



AUSTRALIA

THRIVE 2030 Recovery Phase (2022–2024)

Final Report



THRIVE
2030

Acknowledgements

The Australian Government values the important contribution by all stakeholders in developing the THRIVE 2030 Recovery Phase (2022–2024) Final Report.

Austrade wishes to acknowledge the many industry bodies, government officials, and others who provided content, case studies, time, insights and other contributions through the development of the final report.

Acknowledgement of Country

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

Cover image:

Kangaroo Island,
South Australia
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Published in March 2025.

Message from the Minister for Trade and Tourism

When the government and industry first gathered together to shape THRIVE 2030, we were emerging from some of the hardest of times for our sector. Lockdowns, closed borders and travel cancellations were all front of mind as we turned to what recovery looked like.

But at the core of those conversations across the country was one certainty, the strength of this industry has always been you.

The hundreds of thousands of Australian businesses and their 650,000 employees, alongside dedicated and passionate peak bodies.

And while the pandemic tested our resilience, forcing adaptation, innovation and collaboration, recovery was never in doubt.

Now, as we move beyond the recovery phase, we stand at a pivotal moment – one where we can shift our focus from rebuilding to long-term growth and prosperity.

THRIVE 2030 sets out a bold vision for the future of our sector. It is an industry-led, government-enabled strategy that recognises the power of collaboration between businesses, communities and policymakers.

As this report shows, together we have proven our ability to overcome adversity. Now, we must harness that same spirit to drive innovation, sustainability and competitiveness in the years ahead.

Tourism is more than an economic driver; it is a cornerstone of our identity, connecting people and cultures while delivering jobs and opportunities across the country. By working together, we will ensure a thriving, resilient, and world-leading tourism industry – one that not only meets today’s demands but seizes the opportunities of tomorrow.

While we take stock of how far we have come, I invite all everyone to join us in this journey, shaping a future where our tourism industry thrives like never before.

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



Minister for Trade and Tourism with graduates from the National Indigenous Training Academy (NITA) at Uluru Ayres Rock Resort in 2024. Image supplied.

Introduction

The THRIVE 2030 Phase 1 (Recovery) Action Plan was implemented between 2022 and 2024. With 64 strategic actions aligned to THRIVE 2030's 7 policy priorities, the Recovery Phase recognised the challenges Australia's visitor economy faced from the pandemic. The action plan focused on strengthening collaboration between all levels of government and industry, addressing workforce challenges, supporting businesses to modernise, improving data and insights, and driving domestic and international visitation.

Significant progress was achieved in the delivery of Recovery Phase strategic actions, thanks to the engagement of our industry and government partners.

The interim 2024 target set for the Recovery Phase was **\$166 billion** of visitor spend by the end of 2024 (including **\$70 billion** of regional spend). This was achieved. Visitor spend in Australia reached **\$211 billion** over the 12 months to September 2024. Of this, **\$80 billion** was spent in regional Australia.

Of the 64 strategic actions, 62 were actioned with 26 actions completed and another 36 actions to continue being delivered throughout the life of THRIVE 2030. Key outcomes delivered included:

- The Australian Government's **\$48 million** Tourism and Travel package supported tourism sector recovery, attracted and upskilled workers, helped businesses build capability and enhance their tourism products, and delivered infrastructure upgrades for caravan parks.
- Efforts to rebuild international markets, underpinned by Tourism Australia's *Come and Say G'Day* international marketing campaign, its trade shows, and its collaboration with state and territory tourism organisations.
- Initiatives to rebuild visitor economy workforce capability, including the Australian Government's **\$8.1 million** Choose Tourism Program to attract people to work in tourism.
- The National Sustainability Framework and the Sustainable Tourism Toolkit helped tourism businesses become more sustainable, and the WELCOME Framework provided practical advice to make tourism businesses more accessible and inclusive.
- Austrade's Tourism Research Australia (TRA) published more granular and timely data, including domestic mobility data and business events data.
- The LIVE Framework was released to measure the visitor economy's economic, social, environmental and institutional metrics.
- The First Nations Visitor Economy Partnership was established to support greater participation and economic opportunities for First Nations people and businesses in the tourism industry.
- Tourism infrastructure, such as upgrades to Commonwealth National Parks, was enhanced.
- 346 tourism investment projects (worth \$20 million or more), worth a total of **\$63.4 billion** were in the project pipeline at 30 June 2024 in the *accommodation, aviation, and arts, recreation and business services* sectors.
- Major events (sports, arts and business) drove visitation across Australia.
- State and Territory Governments worked to support business modernisation, attract visitors and rebuild international aviation links.

This report provides an overview of key initiatives delivered under each policy priority throughout the implementation of the THRIVE 2030 Recovery Phase Action Plan (2022–2024).

Recovery Snapshot: Targets and Data

THRIVE 2030 sets out a vision to achieve total visitor expenditure (including from long-stay international students) in Australia of **\$230 billion** by 2030 (including **\$100 billion** of regional spend), with a target range of **\$195 billion** to **\$270 billion**. The interim target was **\$166 billion** of spend by the end of 2024 (including **\$70 billion** of regional spend).

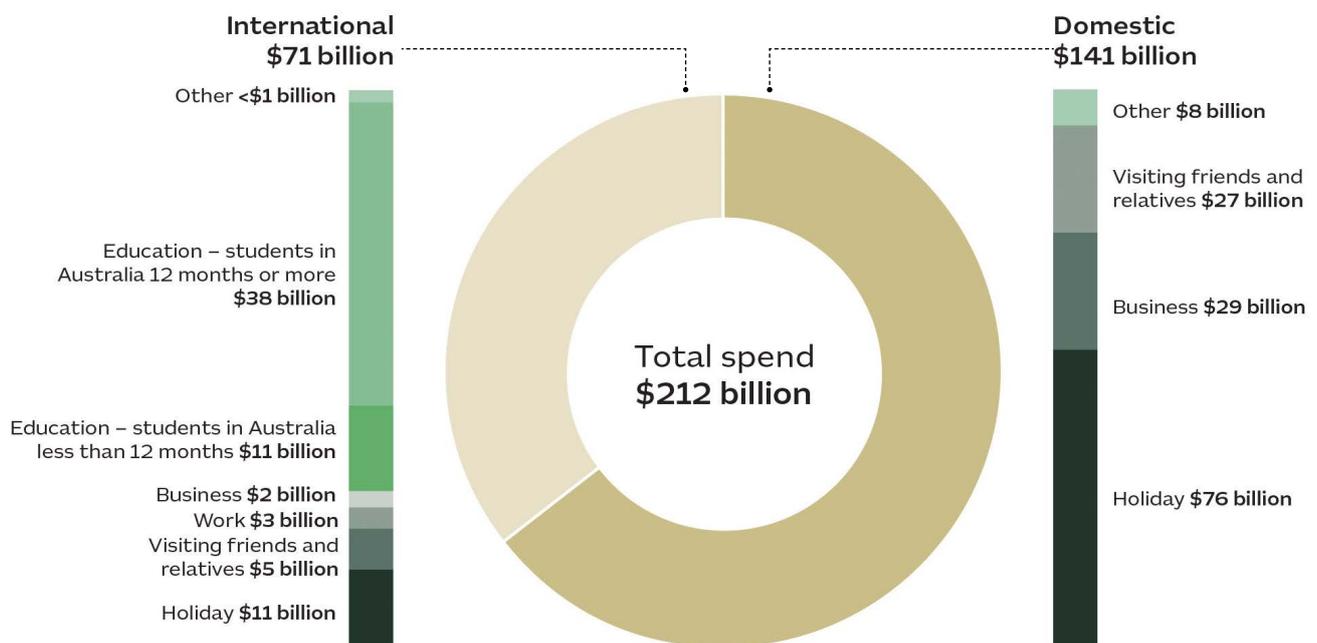
During the Recovery Phase, the interim target was exceeded by December 2023, well ahead of the expected timeline, both in actual (nominal) and inflation-removed adjusted (real) terms.

As at year ending September 2024, the most recent published data available, total spend in Australia by all visitors had reached **\$211 billion** (including long-stay international students), with **\$80 billion** spent in regional areas.¹

Although the interim target was achieved early, the latest TRA forecasts suggest moderating growth in total visitor expenditure and visitor numbers in the near-term, although the long-term outlook for visitor growth remains sound.

Snapshot of Australia’s visitor economy

Figure 1. Australia’s visitor economy in the year ending September 2024²



1. This assessment is based off headline inflation.
 2. Numbers are rounded up to the nearest billion.

Priority 1: Deliver success through comprehensive collaboration

ACTIONS: 8/8 Completed

The Australian Government, states and territories, local governments, industry bodies and businesses have worked together, through new and existing collaborative mechanisms, to deliver THRIVE 2030 Phase 1 actions. This collaboration has critically underpinned many of the actions set out in the Phase 1 Action Plan.

Key outcomes:

- Established the THRIVE 2030 Implementation Advisory Group (TIAG) to oversee and monitor THRIVE 2030 implementation and the Australian Government Visitor Economy Senior Officials Taskforce to support delivery of THRIVE 2030 initiatives.
 - Established working groups to accelerate consideration and progress of complex policy issues. This included the Workforce and Skills Technical Working Group, which informed delivery of the Visitor Economy Workforce and Skills Interim Action Plan, and the Industry Data and Expert Analysis (IDEA) Working Group, which recommended development of the Longitudinal Indicators for the Visitor Economy (LIVE) Framework.
 - First Nations tourism industry led co-design of the First Nations Visitor Economy Partnership to support greater participation and economic opportunities for First Nations people and businesses in the tourism industry. The South Australian Aboriginal Tourism Operators Council (SAATOC) was also established.
 - Australian Government and state and territory tourism officials jointly worked to deliver initiatives on sustainable tourism, accessible tourism, First Nations tourism, tourism data modernisation and insurance.
 - Regular engagement occurred between Tourism Australia and state and regional tourism organisations and industry resulting in coordinated and shared knowledge on destination marketing and marketing Australia to international markets.
- The National Emergency Management Agency (NEMA) worked with states and territories to ensure the visitor economy was considered in crisis management and recovery plans. In response to Tropical Cyclone Jasper, Queensland's Department of Tourism, Innovation and Sport collaborated with regional tourism organisations to develop and deliver a Crisis Communications Kit and Crisis Communications Workshop, funded under Australian Government Disaster Recovery Funding Arrangements. The kit and workshop allowed tourism businesses to work closely with government to improve crisis response and recovery.



Mandingalbay Authentic Indigenous Tours in Cairns was mentored to welcome diverse international visitors under the Reviving International Tourism Grant Program. Image © Tourism Australia.

Looking ahead:

Governments across all levels and industry will continue to collaborate in the Consolidation Phase (2025–2027). Effectiveness of existing collaborative mechanisms will be reviewed and opportunities to further strengthen cooperation and integration, particularly with regional stakeholders, will be embraced.



Government and industry have worked together to facilitate the sharing of lessons learnt, best practice and industry resources to help directly improve insurance affordability outcomes. Image: Margaret River Adventure Co © Tourism Western Australia.

Working with tourism businesses to support improved insurance affordability and accessibility

Accessing affordable insurance has become harder for tourism businesses across the world. Austrade has worked closely with industry and other government agencies to support improved insurance affordability and accessibility for Australian tourism businesses.

In 2023, Austrade, with support from Treasury, brought together stakeholders for a series of workshops to share ideas to address the challenge of rising public liability insurance premiums in the visitor economy.

Participants came from state and territory tourism bodies, and from the insurance industry. Treasury, NEMA, the Australian Prudential Regulation Authority and the Australian Small Business and Family Enterprise Ombudsman were also represented.

Outdoors NSW & ACT (also known as Australian Outdoor Industry) went on to work with Affinity Insurance and Aon to create 'Activity Safe' guidelines, to help adventure operators to lower risks. The Caravan Industry Association of Australia (CIAA) teamed up with the Insurance Council of Australia to create an 'Insuring Caravan Parks' roadmap.

Austrade has been 'instrumental in facilitating collaboration and sending a message to the insurance industry that we are doing what it takes to reduce risk' says CIAA CEO Stuart Lamont. 'We have already seen some insurance premium relief and increased access for businesses.'



Through its 'One Voice' strategy, Tourism Australia fosters a whole-of-country approach to destination marketing. Image supplied.

Speaking with One Voice, Tourism Australia partners with states and territories

As the national tourism marketing organisation that promotes Australia as a compelling tourism destination, Tourism Australia has worked closely with Austrade and industry on the implementation of the THRIVE 2030 visitor economy strategy.

Through its 'One Voice' strategy, Tourism Australia fosters a whole-of-country approach to destination marketing by collaborating with state and territory tourism organisations (STOs).

The One Voice approach helps drive alignment in research, distribution and marketing. Key initiatives include managing and delivering the:

- 'Aussie Specialist Program' platform and team for training travel agents
- 'Signature Experiences of Australia' curated portfolio of exceptional experiences across the country
- 'Consumer Demand Project', a survey of international travellers, to inform and shape the development of campaign and strategic direction.

Through the One Voice approach, Tourism Australia and STOs partner on:

- conversion campaigns in international markets
- familiarisation trips bringing trade and media to selected destinations.

Teams from Tourism Australia and STOs have met regularly to share insights and discuss plans during the THRIVE 2030 Recovery Phase. Both sides recognise that working effectively together leads to better outcomes for the Australian tourism industry.

In late 2024, Tourism Australia led a One Voice delegation of STOs and convention bureaux leaders to India. In a high-impact program across 4 days and 2 cities, more than 600 leisure and business events stakeholders came together for 25 events. India has been one of the fastest markets to recover since international borders reopened in 2022, with visitors to Australia exceeding pre-pandemic figures. The trip aimed to further strengthen ties with key partners in this market.

Priority 2: Improve data and insights

ACTIONS: 5/6 completed or 'actioned and ongoing'

There has been substantial effort to modernise and improve tourism data and produce relevant, robust and timely insights during THRIVE 2030's Recovery Phase. The Australian Government and states and territories have worked together to leverage and share existing data and develop new data products to more effectively measure industry performance, monitor trends, and inform decision-making and policy development. The IDEA Working Group, comprising members from industry and government, identified unmet information needs and made recommendations, which included developing new Longitudinal Indicators for the Visitor Economy (LIVE) Framework data dashboard.

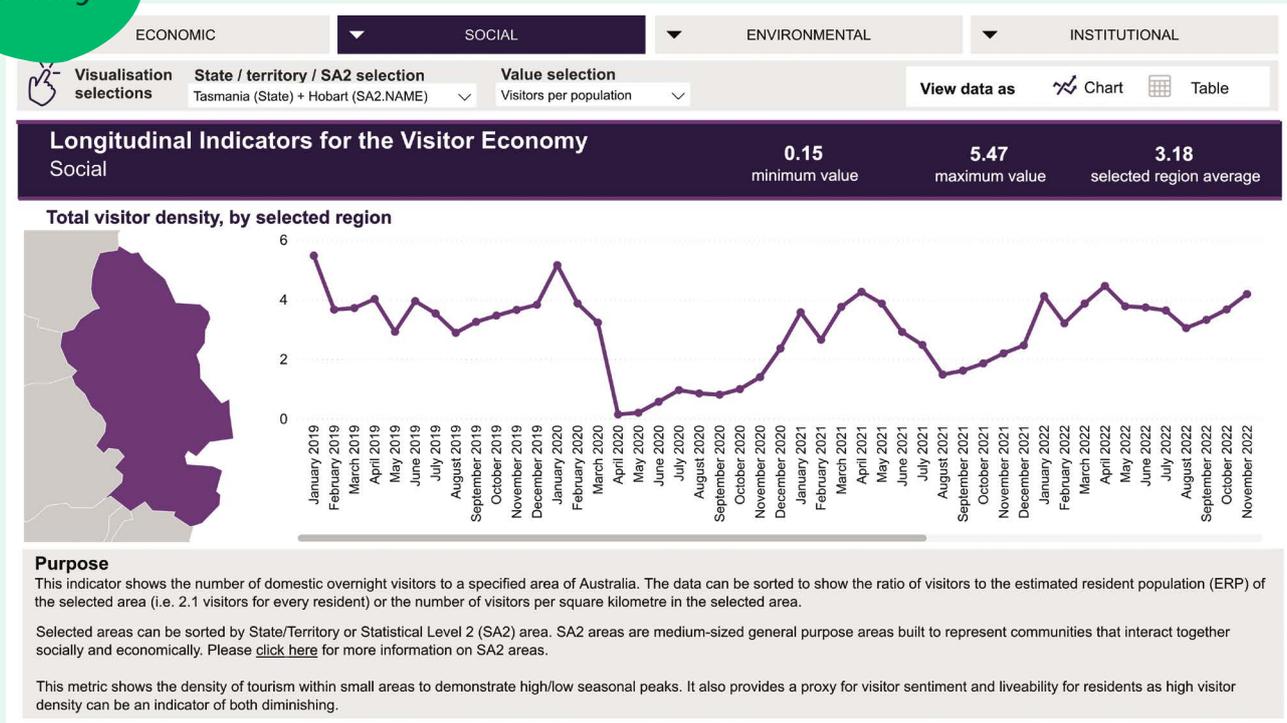
Key outcomes:

- Austrade's Tourism Research Australia (TRA) has invested significant resources into modernising the measurement of domestic tourism to future-proof the collection and take advantage of new data sources.
 - This has culminated in the introduction of Domestic Tourism Statistics (DoTS) from 1 January 2025 to replace the National Visitor Survey. DoTS combines survey data with mobility data in a world-leading approach to measuring domestic tourism.
- TRA has also:
 - Commenced publishing mobility data on a monthly basis in new data dashboards, which is available at national, state and territory, and tourism region level;
 - published a new dashboard of official tourism statistics related to business events, drawing on information from new questions added to key surveys;
 - released reports on international and domestic tourism forecasts, tourism business numbers and tourism investment, with upgraded commentary and insights;
 - published data on new tourism topics including First Nations tourism activities, travellers with accessibility needs, and international visitor market profiles.
- The Longitudinal Indicators for the Visitor Economy (LIVE) Framework data dashboard was launched, comprised of 21 indicators that provide a more comprehensive assessment of sustainable growth of the visitor economy across economic, social, environmental and institutional dimensions.
- Tourism Australia collaborated with states and territories to inform destination marketing by delivering consumer market research for Australia's largest inbound markets.
- Tourism Australia also delivered the *Future of Demand* research, designed to help Australian tourism businesses make decisions about their product development and marketing by providing insights into what global travellers will want from destinations into the future.

Looking ahead:

Development of new data products will continue in the Consolidation Phase. Data providers will continue to review and revise communication and outreach strategies to ensure users are aware of the full suite of information available and its uses to inform business, organisational and government decision-making.

Case study



Austrade's wide-ranging new LIVE Framework data tool includes the social impacts of tourism, such as visitor density.

Measuring and understanding the overall health of the visitor economy – LIVE Framework

The LIVE Framework was developed by Austrade's Tourism Research Australia (TRA) in response to the need for more comprehensive and timely data to measure sustainable growth of the visitor economy. The framework was a key recommendation from the IDEA Working Group, established to identify unmet information needs and make recommendations for improving data and insights.

The LIVE Framework dashboard consists of 21 indicators tracking the visitor economy across economic, social, environmental, and institutional metrics. This innovative framework combines various data sources, including survey data, mobility data and more, to provide a holistic view of the visitor economy. The development and implementation of the LIVE Framework has demonstrated the value of collaboration between the Australian Government, states and territories, academia, and industry stakeholders.

The LIVE Framework has been designed to enable more effective measurement of industry performance, informed decision-making, monitoring of trends, and input into policy development.

The LIVE dashboard will continue to be a vital tool in THRIVE 2030's Consolidation Phase, with ongoing work to consider additional indicators for inclusion in the dashboard along with other enhancements to support interpretation and understanding. TRA will also focus on communication and outreach strategies to ensure users are aware of the full suite of information available and how it can be accessed and used effectively by businesses, organisations and governments.



On average, Hobart sees just over 3 visitors for every resident of the Tasmanian capital. Image © Tourism Australia



Austrade's Tourism Research Australia now measures data around business events, a vital driver of Australia's visitor economy. Image © Tourism and Events Queensland.

Measuring business events and their contribution to Australia's visitor economy

Business events are a vital driver of Australia's visitor economy and broader economy. The Australian Government committed in the October 2022 Budget to include business event measurement in national and international visitor datasets released by Austrade's Tourism Research Australia (TRA). The data collection commenced in 2023.

In 2024, TRA developed a dashboard by combining datasets to present unique insights into the impact of business events in the visitor economy.

The data presents estimates across several key business event topics. Insights can be viewed at the national, state (including regional) and international level. The dashboard includes spend in Australia and total trip spend across all traveller types whether it be domestic day trips, domestic overnight or international visitors. Extra insights include purpose of visit, spend breakdown by item, venue type, days at event and origin of event attendees.

For international business event visitors, the dashboard outlines the top 10 origin markets and activities undertaken while visiting.

This innovative business events initiative improves Government and industry's understanding of the true economic value of business events. It enables data-driven decision-making across the sector to support post-pandemic recovery and growth towards 2030.

Priority 3: Grow a secure and resilient workforce

ACTIONS: 12/12 completed or 'actioned and ongoing'

Australian Government initiatives under THRIVE 2030's Recovery Phase have helped rebuild the visitor economy workforce and capability. The Minister for Trade and Tourism convened a Tourism Jobs Summit in August 2022 to identify innovative ways to address workforce challenges. The THRIVE 2030 Workforce and Skills Working Group informed the delivery of the Visitor Economy Workforce and Skills Interim Action Plan. The Australian Government established Service and Creative Skills Australia (SaCSA) to enhance tourism industry voices in the Government's skills and workforce planning.

Key outcomes:

- Tourism workforce numbers recovered to **over 690,000**. This was supported by the Australian Government's **\$8.1 million** Choose Tourism Grant Program, which attracted people to work in tourism. The program targeted young Australians, mature Australians, people with disability and First Nations Australians. Businesses were encouraged to employ an inclusive and diverse workforce.
- Complementing Choose Tourism, state and territories delivered initiatives including:
 - The Tasmanian Government funded Visitor Experience Training (VXT) for industry-led tourism and hospitality short courses in regional areas.
 - Tourism WA launched an *always-on* paid digital campaign under the Tourism Workforce Development Program, to drive job seekers and career seekers to a dedicated industry workforce portal.
- The Australian Government funded 300,000 Fee-Free TAFE places across 2024–2026, with tourism and hospitality courses recognised as a national priority sector.
- Older Australians were supported to participate in the workforce through Australian Government increases to the Work Bonus for pension holders.
- The Tourism Local Navigator Pilot (supporting tourism businesses to employ people with a disability) engaged around 1,600 businesses delivering up to 163 employment outcomes.
- Accommodation Australia (AA), supported by a **\$10 million** Australian Government grant, developed the employment, skills and training portal named Eeger, designed to address the challenges of workforce development, skills shortages and career growth.
- Tour Guides Australia (TGA) developed a micro-credential training course, delivering 15 courses in 2024 to around 150 people nationally interested in becoming a tour guide.

Looking ahead:

Work will continue to address workforce shortages in the short term while working to address structural challenges in the visitor economy workforce over the longer term. A focus on improving staff skills, workforce participation and promoting the visitor economy as an attractive career choice will continue.



Leesa, a tourism information officer in Port Lincoln, SA, appeared in Choose Tourism promotions. Image © Mike Smith Pictures.



Choose Tourism activities, including this careers expo, have aimed to improve perceptions of tourism as a career choice. Image courtesy of Victoria Tourism Industry Council.

Choose Tourism – Governments and industry working together

The THRIVE 2030 Recovery Phase recognised the immediate need to address critical workforce and skills shortages in the visitor economy. The Choose Tourism Grants Program involved collaboration across the Australian Government, state and territory governments and industry to highlight the diverse career pathways in the visitor economy, promote tourism as a career of choice and attract new workers.

With a focus on reaching underrepresented cohorts including younger people, First Nations people, people with disability and older Australians, the grant funding delivered a range of activities tailored to each state and territory, including:

- The Choose Tourism Careers Expo in Victoria, which connected 750+ attendees with 50 employer exhibitors, and led to connections for potential employment outcomes.
- A partnership with TAFE NSW to develop video masterclasses, an ‘Introduction to the Visitor Economy’ microskill course and a modernised Certificate III in Tourism, providing a skills and training pathway for future workers.
- Marketing campaigns in Western Australia, South Australia and the Northern Territory, showcasing the diversity of the industry, the breadth of opportunities it offers, and the range of training pathways available.
- A series of transition and employment seminars for mature Australians in Queensland, showing older workers how they could take up a tourism career.
- Information and training programs delivered to high school students in Tasmania promoting tourism and hospitality as a career of choice.
- An immersive camp program for Aboriginal and Torres Strait Islander youth in the ACT to connect to land, culture, peers and mentors while learning about career options in the tourism industry.

Overall, through various state and territory events and marketing campaigns, the Choose Tourism Grant Program reached an audience of more than 21.4 million. More than 71,000 people attended 77 events and training courses.

Case study



Callan, at Bay Pavilions Theatre, is one of many people to have found meaningful tourism jobs through the Disability Employment Tourism Local Navigators Pilot. Image supplied.

Tourism Local Navigators Pilot – Reducing barriers to participation

The Government has supported visitor economy employers to find willing and ready workers while reducing barriers to workforce participation for people with disability. The \$3.3 million Disability Employment Tourism Local Navigators pilot tested new ways to connect job seekers with disability to meaningful tourism jobs. The pilot was an outcome of the Jobs and Skills Summit in September 2022, and supported workforce priorities in THRIVE 2030.

Twelve organisations across the country were funded to support small and medium tourism businesses in recruiting, retaining and promoting employees with disability, building the confidence and capability of these employers. Place-based Local Navigators acted as the connector between tourism businesses and employment service providers, along with people with disability. By October 2024, approximately 1,600 employers had participated in the pilot and 163 jobseekers with disability had commenced employment.

Bay Pavilions, an arts and leisure centre in Batemans Bay on the NSW South Coast, accessed the pilot to employ Callan, who has vision impairment and lives with albinism, as a Front of House attendant in the theatre. Through the pilot, Callan's employer Lachlan Knight was made aware of resources such as working with a disability support provider, free online training courses and workplace modifications for staff members with disability.

'Team morale has increased, as well as connection within the team, because it's started conversations. We've had experience with staff with disability and the aids and support they need sometimes. While we try and do our best, the extra information and resources this Pilot has pointed us to has been very beneficial.'

Priority 4: Embrace leading-edge business practices

ACTIONS: 10/10 completed or 'actioned and ongoing'

Industry and governments have worked individually and collaboratively to support businesses in the visitor economy to modernise and create competitive, more resilient and sustainable businesses. This includes through the Government's investment in the Quality Tourism Framework, which helps lift the capacity and ability of small and medium tourism businesses, and the National Sustainability Framework and Sustainable Tourism Toolkit, which is encouraging industry to embrace leading business practices to create competitive, more resilient and sustainable businesses.

Key outcomes:

- The Australian Government invested **\$1.7 billion** over 10 years from 2024–25 to the Australian Renewable Energy Agency to, amongst other things, support innovation and development in low carbon liquid fuels (including sustainable aviation fuel).
- The National Sustainability Framework for the Visitor Economy and the Sustainable Tourism Toolkit for businesses were launched to build awareness and support improved sustainability in the visitor economy.
- Tourism Australia published research on the travel distribution landscape, consumer behaviour, booking and travel trends, and what the implications might be for Tourism Australia's strategy, state and territory tourism organisations, and tourism operators.
- The Australian Tourism Industry Council's (ATIC) Quality Tourism Framework (QTF) was relaunched, supported by Australian Government funding, to build tourism business capability.
- Industry programs delivered to build business capability included Ecotourism Australia's 'Strive 4 Sustainability Scorecard' and the Australian Tourism Export Council's (ATEC) 'Tourism Trade Ready' programs.
- Business crisis management planning was supported through promotion of the ATIC 'Don't Risk It' tourism business guide and toolkit developed by EarthCheck.
- Tourism NT supported businesses during the 2024 shoulder season through a Territory Tourist Discount Scheme. The scheme provided a 25% discount on tourism experiences booked at NT visitor information centres.
- The Tasmanian Government released a **\$1.5 million** package to support emissions reduction activities in the tourism industry.
- Tourism industry associations were supported to work collaboratively to improve insurance affordability and accessibility for members by sharing their experiences of the insurance industry through a series of webinars facilitated by Austrade.



Governments and industry promoted accessible tourism as both a leading-edge business practice and an area of focus for infrastructure upgrades. Image: Puddleduck Vineyard, Tasmania © Dearnna Bond.

Looking ahead:

The business modernisation journey of tourism businesses will need to continue, including as it relates to managing risk and building resilience, accessibility, inclusion and sustainability, technology, consumer preferences, and environmental and global changes.

Case study



Maleny Botanic Gardens and Bird World upgraded its accessible vehicle fleet as part of Queensland's Year of Accessible Tourism 2023–2024. Image supplied.

The Queensland Government's Year of Accessible Tourism

The Queensland Government's \$12 million Year of Accessible Tourism 2023–2024 provided an opportunity to recognise the importance of accessible tourism experiences for people of all abilities, and to ignite change and create opportunities for Queensland tourism businesses.

As part of the Year of Accessible Tourism 2023–2024, Maleny Botanic Gardens and Bird World on the Sunshine Coast purchased 2 wheelchair-accessible buggies and upgraded the rest of the fleet to improve safety and accessibility.

The buggies were locally manufactured and designed in consultation with Spinal Life Australia.

The fleet of buggies are integral to the experience at the venue and the upgrade ensures accessibility of an otherwise challenging site home to over 600 native and exotic birds, 8 kilometres of winding paths, terraced gardens and numerous waterfalls and lakes.

Maleny Botanic Gardens and Bird World received \$25,000 under the Accessible Tourism Infrastructure Grant.



Tourism operators focused on welcoming visitors from different markets and market segments can find help via ATEC's Host programs. Image: Camp Cove, Watsons Bay, NSW © Tourism Australia.

Australian Tourism Export Council Host programs – New online training to help tourism businesses welcome visitors from Southeast Asia

The Australian Tourism Export Council (ATEC) has expanded its series of country-specific 'Host' programs, with help from Australian Government funding, to include new and emerging Southeast Asian markets.

ATEC's Host programs, found on its Tourism Training Hub, are designed to support tourism operators in welcoming visitors from different markets and market segments.

New Host programs developed by ATEC cover the fast-growing or recovering markets of Vietnam, Philippines and Thailand.

These new Host programs join existing training courses to welcome visitors from China, Japan, Korea, Indonesia and India, a 'Domestic Ready' program, 'Muslim Host', 'Accessible & Inclusive Host' and more.

The Host programs are useful to tourism operators with varying exposure to these markets, providing participants with insights into distribution fundamentals and key trends in inbound tourism.

The programs support operators to build the skills and understanding necessary to deliver exceptional, personalised experiences that create lasting memories for visitors. They feature 3 online modules: Market & Culture Ready, Product & Service Ready and Trade Ready.

Graduates of the program receive an online badge that can be used to demonstrate their capability with a particular market.

By fostering a deeper understanding of Southeast Asian markets, ATEC's new Host programs enhance service quality and position Australian tourism businesses to attract more Southeast Asian travellers.

Priority 5: Enhance visitor infrastructure

ACTIONS: 12/12 completed or 'actioned and ongoing'

Visitor infrastructure experienced significant investment by government, industry and investors, including to modernise, become more accessible and meet emerging needs of visitors. TRA's annual review of the tourism investment pipeline for 2023–24 showed continued growth in the number and value of large tourism-related projects. The Tourism Investment Monitor identified 346 tourism investment projects (with a value of \$20 million or more), worth a total of **\$63.4 billion** in 2023–24.

Key outcomes:

- Continued enhancements to tourism infrastructure included **\$233 million** Australian Government investment in upgrades to Commonwealth National Parks, plus a further **\$216 million** to grow tourism in Kakadu National Park. The **\$10 million** Caravan Parks Grant Program contributed to projects valued at over **\$31 million** in caravan parks across Australia.
- The Aviation White Paper set out the Government's vision for aviation to 2050. Inbound aviation capacity returned to pre-COVID-19 levels, including through aviation attraction schemes by states and territories.
- The Australian Government upgraded SmartGates at airports and launched the Trans-Tasman Seamless Travel Group to trial a digital incoming passenger card.
- **\$27.9 million** in grant funding for 44 regional airport projects under Round 3 of the Regional Airports Program (RAP) and **\$28.3 million** for 76 remote airstrip projects under Rounds 9 and 10 of the Remote Airstrip Upgrade (RAU) Program.
- Funding for 40 projects under Round 1 of the Growing Regions Program, including new tourism and cultural precincts and upgraded sport and recreation facilities.
- Tourism businesses were encouraged to make their facilities more accessible by the WELCOME Framework, launched by Tourism Ministers. The Queensland Government delivered its 'year of accessible tourism' in 2023 and again in 2024.
- VisitCanberra's Tourism Product Development Fund (TPDF) supported the development of new tourism offerings in the ACT.
- South Australia's *Experience Nature Tourism Fund* Rounds 1 and 2 provided **\$1 million** in grants to unlock **\$1.6 million** in combined project value for projects that enhanced the visitor experience in South Australia's national parks.
- With support from the Tasmanian Government's Tourism Innovation Grant program, Pennicott Wilderness Journeys' launched a new Tasmanian-built catamaran delivering wilderness cruises directly from the Port Arthur Historic Site.

Looking ahead:

Planning and investment will need to continue to meet visitor infrastructure needs, maintain social licence and support a sustainable visitor economy. Aviation White Paper implementation will continue, including to make aviation more inclusive, and ensure a competitive and efficient aviation sector. Modernisation of the traveller pathway across the border will continue.



The new accessible camp kitchen at Tathra Beach Eco Camp, NSW, was one of many projects funded under the \$10 million Caravan Park Grant Program. Image supplied.

Caravan park infrastructure grant program

New cabins, accessible bathrooms and camp kitchens – the Australian Government’s Caravan Parks Grant Program has funded many of these and more. Managed by Austrade, the grant program has helped 110 recipients to refresh their parks and offer their customers improved facilities.

A total \$9.6 million in matched funding was dispersed, contributing to \$31.2 million worth of caravan park infrastructure upgrades across the country. Grants ranged from \$10,000 to \$100,000.

Some grantees would not have made upgrades without the funding. For others, the grant allowed them to accelerate existing renovations plans or to complete major construction projects.

Building back from a devastating bushfire, the award-winning Tathra Beach Eco Camp, on the New South Wales south coast, put their grant towards a sustainable camp kitchen that’s now the park’s centrepiece.

Fifty-eight grant-funded projects installed accessible features, while 49 had a sustainability focus. Projects weren’t limited to renovated camping sites, upgraded cabins or playgrounds, pools and pathways – as important as these are. Some parks installed a business centre, an outdoor cinema and even a mini-observatory.

In a subsequent survey of grantees, 86% reported an increase in bookings following the completion of their project; 74% said they had increased their appeal to a broader customer base.

Caravan parks are a major contributor to Australia’s visitor economy. The better amenities supported by this funding will help make destinations more attractive and better able to meet visitor needs.



Among 48 projects under the ACT's \$2.5 million Tourism Product Development Fund was the reopened Lunetta restaurant, on Canberra's Red Hill. Image © VisitCanberra.

The Australian Capital Territory Government's Tourism Product Development Fund – a commitment to enhancing visitor infrastructure

The Australian Capital Territory (ACT) Government's Tourism Product Development Fund (TPDF) offered matched funding to local tourism businesses via a competitive grant program managed by VisitCanberra.

The TPDF was established with the primary objective of stimulating infrastructure investment to create innovative and improved tourism products and experience projects.

The TPDF has delivered 48 projects and provided over \$2.5 million in funding to a diverse range of projects since its inception. The fund has supported the development of compelling experiences, enhancing Canberra's reputation as a tourism destination.

This includes the re-establishment of an exquisite dining establishment, *Lunetta*, atop Canberra's iconic Red Hill, and the entry of Experience Co to the Canberra market through *Treetops Adventure*, in partnership with The Woodlands and Wetlands Trust.

The program demonstrated that targeted government investment of this type can further support industry collaboration, opportunities for job creation, and economic growth across the Canberra region through increased visitation and visitor spend.

Priority 6: Build markets and attract visitors

ACTIONS: 8/9 completed or 'actioned and ongoing'

Following the re-opening of international and domestic borders, the THRIVE 2030 Recovery Phase was focused on activities to build markets and attract international visitors back to Australia. This included demand driving marketing initiatives led by Tourism Australia and state and territory tourism organisations, alongside initiatives that position Australia to better take advantage of new and higher yield traveller cohorts from emerging markets. Funding has also continued in programs for festivals, arts, and music, which contribute to attracting visitors.

Key outcomes:

- Tourism Australia's **\$125 million** *Come and Say G'Day* international marketing campaign, complemented by distribution-focused events such as the largest ever Australian Tourism Exchange, led efforts to attract international visitors to Australia.
- Invested – Australia's Southeast Asia Economic Strategy to 2040 set a pathway to strengthen Australia's economic engagement with the region, including through tourism.
- The Migration Strategy outlined a plan to simplify the migration system and improve visitor visa settings.
- Australian Government funded programs to assist industry to re-engage with the international market included the Austrade-administered **\$15 million** Tropical North Queensland International Tourism Recovery Program which supported **\$164 million** in direct sales and the 'Guardian of the Reef' initiative linking tourism and conservation in a world-first approach.
- The Austrade-administered **\$10 million** Reviving International Tourism Grant Program supported wholesalers and exporters to undertake demand-driving activities to rebuild and strengthen international supply chains.
- The Approved Destination Status (ADS) scheme with China was reopened, with the Government investing **\$8.1 million** over the next 4 years for Austrade to ensure ADS facilitates high quality guided group tours from China.
- Growing two-way tourism with Vietnam under the Australia–Vietnam Enhanced Economic Engagement Strategy through the Strengthening Australia Vietnam Tourism Cooperation project.
- Cruising returned with new marketing approaches developed to attract international visitors to Australia's cruise industry.



Emerging markets in Southeast Asia and India offer major opportunities for Australia to broaden its international visitor base. Image: Cradle Mountain © Tourism Tasmania.

Looking ahead:

Activities to build markets and grow demand will continue to evolve in the next 3 years to address opportunities and challenges of the market as it moves from recovery to consolidation. There will continue to be a long-term focus on sustaining and growing the domestic market by encouraging Australians to explore more of their own country and engage in local experiences. Efforts will continue to build a portfolio of international markets, incorporating both core markets, emerging markets and market segments that present growth opportunities.



Released in Australia's 15 key international markets in 2022, Tourism Australia's 'Come and say G'day' campaign has been broad and aspirational in appeal. Image supplied.

'Come and Say G'Day' – a winning campaign for the visitor economy

Tourism Australia's 'Come and Say G'day' campaign launched in October 2022 to reintroduce Australia to international visitors after 2 years of closed borders during COVID-19. Released in Australia's 15 key international markets, the campaign has been broad and aspirational in appeal. The storytelling and media are angled towards high-yielding travellers to maximise income. The campaign has included Australia's most famous icons for instant recognition, but also takes a fresh look at exceptional parts of our country to broaden international audiences' idea of Australia.

As advertising research shows brand characters stand the test of time, Tourism Australia created this campaign centred on a new brand ambassador, Ruby the Roo. The creative assets were designed to be reused, without major extra production over the 3-year campaign – maximising reach and media investment. Special instalments of the Come and Say G'day campaign have tied in with the FIFA Women's World Cup Australia and New Zealand 2023 and the 2024–25 Summer of Cricket.

After the campaign's launch, measures of reach, earned advertising value, website visits, and social media engagement all exceeded Tourism Australia's targets. Longer-term metrics seek to monitor shifts in consumer perceptions, awareness, consideration and intention to book an Australian holiday.

As of November 2024:

- Seventy-nine per cent of those who recalled seeing the campaign said they were more likely to visit Australia in future because of the ads
- Seventy-eight per cent of out-of-region travellers said it is a campaign they love
- Eighty-two per cent said it made Australia more appealing.

These results are much higher than for advertisements by Australia's competitors in the travel category. This strong performance of the Come and Say G'day campaign has helped a steady recovery of international arrivals in Australia and a positive outlook for growth over the next few years.



With Vietnam being Australia's fastest-growing inbound tourism market after the pandemic, Austrade and partners have worked to cement Australia–Vietnam tourism ties. Image: Pinnacles in Cervantes, Western Australia. Image supplied.

Diversifying markets and growing two-way tourism ties with Southeast Asia

Vietnam has been Australia's fastest-growing inbound tourism market in the post-COVID-19 recovery period. Austrade and partners have been working with the Vietnam National Authority of Tourism (VNAT) to cement the countries' two-way tourism ties.

With support from the Department of Foreign Affairs and Trade, Austrade launched the 'Strengthening Australia Vietnam Tourism Cooperation' (SAVTC) project.

Bilateral meetings and industry forums in both countries led to an Australia–Vietnam Travel Symposium in Melbourne in June 2024.

Projects funded under SAVTC have improved the capabilities of Australian and Vietnamese industries to attract and service sustainable growth. These include:

- an Australia–Vietnam Tourism Cooperation Report by Asialink Business, which identified growth potential and guided areas of cooperation
- a data project about Australian and Vietnamese visitors published by the Griffith Institute for Tourism in cooperation with VNAT
- a 'Vietnam Host' training program for Australian tourism businesses, developed with ATEC
- a sustainable tourism micro-credential by the Western Australia Technical Vocational and Education Training Consortium. This course was based on Australia's National Sustainability Framework for the Visitor Economy and Sustainable Tourism Toolkit and offered to Vietnam's travel industry and destination management organisations.



An initiative promoting environmentally conscious travel to the Great Barrier Reef was part of the International Tourism Recovery Grant Program for tropical north Queensland. Image © Tourism and Events Queensland.

Tropical North Queensland International Tourism Recovery Grant Program – Wooing overseas visitors back to North Queensland

Tropical North Queensland’s economy is highly reliant on international tourism, and the local industry was significantly impacted by COVID-19. To help accelerate the post-pandemic return of international visitors, including to the Great Barrier Reef, the Australian Government provided up to \$15 million over 2 years to Tourism Tropical North Queensland (TTNQ) for demand-driving activities.

Marketing, public relations and trade engagement have all been part of this \$15 million International Tourism Recovery Grant Program, administered by Austrade. So, too, has product and industry development.

By December 2024, international marketing activities had generated approximately \$325 million in Advertising Value Equivalent through paid, earned, retail and trade channels, supporting \$164 million in direct sales.

With partners such as Tourism Australia and Tourism and Events Queensland, TTNQ has supported the growing number of direct international flights into Cairns. Activity to date is forecast to bring an extra 140,000 visitors to the region.

In another grant area of focus, 4 First Nations-owned and operated tourism businesses and 15 other operators have been successfully mentored to be ‘international ready’.

Funding has also supported the ‘Guardian of the Reef’ initiative that reached more than 200 million consumers. This website launched by TTNQ and online travel agency Expedia links tourism and conservation in a world-first approach. The platform educates visitors about the Great Barrier Reef and promotes environmentally conscious travel to it. As travellers work their way through educational content, they unlock discounts on environmentally responsible bookings. The initiative has generated over \$13 million in sales.

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

ACTIONS: 7/7 completed or 'actioned and ongoing'

Unique and high-quality products, including First Nations experiences, were developed during THRIVE 2030's Recovery Phase. Important in driving visitation, the Australian Government released and implemented *Revive* – the National Cultural Policy to support Australia's arts and culture sector, while the National Sport Strategy, *Sport Horizon*, set a new and united direction for sport in Australia and will maximise the opportunities of the 'green and gold decade'. Major events, including the FIFA Women's World Cup 2023, business, arts and other events drove visitation across Australia. First Nations businesses were supported by the National Indigenous Australians Agency (NIAA) working with states and territories to co-invest in strategic First Nations Tourism projects and through the First Nations Tourism Mentoring Program. Tourism Australia's Discover Aboriginal Experiences marketing collective expanded to over 200 experiences from 48 businesses. States and territories supported development of unique tourism product, including First Nations experiences, through a range of initiatives.

Key outcomes:

- States and territories worked with NIAA to co-invest in strategic First Nations tourism projects. This included **\$6 million** to enrich First Nations tourism experiences in Queensland, and **\$6 million** to increase and diversify Aboriginal tourism products and experiences in the Northern Territory.
- NIAA's First Nations Tourism Mentoring Program recorded 151 registrations and 111 approved mentees as at 30 September 2024.
- Tourism Australia's Discover Aboriginal Experiences marketing collective expanded to over 200 experiences from 48 businesses, all led by Aboriginal guides.
- Grant and business support programs run by states and territories assisted the development of First Nations tourism products, through the Northern Territory's updated Aboriginal Tourism strategy, Tourism WA's EverNow festival, and Queensland's Indigenous Tourism Business Development Officers.
- Events, including sporting events such as the FIFA Women's World Cup 2023, concerts, arts and business events, drove visitation across Australia.
- **\$8.6 million** funding provided for the Revive Live initiative supported established live music venues and music festivals to continue operating.



Paartjima, the First Nations light festival in Alice Springs, is an annual event drawing visitors to the NT – and combining several THRIVE 2030 themes. Image © Tourism NT.

Looking ahead:

There is an ongoing opportunity to continue expanding First Nations tourism offerings, with further action needed across industry and government, and to further develop tourism offerings in our vibrant cities and distinctive regions. Work will continue to be directed towards growing unique offerings for international and domestic visitors with opportunity to grow events across Australia, including for business events, and drive visitation by creating new products and experiences in the lead up to the Brisbane 2032 Olympics and Paralympic Games.



The first co-design workshop was held in Meeanjin/Brisbane for the First Nations Visitor Economy Partnership announced in late 2024. Image supplied.

First Nations Visitor Economy Partnership

The First Nations Visitor Economy Partnership, comprising First Nations tourism industry representatives from every state and territory, was announced by the Australian Government in October 2024 to support greater participation and economic opportunities for First Nations people and businesses in Australia's tourism industry.

Under the Recovery Phase (2022–2024) Action Plan, the Partnership was co-designed by First Nations industry representatives in collaboration with state, territory and Australian Government agencies. The Partnership will be funded for an initial 2 years through the NIAA's Indigenous Advancement Strategy.

The Partnership will begin meeting in early 2025. It will provide leadership and guidance on respectfully embedding Australia's rich cultural heritage in our tourism offering. It will be tasked with investigating and establishing a permanent First Nations national tourism peak body which will provide guidance and strategic support to grow the sector.

'First Nations tourism provides opportunities to share the world's oldest living culture with travellers from around the world, while empowering First Nations people through employment and business prospects.'

– Senator the Hon Malarndirri McCarthy, Minister for Indigenous Australians

The National Sustainability Framework and Toolkit for the Visitor Economy

THRIVE 2030 is a strategy for sustainable growth of the visitor economy and recognises Australia's environment and culture are central to our attractiveness to visitors. A balanced approach to growth is required that weighs up economic, social, and environmental issues to sustain a positive visitor experience and remain internationally competitive.

A key action to improve Australia's sustainability outcomes was the development of the National Sustainability Framework for the Visitor Economy and accompanying Sustainable Tourism Toolkit jointly developed and funded by the Australian Government, and state and territory governments.

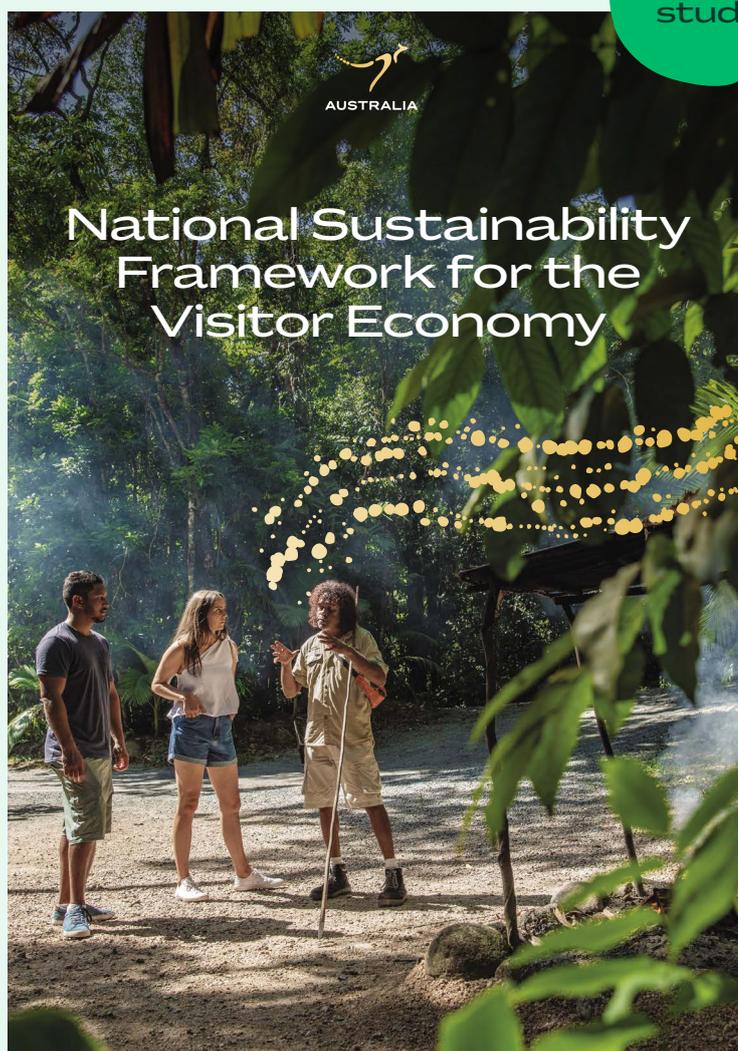
The Framework and Toolkit seek to improve understanding of what sustainability means in the visitor economy and provide practical assistance to businesses to improve their sustainability practices, including how to reduce their emissions.

The Framework, the first of its kind for Australian tourism, provides a nationally agreed understanding of sustainable tourism and a vision for Australia to be a world leader in sustainable tourism.

It sets out a goal and priorities for each of the 4 pillars of sustainability in tourism, including a pillar on respecting culture. The primary goal of this pillar is for visitor economy businesses to protect and share Australia's unique culture, heritage, traditions and sites through respectful partnerships with First Nations people, and by celebrating the diversity of our multicultural communities. This work specifically prioritises protecting and preserving cultural assets, engaging respectfully with, and learning from, First Nations peoples, respecting First Nations' peoples enduring traditional knowledge, embedding sustainable building design practices and celebrating Australia's diversity and multicultural communities.

The Toolkit includes a chapter on Respecting Culture, including content on engaging with First Nations peoples and understanding the principles of "Free, Prior and Informed Consent" and has a series of tips, templates and easy to follow advice for tourism businesses.

The Sustainability Framework and Toolkit will continue to guide the Australian visitor economy in protecting our unique natural environment and cultural heritage in the Consolidation Phase.



Providing a nationally agreed understanding of sustainable tourism, the National Sustainability Framework for the Visitor Economy laid the groundwork for improving sustainability outcomes. Cover image © Tourism Australia.

Index: Recovery Phase (2022–2024) action items

This table reports on the status of all THRIVE 2030 Recovery Phase (2022–2024) Action Plan items.

Completed status indicates an activity has been completed for the Recovery Phase. **Actioned and ongoing** status indicates an activity is ongoing at the end of the Recovery Phase. **Not progressed** status indicates the action was not undertaken in Recovery Phase.

No.	Action	Action Lead (Partners)	Recovery Phase status
1.1	Appoint a THRIVE 2030 Implementation Advisory Group, representing a cross-section of industry, and governments, to guide, oversee and monitor progress of the Strategy.	Austrade	COMPLETED
1.2	Establish advisory working groups to accelerate consideration of complex policy issues.	Austrade	COMPLETED
1.3	Maintain and enhance existing collaboration mechanisms such as the Tourism Ministers' Meeting and the Australian Standing Committee on Tourism.	Austrade, S&TG	COMPLETED
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)	COMPLETED
1.5	Identify how to use existing cooperative mechanisms better or establish new mechanisms to plan and implement interregional marketing and development activities.	TA (S&TG, RTOs, VE industry)	COMPLETED
1.6	Ensure that the visitor economy is considered and integrated into state and local crisis management and recovery plans.	S&TG (LG, NEMA)	COMPLETED
1.7	Establish an effective partnership of experienced appropriate parties to support the greater participation of First Nations cultures, interpretation and businesses into the visitor economy.	Austrade, NIAA (VE industry, TA, S&TG)	COMPLETED
1.8	Integrate Regional Development Australia, the local government sector and other appropriate existing mechanisms into the Strategy's collaborative architecture to ensure a stronger engagement with the visitor economy at the regional and local level.	DITRDCA (RDA, LG, RTOs)	COMPLETED
2.1	Establish an IDEA Working Group to identify the information needs of visitor economy participants which are not being met and potential methods to respond to those needs, assess those methods according to cost, contribution, capability, and potential yield, and, based on that analysis, make recommendations to Austrade.	Austrade (S&TG, VE industry)	COMPLETED
2.2	Tourism Research Australia (TRA) to provide world-class relevant, robust, granular, and timely data and analytics.	Austrade	COMPLETED

No.	Action	Action Lead (Partners)	Recovery Phase status
2.3	<p>Develop new products aimed at the needs of particular segments of the sector.</p> <ul style="list-style-type: none"> Leverage existing data and ABS integration capabilities to support the production of research products. Leverage new and existing data sets to measure the important economic contribution of business events to the visitor economy. 	Austrade, ABS	COMPLETED
2.4	Build a deeper understanding of the supply-side requirements of the visitor economy through the development of a Longitudinal Indicators for the Visitor Economy (LIVE) Framework to provide a more detailed picture of demand and supply side performance, incorporating leading and lagging performance indicators, and identify emerging challenges and opportunities for the industry (developed in partnership with IDEA Working Group).	Austrade (S&TG, VE industry)	COMPLETED
2.5	Implement a visitor expenditure target specifically for regional Australia to help drive and monitor visitor economy growth in regional Australia.	Austrade	COMPLETED
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 control of industry and government that will support improved resilience and sustainable growth.	Austrade	NOT PROGRESSED
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)	COMPLETED
3.2	<p>Develop a Visitor Economy Workforce and Skills strategy in response to ongoing workforce pressures exacerbated by the COVID-19 pandemic to strengthen the visitor economy's workforce, drawing on research to better understand the gaps, barriers and future needs of the visitor economy workforce, and related initiatives being implemented by state and territory governments.</p> <ul style="list-style-type: none"> ABS will deliver a comprehensive update to the Australian and New Zealand Standard Classification of Occupations by December 2024, and then commence a rolling program of work to maintain the currency of this classification. Over time this will assist in better identifying visitor economy occupations and their skill levels and assist training products and visa settings to better meet needs of the visitor economy. Australian Chamber – Tourism, in conjunction with Tourism Training Australia, will continue to implement a Workforce Development Strategy that sets out the industry priorities for workforce development. 	<p>Austrade (S&TG)</p> <p>ABS</p> <p>Australian Chamber – Tourism</p>	COMPLETED

No.	Action	Action Lead (Partners)	Recovery Phase status
3.3	<p>Increase workforce participation from under-participating cohorts, including mature workers, First Nations peoples, people with disability, youth, and women, especially in regional areas.</p> <ul style="list-style-type: none"> Leverage Government employment programs to support pathways to employment for First Nations Australians. Support people living with disability with employment opportunities in the visitor economy, including through a pilot program to facilitate people with disability into the visitor economy workforce. Supports eligible job seekers with tailored assistance to find sustainable employment including through Workforce Australia Services, Transition to Work, and Launch into Work employment programs. Maintain services that connect people wishing to work in regions with job vacancies, reskilling support, and relocation advice including through the Local Jobs Program. Encourage local job creation through business start-up and self-employment advisory services for new and existing small businesses through the Entrepreneurship Facilitators and Self-Employment Assistance program. Support tourism and hospitality employers to develop long-lasting workforce solutions through the Accommodation Australia’s ‘The Hub’ and the Government’s Employer Liaison Officer. Ensure policy settings are right and improve awareness of the Pension Work Bonus to encourage more retired workers to undertake part-time work in the visitor economy. Leverage the Fee-Free TAFE initiative, which includes hospitality and tourism as an area of national priority for skills and development. Ensure access to the National Careers Institute, which assists people with careers information and support, whatever their age or career stage. 	<p>DEWR, DSS, Austrade (S&TG, NIAA, VE industry including AA)</p>	<p>COMPLETED</p>
3.4	<p>Review the Working Holiday Maker scheme to increase the pool of potential workers.</p> <ul style="list-style-type: none"> Undertake a promotional campaign to coordinate Australian employers to refund Working Holiday Maker Visa fees. 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> <p>VE industry, incl. Australia Chamber – Tourism</p> <p>Home Affairs</p>	<p>COMPLETED</p>

No.	Action	Action Lead (Partners)	Recovery Phase status
3.5	Home Affairs to prioritise 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	COMPLETED
3.6	Improve access by small and medium sized enterprises to existing migration schemes such as the Pacific Australia Labour Mobility (PALM) scheme. <ul style="list-style-type: none"> Implement the Migrant Worker Taskforce report recommendations and refinements to the PALM scheme, including improving working conditions for PALM participants. 	DFAT, DEWR, Home Affairs	COMPLETED
3.7	Progress the Government's Skills Reform agenda for a high-quality, relevant and accessible vocational education and training sector in which funding arrangements improve consistency and are linked to skills needs; micro-credentials are supported; and apprenticeships and other forms of work-based training are promoted. <ul style="list-style-type: none"> Jobs and Skills Australia has been established as a statutory body to provide independent advice on current, emerging and future workforce, skills and training needs. Industry clusters to be established from January 2023 to identify and respond to current and emerging skills needs and workforce challenges, including for those in the visitor economy. Provide on-the-job-training opportunities for people by connecting them with tour operators, and a pathway to accreditation as a professional tour guide, through Tour Guides Australia's micro-credential training course. 	DEWR (S&TG, VE industry) Jobs and Skills Australia Tour Guides Australia	ACTIONED AND ONGOING
3.8	Promote the visitor economy as an attractive career choice including through communication strategies, incentives and awards to promote best practice by employers.	Austrade, S&TG, VE industry	COMPLETED
3.9	Encourage the uptake of training programs for First Nations peoples that create opportunities for participants to further enhance industry knowledge, equip participants to advance their careers and to develop new products or experiences in the sector.	NIAA, VE industry (S&TG)	ACTIONED AND ONGOING
3.10	Encourage mutual recognition for foundational credentials (such as the Responsible Service of Alcohol (RSA)) to support mobility of workers across jurisdictions, especially in relation to seasonal hospitality work. <ul style="list-style-type: none"> Increase acceptance across all states and territories of micro-credentialing as a recognised and valued form of training and accreditation in visitor economy occupations, including for tour guides. 	S&TG	COMPLETED

No.	Action	Action Lead (Partners)	Recovery Phase status
3.11	<p>Promote employment standards of employers including compliance with workplace obligations such as modern awards and superannuation requirements, including through the Fair Work Ombudsman’s education tools and advice services.</p> <p>Promote understanding and awareness of work, health and safety duties through Safe Work Australia’s education and communication tools.</p>	FWO, ATO, S&TG, VE industry, (DEWR)	COMPLETED
3.12	<p>Encourage larger industry operators to implement formal in-house training and diversity programs.</p> <ul style="list-style-type: none"> Tourism Training Australia (in conjunction with the travel, tourism, hospitality, accommodation and events sector groups) has a project supported by the Victorian Government, to develop micro-credential training that is linked to the formal training system. 	VE industry, including Australian Chamber – Tourism	ACTIONED AND ONGOING
4.1	<p>Build business capability programs that help drive product innovation, diversification and product quality to deliver world-class visitor experiences, including micro-credentialing and accreditation for tour guiding.</p> <ul style="list-style-type: none"> Enhance the Quality Tourism Framework, in partnership with the Australian Tourism Industry Council (ATIC), to help small tourism businesses. Promote the adoption of sustainable tourism practices and pathways to certification with the new ‘Strive 4 Sustainability Scorecard’ program, founded in partnership with Tourism Australia, a new entry level program for all tourism businesses wishing to start their sustainability journey in an efficient and affordable way. 	<p>VE industry, DEWR, S&TG</p> <p>ATIC (VE industry, Austrade, NIAA)</p> <p>EcoTourism Australia</p>	ACTIONED AND ONGOING
4.2	<p>Streamline and target information about government resources assisting businesses to modernise and diversify, and to build resilience and capability. Including through programs such as:</p> <ul style="list-style-type: none"> The Digital Solutions – Australian Small Business Advisory Services (ASBAS) Program to assist small businesses to improve their digital capability and adopt digital tools and processes. eInvoicing – to assist small businesses to digitise their processes, widen trade connectivity and improve productivity. 	<p>Treasury, ATO, S&TG, LG, VE industry</p> <p>Treasury</p> <p>ATO</p>	ACTIONED AND ONGOING
4.3	<p>Encourage businesses to implement resilience and crisis management plans.</p> <ul style="list-style-type: none"> Work with Australian travel and tourism stakeholders to upskill travel industry personnel on crisis management, risk planning and mitigation and resilience. Develop an updated Destination Management Planning – Best Practice Guide, in collaboration with local council work units, that will include advice on crisis management, crisis communications for visitors and resilience to align with THRIVE 2030. 	<p>VE industry, S&TG (NEMA)</p> <p>Council of Australia Tour Operators</p> <p>Australian Regional Tourism</p>	ACTIONED AND ONGOING

No.	Action	Action Lead (Partners)	Recovery Phase status
4.4	Implement an industry sustainability framework and education tools to assist businesses to implement and further improve sustainability practices.	Austrade, DCCEEW, VE industry, S&TG	COMPLETED
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	ACTIONED AND ONGOING
4.6	Monitor the accessibility and affordability of public liability insurance for visitor economy businesses and continue to support improved access and affordability including through Government and industry cooperation. <ul style="list-style-type: none"> Australian Chamber – Tourism is working with Business NSW, the Insurance Council of Australia and the Australian Small Business and Family Enterprise Ombudsman on insurance solutions for the tourism and hospitality industries. 	Treasury, VE industry Australian Chamber-Tourism	ACTIONED AND ONGOING
4.7	Ensure that visitor economy businesses, especially those in the regions, have access to suitable internet products, services and infrastructure, including through: <ul style="list-style-type: none"> the Better Connectivity Plan for Regional and Rural Australia the Regional Connectivity Program the Mobile Black Spot Program access to the National Broadband Network which is being enhanced by initiatives including upgrades providing full-fibre access, fixed wireless and satellite upgrades, the Regional Co-Investment Fund and the Business Fibre Initiative. 	DITRDCA, VE industry	ACTIONED AND ONGOING
4.8	Implement measures to deliver on Australia's international commitments to achieve net zero emissions by 2050, and to halt and reverse biodiversity loss by 2030. <ul style="list-style-type: none"> Improve sustainability practices in visitor economy businesses in line with international commitments, including by making use of available government programs and through industry-led initiatives. 	DCCEEW, S&TG, VE industry	ACTIONED AND ONGOING
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. <i>(To be conducted in association with Action 2.6 to study the architecture of the visitor economy.)</i>	TA, Austrade, (S&TG, VE industry)	COMPLETED
4.10	Support tourism and accommodation providers to set their own prices when guests contact them directly to book.	Austrade, Treasury, VE industry	ACTIONED AND ONGOING

No.	Action	Action Lead (Partners)	Recovery Phase status
5.1	<p>The Commonwealth, state and territory governments and industry will work together to ensure that infrastructure best meets the needs of the visitor economy. This includes the well-planned delivery of safe land transport infrastructure to support the wellbeing of communities and visitors.</p> <ul style="list-style-type: none"> Stimulate domestic accommodation, travel and attractions for both regions and metropolitan visitor economies through voucher programs in partnership with state and territory governments. 	<p>DITRDCA, Austrade, S&TG, LG, VE industry</p> <p>VE industry, including Accommodation Australia and the Australian Hotels Association</p>	ACTIONED AND ONGOING
5.2	<p>Facilitate investment, including through appropriate foreign direct investment programs, to create new and refreshed offerings, for example by governments working to reduce regulatory barriers to appropriate development of visitor infrastructure such as luxury accommodation in natural environments.</p> <ul style="list-style-type: none"> Support upgrades to caravan parks, which deliver affordable accommodation options for travellers, particularly families. 	VE industry, Austrade, S&TG, LG, DCCEEW	ACTIONED AND ONGOING
5.3	<p>Develop assets, infrastructure and experiences that are accessible to all people, regardless of physical limitations, disability or age.</p>	VE industry, Austrade, S&TG, LG	ACTIONED AND ONGOING
5.4	<p>Prioritise new destination development through use of holistic destination development plans, community and stakeholder collaboration, and streamlined regulatory approvals.</p>	VE industry, S&TG, LG	ACTIONED AND ONGOING
5.5	<p>Improve tourism infrastructure in regional areas, including through the rollout of regional infrastructure programs, noting the importance of good-quality roads to connect visitors and communities to attractions and services.</p> <ul style="list-style-type: none"> City Deals with Darwin, Hobart, Perth, Townsville and Geelong, and Regional Deals with Hinkler and Barkly, will continue to deliver improved visitor economy infrastructure, including sporting and cultural facilities, airports, attractions and public realm amenity. The \$3.25 billion Local Roads and Community Infrastructure Program will support local councils across Australia to deliver priority local infrastructure projects to support local communities including roads, parks and sports facilities, and bike paths. 	DITRDCA, S&TG, LG (NEMA)	ACTIONED AND ONGOING
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 (DCCEEW), Traditional Owners, S&TG	ACTIONED AND ONGOING

No.	Action	Action Lead (Partners)	Recovery Phase status
5.7	Identify and deliver improved visitor assets and resources at culturally significant sites.	VE industry, Traditional Owners, NIAA, Director of National Parks (DCCEEW), S&TG, LG	ACTIONED AND ONGOING
5.8	Ensure that regional airport facilities meet the needs of visitors and communities. <ul style="list-style-type: none"> Continue to support regional and remote aviation, for example, through the Remote Airstrip Upgrade Program (RAU), which supports improved aviation safety and accessibility at remote aerodromes. 	DITRDCA, LG, VE industry	ACTIONED AND ONGOING
5.9	Continue to upgrade passenger facilitation methods and infrastructure consistent with approaches to modernise traveller facilitation and border clearance.	ABF, VE industry	ACTIONED AND ONGOING
5.10	Deliver an Aviation White Paper to set the long-term policies to guide the next generation of growth and innovation in the aviation sector.	DITRDCA (VE industry)	ACTIONED AND ONGOING
5.11	Work cooperatively to maximise the return of inbound aviation capacity.	S&TG, TA, Austrade, VE industry	ACTIONED AND ONGOING
5.12	Work collaboratively to address barriers to maximising the contribution from the cruise sector and managing associated community expectations. <ul style="list-style-type: none"> Grow the cruise market in Australia with the goal of converting cruise participation into domestic spend, including through the tripartite MOU between TA, Cruise Lines International Association (CLIA) and Australian Cruise Association (ACA). Collaborate to ensure consistent and effective border management. Improve port infrastructure. Increase benefit to regional communities from cruise visitation. 	Austrade, Home Affairs, TA, S&TG, VE industry	ACTIONED AND ONGOING
6.1	Implement health measures to protect visitors and communities and which will provide traveller confidence and community protection. <ul style="list-style-type: none"> Implement health and safety measures to provide visitors, workers and the community with a safe environment and to provide consumers with the confidence to travel. 	DoHAC, S&TG, VE industry	COMPLETED
6.2	Encourage Australians to spend on the domestic visitor economy as they would overseas, including through targeted offerings and marketing. Apply behavioural economic research to develop product and marketing approaches to attract greater domestic visitation and spend. Attract domestic and international visitors to Australia's regional events and heritage offerings noting that potential funding mechanisms already exist such as the Regional Arts Fund, Festivals Australia and the Indigenous Visual Arts Industry Support Program. Targeted offerings and marketing to visitors should include disclosure about the impact of purchasing First Nations 'style' arts and crafts (or inauthentic First Nations arts and crafts), as these products have no connection with and provide no economic benefit to First Nations peoples.	Austrade, DITRDCA, TA, S&TG, VE industry	ACTIONED AND ONGOING

No.	Action	Action Lead (Partners)	Recovery Phase status
6.3	<p>Develop an International Diversification Strategy for the visitor economy to identify emerging markets for travel and education; and strengthen key bilateral relationships in the Indo-Pacific region and beyond through the growth of people-to-people links and Brand Australia marketing.</p> <ul style="list-style-type: none"> 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)	ACTIONED AND ONGOING
6.4	Implement a coordinated marketing strategy to re-establish core markets and grow emerging international markets.	TA, S&TG	COMPLETED
6.5	Develop and implement a coordinated approach for direct, affordable, long-haul flights to Australia.	VE industry	NOT PROGRESSED
6.6	Ensure Australia has a safe, affordable, and competitive visitor visa system to maintain and grow market share.	Home Affairs	ACTIONED AND ONGOING
6.7	<p>Continue to support Australia's international education sector to attract students from diverse markets, grow offshore and online delivery and help meet Australia's future workforce needs, including through competitive policy and visa settings. The review of Australia's migration system will help inform the next steps to supporting the international education sector.</p> <ul style="list-style-type: none"> Support diversification of international student cohorts, including by identifying new and emerging markets. Increase the duration of post-study work rights for certain international students eligible for a Temporary Graduate (subclass 485) visa, in select fields of study. 	DoE, Home Affairs, Austrade	ACTIONED AND ONGOING
6.8	<p>Help tourism businesses to get back into the international market and attract more international visitors to Australia. Develop and implement innovative marketing approaches including partnership marketing, extending reach of marketing and conversion, greater personalisation and effective trade marketing.</p> <ul style="list-style-type: none"> Drive growth in international visitation to Tropical North Queensland and the Great Barrier Reef region. Support tourism businesses through the Accommodation Australia's 'The Hub' to attract and upskill workers and the Australian Tourism Export Council's Tourism Training Hub. 	<p>TA, S&TG, VE industry</p> <p>Tourism Tropical North Queensland</p> <p>Australian Tourism Export Council, AA</p>	ACTIONED AND ONGOING
6.9	Improve promotion, marketing and provision of information about accessible infrastructure available at destinations, accommodation, venues and experiences and business sustainability practices.	VE industry	ACTIONED AND ONGOING
7.1	Expand target market offerings including for high yield/luxury visitors and business travellers.	VE industry	ACTIONED AND ONGOING
7.2	Respectfully embed First Nations cultures into the visitor economy and Australia's brand positioning, supporting prioritised product development.	VE industry (NIAA, Austrade, TA, S&TG)	ACTIONED AND ONGOING

No.	Action	Action Lead (Partners)	Recovery Phase status
7.3	<p>Support return of events, including business, cultural and arts, regional and major events, and implement an annual coordinated calendar of events to encourage new and return visitors, including:</p> <ul style="list-style-type: none"> • Leverage and support the ‘green and gold decade’ of major sporting events, culminating in the Brisbane 2032 Olympic and Paralympic Games. • Governments and industry to collaborate to optimise the impact of the many existing event promotion and support programs including the Business Events Australia Bid Fund Program. • Incorporate creative/cultural assets into destination marketing to maximise contribution of the creative economy, including to support the delivery of Revive: a place for every story, a story for every place, Australia’s National Cultural Policy. • Establish new mass participation events including in regional areas to encourage visitor dispersal, noting that potential funding mechanisms already exist such as the Australia Council for the Arts’ Major Festivals initiative fund for 7 major international arts festivals, supporting regional festivals through the Festivals Australia program and supporting regional collecting institutions through programs such as Visions of Australia, the National Collecting Institutions Touring and Outreach Program, the Australian Government International Exhibitions Insurance Program, and the National Cultural Heritage Account. 	VE industry, DoHAC, DITRDCA, NIAA, Creative Australia, (TA, S&TG, LG)	ACTIONED AND ONGOING
7.4	Cities to develop and offer a compelling differentiated offering for both the domestic and international markets to revitalise visitation.	S&TG, LG	ACTIONED AND ONGOING
7.5	<p>Grow and develop high-quality products and experiences around unique Australian locations and themes, including approaches which integrate sustainable nature tourism with economic opportunities in collaboration with Traditional Owners, and capitalising on emerging tourism trends such as geotourism.</p> <ul style="list-style-type: none"> • Leverage the \$10 million annual Wine Tourism and Cellar Door Grants Program to boost wine tourism and attract visitors to wine regions. • Produce and promote suites of products that will assist tourism businesses to develop high-quality, distinctly Australian agritourism experiences and build business capability programs that drive innovation, diversification and regional product development. • Encourage the industry to operate in ways that respect and reinforce Indigenous cultural heritage and the living cultures of First Nations communities through Ecotourism Australia’s Respecting our Culture program. 	<p>VE industry</p> <p>DAFF</p> <p>ART</p> <p>Ecotourism Australia</p>	ACTIONED AND ONGOING
7.6	Encourage the creation of new and expansion of existing First Nations-owned and operated tourism enterprises.	VE industry, NIAA (Austrade, S&TG)	ACTIONED AND ONGOING
7.7	Enhance the visitor experience through use and availability of technology.	VE industry	ACTIONED AND ONGOING

List of acronyms

AA	Accommodation Australia
ABF	Australian Border Force
ABS	Australian Bureau of Statistics
ART	Australian Regional Tourism
Austrade	Australian Trade and Investment Commission
ATEC	Australian Tourism Export Council
ATIC	Australian Tourism Industry Council
ATO	Australian Taxation Office
CIAA	Caravan Industry Association of Australia
DAFF	Department of Agriculture, Fisheries and Forestry
DCCEEW	Department of Climate Change, Energy, the Environment and Water
DoE	Department of Education
DEWR	Department of Employment and Workplace Relations
DFAT	Department of Foreign Affairs and Trade
DITRDCA	Department of Infrastructure, Transport, Regional Development, Communications and the Arts
DoHAC	Department of Health and Aged Care
DSS	Department of Social Services
FWO	Fair Work Ombudsman
Home Affairs	Department of Home Affairs
LG	Local governments
NEMA	National Emergency Management Agency
NIAA	National Indigenous Australians Agency
QTF	Quality Tourism Framework
RDA	Regional Development Australia
RTOs	Regional tourism organisations
SaCSA	Service and Creative Skills Australia
S&TG	State and territory governments
STOs	State and territory tourism organisations
SWA	Safe Work Australia
TA	Tourism Australia
TGA	Tour Guides Australia
TIAG	THRIVE 2030 Implementation Advisory Group
TPDF	Tourism Product Development Fund
Treasury	Department of the Treasury
TTNQ	Tourism Tropical North Queensland
VE industry	Visitor economy industry



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