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 45). Ahead of finalising

action plans for the Consolidation and Acceleration phases, the targets and actions set in Phase 1 will be reviewed.

Figure 8 lists factors that will guide development of actions for the Consolidation and Acceleration phases. In addition, the Longitudinal Indicators for the Visitor Economy framework (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

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




Current context	What is the current economic context and the industry's performance against the Strategy's targets for the prior phase?
Segment assessment	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?
Prior phase actions assessment	Have participants delivered against all actions in the prior period action plan; assess lessons learned and any shortfalls for carry forward into the next phase.
Apply THRIVE strategy guiding principles	In developing actions for the next phase, apply the 6 THRIVE strategy guiding principles.
Geographic market assessment	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.
Consultation	The Strategy's action plans will be developed in consultation with industry, governments and other stakeholders.



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		
6. Build markets and attract visitors	DIVERSIFY	
7. Grow unique and high-quality products, including Aboriginal and Torres Strait Islander experiences		

A description of each strategy priority is below, providing 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 which will allow monitoring of progress against each strategy priority.

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.

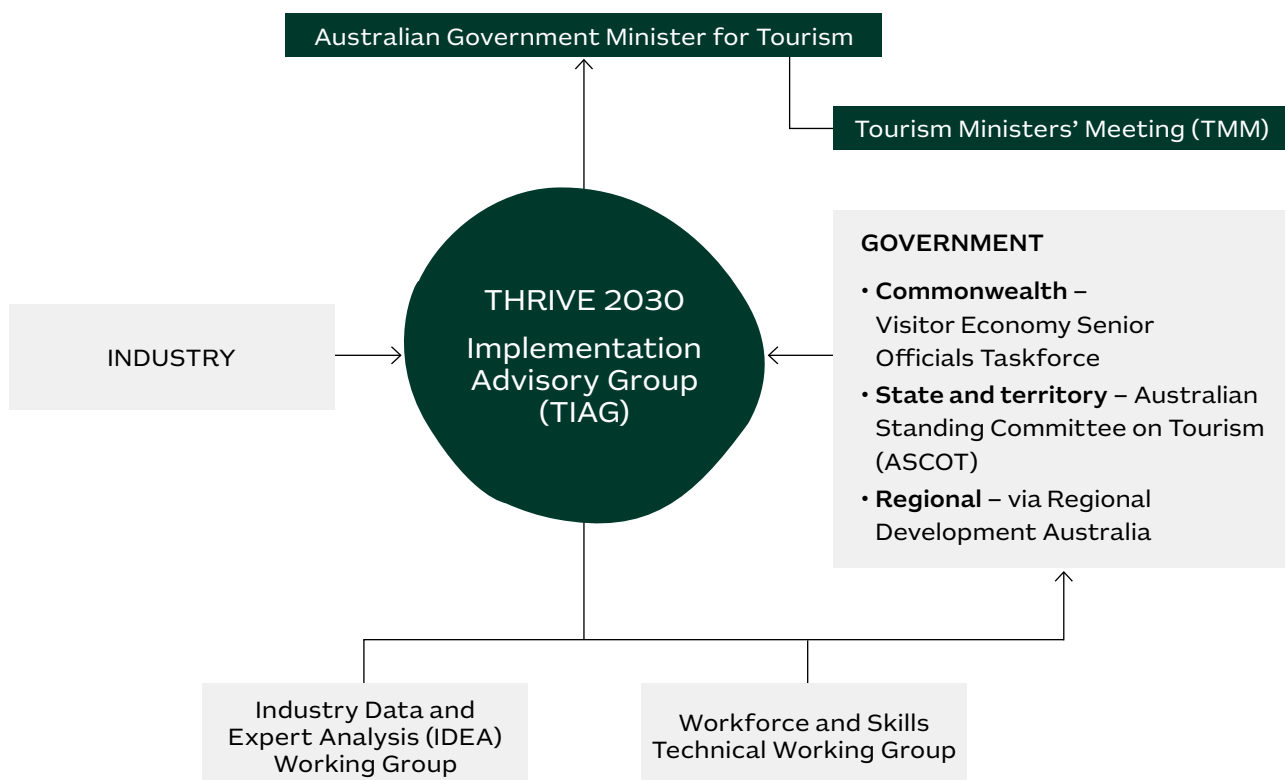
The visitor economy is a complex ecosystem of many stakeholders. It therefore requires comprehensive and effective collaboration to ensure stakeholders act in concert to support achievement of industry goals. The COVID-19 pandemic has been a catalyst for increasing levels of collaboration across the 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 framework recognises and incorporates existing collaborative engagement mechanisms throughout the jurisdictions while enhancing it with new and improved activities.

Figure 10: THRIVE 2030 collaboration framework



At the centre of the framework is the **THRIVE 2030 Implementation Advisory Group**, 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 **Industry Data and Expert Analysis 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 Aboriginal and Torres Strait Islander 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, and the Strategy will leverage a productive engagement of this group as part of its collaborative framework.

The Strategy will also see establishment of an ongoing cross 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.





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.

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 through creation of an Industry Data and Expert Analysis Working Group.

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 SME and micro-SME users, and particular market segments (e.g. Aboriginal and Torres Strait Islander tourism operators). 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's success is 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.'

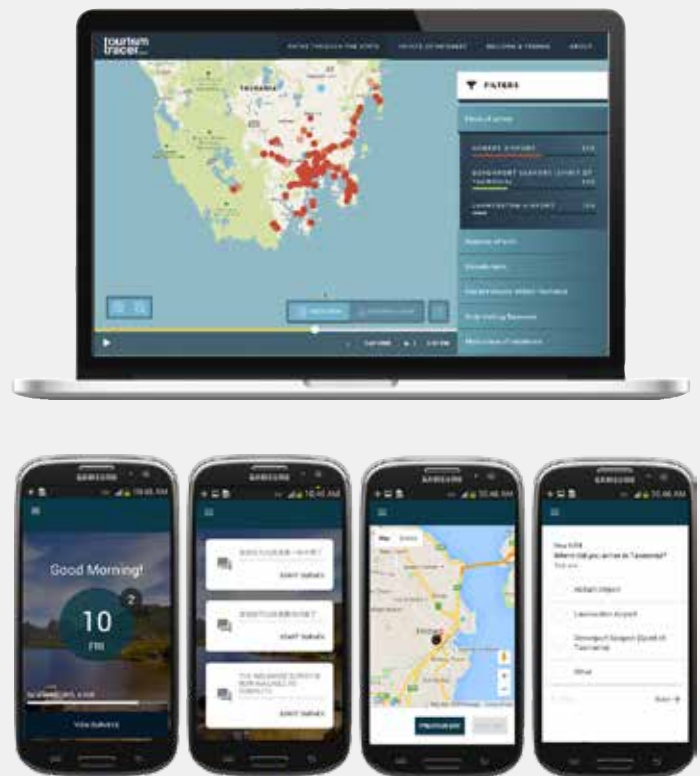


Image Credit: University of Tasmania.

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.

Indicative success measures: Workforce numbers; increase in workers from specific demographics (Indigenous, 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. The sector has for many years 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 sector 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 prioritising the return of temporary workers such as working holiday makers, international students and people recruited under programs like the *Pacific Australia Labour Mobility Scheme* on the international side. In the longer term, more needs to be done to elevate the sector as a career of choice, through career path development 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.

Improving workforce capability through better, more relevant education and training is critical. Reforms to 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 for Aboriginal and Torres Strait Island peoples. These will help drive and reinforce relevant aims of the *National Agreement on Closing the Gap* and the *National Roadmap for Indigenous Skills, Jobs and Wealth Creation*.

Addressing workforce challenges will be an early priority with the commissioning of a Visitor Economy Workforce and Skills Strategy. The 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.





Fostering business success for First Nations tourism

An innovative program is helping First Nations people 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.

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 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 which deliver high-quality products and services. Optimise uptake of technology to improve service delivery and business efficiency.

Indicative success measures: Level of innovation in visitor economy businesses which could include measures of technology adaptation, new product development, business process improvement, 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. This includes 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 dangers that technology causes, for example business dislocation, and privacy and cyber security threats. Industry must be ready to embrace and address these challenges.

There has been significant disruption to sales and distribution networks within the travel distribution system brought about by the COVID-19 pandemic. 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.

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.

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*, 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.



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*.

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 can be leveraged in industry, government and business product promotion that simultaneously inspire best practice for all the industry.



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

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. Equally important, assets must be high-quality and maintained so that they deliver a positive visitor experience. Finally, asset development and management must be conducted in a sustainable way which takes into account community expectations, environmental concerns, 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. The Strategy will, through collaboration, 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 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.

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.

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. Under the Australian Government's Aviation Recovery Framework – *Flying to Recovery* – governments will continue to work with industry to deliver a strong and competitive aviation sector; safe, secure and sustainable aviation; and ensure connectivity in Australia's regions through access to essential aviation services. The Recovery Framework includes a set of strategic priorities and supporting measures that will help drive investment and recovery, and strengthen the aviation sector. In the short term, the Australian

Government will work cooperatively with the industry which will determine its international market priorities, having regard to the ongoing impacts of COVID-19 on particular markets, with some state and territory jurisdictions also offering financial support to boost international capacity.

There is considerable opportunity to grow the cruise market in Australia. There is an ongoing challenge to convert cruise participation into domestic spend. Governments and industry will work together to address issues to unlock this potential, 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.

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.

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.

Unique circumstances mean we must adopt a unique and targeted approach to market development. Some closed international borders and limited international visitation in the short term mean a necessary ongoing focus on growing the domestic market. As international borders have re-opened and more do so in future, we will be swift and agile to capitalise on attracting 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 and market research 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 economies²¹. 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 varietals 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.

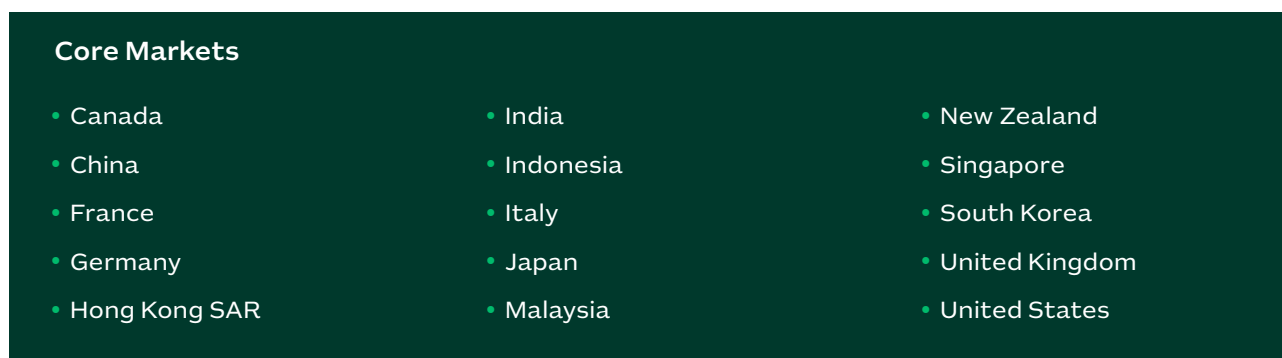
‘After a 160-year journey, Queensland wine has come of age. It is being taken seriously on both a national and international level. Key to this success was the industry working together across Queensland.’

International market

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



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 diverse range of travellers from a balanced portfolio of markets.

There will be a continuing focus on the top priority markets of the United States, United Kingdom and China, noting that a recalibration of our pre-COVID focus on these markets will be required given changing country conditions and marketing strategies adopted by competitor countries. A greater focus will be explored in Japan, South Korea, Singapore, Indonesia, Canada, Germany, Italy, India and France based on their historical performance, growth potential, latent demand and regional dispersal opportunities. Markets to keep on a 'watch list' for growth opportunities include Vietnam, Taiwan, Scandinavia, Philippines, Brazil, Ireland, and Switzerland. Ongoing changes in comparative promotion costs across markets also demand a reassessment of where the best return on marketing investment can be achieved.

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 South East Asia growing in importance towards the end of the decade.

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. 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.

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 into the future to sustain a greater contribution from the domestic market.



Image Credit: GoBoat Australia.

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.'

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. 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 COVID-safe health and safety measures, and also adjusting and adapting to flexible booking arrangements and promoting availability of appropriate travel insurance products.

7. Grow unique and high-quality products, including Aboriginal and Torres Strait Islander experiences

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

Indicative success measures: Number of new visitor economy businesses/experiences; increase in 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 Aboriginal and Torres Strait Islander peoples. This Strategy will drive the respectful embedding of Aboriginal and Torres Strait Islander cultures into Australia's brand positioning and support related product development. Through a range of actions aimed at enhancing our Aboriginal and Torres Strait Islander experiences, the Strategy will help drive and reinforce relevant aims of the *National Agreement on Closing the Gap* and the *National Roadmap for Indigenous Skills, Jobs and Wealth Creation*.

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
- Goroke
- Kaniva
- Patchewollock
- Nullawil
- Rupanyup
- Sea Lake.

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.

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 Aboriginal and Torres Strait Islander cultures will also help to increase visitor numbers to regions.

To be successful, identifying and prioritising regions according to their readiness and ability to support visitation is required. 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.

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 and represents an opportunity to entice business people to travel again for work.

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
- Fossickers Way Touring Route
- Stonehenge Recreational Reserve
- World Heritage Way
- World Heritage Walk
- State Tourist Drive 11 – Miners Way.

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

Aiming to be recognised by UNESCO

UNESCO recognises 169 Global Geoparks in 44 countries.

Glen Innes aims to be 1 of 3 Australian geo-regions 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.

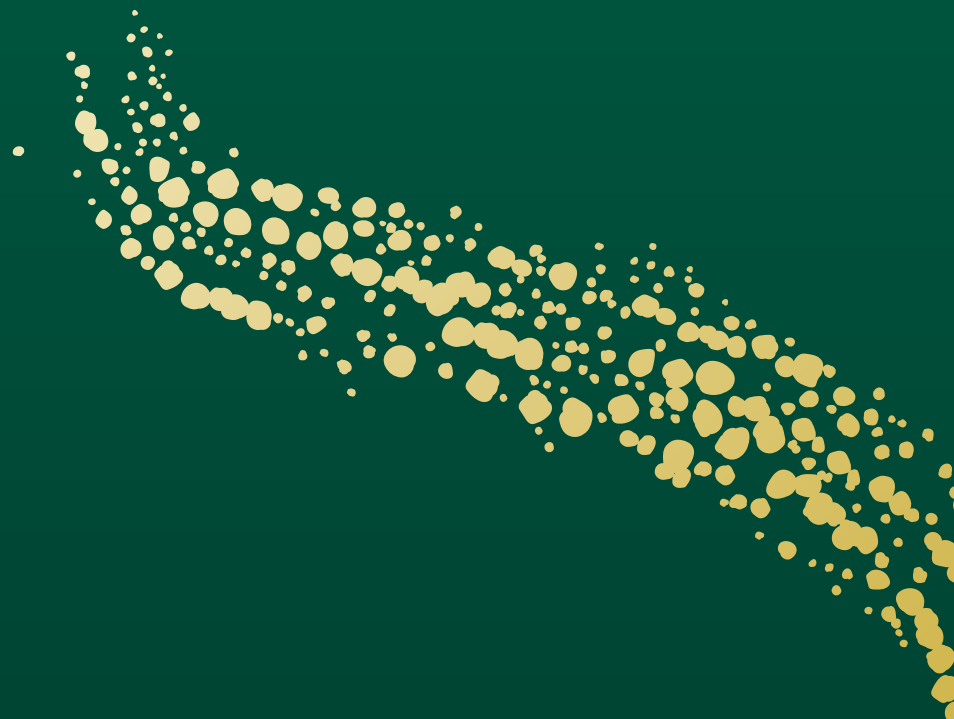




THRIVE
2030

THRIVE 2030 Strategy Action Plan

Phase 1: Recovery 2022–2024



The Strategy in action – implementation

While the challenges ahead are significant, and delivering a reimagined visitor economy will be demanding, by working together in pursuit of the THRIVE visions 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	
ABF	Australian Border Force
ABS	Australian Bureau of Statistics
AGD	Attorney-General's Department
Austrade	Australian Trade and Investment Commission
ATO	Australian Taxation Office
DAWE	Department of Agriculture, Water and the Environment
DESE	Department of Education, Skills and Employment
DFAT	Department of Foreign Affairs and Trade
DISER	Department of Industry, Science, Energy and Resources
DITRDC	Department of Infrastructure, Transport, Regional Development and Communications
DoH	Department of Health
DSS	Department of Social Services
FWO	Fair Work Ombudsman
Home Affairs	Department of Home Affairs
LG	Local governments
NDIA	National Disability Insurance Agency
NIAA	National Indigenous Australians Agency
NRRA	National Recovery and Resilience 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.	Austrade, 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, NRRRA)
1.7	Establish an effective collaborative mechanism of experienced appropriate parties to improve and encourage greater participation of Aboriginal and Torres Strait Islander cultures, interpretation and businesses into the visitor economy.	VE industry (Austrade, NIAA, TA)
1.8	Integrate Regional Development Australia 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.	DITRDC (RDA, LG, RTOs)

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 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 Industry Data and Expert Analysis (IDEA) Working Group to identify the information needs of visitor economy participants which are not being met, 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 data and research products aimed at the needs of particular segments of the sector. <ul style="list-style-type: none"> Leverage existing data and ABS integration capabilities to produce new and existing data assets. 	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 framework (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

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 with commissioning of a Visitor Economy Workforce and Skills Strategy which will require striking 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 Aboriginal and Torres Strait Island 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 (Indigenous, 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	As a priority, 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. <ul style="list-style-type: none"> • ABS will undertake a rolling program of work to incrementally review the <i>Australian and New Zealand Standard Classification of Occupations</i> in line with government priorities. This will assist better identify visitor economy occupations and their skill levels and assist training products and visa settings to better meet needs of the visitor economy. 	Austrade (S&TG), ABS
3.3	Increase workforce participation from under-participating cohorts including mature workers, Aboriginal and Torres Strait Islander peoples, people with disability, youth, and women, especially in regional areas.	DESE, DSS, Austrade (S&TG, VE industry, NDIA, NIAA)

No	Action	Action lead (Partners)
3.3	<ul style="list-style-type: none"> • Leverage the <i>Indigenous Skills and Employment Program</i> which supports pathways to employment for Indigenous Australians. • Conduct pilot program to facilitate people with disability into the visitor economy workforce. • Supports eligible job seekers with tailored assistance to find sustainable employment including through the <i>New Employment Services Model, Transition to Work, and Launch into Work Programs</i>. • 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>. • Encourage local job creation through business start-up and self-employment advisory services such as the <i>Entrepreneurship Facilitators program</i>. • Support tourism and hospitality employers to develop long-lasting workforce solutions through services such as the <i>Employer Liaison Officer</i>. • Ensure policy settings are right and improve awareness of the <i>Pension Work Bonus</i> to encourage more retired workers to undertake part-time work in the visitor economy. • Leverage the \$2 billion <i>JobTrainer Fund</i>, which includes 24,000 current enrolments in visitor economy courses. • Ensure access to the \$42.4 million <i>National Careers Institute</i>, which assists all Australians with careers information and support, whatever their age or career stage. 	<p>DESE, DSS, Austrade (S&TG, VE industry, NDIA, NIAA)</p>
3.4	<p>Review the working holiday maker scheme to increase the pool of potential workers.</p> <ul style="list-style-type: none"> • Allow the return of working holiday makers to Australia as a priority consistent with the <i>National Plan to Transition Australia's National COVID-19 Response (the National Transition Plan)</i>, noting that almost all identified core and expansion markets are eligible to participate in the program. • Incentivise the return of working holiday makers through visa fee rebates (and for international students) for a fixed period in early 2022. • Provide incentives for working holiday makers who work in tourism and hospitality, including in regional Australia, allowing them to stay longer and contribute more to the visitor economy. • 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. 	<p>Home Affairs</p>

No	Action	Action lead (Partners)
3.5	<p>Streamline the return of international students in accordance with the <i>National Transition Plan</i>.</p> <ul style="list-style-type: none"> 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 small and medium enterprises to existing migration schemes such as the <i>Seasonal Worker Program</i> and the <i>Pacific Labour Scheme</i>.</p> <ul style="list-style-type: none"> Programs have been streamlined under the <i>Pacific Australia Labour Mobility (PALM)</i> scheme. 	DFAT, DESE
3.7	<p>Progress the <i>Government's Skills Reform</i> agenda for a high-quality, relevant and accessible VET 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>	DESE (S&TG, VE industry)
3.8	<p>Promote the visitor economy as an attractive career choice including through incentives and awards to promote best practice by employers.</p>	VE industry
3.9	<p>Develop Aboriginal and Torres Strait Islander training programs that create opportunities for participants to fully understand the industry and be able to advance their career and to develop new products or experiences in the sector.</p> <ul style="list-style-type: none"> Promote access to the \$10 million <i>National Indigenous Tourism Mentoring Program</i> which assists Indigenous tourism businesses to get practical advice and support from industry experts. 	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"> Increase acceptance across all state and territories of micro-credentialing as a recognised and valued form of training and accreditation in visitor economy occupations, including for tour guides. 	S&TG
3.11	<p>Promote employment standards of employers including compliance with workplace obligations such as modern awards, superannuation requirements, and work health and safety obligations including through the Fair Work Ombudsman's education tools and advice services.</p>	FWO, ATO, SWA, VE industry, (AGD)
3.12	<p>Encourage larger industry operators to implement formal in-house training and diversity programs.</p>	VE industry

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, 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, participation in and compliance with quality accreditation programs.

No	Action	Action lead (Partners)
4.1	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.	VE Industry, DESE, S&TG
4.2	Streamline and target information about government resources assisting businesses to modernise and diversify, including through programs such as the Digital Solutions – <i>Australian Small Business Advisory Services</i> to assist small businesses to improve their digital literacy and adopt digital tools and processes. <ul style="list-style-type: none"> Assist small businesses to improve connectivity through adopting e-invoicing. <i>Rural Financial Counselling Service and Regional Small Business Support Program</i> assist regional businesses to build resilience and capability. 	Treasury, ATO, S&TG, LG, VE industry, ATO
4.3	Encourage businesses to implement resilience and crisis management plans.	VE industry, S&TG, NRRRA
4.4	Implement an industry sustainability framework and education tools to assist businesses implement and further improve sustainability practices.	Austrade, DAWE, VE industry, S&TG

No	Action	Action lead (Partners)
4.5	Develop, promote, and encourage businesses to improve quality through industry-led programs and celebrate exceptional visitor economy businesses.	VE industry, Austrade, TA, S&TG
4.6	Monitor the accessibility and affordability of public liability insurance for visitor economy businesses, and continue to support improved access and affordability through Government and industry cooperation.	Treasury, VE industry
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"> • the <i>Regional Connectivity Program</i> • the <i>Mobile Black Spot Program</i> • NBN Co's \$4.5 billion <i>Network Investment Plan</i> • NBN Co's \$300 million <i>Regional Co-Investment Fund</i>. 	DITRDC, VE industry
4.8	Implement measures to address emissions reductions, and climate resilience and adaptation including through <i>Australia's Long-Term Emissions Reduction Plan</i> and the <i>National Climate Resilience and Adaptation Strategy</i> .	DISER, DAWE, S&TG
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)

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. Equally important, assets must be high-quality and maintained so that they deliver a positive visitor experience.

Infrastructure supporting visitors upon arrival (i.e. airports, 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	Coordinate across governments to ensure infrastructure, including transport infrastructure, is well planned and delivered to support visitor growth and flows.	DITRDC, Austrade, S&TG, LG
5.2	Facilitate investment including through appropriate foreign direct investment programs to create new and refreshed offerings, including by governments working to reduce regulatory barriers to appropriate development of visitor infrastructure such as luxury accommodation in natural environments.	VE industry, Austrade, S&TG, LG, DAWE
5.3	Develop assets, infrastructure and experiences that are accessible to all people, regardless of physical limitations, disability or age.	VE industry, Austrade, S&TG, LG
5.4	Prioritise new destination development through use of holistic destination development plans, community and stakeholder collaboration, and streamlined regulatory approvals.	VE industry, S&TG, LG
5.5	Improve tourism infrastructure in regional areas including through roll out of <i>Regional Recovery Partnerships Program</i> , the <i>Building Better Regions Fund</i> , and other regional infrastructure programs noting the importance of good quality roads to connect visitors and communities to attractions and services.	DITRDC, S&TG, LG, NRRRA

No	Action	Action lead (Partners)
5.5 cont.	<p><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.</p> <p>The Australian Government's \$600 million <i>Preparing Australia Program</i> will support projects that improve the long-term resilience of Australian communities by supporting disaster risk mitigation and limiting the impact of future disasters. Under the Local stream this includes activities relating to planning, awareness and capacity, as well as built infrastructure.</p> <p>The <i>Rural Financial Counselling Service and Regional Small Business Support Program</i> assist regional businesses to build resilience and capability.</p> <p>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.</p>	DITRDC, S&TG, LG, NRRRA
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"> • \$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. 	Director of National Parks, 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, S&TG, LG
5.8	<p>Ensure that regional airport facilities meet the needs of visitors and communities, including through the following programs:</p> <ul style="list-style-type: none"> • The Australian Government's <i>Regional Airports Program</i>. • The <i>Remote Airstrip Upgrade Program</i> to improve safety and accessibility at regional and remote airports, aerodromes and airstrips. 	DITRDC, LG, VE industry

No	Action	Action lead (Partners)
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	Implement the Australian Government's Aviation Recovery Framework, <i>Flying to Recovery</i> , to deliver a strong and competitive aviation sector; safe, secure and sustainable aviation; and ensure connectivity in Australia's regions through access to essential aviation services.	DITRDC, VE industry
5.11	Work cooperatively to maximise the return of inbound aviation capacity.	DITRDC, S&TG, Tourism Australia, Austrade
5.12	<p>Work collaboratively to address barriers to maximising the contribution from the cruise sector and managing associated community concern.</p> <ul style="list-style-type: none"> • Grow the cruise market in Australia with the goal of converting cruise participation into domestic spend. • Collaborate to ensure consistent and effective border management. • Improve port infrastructure. • Increase benefit to regional communities from cruise visitation. 	Austrade, Home Affairs, S&TG, VE industry

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>Swift vaccine and booster rollouts: once vaccinations reach mandated level, jurisdictions adhere to the <i>National Transition Plan</i> and reopen state and territory borders to enable domestic travel.</p> <p>Implement health and safety measures to provide visitors, workers and the community with a COVID-safe environment and to provide consumers with the confidence to travel.</p>	DoH, S&TG, VE industry
6.2	<p>Prioritise development and rollout of internationally recognised vaccine certificate and systems to allow vaccinated people to travel domestically and internationally consistent with the <i>National Transition Plan</i>.</p>	DFAT
6.3	<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 later 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>, the <i>Indigenous Visual Arts Industry Support Program</i>, and the <i>Culture, Heritage and Arts Regional Tourism Program</i>.</p>	Austrade, S&TG, VE industry

No	Action	Action lead (Partners)
6.4	<p>Target international markets that have opened to Australia, consistent with the <i>National Transition Plan</i> including:</p> <ul style="list-style-type: none"> • Use of vaccine certificates. • Aligned, dedicated and targeted marketing campaigns to maximise impact. 	DFAT, TA
6.5	<p>Develop an International Diversification Strategy to identify emerging markets for travel and education; 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"> • The diversification strategy will also look at attraction of certain growing (and higher yield) traveller cohorts including people seeking luxury, nature and cultural experiences. 	Austrade, TA (S&TG)
6.6	Implement a coordinated marketing strategy to re-establish core markets and grow emerging international markets.	TA, S&TG
6.7	Develop and implement a coordinated approach for direct, affordable, long-haul flights to Australia.	VE industry
6.8	Ensure Australia has a safe, affordable, and competitive visitor visa system to maintain and grow market share.	Home Affairs
6.9	Prioritise the return of international students in accordance with the <i>National Plan to Transition</i> .	Home Affairs, S&TG
6.10	<p>In accordance with the <i>Australian Strategy for International Education 2021-2030</i>, ensure that Australia attracts international students from diverse markets and in study streams that ultimately help meet Australia's skills shortages if they choose to migrate subsequently. Includes review of the <i>ESOS Act</i>.</p> <ul style="list-style-type: none"> • Build offering of mixed-mode course delivery and micro-credential products. • Support diversification of international student cohorts and source countries, including identifying new and emerging markets. • Changes to the length of stay for the <i>Temporary Graduate</i> (subclass 485) visa: <ul style="list-style-type: none"> – Increasing the length of stay from 2 years to 3 years for Masters by coursework graduates. – Temporarily increasing the length of stay from 18 months to 24 months for VET sector graduates. 	DESE, Home Affairs
6.11	Develop and implement innovative marketing approaches including partnership marketing, extending reach of marketing and conversion, greater personalisation and effective trade marketing.	TA, S&TG, VE industry
6.12	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 Aboriginal and Torres Strait Islander experiences

Provide high-quality products and services that leverage Australia’s competitive advantages such as our natural, built, and cultural attributes, including our Aboriginal and Torres Strait Islander cultures, vibrant cities, and authentic regions.

THRIVE 2030 will drive the respectful embedding of Aboriginal and Torres Strait Islander cultures into Australia’s brand positioning and support related product development. Through a range of actions aimed at enhancing our Aboriginal and Torres Strait Islander experiences, the Strategy will help reinforce relevant aims of the *National Agreement on Closing the Gap*.

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 Aboriginal and Torres Strait Islander cultures into Australia’s brand positioning and support prioritised product development.	VE industry (NIAA, Austrade, S&TG)
7.3	Support return of events, including business, cultural and arts, regional, and major events, and implement an annual coordinated calendar of events to encourage new and return visitors, including: <ul style="list-style-type: none"> • Leverage and support the <i>Green and Gold Decade</i> 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 <i>Business Events Australia Bid Fund Program</i>. • Incorporate creative/cultural assets into destination marketing to maximise contribution of the creative economy. 	VE industry, DoH, DITRDC, Australia Council for the Arts (TA, S&TG, LG)

No	Action	Action lead (Partners)
7.3 cont.	<ul style="list-style-type: none"> 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, 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>. 	VE Industry, DoH, DITRDC, Australia Council for the Arts (TA, S&TG, LG)
7.4	Cities develop and offer a compelling differentiated offering for both the domestic and international markets to revitalise visitation.	S&TG, LG
7.5	<p>Grow and develop high-quality products and experiences around unique Australian locations and themes, including approaches which integrate sustainable nature tourism with economic opportunities for Traditional Owners, and capitalising on emerging tourism trends such as geo-tourism.</p> <ul style="list-style-type: none"> Leverage the \$10 million annual <i>Wine Tourism and Cellar Door Grants Program</i> to boost wine tourism and attract visitors to wine regions. 	VE industry DAWE
7.6	<p>Develop new and expand existing Aboriginal and Torres Strait Islander owned and operated tourism enterprises, including through:</p> <ul style="list-style-type: none"> The \$12 million <i>Tourism Grants for Indigenous Business Program</i> which helps individual businesses and community organisations invest in developing new products, equipment, business planning and marketing in the tourism sector. The \$17 million <i>Strategic Indigenous Tourism</i> co-investment projects which will help increase the supply of Indigenous tourism experiences and create supply chain opportunities for Indigenous tourism businesses. 	VE industry, NIAA (Austrade, S&TG)
7.7	Enhance the visitor experience through use and availability of technology.	VE industry

A group of people are gathered in a cave, looking at ancient rock art on the walls. The art includes a large, stylized bird or animal figure with intricate patterns. One person is holding a yellow object, possibly a hat or a piece of equipment. The scene is lit with warm, focused lights, highlighting the textures of the rock and the details of the artwork.

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