



Australian Government

Australian Trade and Investment Commission

# DESTINATION CANBERRA

## THRIVE 2030 Update

**Sam Palmer**

General Manager, Visitor Economy and Client Programs

22 June 2023



AUSTRALIA

# Acknowledgment of Country

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

“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.”



# THRIVE 2030 reissue – what's new?



THRIVE 2030 was reissued on **17 March 2023** to reflect the government's priorities and policy agenda, including:

- building tourism workforce and business capability
- supporting First Nations tourism
- refreshing infrastructure
- supporting the transition to a green economy
- greater engagement within the Indo-Pacific region

# THRIVE 2030



## Vision

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

## Themes



**Diversifying** markets, experiences and destinations



**Modernising** supply side enablers



**Collaborating** across all stakeholders to achieve success

## Targets

- The Strategy sets ambitious yet achievable targets
- **\$166 billion in visitor expenditure by 2024**
- **\$230 billion by 2030**
- Approximately 40% of target spend will be **regional**: \$100 billion
- A broader set of '**longitudinal indicators**' is being developed

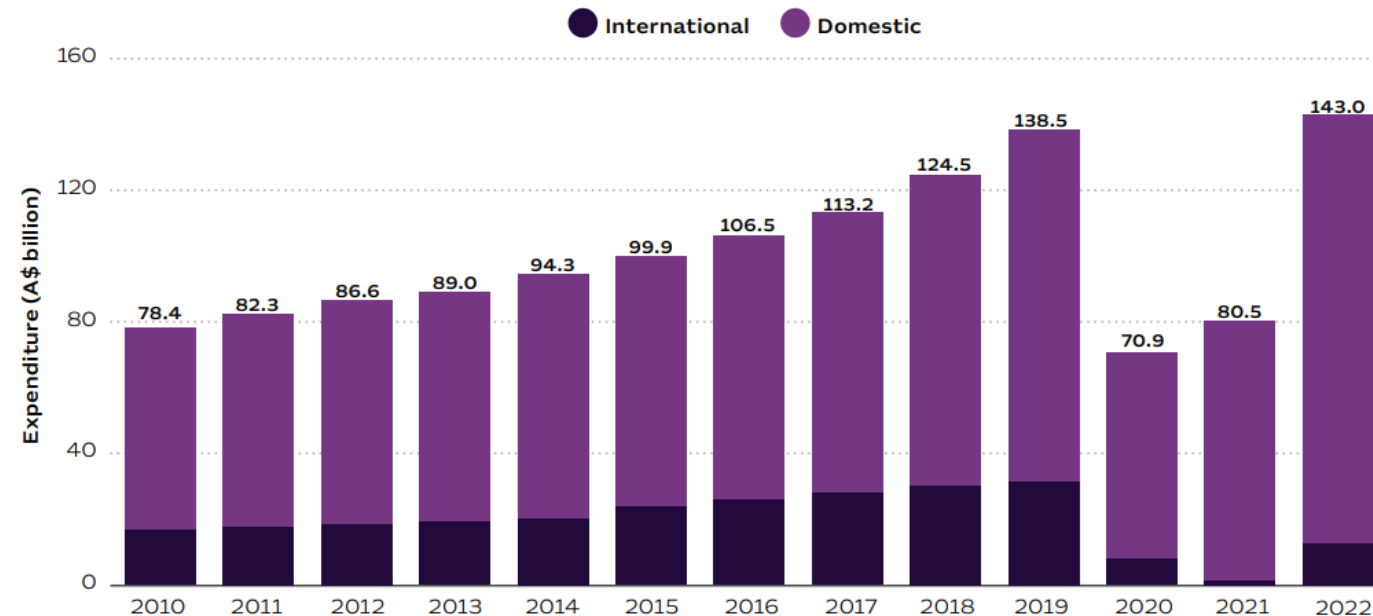
# THRIVE 2030 progress against targets



At end 2022, THRIVE 2030 Phase 1 targets for end 2024 in sight

Total VE spend (incl \$24b for long-stay int students) at **\$164.2b** (1% below \$166b target). **\$74.2 b** spent in regional Aust (6% above \$70b target).

Figure 1. Domestic and international visitor spend in Australia, calendar year 2010 to 2022.

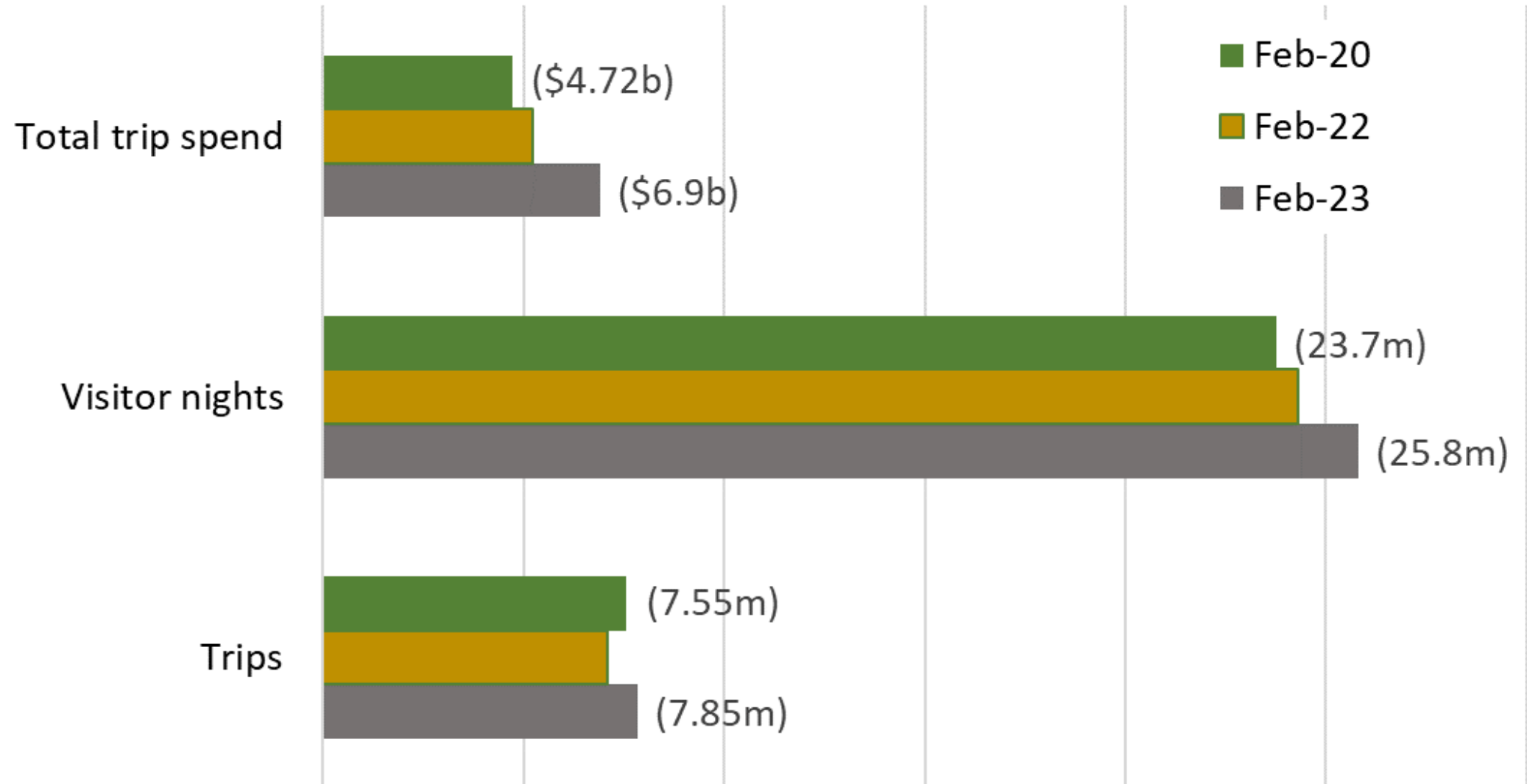


Note: The data excludes long-term international students. This means estimates will not directly align to THRIVE 2030 targets

Source: Tourism Research Australia

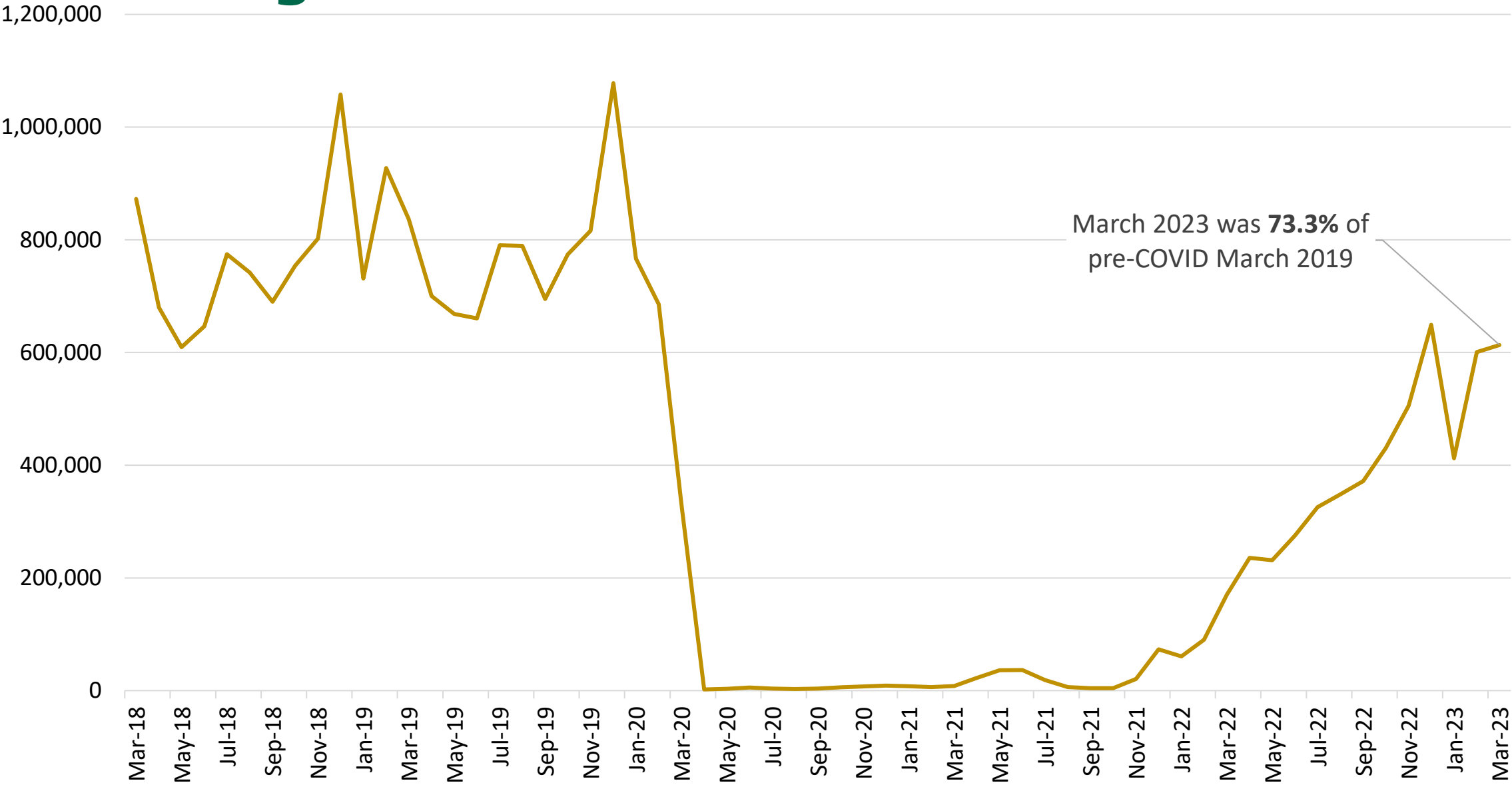
# Domestic visitor economy has practically fully recovered...

Domestic visitor economy - 3 metrics over 3 years

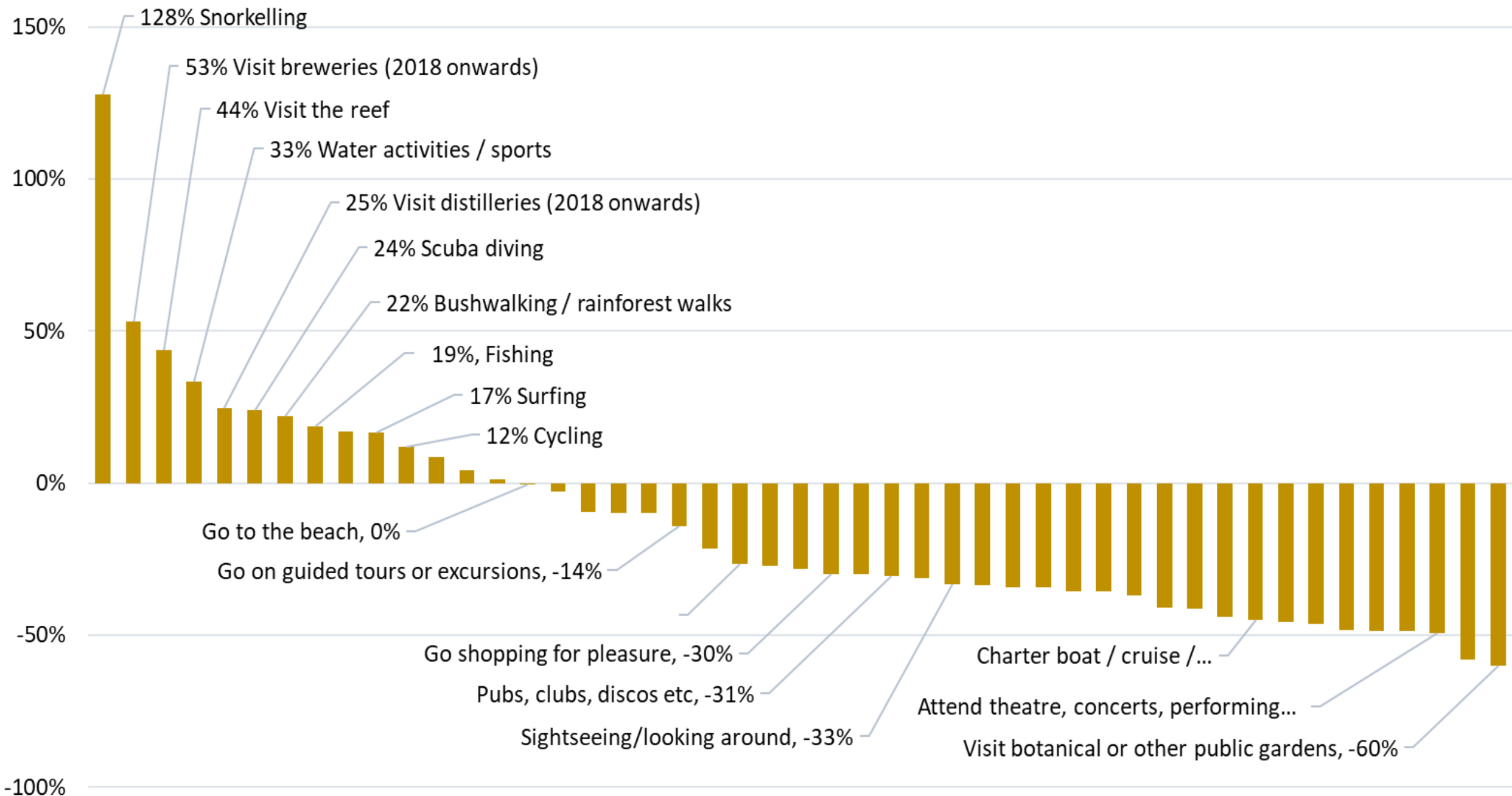


# ... and international visitors are steadily returning.

International short-term visitor arrivals



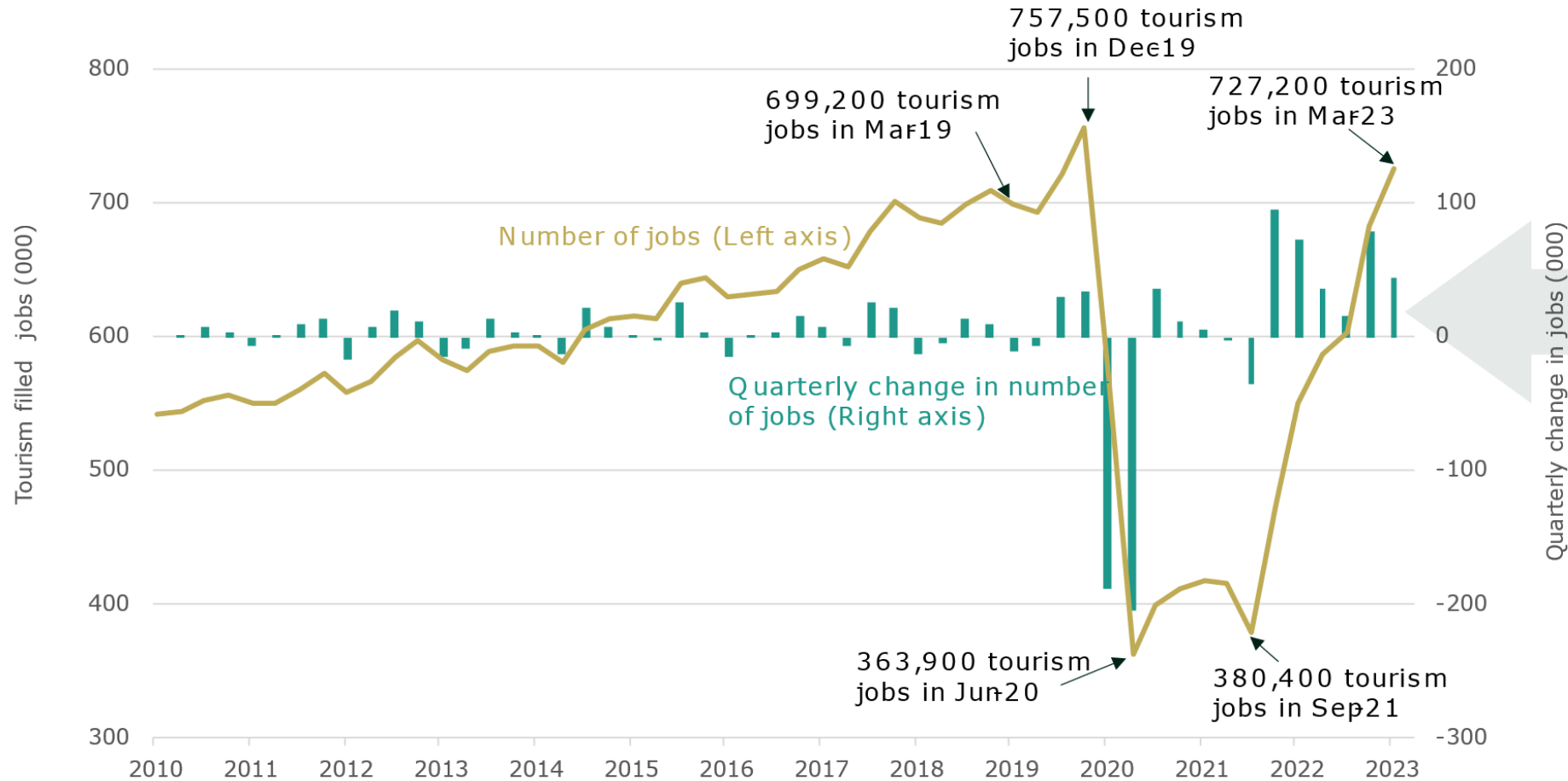
# Changes in domestic visitor activities from pre-pandemic levels, post-lockdowns (2019 vs 2022)





# Rebuilding Australia's tourism workforce

Tourism jobs were higher in March 2023 than in March 2019 (but below the Dec -19 peak – which is partly seasonal)

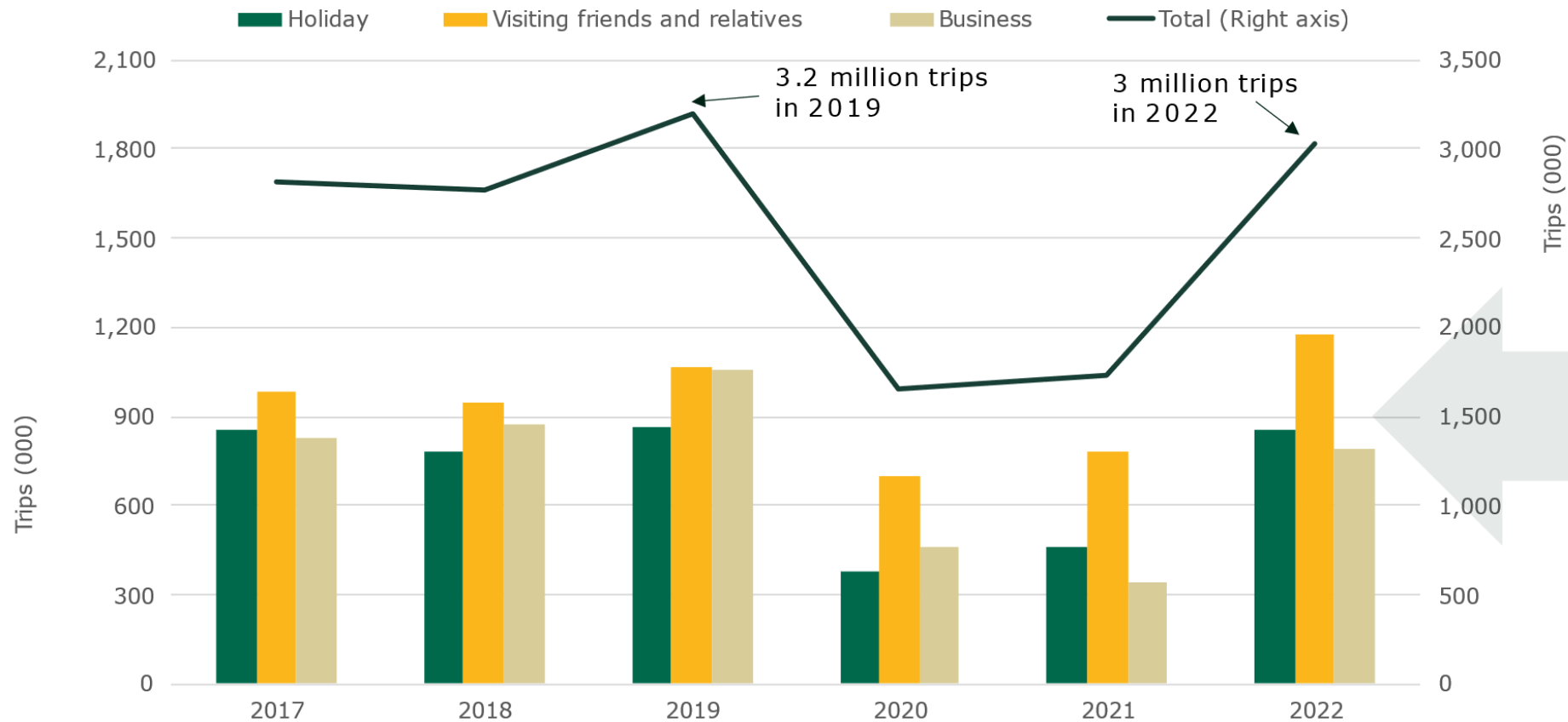


6 consecutive quarterly increases added 347,000 tourism jobs since Sep-21

With larger increases in the number of full-time jobs and female jobs (these categories had declined by more in 2020)

# Domestic overnight trips to the ACT almost fully recovered in 2022, after travel restrictions ended in late 2021

Only business travel remained below pre-pandemic in 2022, but it rose strongly... more than double the number of business trips in 2022 than in 2021



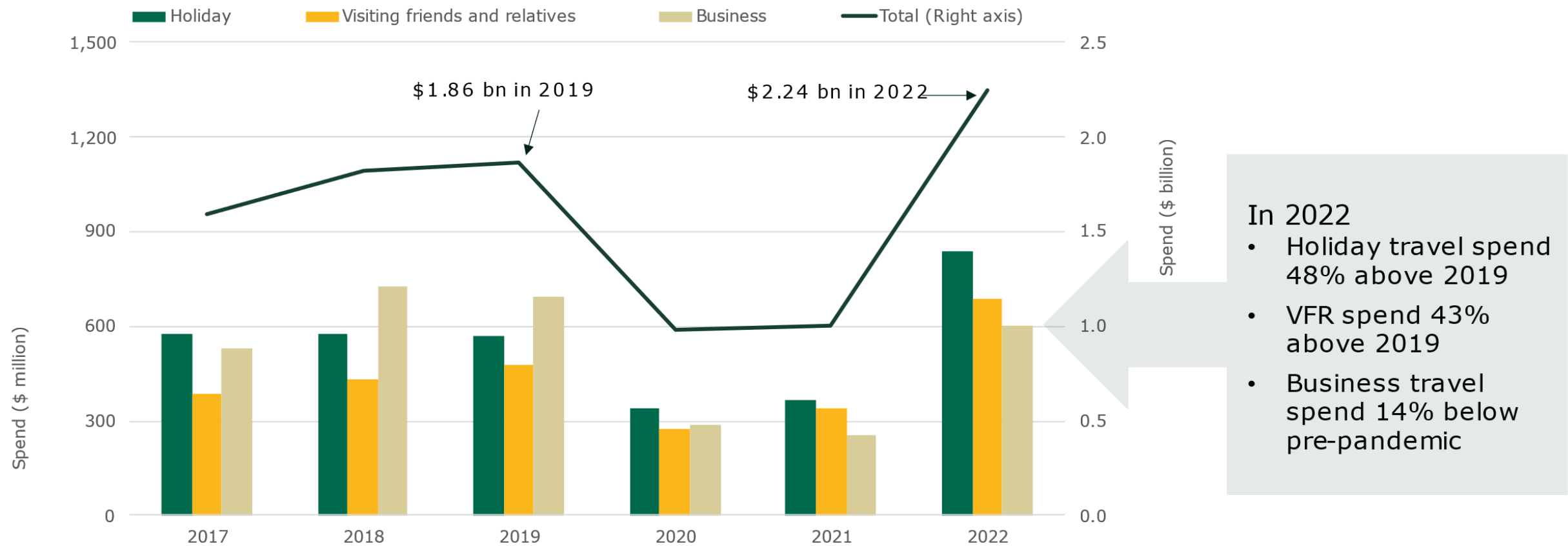
## In 2022

- The number of domestic overnight holiday trips to the ACT returned to its 2019 level (860,000)
- There were 11% more VFR trips than in 2019
- There were 26% fewer business trips than pre-pandemic

Source: National Visitor Survey Tourism Research Australia

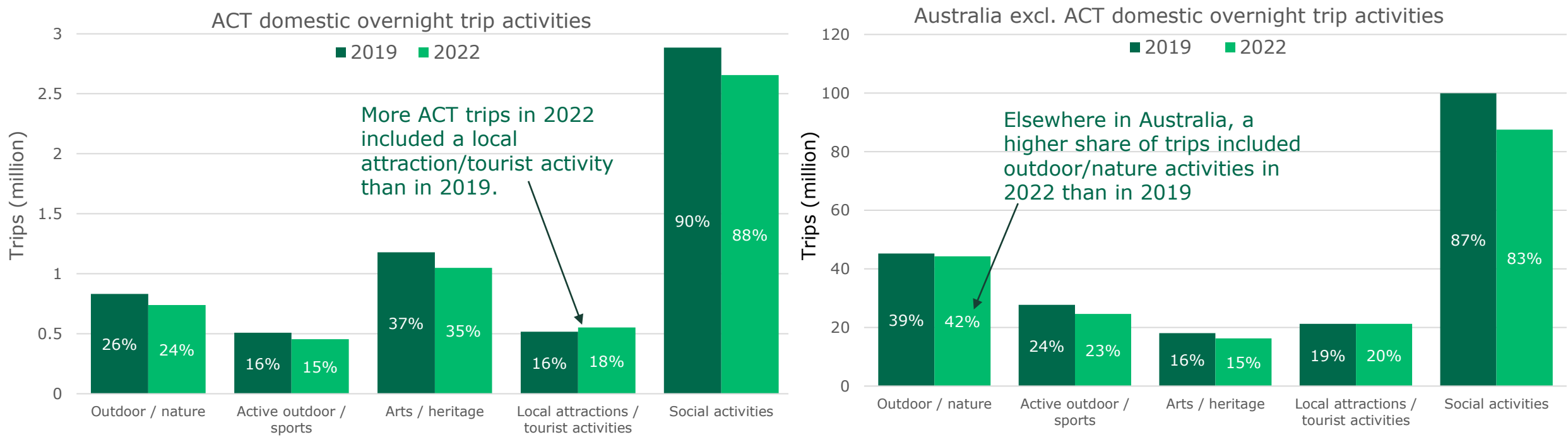
# ACT domestic overnight visitor expenditure 20% higher in 2022 than in 2019

Strong leisure travel more than offsetting slower recovery in business travel



Source: National Visitor SurveyTourism Research Australia

# Domestic ACT trips have a higher share of arts/heritage and social activities and lower share of outdoor/nature and active/sports activities



More ACT trips in 2022 included the following local attractions/tourism activities than in 2019: Go on guided tours or excursions, visit winery/ brewery/ farmgate/ food market, charter boat/cruise or ferry.  
And more ACT trips included the following activities: visit to museum/art gallery, visit art/craft studio, visit Indigenous site/community, golf.

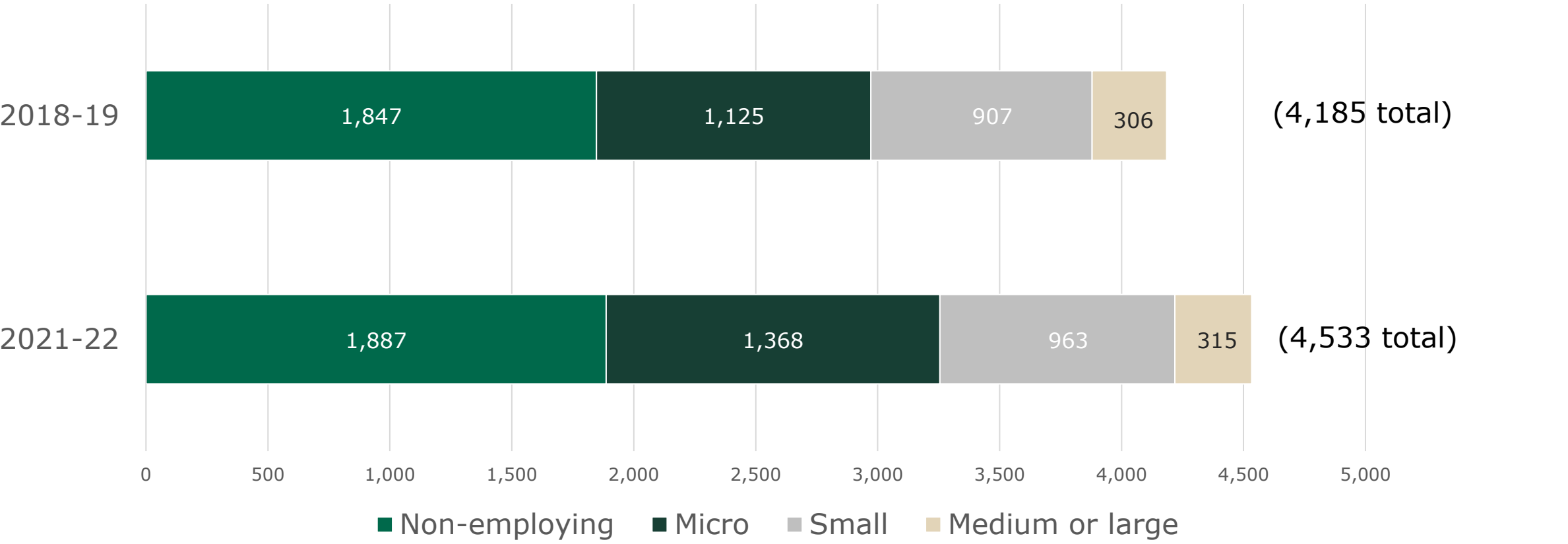
\*Values report the share of trips with that activity type for the year.  
Trips can include multiple activity types across the trip and multiple stopover locations, therefore trips to ACT may include activities undertaken elsewhere.

# The number of tourism-related ACT businesses in 2022 was 8% higher than in 2019

Driven by growth in micro business sector (21%)

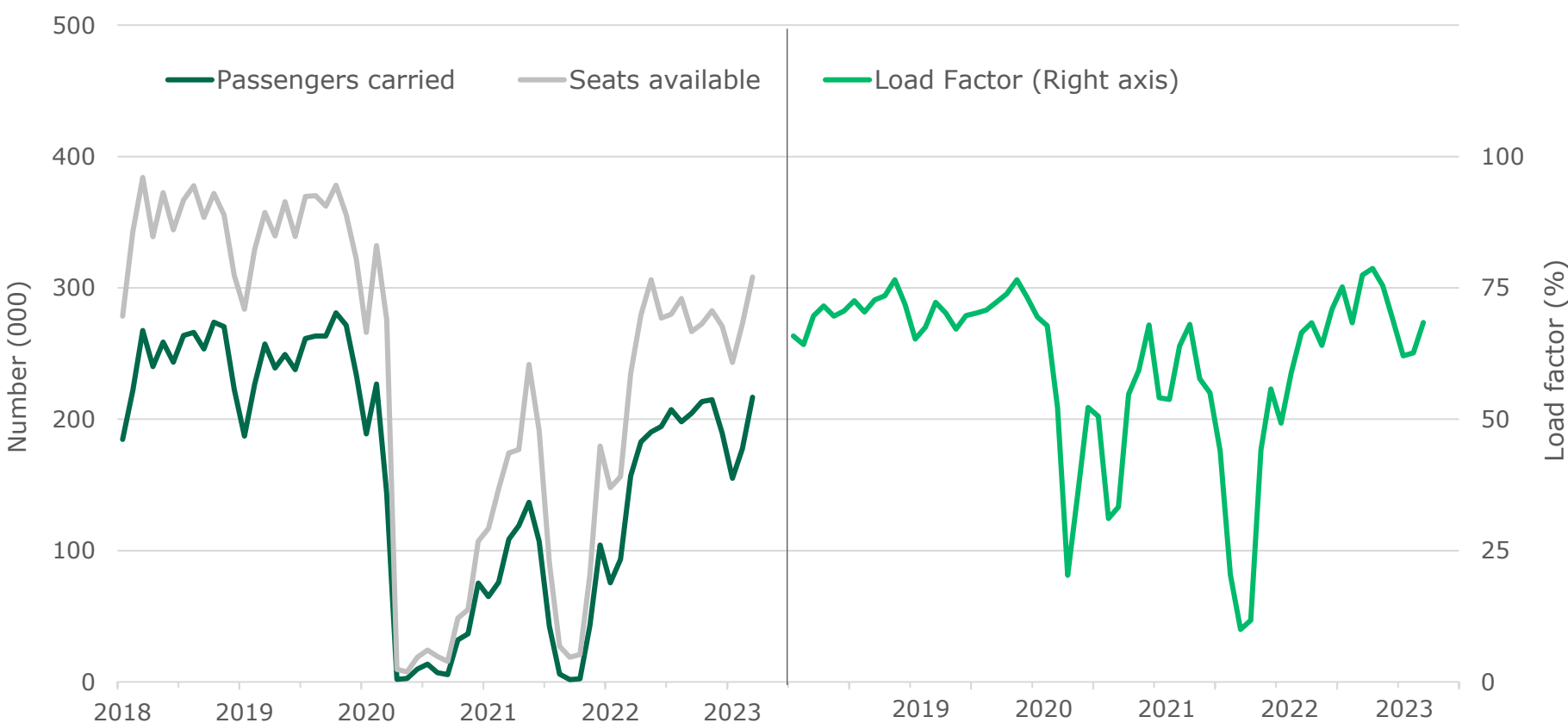
The number of businesses in each category was higher in 2022 than pre-pandemic

ACT tourism businesses by employment size, 2018-19 and 2021-22



# Canberra domestic flight seats and passenger numbers remain below pre-pandemic level

While load factor has returned to pre-pandemic high



Similar trends across Australia's capital cities. Total domestic flight seats available in 2022 was 15% below 2019 level.

Has taken time to replenish workforces and resume flights of grounded aircraft.

International flights to Canberra yet to resume (flight to Fiji commencing in July 2023)

\* For top 4 domestic flight routes to/from Canberra airport (Sydney, Melbourne, Brisbane, Adelaide)  
Source: Domestic flight routes data, BITRE.

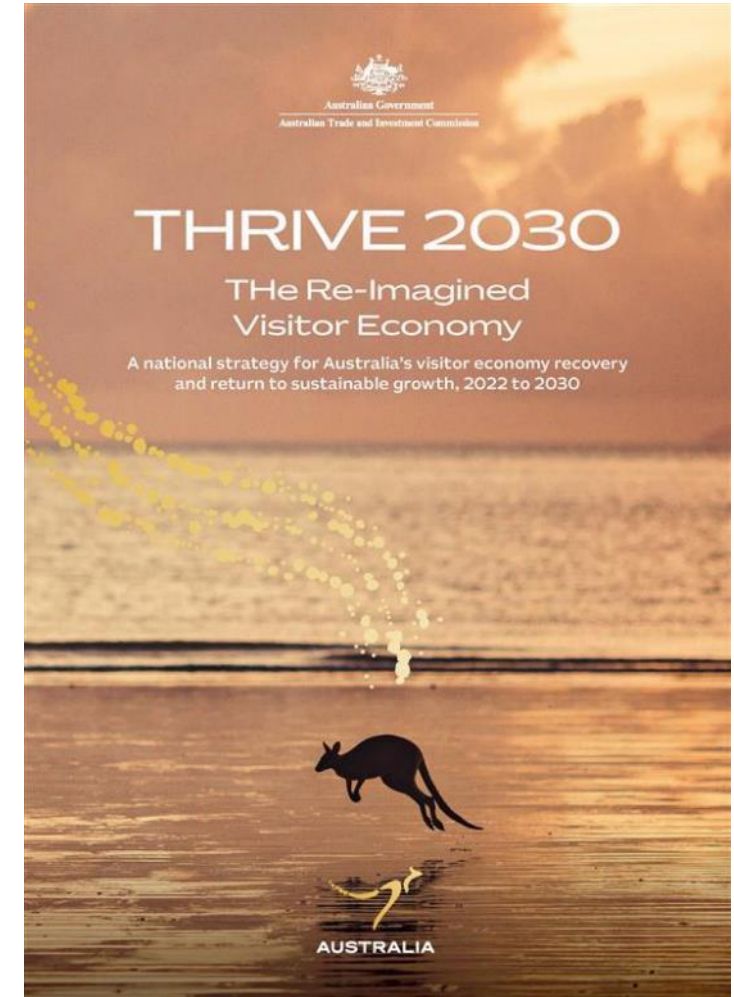
# THRIVE 2030 progress to date



THRIVE has seven policy priorities, with a total of 64 strategic actions

Progress on actions:

- 8 have been **completed**
- 51 are **underway**
- 5 are **pending**.



# Priority 1: Comprehensive collaboration



- Established **THRIVE 2030 Implementation Advisory Group** and THRIVE 2030 workforce and data working groups
- Regular engagement with industry through **Visitor Economy Industry Forum** to inform whole of government policy
- **Visitor Economy Taskforce** regularly meets to discuss Commonwealth delivery
- **Tourism Ministers' Meetings** and **Australian Standing Committee on Tourism** driving collaboration with states and territories with TMM communiques released publicly and agreed ASCOT THRIVE 2030 work program

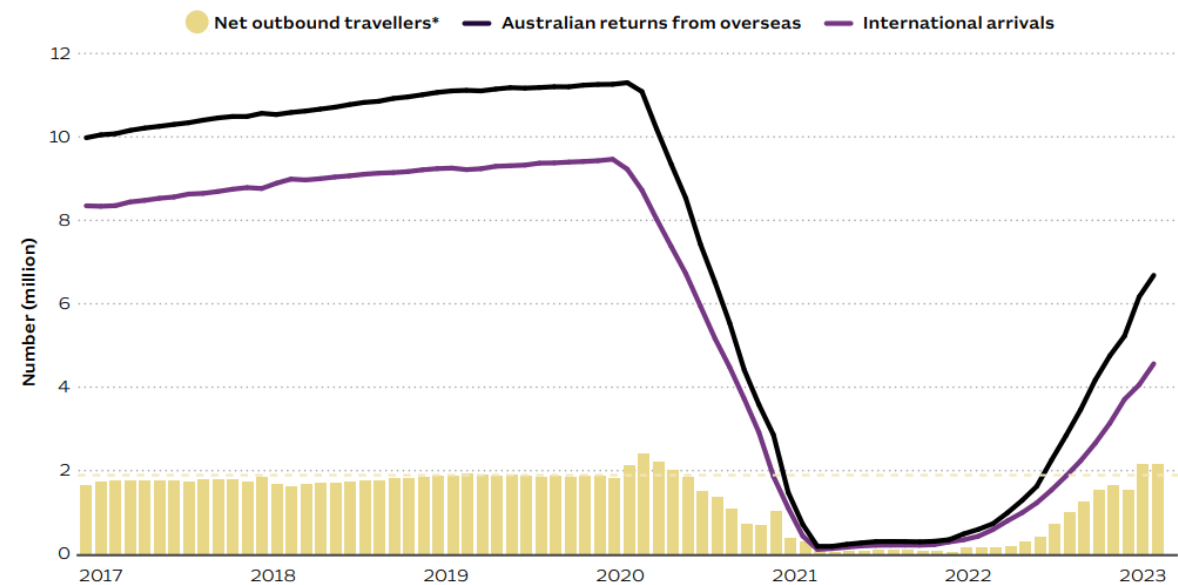


# Priority 2: Improve data and insights



- Developed guidelines for the **Longitudinal Indicators for the Visitor Economy (LIVE)** framework
- **Industry Data and Expert Analysis (IDEA)** Working Group has held its final meeting and finalising its report to Government
- Funded work to better **measure how business events contribute to the Visitor Economy** underway

Figure 9. Rolling annual sum of international inbound and outbound travel, with net outbound travel number, January 2017 to February 2023.



\* Differences between Australian returns and international arrivals, rolling annual sum. Dotted line shows average for 2019.

Source: ABS Overseas Arrivals and Departures, Australia. Data to February 2023.

# Priority 3: Grow a secure and resilient workforce



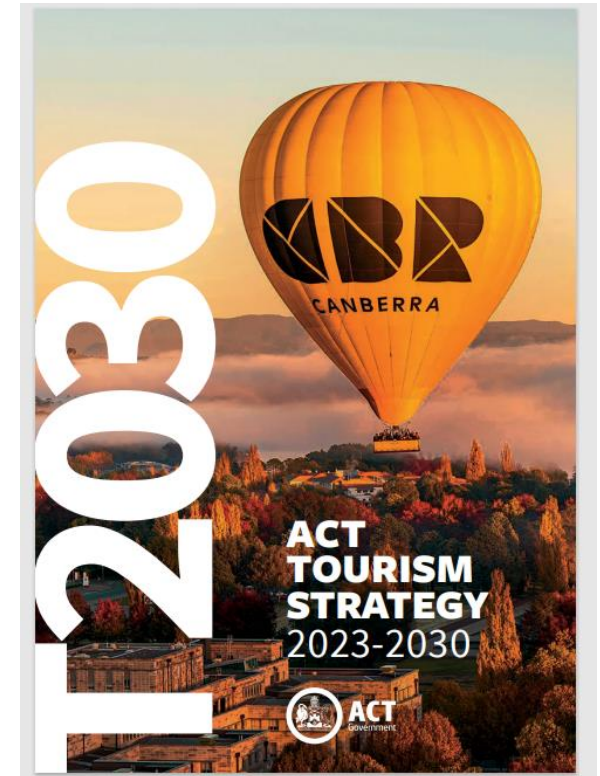
- **Tourism Jobs Summit** informed **Jobs and Skills Summit, interim visitor economy workforce and skills action plan** (and future strategy)
- **Tour Guides Australia's micro-credentialing course** providing pathway to accreditation as professional tour guide
- **Accommodation Association** begins development of employment and training portal '**the Hub**' with broad advisory group to drive collaboration
- **\$450,000 Choose Tourism Grants to ACT Government**



# Measures to build tourism workforce



- **Campaign targeting eligible Pensioners** to take up \$4k Work Bonus increase and work in tourism, to help businesses attract older Australians to work in tourism & employers kit
- Targeted, local campaigns **promoting benefits of employing people with disability** to tourism employers, and explaining existing government services that can assist
- **Expanding 'The Hub'**, an online employment and training portal run by the Accommodation Association
- **Enhancing Quality Tourism Framework**, run by Australian Tourism Industry Council, to improve supply-side capacity



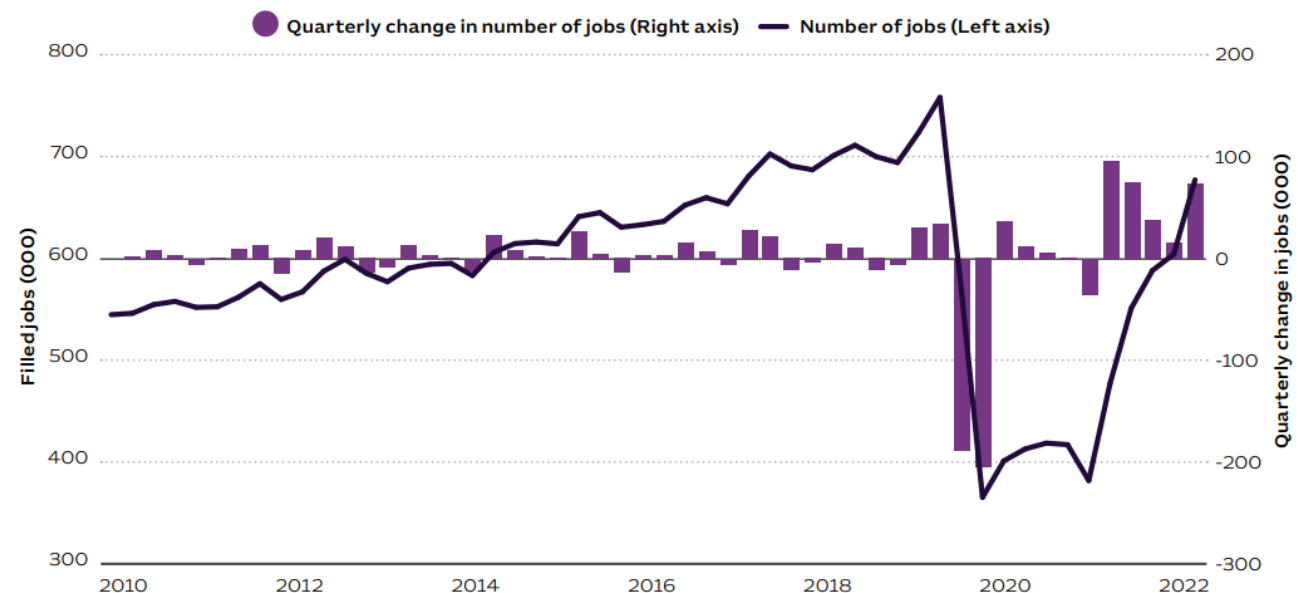
# Measures to build tourism workforce



Measures from May 2023 Budget

- Partnering with S&T govts to support **further 300,000 Fee-Free TAFE and VET places**, with tourism and hospitality courses national priority sector
- Addressing housing shortages through **additional \$2b in financing for social and affordable rental housing**, tax breaks for build-to-rent developments and expanding eligibility for Home Guarantee Scheme
- Strengthening migration system through **\$370.8m for the Pacific Australia Labour Mobility Scheme** and **\$75.8m** to extend **visa processing surge**

Figure 25. Tourism filled jobs, quarter-end number and quarterly change, 2010 to 2022.



Source: ABS, Tourism Satellite Account: quarterly tourism labour statistics, December 2022

# Campaign: Older Australians working in tourism

## Purpose

- To encourage older Australians to consider tourism jobs to supplement their income
- To encourage tourism employers to consider older Australians to fill workforce gaps
- To raise awareness of the Work Bonus which enables Age Pensioners to earn more without affecting their pension

## Timing

- May to October 2023



Australian Government

Australian Trade and Investment Commission

THRIVE  
2030



Retired and  
want to  
supplement  
your income?



# Campaign: Older Australians working in tourism

## Performance

- Early results exceeding expectations
- Running across
  - Meta – Facebook and Instagram
  - LinkedIn
  - Digital display
  - Search
- Exceeding cost per click benchmarks from previous campaigns on social channels

## Please share!

- **[Austrade.gov.au/TourismBusiness](https://austrade.gov.au/TourismBusiness)**
- Download the Industry Communications Kit



# Priority 4: Embrace leading-edge business practices



- Australian Tourism Industry Council is enhancing the **Quality Tourism Framework**.
- Ecotourism Australia's **Strive 4 Sustainability Scorecard program** launched
- **Visit Canberra's Tourism Product Development Fund** helping drive business capability in tourism sector
- Advice for businesses available through [business.gov.au](https://business.gov.au); *Better Connectivity Plan for Regional and Rural Australia*.
- ASCOT Workshop with **Insurance Council of Australia (ICA)** and the **National Insurance Brokers Association (NIBA)** on **insurance affordability**.



# Sustainability - the broader perspective

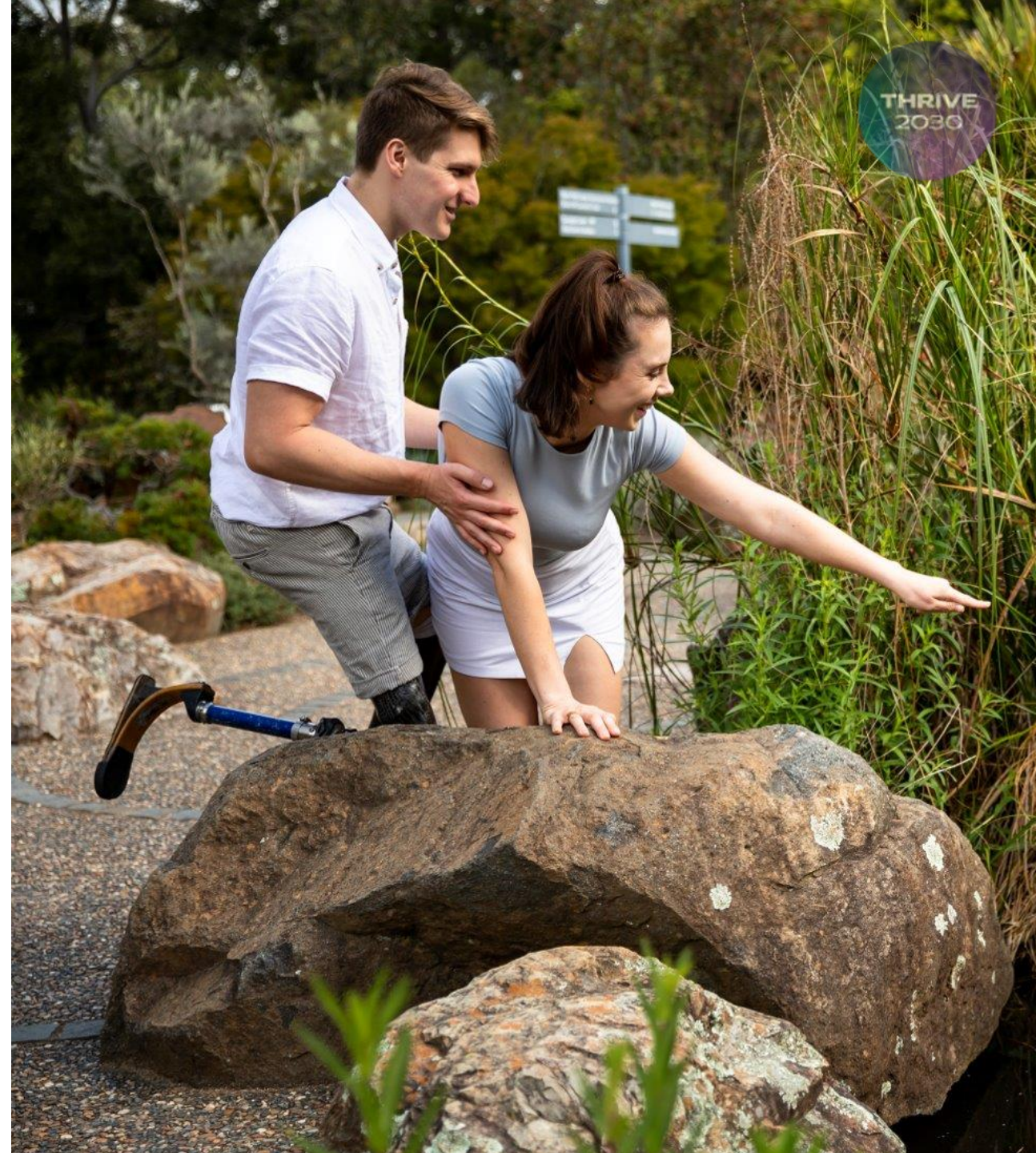
- Visitor economy policy sits in a broader national policy context
- Environmental policy
  - Climate change
  - Environmental protection
  - National Parks and land management
- First Nations agenda
  - Voice to Parliament
  - Cultural protection





# THRIVE 2030: Priority actions for sustainability

- **Industry sustainability framework and education tools** – tailored to tourism businesses
- **Longitudinal Indicators for the Visitor Economy (LIVE) framework** - to holistically measure the performance of the visitor economy, including on measures of sustainability.
- **First Nations Visitor Economy Partnership** to elevate First Nations voices across the visitor economy
- Increase **workforce participation and training opportunities** for under-participating cohorts
- **Develop assets, infrastructure and experiences accessible to all people**, regardless of physical limitations, disability or age





# National sustainability framework and toolkit

## Two parts:

A) **Sustainability framework** – a nationally agreed definition of sustainable tourism

B) **Toolkit**– a practical guide to assist SMEs to implement sustainability practices across all aspects from implementation to monitoring and reporting

Both aspects designed to reinforce industry led initiatives



# Priority 5: Enhance visitor infrastructure



- **Strong tourism investment pipeline** – 244 projects worth \$44.3 billion.
- Australian Govt developing **Aviation White Paper** and investing in airport development and upgrades
- TA signed an MoU with Australian Cruise Association and Cruise Lines International Australia **to grow inbound demand for cruising in Australia**

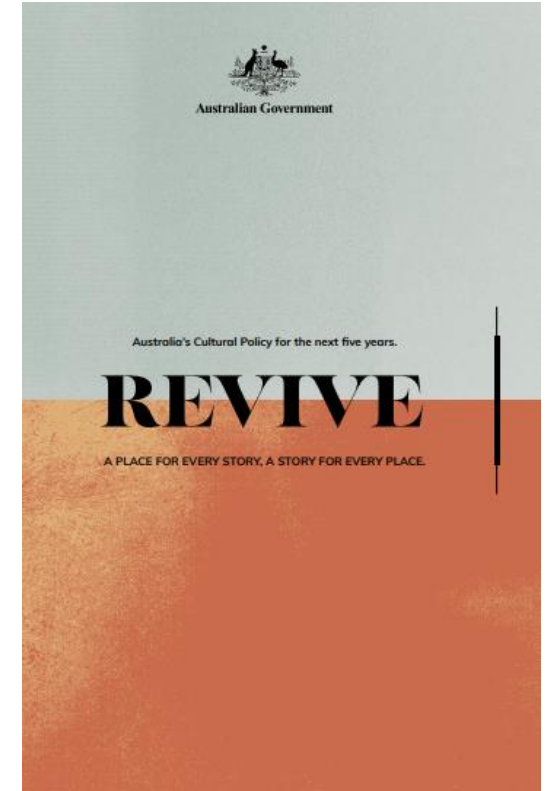




# Priority 6: Build markets and attract visitors



- TA's "**Come and Say G'Day**" campaign to re-introduce Australia to the world
- Complemented by **state and territory marketing activities**, e.g. Visit Victoria's *Stay Close, Go Further*
- **National Cultural Policy** – Revive, complemented by funding for national cultural institutions
- **Review of Australia's migration system**
- **International Education Innovation Fund** to promote diversification; consultations to develop **International Diversification strategy**



# Priority 6: Build markets and attract visitors



## DIVERSIFICATION – Action Item 6.3

- Austrade leads development of **International Diversification Strategy** for VE - in cooperation with Commonwealth agencies, States and Territories, TA and industry
- International Diversification Strategy for the Visitor Economy **discussion paper** released on 18 May and **Consultation closes on 13 July**.
- **Online survey & opportunity to provide written submission – go to Austrade website: [tinyurl.com/uxzxw2e2](https://tinyurl.com/uxzxw2e2)**

Markets with strong potential to grow: India, Indonesia, Vietnam, Malaysia

Barriers: Industry capability, product development, visa competitiveness.

Opportunities: Alignment with Government priorities (Southeast Asia Economic Strategy), emerging middle classes, demand for nature based, First Nations & sustainable tourism products, VFR.



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



- Australia's **Nation Brand** being used to tell uniquely Australian stories, and demonstrate Australian capabilities through our First Nations cultures. Go to [www.brandaustralia.com](http://www.brandaustralia.com) for your free materials
- TA, Qantas and others have implemented its comprehensive dual naming policy, ensuring local First Nations' place names are used in Australia's international marketing activities
- Delivery of grants to First Nations tourism operators through the **Indigenous Tourism Fund**



# Activities with States and Territories



To support THRIVE 2030 implementation, Tourism Ministers endorsed a work plan for ASCOT including:

- **Insurance** – resulted in industry presentation by Insurance Council of Australia, National Insurance Brokers Association
- **Aviation** – input into Aviation White Paper
- **Workforce** – input into Employment White Paper
- **First Nations partnership**
- **Sustainability framework and business toolkit**
- **Cruise attraction (Vic led)**
- **Blue sky THRIVE future including Phase 2 and 3 action plans**





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