PARLIAMENT OF AUSTRALIA

‘Are we there yet?’: From recovery to resilience – opportunities and challenges for Australia’s tourism sector

Final report for the inquiry into Australia’s tourism and international education sectors

Joint Standing Committee on Foreign Affairs, Defence and Trade

September 2024

CANBERRA

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When we talk about workforce challenges, it is literally the lack of people and encouraging domestic migration into regional and remote Australia, and that requires fundamental policy consideration: how do we encourage people to come into remote and regional Australia?

– **Mr Danial Rochford, Tourism Central Australia**

A range of capability constraints are impacting the delivery of authentic Aboriginal and Torres Strait Islander tourism experiences, meaning supply is not always able to meet the increasing demand in the sector

– **National Indigenous Australians Agency, Submission 120**

When you're working on country you've got to talk to traditional owners about what's important and what matters to them and how they want to tell a story. It may not necessarily be them telling the story, but you've got to work with them to tell the story

– **Mr Matthew Cameron-Smith, Voyages Indigenous Tourism Australia**

We consider education as a strong soft-power tool and a vector of regional integration. Education can and should be seen as an investment, as it's the key to success and the pathway to a better future

– **Dr Yves Lafoy, Official Representative of New Caledonia to Australia**

Without a successful Northern Territory you don't have a successful northern Australia, and, in my opinion, without a successful northern Australia you don't have a successful Australia. Bringing people into the north is incredibly important and bringing international students is important

– **Professor Scott Bowman AO, Charles Darwin University**

Australia is very much at risk of falling behind the demands of the global traveller in terms of sustainability... Intrinsically, tourism is about sustainability. It is about protecting the product, protecting our assets and protecting local communities. There is a real opportunity for Australia in this space. But if we don't move, particularly the European market will say, 'It's not worth potentially that emission risk to do that'

– **Ms Elannah Strathearn, Tourism Tropical North Queensland**

... what we practise as culture at home isn't a product. It's culture, that belongs to community and family. The product is really an aesthetic and certain thing, that you create for someone to consume and pay money for as an experience or something else, and that stands outside of the community

– **Mr James William, Torres Strait Island Regional Council**

I do think there is a need for Aboriginal cultural experiences in places our visitors turn up in large numbers, which are the capital cities, first and foremost, even if it's the point of arrival and part of that experience... I think that would be a worthwhile investment, if it were done well and absolutely designed with the visitor in mind

– **Mr Evan Hall, Australian Tourism Industry Council**

Aboriginal and Torres Strait Islander people should be supported to offer their cultural products, stories, expressions, language and experiences in the tourism sector in ways that are self-determined and protected from exploitation by others

– **The Indigenous Art Code Ltd, The Copyright Agency Ltd and Arts Law Centre of Australia, Submission 74**

Dja Dja Wurrung has found with its guided tours that there are not enough Dja Dja Wurrung people to go around and deliver the face-to-face. Along with that, not every Dja Dja Wurrung person wants to do that—and nor should they be required to do it. We have a high degree of capability as orators to tell stories and utilise country, but we also have a capacity issue

– **Mr Rodney Carter, Dja Dja Wurrung Clans Aboriginal Corporation**

... the product development side has to be whole of life from a product perspective. It has to be from concept to design development, then product release and then improving that product, because products can get tired, markets can change and a whole bunch of things can happen

– **Mr James William, Torres Strait Island Regional Council**

The visitor economy makes a greater proportional contribution to regional communities than to capital cities, contributing 4.1 per cent to gross domestic product in regions, compared to 2.7 per cent in capital cities

– **Austrade, Submission 73**

The mentoring programs are quite in-depth, in what we go through with them … We talk about intergenerational wealth, but intergenerational intellectual wealth is really important too; that's sadly missing from the case, so we are making sure that gap is filled in. The business support hub is intended to work with them closely and take on a lot of that administrative burden within the first three months and then gradually divest that to the business as well. We are trying to ensure that we are not creating dependency on any of our systems at any stage but always transferring that responsibility and ownership through to the business. That's resulted in a large number of businesses being created through WAITOC and a very small failure rate for those businesses

– **Mr Karl Millard, Western Australian Indigenous Tourism Operators Council**

We saw people going out to the regions. We saw towns being visited by tourists that had never been visited by tourists before. An opportunity came out of that time in that our regional tourism destinations really came alive…

– **Dr Gabby Walters, University of Queensland**

… the third most important task really is the capacity for the industry to invest in its own product. That includes staff, and it includes either built form, if we're talking about accommodation or attractions, or the other one that's often forgotten about, which is vehicles and vessels…

We've had very little investment in that product, for a range of reasons

– **Mr Evan Hall, Australian Tourism Industry Council**

The high cost of living, getting workers up to the region—these are all impacts on our operators being able to fill their business objectives and provide a quality experience which makes our destination competitive and marketable

– **Mr Bill Tatchell, Australia's North West Tourism**

We need to invest in international-ready training and trade engagement training in order to upskill regional operators and broaden their offering

– **Australian Tourism Export Council, Submission 44**

The best practice example of supporting appropriate tourism operations in parks was demonstrated in the Great Barrier Reef Marine Park Authority's (GBRMPA) program where they link longer licenses, preferential marketing opportunities and access to training for operators certified to a global standard. These programs are all designed to encourage tour operators to manage a sustainable business, deliver high quality experiences and provide accurate information to guests in an engaging manner

– **Ecotourism Australia, Submission 117**

Agritourism is a key opportunity for developing product in regional Australia…

Developing Agritourism will provide our visitors with unique, distinctly Australian experiences. While investment is required for product development in agritourism, equally of importance is the need to consider red tape reduction that enables innovation and growth

– **Australian Chamber of Commerce and Industry, Submission 80**

… equity, inclusivity, and diversity should permeate all aspects of the visitor economy

– **Queensland Tourism Industry, Submission 39**

I say to government and to council, invite industry into the room… There may be solutions that you're unable to think of, or maybe it's not for government to provide that solution. The other piece to that is that if you bring industry and business to the table sooner rather than later they can see what's coming down the pipeline and they can gear up for it

– **Ms Alina Bain, Chief Launceston Chamber of Commerce**

… we need to be data informed so we're not left in a position where we're unsure of what's going on, on the ground…

Without that data it leaves a lot of regional areas pretty vulnerable

– **Mr Tim Booth, Mudgee Region Tourism**

Relevant, robust and timely data and insights that are easily accessible, discoverable and cost-effective are critical tools that underpin decision-making, business growth and investor confidence. They are also important for measuring industry performance, monitoring trends and informing government policy development. In some cases, more granular data is needed to guide specific business activity or for decisions regarding particular geographic locations

– **THRIVE 2030**

What we find, though, with international visitors is that they make up about one in 33 of all visitors to the ACT; however, the spend is significant. So one in every eight dollars spent in the ACT comes from an international visitor. When it comes to international students, they might only be six per cent of the total of international visitors that we have at the moment, but they represent 53 per cent of the spend that comes into the territory from the contribution international markets made to the territory

– **Ms Kareena Arthy, ACT Government**

The connections built on the Australian experience through overseas alumni significantly contributes to the people to people links that are so important for leveraging opportunities in the Association of Southeast Asian Nations and Pacific regions

– **Flinders University, Submission 134**

Chair's Foreword

Australia is one of the most beautiful and safe countries in the world. It possesses iconic natural and man-made attractions, diverse communities, and historic cultures. For these reasons tourism is Australia's fourth largest export earner,[1] employing over one million people.[2] In addition to its significant economic benefits, tourism is an invaluable way to share Australian culture and communities with the world.

The Committee commenced this inquiry into Australia's tourism and international education sectors in October 2022, as the world was emerging from the height of the COVID-19 pandemic. This period saw two years of closed international borders and domestic restrictions on movement that tested the resilience of communities and businesses.

The Committee released an Interim Report in late 2023 focusing on the complexities and challenges of the international education sector and how it had been impacted by the pandemic.[3] After considering the interplay of institutions, educators, businesses and the regulatory framework, it was the Committee's view that the sector take the COVID-19 disruption as an opportunity to reset. The Interim Report recommended that a student wellbeing focused approach that builds the brand of 'Team Australia', supported by the strengthening of alumni networks will help foster enduring connections to Australia. I would like to thank the Hon Julian Hill MP who took a leading role in the development of the Interim Report. Since the Interim Report was released, the Australian Government has announced changes in the policy for international education which will take time to be fully developed and implemented, and see measurable results.

This report focuses on the tourism sector and reflects the lived experience of stakeholders during and after the peak of the pandemic. The Committee was eager to hear from government, businesses, industry, First Nations people, communities and peak bodies during the inquiry, and expresses its thanks to parties that tendered submissions or appeared as witnesses. While the Committee heard stories of struggle and loss, we also heard about collaboration and innovation, as governments and businesses pivoted to new markets or products to meet radically different circumstances.

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1 Australian Trade and Investment Commission (Austrade), Submission 73, p. 8.

2 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, p. 6, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

3 Joint Standing Committee on Foreign Affairs, Defence and Trade, Parliament of Australia (JSCFADT), *Inquiry into Australia's tourism and international education sectors, Quality and Integrity – the Quest for Sustainable Growth: Interim Report into International Education*, October 2023, https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Foreign_Affairs_Defence_and_Trade/Tourismandeducation/Interim_Report_-_Inquiry_into_Australias_International_Education_Sector, viewed 23 September 2024.

One of the key learnings from the pandemic is that the domestic and international demand for Australian tourism offerings is strong and enduring. Growth in the tourism sector is already exceeding the industry's 2024 post-COVID-19 recovery target of $166 billion dollars in visitor expenditure by $42 billion,[4] with Minister Farrell announcing in July 2024 that international tourism levels are climbing back to pre-pandemic levels.[5]

However, while the tourism sector's recovery is progressing well overall, evidence received during this inquiry identified that it is patchy and there are ongoing structural issues that impede further growth. The sector needs to be dynamic and embrace the changing needs and interests of travellers, particularly those who are concerned about the environmental impacts, or accessibility, inclusivity and costs of tourism. There is an opportunity to learn from COVID-19 and take on board the findings of other recent reviews such as the Migration Review, Aviation White Paper and the Employment Review. The Committee recognises that there is no way to futureproof the tourism sector, however the recommendations in this Report are aimed at strengthening the sector to be more resilient and inclusive, and points to opportunities where the sector can seek new products and markets.

Two areas of significant opportunity for the sector are highlighted in this report: First Nations tourism and regional tourism.

First Nations tourism is one of Australia's most unique offerings and is of growing interest to domestic and international tourists. Critically, it is also a powerful opportunity to further the social and economic empowerment of First Nations peoples. However, the Committee heard about the barriers faced by First Nations tourism businesses and cautions that the development of new First Nations tourism products and experiences needs to be undertaken by the owners of the cultural knowledge, so they determine the product brought to the market. First Nations tourism of this type could be delivered by the traditional custodians or in partnership with culturally informed others in the tourism industry. Recognising concerns about authenticity and self-determination, the Committee supports the current work to establish a national First Nations tourism body to facilitate the development of First Nations tourism and lead industry strategy and coordination. The Committee also endorses the drive for increased representation of First Nations peoples on decision-making bodies in the tourism sector to ensure the future direction of First Nations tourism is led by First Nations peoples.

The Committee was impressed by the diversity of tourism offerings in regional Australia, and the resilience of regional tourism operators during the pandemic amid challenges in transport, workforce, and infrastructure maintenance. Many of these issues did not just affect regional tourism operators - they were protracted issues faced by regional communities themselves. The Committee appreciates the focus on regional Australia in the Government's THRIVE 2030 long-term tourism strategy. The Committee also welcomes government efforts

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4 Tourism Research Australia (TRA), Austrade, *State of the Industry: Australia's tourism sector in 2023*, Canberra, p. 3, https://www.tra.gov.au/content/dam/austrade-assets/global/wip/tra/documents/soti/tra-state-of-the-industry-2023.docx, viewed 15 July 2024.

5 Minister for Trade and Tourism, Senator the Hon Don Farrell, *Media release: Tourism Boom – More visitors, longer stays, higher spend into Australian economy*, 26 June 2024, https://www.trademinister.gov.au/minister/don-farrell/media-release/tourism-boom-more-visitors-longer-stays-higher-spend-australian-economy, viewed 7 July 2024.

to address regional workforce shortages and increase investment in regional infrastructure as these efforts also provide broader benefit to regional communities. This report includes a recommendation to develop a regional dispersal strategy to open the regions to foreign markets and share the benefits of international visitors and become more financially resilient. Hearing from regional communities was critical to the inquiry, and I would particularly like to thank witnesses who appeared before the Committee at regional hearings and the members of the Committee who travelled for the 31 hearings across Australia.

From the earliest stage of the inquiry it was clear that there is a delicate equilibrium between the demand for Australian tourism products and the quality and enablers of the supply. Many stakeholders expressed concern about the ability of infrastructure, including affordable transport and accommodation, to support the changing needs of modern, diverse and digital-enabled travellers. The Committee were particularly concerned that ageing tourism assets and a lack of renewal will become more pronounced over time, particularly in regional areas.

At times during the inquiry the Committee was frustrated by the lack of accessible, simple and targeted data on aspects of the tourism sector, and the difficulty in obtaining data at different scales. As nearly all tourism businesses are small to medium enterprises, they need easily accessible data that is relevant and easy to understand. Research, information sharing, and data improvements will drive future product development, business planning, market identification and promotion. New markets also need access to quality and up to date information about Australia's tourism offerings.

The tourism sector is inherently complex, with operators navigating multiple agencies, layers of government, laws and regulations. While many stakeholders were positive about the performance of Austrade and Tourism Australia in their stewardship of the sector at a national level, particularly regarding the effectiveness of recent international tourism campaigns and THRIVE 2030, it is clear to the Committee that the 'connective tissue' of the tourism ecosystem needs to be strengthened. Clearer roles and responsibilities, improved data sharing and better coordination between levels of government and grassroots tourism operators will enable operators to access assistance and input into plans for sector growth. This will also facilitate a 'no wrong door' access to government approach for tourism businesses seeking to expand or promote their offerings.

The Committee cautions against being lulled into a false sense of security regarding the positive post-COVID-19 recovery to date. The sector needs attention and nurturing to maintain its position as one of Australia's top export earners in the face of current and emerging challenges to the sector. This Inquiry took place in the context of other relevant reviews into various cross-cutting issues that affect the tourism and education sectors, and the Committee recognises that these reviews will help drive the sectors forward.

Lastly, I wish to thank our Committee Chair the Hon Shayne Neumann MP, my sub-committee Deputy Chair, the Hon Michael McCormack MP, and the Committee Secretariat.

Senator Deborah O'Neill

Chair Trade Subcommittee

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Senator Claire Chandler (from 21 June 2023)

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Ms Zoe Daniel MP

Senator Lisa Darmanin (from 24 June 2024)

Senator Mehreen Faruqi (to 26 October 2022)

Mr Steve Georganas MP

Mr Luke Gosling OAM MP (to 14 September 2023)

Senator Nita Green

Hon Julian Hill MP (to 29 July 2024)

Mr Peter Khalil MP

Hon Michael McCormack MP

Senator Andrew McLachlan CSC (from 21 June 2023)

Mr Rob Mitchell MP

Senator Jim Molan AO DSC (to 16 January 2023)

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Hon Josh Wilson MP (to 29 July 2024)

Mr Terry Young MP

Abbreviations

AAA	Australian Airports Association
ABS	Australian Bureau of Statistics
ACCI	Australian Chamber of Commerce and Industry
AFTA	Australian Federation of Travel Agents
AHPRA	Australian Health Practitioner Regulation Agency
ALGA	Australian Local Government Association
AMC	Australian Maritime College
APRA	Australian Prudential Regulation Authority
ART	Australian Regional Tourism
ASBFEO	Australian Small Business and Family Enterprise Ombudsman
ASEAN	Association of Southeast Asian Nations
ATEC	Australian Tourism Export Council
ATIA	Australian Travel Industry Association
ATIC	Australian Tourism Industry Council
BCCI	Broome Chamber of Commerce and Industry
BECA	Business Events Council of Australia
BYTAP	Backpacker and Youth Tourism Advisory Panel
CDU	Charles Darwin University
CLIA	Cruise Lines International Association Australasia
DFAT	Department of Foreign Affairs and Trade
DMO	Destination Marketing Organisation
EA	Ecotourism Australia
FPOE	First Points of Entry
G20	Group of 20
GDP	Gross Domestic Product
GVA	Gross Value Added
IartC	Indigenous Art Code Ltd
ICA	Insurance Council of Australia

IPA	Indigenous Protected Areas
JSCFADT	Joint Standing Committee on Foreign Affairs, Defence and Trade
LGA	Local Government Authority
NASWD	National Agreement for Skills and Workforce Development
NECI	National Experience Content Initiative
NIAA	National Indigenous Australians Agency
NTRB	Native Title Representative Body
OECD	Organisation for Economic Co-operation and Development
OLALC	Orange Local Aboriginal Land Council
PALM	Pacific Australia Labour Mobility
PBSA	Purpose-Built Student Accommodation
PMC	Passenger Movement Charge
QTIC	Queensland Tourism Industry
RDA	Regional Development Australia
RDA-K	Regional Development Australia-Kimberley
RTO	Regional Tourism Organisation
SAATOC	South Australian Aboriginal Tourism Operators Council
SATC	South Australian Tourism Commission
SIA	Singapore Airlines
STO	State Tourism Organisation
TA	Tourism Australia
TICSA	Tourism Industry Council South Australia
TRA	Tourism Research Australia
TTF	Tourism and Transport Forum
UTAS	University of Tasmania
VCCI	Victorian Chamber of Commerce and Industry
VET	Vocational Education and Training
VFR	Visiting Friends and Relatives
WAITOC	Western Australian Indigenous Tourism Operators Council
WHM	Working Holiday Makers
WIPO	World Intellectual Property Organization

Terms of reference

The tourism and international education sectors are important contributors to the Australian economy. These sectors contracted significantly following the emergence of COVID-19 in 2020 and the subsequent closure of international borders. Noting that Australia has since opened its borders, the Joint Standing Committee on Foreign Affairs, Defence and Trade (JSCFADT) will inquire into the international education and tourism sectors as key contributors to the post-COVID-19 recovery of the Australian economy, with a focus on:

1 in relation to tourism:

- the challenges and opportunities for growth in tourism and how Australia can reassert itself as a leader in the international tourism sector
- the effectiveness of recent tourism campaigns overseas
- the promotion of regional Australia as a world class international travel destination
- the role of Australia as a hub in support of tourism in the Asia Pacific region
- other related matters that may assist in the inquiry.

2 in relation to international education:

- challenges associated with the loss of international student numbers as a result of the significant disruption caused by the COVID-19 pandemic and effective measures to attract and retain students to Australia
- online innovations in education delivery and potential opportunities to strengthen the sector's resilience
- initiatives to ensure positive international student experience and support pathways to build their skills and contribute to Australia's prosperity
- opportunities for international education to support strategic and foreign policy objectives.

List of recommendations

Recommendation 1

3.89 The Committee recommends the Australian Government establishes a national First Nations tourism body to represent the interests of First Nations businesses and communities in visitor economy policy and program development.

3.90 The Committee recommends the terms of reference of the new body are informed by the strategies and successful activities of the Western Australian Indigenous Tourism Operators Council (WAITOC), particularly WAITOC's approach to community engagement, business capability development, and fostering employment opportunities for First Nations people.

Recommendation 2

3.91 The Committee recommends that once the First Nations tourism body referred to in Recommendation 1 is established, it should consider:

- **A review into the current state of the First Nations tourism sector with the aim to make recommendations to government and industry on the short-, medium- and long-term actions to build a stronger and sustainable First Nations tourism sector and enable First Nations peoples to derive real financial benefit from appropriately sharing their cultural knowledge in the tourism sector;**
- **Preparation of a National First Nations Visitor Economy Strategy; and**
- **Development and implementation of programs that educate non-First Nations tourism operators on how to engage and ethically partner with First Nations people in their local communities and how to appropriately collaborate with First Nations people and showcase cultural product in their business and services.**

Recommendation 3

3.92 The Committee recommends the Australian Government continues to implement grant programs that support First Nations tourism businesses to design and deliver authentic, culturally appropriate experiences including in ethical partnerships with established operators. In implementing these programs, the Government should engage with the new national First Nations tourism body proposed in Recommendation 1.

Recommendation 4

3.93 The Committee recommends the membership of Tourism Australia's board should include at least one or more First Nations people.

Recommendation 5

3.94 The Committee recommends the Board of Tourism Australia establishes a First Nations advisory panel under section 28(1) of the Tourism Australia Act 2004 (Cth). The purpose of the panel would be to advise Tourism Australia on appropriate representation of First Nations in marketing strategies and campaigns. The membership of the panel should comprise a majority of First Nations peoples.

Recommendation 6

3.95 The Committee recommends relevant Australian Government agencies work with the tourism industry and First Nations representatives to develop partnerships and implement a robust accreditation scheme that supports and promotes the integrity and authenticity of First Nations tourism products, experiences and partnerships.

Recommendation 7

4.128 The Committee recommends that Austrade develops, in consultation with Tourism Australia, State Tourism Organisations and Regional Tourism Organisations, a Regional Dispersal Strategy to drive greater domestic and international visitation into more of Australia's regions.

Recommendation 8

4.129 The Committee recommends that tourism training providers make training more accessible for regional tourism operators, particularly through culturally appropriate partnership with First Nations businesses, in order to support innovation.

Recommendation 9

4.130 The Committee recommends that the Australian Government supports the sustainability of the tourism sector in regional communities, and the development of both accommodation and attractions in regional areas.

4.131 Where appropriate, the Australian Government should consider incentives to promote development, co-investment in tourism stock and other mechanisms to promote development in regional areas.

Recommendation 10

4.132 The Committee recommends that the Australian Government, in the context of implementing the Aviation White Paper, prioritises policies that will achieve more accessible and affordable regional air access for travellers across Australia.

Recommendation 11

4.133 The Committee recommends that in developing its International Diversification Strategy, Austrade includes actions that build industry capability to meet the needs of visitors coming from the new markets identified in the Strategy.

Recommendation 12

4.134 The Committee recommends Austrade supports industry to develop and implement national standards and certification systems to promote best practice and deliver quality service outcomes for identified sectors. These standards should be aligned with global standards where applicable. The Committee recommends that Austrade and industry consider the following sectors as priorities for standards development:

- **sustainable practices within the tourism sector; and**
- **tourism activities in national parks and other protected areas, including Indigenous Protected Areas.**

Recommendation 13

4.135 The Committee recommends the Australian Government prioritise the development of policies which improve regional transport and infrastructure, in coordination with state and local governments.

Recommendation 14

4.136 The Committee recommends that the Australian Government considers the expansion of first-point-of-entry status for ports, in order to promote access to regional tourism.

Recommendation 15

4.137 The Committee recommends the Australian Government engage with the government of New Zealand and the governments of other neighbouring countries to develop and implement innovative initiatives and opportunities to encourage tourists to visit multiple countries in the region; for example joint visa offerings.

Recommendation 16

4.138 The Committee recommends that the Australian Government works with states and territories to support the promotion of regional tourism initiatives through effective marketing, improving transport linkages, streamlining regional development and providing incentives for investment.

4.139 This should be informed by enhanced destination management plans developed by state and territory governments in collaboration with regional tourism operators

Recommendation 17

4.140 The Committee recommends the Australian Government seeks opportunities to promote nature-based tourism and agritourism in combination with developing policies directed at enhancing international tourism to regional areas, including through streamlining approval processes with state and national parks and the Environment Protection and Biodiversity Conservation Act 1999 (Cth).

Recommendation 18

4.141 The Committee recommends the Australian Government works with State and Regional Tourism Organisations to promote the inclusion of people with a disability in the tourism sector, including through inclusion on national and state tourism organisation boards.

Recommendation 19

5.176 The Committee recommends that the Minister for Tourism issue a new Statement of Expectation to Tourism Australia reinforcing its primary focus on marketing to drive demand from international visitors.

Recommendation 20

5.177 The Committee recommends increased communication and flexibility among agencies in the tourism sector on both state and federal levels to improve integration and cooperation.

Recommendation 21

5.178 The Committee recommends that Austrade, in collaboration with Tourism Australia, State Tourism Organisations and Regional Tourism Organisations, collectively develop a charter that explains and delineates the responsibilities

each level has in the tourism sector to improve clarity, communication and accountability between the agencies.

5.179 This charter should be promoted and communicated effectively to ensure it is easily understood by new and established stakeholders across the sector. Organisations should take active steps to ensure that stakeholders understand the charter and have easy pathways to ask for clarification if necessary.

Recommendation 22

5.180 The Committee recommends more effective communication and regular interaction with local and Regional Tourism Organisations to foster effective knowledge sharing and to enable productivity gains. Austrade, Tourism Australia and State Tourism Organisations are recommended to implement a new engagement mechanism to achieve more effective communication with Regional Tourism Organisations and Local Government Authorities regarding government policies and programs. This will also improve the capacity for federal, state and territory governments to understand the needs and concerns of regions and regional tourism businesses.

5.181 This mechanism, in conjunction with the charter developed in Recommendation 21, will foster a 'no wrong door' environment for tourism operators seeking assistance or advice.

Recommendation 23

5.182 The Committee recommends that Austrade, in consultation with Tourism Australia and State Tourism Organisations, undertakes surveys of tourism businesses every three years to understand their data and research needs, including how data and research should be presented and accessed.

Recommendation 24

5.183 The Committee recommends the Australian Government, through the Aviation White Paper, prioritise implementation of policies to increase the competitiveness, accessibility and environmental friendliness of air travel into and around Australia, and continues to pursue increased capacity on international routes, including consideration of further 'open skies' agreements, consistent with our national interests.

Recommendation 25

5.184 The Committee recommends that Treasury engages with Austrade and the tourism sector to improve access and affordability of insurance for tourism businesses.

Recommendation 26

5.185 The Committee recommends that Austrade work with the tourism sector, in particular Regional Tourism Organisations, to develop resilience plans to make them less susceptible to 'shocks'.

Recommendation 27

6.85 The Committee urges the Australian Government to consider the recommendations from the Committee's Interim Report on the international education sector, with a particular emphasis on implementing policies and actions that support regional education providers.

6.86 This consideration of the Interim Report should take into account updated government policy settings in the sector, to ensure that the adoption of recommendations aligns with their intent.

Recommendation 28

6.87 The Committee recommends the Australian Government promotes the accessibility and affordability of appropriate housing in regional areas and supports policies which will increase housing stock more broadly to improve the availability of housing for international students and workers in the tourism sector.

1. Introduction

Australia – a destination of choice

1.1 The Committee heard throughout this inquiry into Australia's tourism and international education sectors that Australia enjoys a global reputation as a destination of choice for tourists.[1] Australia offers pristine and iconic landscapes, unique and varied cultures, a world class destination for sporting, business and other events, nature and adventure activities, and a host of other outstanding experiences that are discussed further in Chapters 3 and 4. The Committee also heard that prior to the COVID-19 pandemic, the tourism sector was performing well – recording record visitor numbers, expenditure levels, and employment.[2]

1.2 However, Australia's tourism sector was hard-hit by the pandemic, as detailed in this chapter, and continues to be challenged by a range of factors. From evidence, the Committee specifically notes a slower recovery in international visitation compared to domestic tourism, a phenomenon which continues to particularly impact regions dependent on international visitors.[3] Persistent issues on the supply side in relation to workforce shortages, the level and cost of airline services, lack of investment, and resilience challenges from climate events continue to plague the sector's growth. The Committee was asked to examine all of these issues as part of its terms of reference for the tourism sector.

Overview of tourism sector performance pre-COVID

1.3 Prior to the COVID-19 pandemic, Australia's tourism sector was performing at record highs. In the ten-year period to December 2019, visitor expenditure was up 78 per cent and international visitor arrivals had reached a record 9.5 million. The sector employed over one million workers directly and indirectly (or one in 12 of all Australian workers), and accounted for one in eight businesses in Australia.[4] With $39.5 billion in export earnings in 2019, tourism was Australia's fourth-largest export

1 Australian Trade and Investment Commission (Austrade), Submission 60, p. 2.
2 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, March 2023, p. 6, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.
3 Australian Federation of Travel Agents (AFTA), Submission 92, p. 17.
4 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, March 2023, p. 6, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

earner behind only iron ore, coal and natural gas.[5] Beyond these economic contributions, tourism experiences influence travellers' impressions of Australia and can foster people-to-people relationships, cultural exchange and international cooperation.[6] A successful tourism sector provides an opportunity for people from around the world to learn about Australia's rich and diverse histories and cultures, and experience Australia's freedom and democratic traditions, as well as its natural beauties and welcoming people.[7]

1.4 According to the Tourism and Transport Forum (TTF), prior to the pandemic, the tourism industry accounted for nearly 10 per cent of Australia's export income. It submitted that, with support and investment, the sector could return to pre-pandemic levels of success.[8]

1.5 Of the 9.5 million international visitors arriving in Australia in 2019, more than 50 per cent came from just five markets: China (15 per cent); New Zealand (15 per cent);United States of America (9 per cent); United Kingdom (8 per cent); and Japan (5 per cent).[9] Of more significance, nearly 30 per cent of international visitor expenditure was from Chinese visitors, with the remaining four countries all accounting for under nine per cent each.[10]

1.6 While domestic visitors (Australians travelling within Australia) are the 'backbone' of Australia's tourism sector (accounting for 64 per cent of total visitor expenditure), technically international visitors (with 36 per cent of total visitor expenditure) add more value to the economy. For every visitor dollar spent, international visitors contribute $0.55 of economic 'gross value added' (GVA), while domestic overnight visitors contribute 25 per cent less at just $0.41 of GVA.[11]

Impact of COVID-19 – the numbers

1.7 COVID-19 was an unprecedented shock to economies around the world, with tourism industries hit particularly hard. In Australia, international visitation dropped 98 per cent, gross domestic product (GDP) contribution fell almost 50 per cent, and filled tourism jobs were down over 40 per cent at their lowest point. Expenditure from international visitors fell from nearly $45 billion in 2019–2020 to $1.3 billion in 2020–2021. Austrade estimates tourism expenditure losses through the pandemic period

5 Austrade, Submission 73, p. 8.

6 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, March 2023, p. 6, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

7 Department of Foreign Affairs and Trade (DFAT), *About Australia*, undated, https://www.dfat.gov.au/about-australia, viewed 30 July 2024.

8 Tourism and Transport Forum (TTF), Submission 11, p. 3.

9 Australian Bureau of Statistics (ABS), *Overseas Arrivals and Departures, Australia, Reference period December 2019*, 18 February 2020, https://www.abs.gov.au/statistics/industry/tourism-and-transport/overseas-arrivals-and-departures-australia/dec-2019#visitor-arrivals-annually-2019, viewed 28 May 2024.

10 Austrade, Submission 73, p. 37.

11 Austrade, Submission 73, p. 6.

(March 2020 to June 2022) totalled over $150 billion.[12] Many witnesses and submitters argued that pandemic-related border closures and travel restrictions had hit the country's tourism sector the hardest.[13]

1.8 Dr Gabby Walters, an academic from the University of Queensland working on crisis recovery and tourism, told the Committee:

> The COVID pandemic has demonstrated just how vulnerable tourism is as an industry that relies heavily on global movement. One might argue that Australia's challenges in this regard were and remain to be unique given our geographical proximity and the fact we are cut off from the rest of the world.[14]

1.9 The Committee also received evidence on the impact of COVID-19 on the tourism sector within specific states, territories, and regions. In South Australia, for example, the South Australian Tourism Commission (SATC) submitted that international visitors contributed up to $1.2 billion each year prior to the pandemic, with this falling to around $15 million during the pandemic. The SATC emphasised the impact of COVID-19 on international aviation, with passenger numbers falling from 16,000 per week to zero.[15]

1.10 Describing the impact of COVID-19 on the sector, the Queensland Tourism Industry Council (QTIC) stressed the impact on regions dependent on international visitors:

> [Pandemic losses have] placed severe financial stress on operators, with many businesses becoming unviable or having to close, with impacts acutely felt in regions that are highly dependent on international visitation.[16]

1.11 For Queensland's Gold Coast, in 2019 more than 14.4 million tourists visited the region, contributing nearly $6 billion to the sector with $1.3 billion of that from international tourists. Destination Gold Coast submitted that the pandemic cost the region $5.6 billion in annual revenue, and 12,000 skilled workers had left, many of whom were international students and working holidaymakers (see also Chapter 4).[17]

Recovery

1.12 The consensus of evidence to the Committee was that domestic tourism has been much quicker to recover from the pandemic than international. Recent statistics show that the domestic visitor expenditure for 2023 was 33 per cent higher than pre-pandemic levels. By contrast, international visitor spend is still down 11 per cent on

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12 Austrade, Submission 73, p. 9.

13 See for example, Australian Tourism Export Council (ATEC), Submission 44, p. 3; and Mr Shaun de Bruyn, Chief Executive Officer, Tourism Industry Council of South Australia (TICSA), *Committee Hansard*, 20 February 2024, p. 26.

14 Dr Gabby Walters, Associate Professor in Tourism, University of Queensland, *Committee Hansard*, 17 May 2023, p. 38.

15 South Australian Tourism Commission (SATC), Submission 23, p. [1].

16 Queensland Tourism Industry Council (QTIC), Submission 39, p. 2.

17 Destination Gold Coast, Submission 14, p. [1]; and Ms Karen Bolinger, Interim Chief Executive Officer, Destination Gold Coast, *Committee Hansard*, 17 May 2023, p. 45.

pre-pandemic levels.[18] The Australian Bureau of Statistics (ABS) reported that for 2023 there were 7.19 million visitor arrivals to Australia. While this figure is nearly double the 3.69 million that arrived in 2022, it is still down approximately 25 per cent on the pre-COVID-19 high of 9.47 million in 2019.[19]

1.13 Evidence to the Committee supported this 'two-speed recovery' between the domestic and international segments, with this contribution as an example:

> The 2022-23 financial year brought us more customers than any year preceding the pandemic. These were primarily domestic groups, and slowly this past year internationals have returned in small numbers.[20]

1.14 The Queensland Department of Tourism, Innovation and Sport attributed the slower return of international visitors to 'significant and ongoing challenges' including workforce shortages and unstable global economic conditions.[21] Queensland Airports Ltd (operators of the Gold Coast, Townsville, Mount Isa and Longreach airports) reported being back to pre-COVID-19 levels of domestic visitors in the first half of 2023, but noted that international recovery had been slower, at around 70 per cent of pre-pandemic levels.[22]

1.15 The Australian Tourism Export Council (ATEC) reported that international recovery was 'sluggish' due to travel restrictions in China, the war in Ukraine, high flight costs, visa delays, and workforce and skills shortages.[23] The Tourism Industry Council of South Australia (TICSA) noted in February 2024 that the state was still recovering from the pandemic, saying that international visitor numbers were still down by 19 per cent on pre-COVID-19 levels.[24] The SATC noted that whilst international visitor expenditure in the state had surpassed pre-COVID-19 levels, this was fuelled in part by rising prices and does not necessarily represent profit or recovery within the industry.[25]

1.16 The QTIC added that rising costs could explain the lack of a quicker international recovery and pointed to the increasing price of long-haul travel. It also highlighted the lack of available and affordable insurance for tourism operators, as well as a shortage of affordable housing for employees in key tourism destinations which was 'risking an inability to meet consumers' expectations'.[26]

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18 Tourism Research Australia (TRA), Austrade, *State of the Industry Australia's tourism sector in 2023*, 14 June 2024, p. 65, https://www.tra.gov.au/en/economic-analysis/state-of-the-industry, viewed 17 June 2024.

19 ABS, *Visitor arrivals – short-term – calendar year 2023*, 14 May 2024, https://www.abs.gov.au/statistics/industry/tourism-and-transport/overseas-arrivals-and-departures-australia/mar-2024#visitor-arrivals-short-term-calendar-year-2023, viewed 28 May 2024.

20 Ms Laurie Pritchard, Owner and Managing Director, Small World Journeys, *Committee Hansard*, 15 August 2023, p. 37.

21 Ms Gayle Obrien, General Manager, Tourism, Department of Tourism, Innovation and Sport, Queensland, *Committee Hansard*, 17 May 2023, p. 62.

22 Mrs Amanda Byrne, General Manager Aviation Business Development, Queensland Airports Ltd, *Committee Hansard*, 17 May 2023, p. 44.

23 ATEC, Submission 44, p. 3.

24 Mr Shaun de Bruyn, Chief Executive Officer, TICSA, *Committee Hansard*, 20 February 2024, p. 26.

25 Ms Emma Terry, Chief Executive, SATC, *Committee Hansard*, 20 February 2024, pages 26–27.

26 QTIC, Submission 39, p. 3.

1.17 The ABS also publishes figures based on the purpose of travel and country of origin. It reported that 40 per cent of visitors arriving in 2023 were 'holiday' travellers, with the largest source country being New Zealand (with 18 per cent of the total).[27] After New Zealand, the top next top four countries were: the USA, the UK, China and India. The ABS reported that though visitor numbers are recovering, the numbers from different countries have recovered at different rates, with South Korea being the only country in the top ten source countries to exceed pre-COVID-19 visitor numbers in 2023. The recovery for the Chinese market was the lowest at 37 per cent of the 2019 arrivals numbers.[28]

1.18 Austrade reports a positive outlook for sector growth, forecasting tourism spend to increase by 31 per cent over the next five years to 2028. This will put the sector at 61 per cent above the pre-pandemic level.[29] To achieve this, however, the sector will need to seize the opportunities outlined in this report and also tackle some significant challenges.

The intersection between tourism and international education

1.19 On 19 October 2023 the Committee tabled its interim report, *'Quality and Integrity – the Quest for Sustainable Growth': Interim Report into International Education* (Interim Report). The Interim Report focused on the challenges and opportunities for the international education sector since the reopening of Australia's borders after the COVID-19 pandemic. While this report focuses on international tourism, it also includes information on international education received since the Interim Report was completed.

1.20 During the inquiry, the Committee heard about the criticality of international education to the tourism sector. Mrs Melissa Banks, Head of International Education at the Australian Trade and Investment Commission (Austrade) advised the Committee that 69 per cent of tourism spend is generated from international students.[30]

1.21 The Committee is conscious that the issues affecting the tourism sector significantly overlap with the issues faced by the international education sector due to the reciprocal and interdependent nature of the two sectors. This is particularly the case for regional areas in Australia. The Committee also notes that the recommendations contained in this report, if implemented, may also improve the quality and

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27 ABS, *Visitor arrivals – short-term – calendar year 2023*, 14 May 2024, https://www.abs.gov.au/statistics/industry/tourism-and-transport/overseas-arrivals-and-departures-australia/mar-2024#visitor-arrivals-short-term-calendar-year-2023, viewed 28 May 2024.

28 ABS, *Visitor arrivals – short-term – calendar year 2023*, 14 May 2024, https://www.abs.gov.au/statistics/industry/tourism-and-transport/overseas-arrivals-and-departures-australia/mar-2024#visitor-arrivals-short-term-calendar-year-2023, viewed 28 May 2024.

29 TRA, Austrade, *State of the Industry Australia's tourism sector in 2023*, 14 June 2024, p. 5, https://www.tra.gov.au/en/economic-analysis/state-of-the-industry, viewed 17 June 2024.

30 Mrs Melissa Banks, Head of International Education, Australian Trade and Investment Commission (Austrade), Committee Hansard, 16 May 2023, p. 22.

sustainability of the education sector, and the desirability of Australia as a destination of choice for international students.

Conduct of the inquiry

1.22 On 11 October 2022, the Minister for Trade and Tourism, Senator the Hon Don Farrell, requested the Joint Standing Committee on Foreign Affairs, Defence and Trade (JSCFADT), through its Trade Subcommittee, inquire into Australia's tourism and international education sectors (inquiry).

1.23 A media release announcing the inquiry was published on 19 October 2022. The Committee invited submissions from a variety of stakeholders including government agencies, peak travel and education industry organisations, universities, and higher education peak bodies, academics and the general public.

1.24 The Terms of Reference for the inquiry identified two distinct areas of focus: international education and tourism. Given the breadth of each of those topics, the Committee decided to receive evidence on both topics concurrently, but to report on them separately.

1.25 The topic of international education was prioritised so the Committee could provide recommendations to the Australian Government to inform various activities underway in 2022 that would have significant implications for Australia's international education sector and student visa and graduate visa policies and processes. This included the Migration Review, the Australian Universities Accord and Education Services for Overseas Students Review, and the Rapid Review of Australia's Visa Systems.

1.26 On 19 October 2023 the Committee tabled its Interim Report. The Interim Report focused on the challenges and opportunities presented to the international education sector since the reopening of Australia's borders. While this report focuses on international tourism, it also includes information on international education received since the Interim Report was published.

1.27 In its entirety, the inquiry received 143 submissions, including several supplementary submissions, and two exhibits, as listed in Appendix A and Appendix B. The Committee held 31 public hearings across Australia, as listed in Appendix C. The Committee heard from a range of stakeholders including international and regional tourism operators and providers, including First Nations tourism operators, local councils, government agencies, education and tourism peak bodies, international students and student associations, and education providers.

1.28 A list of witnesses and organisations who attended these public hearings is in Appendix C. Submissions and transcripts of the public hearings can be found on the inquiry website.

1.29 The Committee also undertook seven site visits, as detailed below.

- On Thursday 18 May 2023, following the public hearing on the Gold Coast, the Committee visited Currumbin Wildlife Sanctuary and received a tour of the Sanctuary and Wildlife Hospital.
- On Wednesday 16 August 2023, following the public hearing in Cairns, the Committee attended a site visit at Hartley's Crocodile Adventures, a wildlife sanctuary and ecotourism park in Wangetti.
- On Sunday 20 August 2023, ahead of the public hearing in Broome, the Committee visited Air Kimberley Terminal and met with Mr Ash Munn, the Co-owner of Air Kimberley.
- On Tuesday 3 October 2023, following the public hearing in Port Campbell, the Committee visited the 12 Apostles Visitor Centre and Lookout. The Committee met with Richard Nesseler from 12 Apostles Helicopters, as well as David Petty, District Manager, and Rhianna Burns, Ranger Team Leader, Port Campbell from Parks Victoria.
- On Wednesday 4 October 2023, following the public hearing in Ballarat, the Committee toured Sovereign Hill, including the Main Street, Sovereign Hill Living Museum and the Sovereign Hill Outdoor Museum. The Committee met with Ms Sara Quon, Sovereign Hill Living Museum CEO, and Ms Katrina Nitschke, Deputy CEO and Director.
- On Tuesday 16 April 2024, prior to the public hearing in Darwin, the Committee visited the Royal Flying Doctor Service Darwin Tourist Facility and the Darwin Military Museum. The Committee received a briefing and tour from Ms Noni Romano, Tourist Facility Manager at the Royal Flying Doctor Service, and from Dr Norman Cramp of the Darwin Military Museum.
- On Thursday 2 May 2024, following the public hearing in Launceston, the Committee met with representatives of Launceston Airport, including Mr Shane O'Hare, CEO.

1.30 The Committee would like to thank the organisations and individuals who provided evidence to the Committee during the inquiry.

1.31 The Committee would also like to acknowledge the Traditional Owners of the various lands on which they had hearings and site visits.

Report structure

1.32 The report is divided into six chapters:

- Chapter 1 details the background of the tourism sector and the impact of the COVID-19 pandemic on the sector and the conduct of the inquiry.
- Chapter 2 describes the complex tourism sector 'ecosystem', explaining the supply and demand sides and how they need to work together for the sector to be successful and to grow.

- Chapter 3 explores the opportunities and challenges for First Nations tourism, particularly meeting the increasing demand for First Nations tourism products and supporting authenticity and self-determination.
- Chapter 4 sets out the issues facing regional and peri-urban tourism in Australia, particularly around workforce, infrastructure and marketing and promotion. It also looks at other tourism opportunities including eco-tourism, sustainable tourism, business and events tourism and accessible tourism and increasing international market diversification.
- Chapter 5 considers broader enabling factors affecting the tourism sector, such as roles and governance, workforce capacity and capability, access and transport (including aviation and cruise access), visas, climate and natural disasters and insurance.
- Chapter 6 includes information on the international education sector received since the Interim Report was published in October 2023, with a focus on issues related to international education in regional Australia.

2. Delivering 'Destination Australia'

The complex tourism ecosystem

2.1 Delivering ‘Destination Australia’ is a complex undertaking – a multi-faceted industry, the size and significance of Australian tourism involves the contribution and interplay of a lot of factors and participants. Before delving into the detail of the issues this inquiry, it is important to understand the ‘complex ecosystem’ that is the tourism sector. That is the purpose of this chapter.

2.2 Understanding this complex landscape is an important foundation for policy makers to support the sector, and for tourism operators who must navigate it to operate successful businesses. Each part of the ecosystem must aim to work seamlessly with all other parts if Australia is to have the best chance of re-establishing itself as a global leader in tourism post-COVID-19. The chapter also explores the importance of the sector working collaboratively, given its complex make-up and the amount of engagement it has across all levels of government.

2.3 An easy way to begin to understand the sector is to consider it as having two parts: a ‘supply’ side and a ‘demand’ side. Supply side participants (primarily tourism businesses) must bring together all the necessary elements to provide quality experiences – including a skilled workforce and well-maintained assets – and leverage and navigate enablers like transport and visa systems. Demand side participants (predominantly government marketing agencies and research bodies) have the important roles of targeting the most lucrative markets and conducting effective marketing campaigns to attract visitors.[1] It is then the role of governments to establish a favourable operating environment and provide regulatory settings that give the sector the best opportunity to succeed. These sides and their functions are described in more detail below.

‘Supply side’ – satisfy the visitor

Developing experiences and products visitors want

2.4 Providing visitors with the type and quality of experience they want is fundamental to the success of any tourism sector around the world. This was articulated clearly by Mr Evan Hall, Chairperson of the Australian Tourism Industry Council (ATIC):

[1] As explained for example by the Tourism and Transport Forum (TTF), Submission 11, p. 1.

> Looking at it from an Australian perspective, what we absolutely must do is create high value experiences that are going to either retain Australians travelling in Australia or will attract international guests.[2]

2.5 The Australian Trade and Investment Commission (Austrade) reinforced this in its submission, highlighting the focus the Australian Government's national tourism strategy, THRIVE 2030, has on product development:

> THRIVE 2030 notes that we must develop new and innovative products, and refresh existing ones, to attract first time and repeat visitors. This can be done by leveraging factors we know drive destination choice for high-value travellers and which align to our unique offerings.[3]

2.6 Tourism experiences must meet customer needs, which can evolve over time. Tourism Australia (TA) flagged that post COVID-19, the desires, expectations and patterns of travellers have changed, and so new product identification, development and investment must be informed by consumer research.[4]

2.7 The Australian Tourism Export Council (ATEC) cautioned that regional Australia in particular lacks the 'available product, capable product, staffing and local infrastructure' to meet the demands of international travellers.[5]

2.8 Further comment and recommendations in relation to product and experience development are included in Chapters 3 and 4, particularly in relation to First Nations tourism and improving product and promotion in regional Australia.

Infrastructure and investment

2.9 The THRIVE 2030 strategy highlights the importance of visitor infrastructure to create a competitive visitor economy. Pillar number five of the strategy is devoted to enhancing visitor infrastructure.[6]

2.10 THRIVE 2030 goes on to note that visitor forecasts, understanding visitor needs and planning are key to delivering tourism infrastructure, with the aim, if done correctly, that the right infrastructure can be established in the right place at the right time to meet visitor needs. The Committee provides observations and recommendations in relation to investment and infrastructure in Chapter 5.

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2 Mr Evan Hall, Chairperson, Australin Tourism Industry Council (ATIC), Committee Hansard, 13 September 2023, p. 2.

3 Australian Trade and Investment Commission (Austrade), Submission 73, p. 18.

4 Tourism Australia (TA), Submission 20, p. [19].

5 Australian Tourism Export Council (ATEC), Submission 44, p. 4.

6 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, March 2023, p. 42, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

Providing visitors with easy access to destinations

2.11 Australia's remote location and vast space forms part of its appeal to international and domestic visitors. However, the Committee heard that it also drives up the costs of travel and can discourage international visitors from making the long journey. Facilitating easy access to and within Australia by air, land and sea, and having a cost competitive and efficient visitor visa system are therefore critical to encouraging growth of the visitor economy.

2.12 Many witnesses and submitters emphasised the need to increase the ability and capacity for more for tourists to travel to Australia, and to make it easier for visitors to travel within the country – particularly to remote and regional areas. There were many calls for the costs associated with transport to and within Australia to be brought down.[7] Chapter 5 contains a further discussion of transport challenges and potential reforms.

2.13 The Committee heard calls for reform of Australia's visa system to make it easier and more affordable for tourists and workers to obtain visas. Austrade, for example, argued that reforms to tourism visas are required to 'ensure Australia remains competitive in attracting international visitors'.[8] See Chapter 5 for a further discussion of opportunities for visa reform.

Providing visitors with quality service

2.14 To provide high quality visitor experiences, the tourism sector requires a large workforce as well as workers with specialised skills.

2.15 The Committee heard evidence of a chronic workforce shortage among skilled and non-skilled workers which was slowing the tourism sector's growth post-COVID-19. Many submitters and witnesses described workforce shortages as the biggest challenge for the sector. There were also observations that workforce and skills challenges have existed in the sector for years and had just been exacerbated by the COVID-19 pandemic. It was also noted that recovery of the tourism workforce had lagged behind the rest of the economy.

2.16 Chapter 5 puts forward the evidence received by the Committee on the many challenges in relation to workforce, some of which are linked to structural workforce issues present in the Australian economy more broadly.

7 TTF, Submission 11, pages 3 and 4.
8 Austrade, Submission 73, p. 3.

‘Demand side’ - attracting the visitor

Destination marketing

2.17 The success of a nation’s tourism sector is dependent on, among other things, its popularity. To persuade visitors to come to their country or region, governments – through their destination marketing organisations (DMOs) – undertake marketing to promote their destination.

2.18 TA is the lead tourism promotion agency at the national level for Australia. It is an Australian Government agency which sits in the Foreign Affairs and Trade portfolio. The challenge for TA, and all DMOs, is that marketing activities do not generate additional demand for travel – they are competing amongst one another for the same pool of customers. As noted by TA, attracting visitors is incredibly competitive:

> There is a limited pool of demand around the world at any one time, so we seek to capture as much of that global demand for travel as possible. The big problem is that our competitors seek to do the same thing.[9]

2.19 TA stressed the competitive nature of visitor attraction:

> On average, when they are undertaking travel planning international travellers only consider three international destinations to visit in the next four years. It’s a very short list…
>
> Australia is often competing for consideration with the following high profile destinations: Japan, New Zealand, South Africa, Canada, France and Hawaii.[10]

2.20 Evidence received by the Committee regarding TA’s marketing performance was positive and included calls for the Government to increase its funding so it can increase its activity. The highly competitive global market, escalating marketing costs, and often unrealistic expectations on TA are considered further in Chapter 5.

Market choice and diversification

2.21 Choosing which markets to pursue and how to balance marketing efforts across markets is a key challenge for all DMOs, and a key to success for tourism. THRIVE 2030 recognises the significance of market choice and market diversification:

> Emerging trends and pressures on traditional long-haul markets mean we must adopt a unique and targeted approach to market development…
>
> In the longer term, improved data, market research and strengthened bilateral relationships will support a strategy to build a diversified portfolio of markets,

9 TA, Submission 60, p. [8].
10 TA, Submission 60, p. [8].

> incorporating historical core markets as well as new and emerging markets that present growth opportunities.[11]

2.22 Recognising the importance of market diversification, Austrade is developing an international diversification strategy for the visitor economy. It notes that a broad and balanced portfolio of source markets and market segments is core to building a more resilient visitor economy in coming decades.[12]

2.23 The Committee provides further observations and recommendations in relation to market diversification in Chapter 4.

Managing the tourism ecosystem

2.24 As the tourism sector is so complex, it is important to have robust cooperative, management and governance arrangements to deliver strong performance and outcomes. As stated in THRIVE 2030:

> The visitor economy is a complex ecosystem of many stakeholders. It therefore requires comprehensive and effective collaboration to ensure stakeholders act in concert to support achievement of industry goals. The COVID-19 pandemic has been a catalyst for increasing levels of collaboration across the visitor economy and calls for ongoing national leadership in cooperative approaches to address a host of complex and interconnected issues across both demand and supply side factors.[13]

2.25 This section summarises the key Australian Government agencies involved in the tourism sector, and the participation that occurs at state and regional levels. Discussion and observations on improving collaboration is contained in Chapter 5.

The Australian Government

2.26 Three key government agencies work to support and promote tourism at the federal level: Austrade, TA, and the Department of Foreign Affairs and Trade (DFAT). In addition to these key agencies, the tourism sector intersects with other Australian Government agencies who have responsibility for areas such as First Nations, transport, immigration (for visas), infrastructure, and employment.

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11 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, p. 46, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

12 Austrade, *International Diversification Strategy for Australia's visitor economy – consultation*, undated, https://www.austrade.gov.au/en/how-we-can-help-you/working-groups-and-engagement/international-diversification-strategy-for-australias-visitor-economy-consultation, viewed 4 June 2024.

13 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030'*, March 2023, p. 36, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

Austrade

2.27 Austrade is responsible for tourism policy at the federal level.[14] It is:

> … responsible for tourism policy, programs, tourism research and official data. This includes oversight of the long-term strategy for the visitor economy – THRIVE 2030. To help visitor economy businesses recover from COVID and grow, we administer a range of grants and other programs. Through Tourism Research Australia, Austrade provides the official tourism statistics and research to assist the government and the sector make informed policy and business decisions.[15]

Box 2.1 THRIVE 2023

In March 2022, the Australian Government released THRIVE 2030, a national strategy for recovery and long-term and sustainable growth of Australian's visitor economy through to 2030. THRIVE 2030 was developed by Austrade in consultation across government and industry. It includes policy priorities and actions for governments and industry under three key themes: Collaborate, Modernise and Diversify.

These policies and actions have been put forward to support achieving the goal of returning visitor expenditure to pre-COVID-19 levels of $166 billion by 2024 and growing it to $230 billion by 2030, with regional Australia to capture about 40 per cent of this target. Progress of THRIVE is well under way, with the tourism sector spend ahead of the interim target at $208 billion in 2023.[16]

THRIVE 2030 is being implemented over three phases. The first phase, Recovery, is from 2022–2024 and focused on driving domestic and targeted international visitation, and addressing priority supply issues, such as workforce shortages. The next phases are the Consolidation (2025–2027) and Acceleration (2028–2030) phases which will focus on market diversification, new products and building workforce capability and improvements in business processes and technology.[17]

Tourism Australia

2.28 TA is the national body responsible for attracting international visitors to Australia. Its purpose is to grow demand to enable a competitive and sustainable tourism

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14 Austrade, Submission 73, p. 2.

15 Austrade, Submission 73.3, p. 1.

16 Tourism Research Australia (TRA), Austrade, *State of the Industry: Australia's tourism sector in 2023*, Canberra, June 2024, p. 3, https://www.tra.gov.au/content/dam/austrade-assets/global/wip/tra/documents/soti/tra-state-of-the-industry-2023.docx, viewed 15 July 2024.

17 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, March 2023, p. 33, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

industry.[18] TA is active in 15 international markets and its activities include advertising, public relations and media programs, trade shows and industry programs, consumer promotions, online communications and consumer research.

2.29 TA advised that its current priority is to support a full recovery to 2018–19 expenditure levels in line with THRIVE 2030.[19] While it undertook domestic marketing during the pandemic due to the absence of international visitors, TA stressed that since international borders re-opened, it returned its focus to international marketing.[20] TA works with Austrade and DFAT on tourism policy and programs, and also works closely with other agencies to support policy initiatives including visas, air service agreements, and sports diplomacy.[21]

The Department of Foreign Affairs and Trade

2.30 DFAT promotes and protects Australia's international interests to support security and prosperity. DFAT works with international partners and other countries to increase trade and investment for Australia and takes a leading role in promoting open and transparent services markets, including tourism, in international forums such as the Organisation for Economic Co-operation and Development (OECD), the G20, the Asia-Pacific Economic Cooperation (APEC), and the Association of Southeast Asian Nations (ASEAN). It also supports services exports by negotiating free trade agreements with other countries.

2.31 DFAT told the Committee it is extensively involved in promoting Australia as a tourism destination through its global network of posts and missions, working alongside TA, Austrade, and other stakeholders.[22]

States and Territories

2.32 Government agencies supporting tourism at the state and territory level broadly reflect those at the federal level. There are state marketing agencies in each state and territory (commonly referred to as State Tourism Organisations (STOs)) that are responsible for attracting visitors to their state or territory ('demand-side' issues). Separately, there is typically an area within a department of state responsible for tourism growth and development ('supply-side' issues).[23]

2.33 Also, similar to the federal level, there are other state or territory government departments with policy responsibility for areas that intersect with tourism businesses such as planning, transport and infrastructure, employment and training, business licensing, and consumer affairs.

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18 TA, *Annual Report 2022-23*, October 2023, p. 14 https://www.tourism.australia.com/content/dam/digital/corporate/documents/ta-annual-report-2022-2023.pdf, viewed 4 June 2024.
19 TA, Submission 60, p. [3].
20 TA, Submission 60, p. [3].
21 TA, Submission 60, p. [3].
22 Department of Foreign Affairs, Defence and Trade (DFAT), Submission 63, p. 2.
23 TA, Submission 60, p. [14].

Local government and regional arrangements

2.34 Local government authorities (LGAs) are also relevant to the sector as they regulate businesses in their region and also, in some instances, engage in destination marketing. As noted in THRIVE 2030:

> Collaboration and engagement at the local government level is also critical, as local governments intersect with the visitor economy in many ways, including visitor attraction, service delivery, and facilitation and regulation of infrastructure development.[24]

2.35 In addition to LGAs, two other bodies commonly operate at the regional level relevant to the tourism sector. These are:

- Regional Tourism Organisations (RTOs): dedicated tourism industry specific bodies that support tourism promotion and growth at the regional level. RTOs structure and operation vary from state to state and region to region, depending on the level of funding they receive (predominantly from state government) and the support from the local operators.
- Regional Development Australia (RDA) Committees: the RDA network is administered by the Australian Government. RDAs are made up of local leaders working across government, business, and community to improve their local region through supporting economic and workforce development, local procurement, regional planning and informing government programs and investment.[25] The strength of an RDA's engagement with tourism in their region will depend on the importance and potential of the tourism sector in the region.

Good data

2.36 The Committee heard that quality and timely data is critical for sound policy development and commercial decisions, with the tourism sector no exception:

> Better quality and more granular data provided more quickly will help the visitor economy respond and capture opportunities to drive growth.[26]

2.37 It has also been observed that marketing strategies are most likely to succeed where they are based on research:

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24 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, March 2023, p. 39, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

25 Regional Development Australia (RDA), 'About RDA', *Regional Development Australia*, undated, https://www.rda.gov.au/about/who-we-are, viewed 4 June 2024.

26 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, March 2023, p. 34, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

> In its 2015 research paper into the international tourism industry, the Productivity Commission concluded that international destination marketing has the best chance of providing net benefits when based on research. The research should consider factors such as: which visitors are most likely to be persuaded by marketing to come to Australia; what aspects of Australia's tourism product are most likely to persuade visitors to come; and which potential visitors are likely to result in the greatest net benefits.[27]

2.38 Witnesses from regional areas highlighted the importance of data for tracking visitor numbers and tailoring products. For example, the Australian Capital Territory (ACT) Government advised the Committee that data is used extensively for decisions about future investments in tourism offerings and events.[28]

2.39 The Committee's observations and recommendations regarding data is dealt along with collaboration and governance in Chapter 5.

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27 Austrade, Submission 73, p. 19.

28 Ms Kareena Arthy, Deputy Director-General, Chief Minister, Treasury and Economic Development, ACT Government, Committee Hansard, 15 May 2024, p. 2.

3. First Nations tourism – one of Australia's defining offerings

3.1 Australia has a positive reputation for offering domestic and international visitors unique and inspiring tourism experiences. Many witnesses and submitters highlighted that nowhere is this demonstrated more so than through Australia's capacity to provide engagement with the world's oldest continuous living culture – that of First Nations Australia and First Nations peoples.

3.2 The Committee heard of the growing interest and demand for authentic First Nations tourism, and the opportunity that exists not only economically for the sector and the nation, but also as a way of increasing cultural understanding and sustainability, and cross-cultural people-to-people connection and cohesion.[1] This chapter discusses this opportunity and some of the challenges affecting the sector's capacity to be sustainable and to expand. The chapter concludes with the Committee's views on this significant opportunity and provides several recommendations.

One of Australia's defining tourism offerings

3.3 Submissions and witnesses appropriately reflected on the importance, diversity and uniqueness of First Nations lands, cultures and traditions in Australia. As stated by the National Indigenous Australians Agency (NIAA) in its submission:

> Australia's First Nations peoples have the world's oldest continuous cultures and are central to our national identity.[2]

3.4 Dr Gabby Walters, Associate Professor in Tourism from the University of Queensland, highlighted the importance of First Nations tourism as a key driver of the tourism economy, explaining:

> Indigenous tourism is, obviously, our key cultural product. It's something that differentiates Australia from other countries...[3]

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1 See for example National Indigenous Australians Agency (NIAA), Submission 120, p. 3; Arts Law Australia, Copyright Agency and the Indigenous Art Code (IartC) Ltd submission 74 p. [5]; Ms Ninielia Mills, Chief Executive Officer, Nyamba Buru Yawuru, Committee Hansard, 21 August 2023, p. 1; Mr John Hart, Executive Chair, Tourism, Australian Chamber of Commerce and Industry (ACCI), Committee Hansard, 8 March 2023, p. 9; Tourism Australia (TA), Submission 60, p. [19]; Mr Gerald Power, General Manager and Owner, Indigenous Cultural Adventures, Committee Hansard, 26 June 2023, p. 33.

2 NIAA, Submission 120, p. 3.

3 Dr Gabby Walters, Associate Professor in Tourism, University of Queensland, Committee Hansard, 17 May 2023, p. 40.

3.5 This sentiment was echoed by Ms Ninielia Mills of the Nyamba Buru Yawuru arm of the Yawuru Prescribed Body Corporate:

> Indigenous culture is a crucial point of difference in today's highly competitive domestic and international tourism market, and the demand for authentic nature based cultural interactions and activities continues to grow.[4]

3.6 The NIAA also noted First Nations tourism represents an opportunity not just for Australian tourism, but for First Nations peoples.[5] Similarly, Tourism Australia (TA) asserted that:

> For the world's Indigenous communities, tourism can be a powerful driver for positive change and the sustainability of cultures.[6]

3.7 The NIAA also flagged that First Nations tourism supports progress under the National Agreement on Closing the Gap, as:

> Participating in the sector offers First Nations peoples significant economic opportunities and can build cultural awareness across the broader community.[7]

3.8 Reflecting on the significance of First Nations tourism, Mr Dale Mundraby, an Operations Manager at the Mandingalbay Yidinji Aboriginal Corporation advised the Committee that:

> The biggest revenue achievement outcome for us as Aboriginal people doing business on country is providing jobs and providing opportunities through jobs to break that welfare cycle. What tourism has done for us is not only to have enthused, acknowledged and supported our current culture as a people but also to have enabled us to share that with like-minded people. That's not just the elders passing down that transitional knowledge; that's also our younger ones passing it back, so we've got a saloon door that swings both ways.[8]

3.9 Mr Michael Madden from the Orange Local Aboriginal Land Council (OLALC) impressed the Committee in his evidence of the benefits of involving more First Nations people in tourism, particularly young people, and how this can bring about positive community outcomes:

> Their reconnection with culture is that they're learning dance, they're learning song, they're learning how to make things. All of these things have a commercial basis, so these people could be the entrepreneurs of the future, but it's also about what they can teach tourists. So it's the bringing together of tourism with these kids on what we can build. It's an example of how the private moneys could mix with the support that we need in regard to the public moneys in getting these

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4 Ms Ninielia Mills, Chief Executive Officer, Nyamba Buru Yawuru, Committee Hansard, 21 August 2023, p. 1.
5 NIAA, Submission 120, p. 3.
6 TA, Submission 60, p. [19].
7 NIAA, Submission 120, p. 3.
8 Mr Dale Mundraby, Operations Manager, Mandingalbay Yidinji Aboriginal Corporation, Committee Hansard, 16 August 2023, p. 1.

> programs going. It can drive an outcome that would close the gaps in so many areas, whether it's education, health—all those things.[9]

High visitor interest in First Nations experiences, but it's not all converting

3.10 The Committee received evidence that emphasised the growing demand for First Nations tourism, and the importance of fostering these opportunities.[10]

3.11 Mr John Hart, Executive Chair of Tourism from the Australian Chamber of Commerce and Industry (ACCI) explained:

> There's incredible demand, and I'm certainly happy to source the numbers behind that demand, for international visitors to experience First Nations experiences around Australia. We need to do everything we possibly can to make sure that those experiences are accessible to not only international visitors but also domestic visitors. During COVID we saw an incredible domestic demand for experiencing First Nations tourism product.[11]

3.12 Mr Mundraby, of Mandingalbay Yidinji Aboriginal Corporation proclaimed a 'new era' for Aboriginal and Torres Strait Islander peoples due to opportunities opening up within the visitor economy.[12] He pointed to the potential for a long-term and significant knock-on effect across First Nations communities and generations through involvement in the 'environmental and cultural economy'.[13]

3.13 TA informed the Committee that approximately 1.4 million visitors took part in an Indigenous tourism experience in 2019 (pre-pandemic), adding that since 2010 the figure has grown at 6 per cent per year. However, while this is encouraging, TA advised that only an estimated 17 per cent of international visitors take part in an Indigenous experience.[14]

3.14 The Australian Trade and Investment Commission (Austrade) also emphasised the high levels of interest in First Nations experiences:

> Aboriginal tourism in Western Australia continues to be of great interest to visitors (at 81 per cent in 2018-19) and continues to grow. TRA has also recorded a tripling in domestic trips that incorporated First Nations activities over the 10 years to 2021-22.[15]

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9 Mr Michael Madden, Justice Officer, Orange Local Aboriginal Land Council (OLALC), Committee Hansard, 26 June 2023, p. 35.

10 See for example Mrs Margy Osmond, Chief Executive Officer, Tourism and Transport Forum (TTF), Committee Hansard, 2 March 2023, p. 38; Mr Gerald Power, General Manager and Owner, Indigenous Cultural Adventures, Committee Hansard, 26 June 2023, p. 30; NIAA, Submission 120, p. 3.

11 Mr John Hart, Executive Chair, Tourism, ACCI, Committee Hansard, 8 March 2023, p. 9.

12 Mr Dale Mundraby, Operations Manager, Mandingalbay Yidinji Aboriginal Corporation, Committee Hansard, 16 August 2023, p. 1.

13 Mr Mundraby, Committee Hansard, 16 August 2023, p. 7.

14 TA, Submission 60, p. [19].

15 Austrade, Submission 73, p. 20.

3.15 Witnesses advised the Committee there had been a spike in demand for First Nations tourism experiences among Australians since the COVID-19 pandemic.[16] Mr James William, Chief Executive Officer of the Torres Strait Island Regional Council, argued COVID-19 had assisted development of First Nations tourism experiences:

> Whilst the international market wasn't happening—and we hear COVID has impacted a lot—it's certainly assisted us in terms of an Indigenous experience. People around the kitchen table are talking about what we can do once the borders are lifted. 'We can't go international, so let's go domestic'.[17]

3.16 TA also cautioned, however, that 'Tourism Research Australia [TRA] research has found that visitor interest in First Nations experiences continued to far outweigh participation'.[18]

3.17 Mr Robert Taylor, Chief Executive Officer of the Western Australian Indigenous Tourism Operators Council (WAITOC) attributed the lower level of participation, particularly by international visitors, to a regional dispersal issue related to cost and accessibility (discussed more in Chapter 4). He noted:

> In WA we put that down to Perth being the gateway to the state, and it's quite, as I said, expensive and difficult to get to other parts of the state when they've already paid quite a bit to get into Perth itself or into Australia.[19]

3.18 Interest may also be exceeding participation due to the limited number of providers. The shortage of First Nations tourism products was highlighted for some key regional locations such as the City of Gold Coast[20] and Broome.[21] Mr William of the Torres Strait Regional Council also emphasised that supply of experiences was the major issue.[22]

3.19 Reflecting on the relatively low number of providers, the NIAA also submitted:

> A range of capability constraints are impacting the delivery of authentic Aboriginal and Torres Strait Islander tourism experiences, meaning supply is not always able to meet the increasing demand in the sector.[23]

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16 Mr John Hart, Executive Chair, Tourism, ACCI, Committee Hansard, 8 March 2023, pages 9–10; Ms Annette Steele, Chief Executive Officer, OLALC, Committee Hansard, 26 June 2023, p. 31; Ms Julia Taylor, Senior Legal Officer, Coordinator, Future Acts Mining and Exploration Unit, North Queensland Land Council Native Title Representative Body (NTRB) Aboriginal Corporation, Committee Hansard, 16 August 2023, p. 8.

17 Mr James William, Chief Executive Officer, Torres Strait Island Regional Council, Committee Hansard, 16 August 2023, p. 5.

18 Austrade, Submission 73, p. 20.

19 Mr Robert Taylor, Chief Executive Officer, Western Australian Indigenous Tourism Operators Council (WAITOC), Committee Hansard, 22 August 2023, p. 17.

20 Ms Tanya Lipus, Manager of City Economy, City of Gold Coast, Committee Hansard, 17 May 2023, pages 73–74.

21 Ms Ninielia Mills, Chief Executive Officer, Nyamba Buru Yawurus, Committee Hansard, 21 August 2023, p. 1.

22 Mr James William, Chief Executive Officer, Torres Strait Island Regional Council, Committee Hansard, 16 August 2023, p. 2.

23 NIAA, Submission 120, p. 4.

3.20 Growing unique and high quality First Nations tourism experiences is one of the seven priorities of Australia's national tourism strategy, THRIVE 2030.[24] With regard to the current scale of First Nations tourism, the NIAA advised:

> First Nations tourism is a dynamic but relatively small component of the Australian tourism industry. …
>
> [T]here are approximately 650 First Nations tourism businesses across urban, regional and remote Australia, with relatively higher numbers in Western Australia, the Northern Territory and Queensland.[25]

3.21 Dr Walters from the University of Queensland put forward another reason for the difference in interest in participation in a First Nations tourism experience and actual participation. Offering a note of caution, Dr Walters suggested the demand for First Nations tourism experiences may be lower than some studies had found due to a social desirability bias, in which respondents may fear being labelled racist or prejudiced if they do not respond they would like to experience more First Nations tourism products.[26]

Supporting development of First Nations tourism products

3.22 The Committee received evidence about both creating more First Nations tourism products and experiences and improving existing ones to satisfy the growing demand, noted above. Funding, infrastructure and workforce capability were reported as critical challenges for developing more First Nations tourism products, operators and experiences.[27] Witnesses outlined there were also marketing and awareness challenges. These demand side challenges are also addressed below.

Funding

3.23 While some witnesses asserted financial support was readily available to support First Nations tourism, they also reported that accessing these grants could be 'daunting', a deterrent for potential new businesses.[28] To address this challenge, Mr Gerald Power of Indigenous Cultural Adventures called for education and training for would-be operators of First Nations tourism businesses.[29]

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24 NIAA, Submission 120, p. 3.
25 NIAA, Submission 120, p. 3.
26 Dr Gabby Walters, Associate Professor in Tourism, University of Queensland, Committee Hansard, 17 May 2023, p. 40.
27 NIAA, Submission 120, p. 3.
28 Mr Gerald Power, General Manager and Owner, Indigenous Cultural Adventures, Committee Hansard, 26 June 2023, p. 31.
29 Mr Gerald Power, General Manager and Owner, Indigenous Cultural Adventures, Committee Hansard, 26 June 2023, p. 31.

3.24 Mr Power also raised the difficulty for First Nations tourism providers to access start-up funding, telling the Committee that applicants have to demonstrate the capacity to handle a small grant to be competitive.[30]

3.25 Ms Julia Taylor of the North Queensland Land Council Native Title Representative Body Aboriginal Corporation similarly highlighted the challenges of getting a business off the ground, commenting:

> I think land and presence on country is probably the first hurdle to being able to develop things, and then it's navigating the various grants that are available for startup until you've actually got a profitable business…
>
> We're actually trying to … make sure that groups can actually access … funds to coordinate things like grant fund writers that can actually target all of the opportunities to pull a project together.[31]

3.26 Mr William of the Torres Strait Regional Council also noted communities were often not succeeding in attracting and retaining funds.[32] He emphasised the need for First Nations communities to retain control over the funds allocated to them and called for more targeted funding:

> They should be investing in less but more targeted and more sustained, rather than just sporadic and ad hoc. There should be a strategy because the investment requires some commitment over time because these things take time.[33]

3.27 Mr Mundraby of Mandingalbay Yidinji Aboriginal Corporation welcomed the availability of financial support for First Nations tourism from state governments, but also emphasised the importance of 'wraparound support' to small First Nations operators from the First Nations corporations.[34] He argued for support to be channelled through Aboriginal corporations, which would in turn enable the success of small tourism businesses:

> We've got a communal business, and that's the Aboriginal corporation. Within that, we have individuals employed and there'll be a microbusiness created, and the wraparound support from the corporation is supporting that microbusiness to be successful with everything from paying your tax to your insurance, which are big overheads and killers.[35]

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30 Mr Gerald Power, General Manager and Owner, Indigenous Cultural Adventures, Committee Hansard, 26 June 2023, pages 31 and 33.

31 Ms Julia Taylor, Senior Legal Officer, Coordinator, Future Acts Mining and Exploration Unit, North Queensland Land Council NTRB Aboriginal Corporation, Committee Hansard, 16 August 2023, p. 8.

32 Mr James William, Chief Executive Officer, Torres Strait Regional Council, Committee Hansard, 16 August 2023, p. 4.

33 Mr James William, Chief Executive Officer, Torres Strait Regional Council, Committee Hansard, 16 August 2023, p. 4.

34 Mr Dale Mundraby, Operations Manager, Mandingalbay Yidinji Aboriginal Corporation, Committee Hansard, 16 August 2023, pages 1–2 and 12–13.

35 Mr Dale Mundraby, Operations Manager, Mandingalbay Yidinji Aboriginal Corporation, Committee Hansard, 16 August 2023, p. 7.

3.28 Mr Michael Madden, Justice Officer from the OLALC told the Committee that one of the responsibilities of Land Councils was to protect and to promote awareness of cultural heritage. He insisted, through Land Councils, a national network was already in place to promote authentic First Nations cultural heritage and tourism.[36]

3.29 Ms Taylor also emphasised opportunities for First Nations tourism businesses to build off each other, if properly promoted, which may also reduce costs.[37]

Product development and infrastructure

3.30 The Committee was advised about the importance of a holistic and careful approach to development of First Nations tourism experiences. Mr William of the Torres Strait Regional Council called for support for the whole-of-life of First Nations tourism products:

> … the product development side has to be whole of life from a product perspective. It has to be from concept to design development, then product release and then improving that product, because products can get tired, markets can change and a whole bunch of things can happen.[38]

3.31 Mr William also advised that careful thought was needed to develop appropriate First Nations tourism products:

> … what we practise as culture at home isn't a product. It's culture, that belongs to community and family. The product is really an aesthetic and certain thing, that you create for someone to consume and pay money for as an experience or something else, and that stands outside of the community.[39]

3.32 In a joint submission, the Arts Law Centre of Australia and the Indigenous Art Code Ltd (IartC) highlighted the importance of product self-determination:

> Aboriginal and Torres Strait Islander people should be supported to offer their cultural products, stories, expressions, language and experiences in the tourism sector in ways that are self-determined and protected from exploitation by others.[40]

3.33 Mr Hart of ACCI told the Committee about increasing the supply of authentic First Nations products:

> Tourism Australia has been doing a lot of work looking at the supply of First Nations tourism product and experiences, and actively working to expand the

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36 Mr Michael Madden, Justice Officer, OLALC, Committee Hansard, 26 June 2023, p. 32.

37 Ms Julia Taylor, Senior Legal Officer, Coordinator, Future Acts Mining and Exploration Unit, North Queensland Land Council NTRB Aboriginal Corporation, Committee Hansard, Committee Hansard, 16 August 2023, p. 8.

38 Mr James William, Chief Executive Officer, Torres Strait Regional Council, Committee Hansard, 16 August 2023, p. 5.

39 Mr James William, Chief Executive Officer, Torres Strait Island Regional Council, Committee Hansard, 16 August 2023, p. 2.

40 Arts Law Australia, Copyright Agency and IartC Ltd, Submission 74, p. [13].

> number of experiences that we're promoting within Australia, and also ensuring the legitimacy and authenticity of that product. There's incredible demand…[41]

3.34 Mr William also pointed to significant risks associated with investing in remote and regional areas due to their remoteness, high labour costs, and suggested it is a role for the government to underwrite these risks. He also highlighted the lack of appropriate infrastructure to support tourism in many remote areas and the lack of investment in developing appropriate skills to support tourism in some communities.[42]

3.35 Mrs Margy Osmond, Chief Executive Officer of the Tourism and Transport Forum (TTF) commented on the strong interaction between national parks and First Nations tourism and pointed to the Three Capes Walk in Tasmania, referring to it as a 'stunning example' of what can be achieved with effective commercial, government and First Nations engagement.[43] She went on to suggest:

> It's almost like there is a need for a single piece of work that is looking specifically at the First Nations and traditional tourism sector and government, and how that triangle will work in future with a big overlay of national park availability in that process as well.[44]

3.36 Ecotourism Australia (EA) noted that some First Nations businesses see tourism as a 'potential pathway to care for Country'.[45] EA advocated for partnerships and joint management approaches with Traditional Owners for Indigenous Protected Areas (IPA), in recognition that these sites are of great interest for nature-based tourism and must be managed effectively and with cultural sensitivity.[46]

3.37 Mr Gerald Power of Indigenous Cultural Adventures reflected on the need for new First Nations businesses to learn from more established businesses and work with local councils and communities to identify, develop and promote tourism opportunities, commenting:

> I helped support the guys out at Brewarrina, the Ngiyampaa people…
>
> I was saying to them … 'You've got to do it. You've got to work with the Brewarrina Shire. You've got to pack it together, just like they're doing it in Walgett Shire, which is the Gamilaraay people too.' … I'm also now working with Lightning Ridge, within the Walgett Shire, to enhance their tourism out there. I know they've got the opals and everything else, but they're so rich in tourism.[47]

3.38 Finally, Mr Evan Hall of the Australian Tourism Industry Council (ATIC) observed the different development pathway a First Nations tourism business typically takes. He

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41 Mr John Hart, Executive Chair, Tourism, ACCI, Committee Hansard, 8 March 2023, p. 9.

42 Mr James William, Chief Executive Officer, Torres Strait Regional Council, Committee Hansard, 16 August 2023, pages 1–2 and 9.

43 Mrs Margy Osmond, Chief Executive Officer, TTF, Committee Hansard, 2 March 2023, p. 41.

44 Mrs Margy Osmond, Chief Executive Officer, TTF, Committee Hansard, 2 March 2023, p. 42.

45 Ecotourism Australia (EA), Submission 117, p. 7.

46 EA, Submission 117, p 3.

47 Mr Gerald Power, General Manager and Owner, Indigenous Cultural Adventures, Committee Hansard, 26 June 2023, p. 31.

noted First Nations tourism businesses needed to become export ready more quickly to service the international market, and this presents challenges:

> Most tourism businesses would start off with the local market. They might extend their marketing to try and bring in visitors from other towns, and interstate and so on, long before they'd reach out to an international market, whereas most Aboriginal tourism businesses are going to have to hit the international market and be export-ready from the get-go because there's simply not enough demand from Australian travellers.[48]

Workforce and capability

3.39 The availability, sustainability and skilling of First Nations peoples to provide the workforce to maintain and expand the number of First Nations tourism businesses was also reported as a significant challenge by the NIAA and others.[49]

3.40 Shortages in workers with skills essential to the sector, such as promotion, marketing and tourism in regional and remote areas, compounded by housing shortages, and the instability of employment due to the seasonal nature of tourism business were identified as a barrier to increasing First Nations businesses in the tourism sector.[50]

3.41 In response to some of those issues, Mr Taylor, Chief Executive of WAITOC, recommended increasing regional staff accommodation, noting that:

> The cost of living and the cost of housing are always challenges as well. Seasonality is a big one. Staff accommodation on Aboriginal country could support community management. If there were accommodation put in those sorts of places for staff, it could help both the community and staffing for regional areas.[51]

3.42 Ms Sarah Pilgrim from Tourism Midwest Victoria noted:

> What is clear from working with this group—we've done quite a lot of internal training with our team and our operators—is that the capacity limitations of the traditional owners are probably one of the things that are stopping product from developing.[52]

3.43 Dr Walters told the Committee investments in First Nations tourism should be accompanied by training, mentoring, business skills development, and

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48 Mr Evan Hall, Chairperson, Australian Tourism Industry Council (ATIC), Committee Hansard, 13 September 2023, p. 8.

49 See NIAA, Submission 120, p. 4 and Regional Development Australia – Kimberley (RDA-K), Submission 116, p. 5.

50 See NIAA, Submission 120, p. 4; RDA-K, Submission 116, p. 6; Mr Gerald Power, General Manager and Owner, Indigenous Cultural Adventures, Committee Hansard, 26 June 2023, p. 35; Mr James William, Chief Executive Officer, Torres Strait Regional Council, Committee Hansard, 16 August 2023, p. 7.

51 Mr Robert Taylor, Chief Executive Officer, WAITOC, Committee Hansard, 22 August 2023, p. 17.

52 Ms Sarah Pilgrim, Executive Manager, Tourism Midwest Victoria, Committee Hansard, 4 October 2023, p. 16.

qualifications.[53] Mr Darrell Harris, General Manager, Cairns Indigenous Art Fair Limited called for a workforce strategy to bring young people and entrepreneurs into the sector.[54]

3.44 To support capacity and build a range of generalised business skills, the NIAA pointed to support services available through government that First Nations tourism businesses can access, including the Indigenous Business and Employment Hubs and Indigenous Business Australia.[55]

3.45 Mr Gerald Power of Indigenous Cultural Adventures identified the connection between and importance of developing capacity and developing confidence for First Nations tourism operators, noting:

> … it's also the confidence of the individuals. I'd say: 'Set up a webpage and then get onto Facebook; get Instagram; go and start to sell yourself; be confident in who you are.' And they'd say, 'I don't know how to do all that sort of stuff…
>
> [G]etting them through business management schools and having that other confidence is vitally important.[56]

3.46 EA highlighted the importance of upskilling First Nations people for delivery of ecotourism activities. It provided the example of the IPA Program which supports First Nations communities to voluntarily dedicate and manage their land, and the Indigenous Rangers' Program, but noted resourcing for management was lacking.[57]

3.47 The NIAA advised it has commenced a three-year training activity in Alice Springs with 100% Finke River Culture and Adventures. This company is a First Nations owned and operated tourism enterprise that will deliver training and mentoring to at least 100 local First Nations people to become tour guides.[58]

3.48 Other challenges affecting the attraction and retention of the First Nations tourism workforce were flagged, including 'racial discrimination, stigma and in some cases, language barriers'.[59]

3.49 Further, the availability of enough First Nations peoples in locations who can and want to tell the story of land and cultures was raised as a challenge by Mr Rodney Carter of Dja Dja Wurrung Clans Aboriginal Corporation.[60] He explained:

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53 Dr Gabby Walters, Associate Professor in Tourism, University of Queensland, Committee Hansard, 17 May 2023, p. 40.

54 Mr Darrell Harris, General Manager, Cairns Indigenous Art Fair Limited, Committee Hansard, 16 August 2023, p. 10.

55 NIAA, Submission 120, p. 6.

56 Mr Gerald Power, General Manager and Owner, Indigenous Cultural Adventures, Committee Hansard, 26 June 2023, p. 31.

57 EA, Submission 117, p. 7.

58 NIAA, Submission 120, p. 6.

59 NIAA, Submission 120, p. 4.

60 Mr Rodney Carter, Group Chief Executive Officer, Dja Dja Wurrung Clans Aboriginal Corporation, Committee Hansard, 4 October 2023, p. 23.

> Dja Dja Wurrung has found with its guided tours that there are not enough Dja Dja Wurrung people to go around and deliver the face-to-face. Along with that, not every Dja Dja Wurrung person wants to do that—and nor should they be required to do it. We have a high degree of capability as orators to tell stories and utilise country, but we also have a capacity issue.[61]

3.50 Reflecting on the challenges and opportunities in the First Nations tourism sector, Mr Gerald Power of Indigenous Cultural Adventures, noted First Nations tourism operators in some regions were more advanced in identifying the cultural stories and activities they wanted to share. Mr Power noted the importance of experienced First Nations tourism operators and leaders supporting new businesses in new areas:

> Hopefully in the years to come we can unearth these people to be role models, lighthouses, for those who are coming forward and coming up in relation to building a cultural story, a heritage story…
>
> We are here in Wiradjuri country, but up there all of those nations have their story. Their stories are different to ours here. That's where I see some of the gaps but the opportunities too.[62]

3.51 Ms Mills reflected on the small number of First Nations owned and managed tourism enterprises in Broome, commenting that:

> Engaging in training and retention of the local Indigenous workforce to deliver consistent authentic product will be pivotal in driving the Indigenous cultural tourism market going forward.[63]

Authentic experiences and products

3.52 The joint submission from Arts Law Australia, Copyright Agency and the IartC highlighted strong concerns around widespread selling of inauthentic First Nations experiences and products, and the harm this causes, noting that tourists want to engage with 'genuine expressions of First Nations culture.[64] They estimate that up to 75 per cent of the Indigenous-style consumer products sold in Australia are not produced by a First Nations person.[65] Further, OLALC described how some tourists were unknowingly buying overseas-made products that purported to be authentic First Nations artifacts.[66]

3.53 The NIAA articulated the authenticity issue simply and concisely:

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61 Mr Rodney Carter, Group Chief Executive Officer, Dja Dja Wurrung Clans Aboriginal Corporation, Committee Hansard, 4 October 2023, p. 23.

62 Mr Gerald Power, General Manager and Owner, Indigenous Cultural Adventures, Committee Hansard, 26 June 2023, p. 31.

63 Ms Ninielia Mills, Chief Executive Officer, Nyamba Buru Yawuru, Committee Hansard, 21 August 2023, p. 1.

64 Arts Law Australia, Copyright Agency and the IartC Ltd, Submission 74, p. [13].

65 Arts Law Australia, Copyright Agency and the IartC Ltd, Submission 74, p. [5].

66 Mr Michael Madden, Justice Officer, OLALC, Committee Hansard, 26 June 2023, p. 32.

> The production of inauthentic products undermines Australia's unique identity, erodes Aboriginal and Torres Strait Islander culture and economic opportunities, including those in the tourism sector.[67]

3.54 The Committee also heard how the production and selling of inauthentic First Nations products and experiences may harm Australia's international reputation:

> … fake Aboriginal or Torres Strait Islander art and crafts degrades the cultural experience of tourists, which undermines the objective of promoting Australia as a world class international travel destination.[68]

3.55 The Committee heard from Arts Law Australia, Copyright Agency and the IartC with regard to the harm experienced by First Nations groups regarding inauthentic products, who stated First Nations people worldwide continued to struggle for a 'fair go' in tourism, noting:

> The lack of inauthentic art regulation goes hand in hand with control over representation of Indigenous cultures being taken away from Indigenous people, and tourism opportunities and economic returns being largely an illusion.[69]

3.56 The Committee was advised 'inauthentic products perpetuate myths about Indigenous culture… and inhibit truth telling'.[70] They can also be non-representative of the diversity of First Nations cultures. For example, Ms Annette Steele from the OLALC noted many international tourists associated First Nations cultural experiences with the Northern Territory, but emphasised the differences that exist among First Nations peoples across the country:

> … our song lines are different, our stories are different and our families are different.[71]

3.57 WAITOC CEO Mr Taylor expressed concern about use of First Nations names and words in non-First Nations business names and marketing:

> One of the areas that we're also finding difficult at the moment is where we're having appropriation of culture through non-Indigenous businesses naming their businesses after Aboriginal names—not necessarily just the names, because if we've renamed or we've put the first names back into a place, we can't expect a business not to name their business after that place, because that's how people find them—but then adding a word like 'dreaming' to it when they haven't got that cultural knowledge of what that means to the Aboriginal people. If they weren't using it in that context, if it were English language, it'd be different. But if they're

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67 NIAA, Submission 120, p. 6.
68 Arts Law Australia, Copyright Agency and the IartC Ltd, Submission 74, p. [5].
69 Arts Law Australia, Copyright Agency and the IartC Ltd, Submission 74, p. [5].
70 Arts Law Australia, Copyright Agency and the IartC Ltd, Submission 74, p. [5].
71 Ms Annette Steele, Chief Executive Officer, OLALC, Committee Hansard, 26 June 2023, p. 31.

> putting 'Quandong Dreaming' and you ask the question 'What is the dreaming part?' they can't answer that, because they don't have that cultural knowledge.[72]

3.58 Mr Madden from the OLALC emphasised that 'authenticity' must underpin any Aboriginal cultural and heritage tourism.[73] He commented that:

> We are about protecting those within the tourism business … because they have authentic products. We are about protecting businesses … and encouraging other businesses that are authentic to come here because they're so important. We've been given examples where, before COVID, Chinese tourists would land in Sydney and not go anywhere near an Aboriginal experience up north at Alice Springs. Then they'd buy artefacts that were made in China, but authenticity is about our local artists being able to compete. It's about the ongoing authenticity and purity of the songlines, the storylines and all those things.[74]

3.59 Mr Haydyn Bromley, Chair of the South Australian Aboriginal Tourism Operators Council (SAATOC) insisted industry regulations and certification were needed within the First Nations tourism sector to ensure authenticity, not just of art but of First Nations experiences generally. He suggested there also needed to be compliance checks to ensure that an operator who claims to run a First Nations experience is authentic.[75]

3.60 In their joint submission, Arts Law Australia, Copyright Agency and the IartC also pointed to the need to build capacity in First Nations artists around their Indigenous Cultural Intellectual Property rights for entering into agreements for the use of their work and being alert to those intentionally engaged in 'unscrupulous conduct'.[76]

Box 3.1 First Nations Cultural protection

The Australian Government has committed to working in partnership with First Nations peoples to reform First Nations cultural heritage protections at the national level.[77] First Nations tourism should provide opportunities to showcase heritage to domestic and global tourists, while maintaining First Nations peoples' right to protect and manage their own heritage.[78]

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72 Mr Robert Taylor, Chief Executive Officer, WAITOC, Committee Hansard, 22 August 2023, p. 17.
73 Mr Michael Madden, Justice Officer, OLALC, Committee Hansard, 26 June 2023, p. 32.
74 Mr Michael Madden, Justice Officer, OLALC, Committee Hansard, 26 June 2023, p. 32.
75 Mr Haydyn Bromley, Chair, South Australian Aboriginal Tourism Operators Council (SAATOC), Committee Hansard, 20 February 2024, p. 35.
76 Arts Law Australia, Copyright Agency and the IartC Ltd, Submission 74, p. [9].
77 Minister for Foreign Affairs, Senator the Hon Penny Wong, 'Historic global agreement recognising First Nations' cultural knowledge', *Media Release*, 27 May 2024, https://www.foreignminister.gov.au/minister/penny-wong/media-release/historic-global-agreement-recognising-first-nations-cultural-knowledge, accessed 14 June 2024.
78 NIAA, Submission 120, p. 6.

Revive, the Australian Government's National Cultural Policy released in 2023, includes commitments around the protection of authentic First Nations art, including to:

- Introduce legislation to protect First Nations knowledge and cultural expressions, including to address the harm caused by inauthentic Aboriginal and Torres Strait Islander arts and crafts.
- Review the Indigenous Art Code to strengthen the protections for First Nations artists and consumers across the country.
- Enhance the Resale Royalty scheme to provide royalty payments to visual arts for commercial sale of eligible works internationally.[79]

Australia is also participating in reforms to the protection of First Nations intellectual property rights that are being progressed internationally. In May 2024, the Australian Government welcomed the Treaty on Intellectual Property, Genetic Resources and Associated Traditional Knowledge, which was agreed among members of the World Intellectual Property Organization (WIPO) in Geneva.

The treaty recognises the use of Indigenous peoples' genetic resources and associated traditional knowledge such as medicinal plants and agricultural crops, in patent systems. The Australian Government sees this Treaty as an important step toward further protection for First Nations peoples' traditional knowledge within Australia.[80]

City-based First Nations experiences

3.61 Dr Walters from the University of Queensland explained First Nations tourism offerings were typically located in regional areas.[81] The Committee heard evidence that these offerings could be difficult to access and needed to be supported by adequate and affordable transport and accommodation to improve participation.[82]

3.62 The Committee heard evidence that one way to lessen the gap between those wanting a First Nations experience and being able to easily access it was to create First Nations 'anchor attractions' in metropolitan areas. Taking the example of the planned Aboriginal Cultural Centre in Perth, Mr Robert Taylor, Chief Executive Officer, Western Australian Indigenous Tourism Operators Council (WAITOC) commented:

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79 Commonwealth of Australia, *Revive: a place for every story, a story for every place – Australia's cultural policy for the next five years*, 2023, pages 32 and 58, https://www.arts.gov.au/sites/default/files/documents/national-culturalpolicy-8february2023.pdf, viewed 15 July 2024.

80 Minister for Foreign Affairs, Senator the Hon Penny Wong, 'Historic global agreement recognising First Nations' cultural knowledge', *Media Release*, 27 May 2024, https://www.foreignminister.gov.au/minister/penny-wong/media-release/historic-global-agreement-recognising-first-nations-cultural-knowledge, accessed 14 June 2024.

81 Dr Gabby Walters, Associate Professor in Tourism, University of Queensland, Committee Hansard, 17 May 2023, p. 40.

82 Ms Ninielia Mills, Chief Executive Officer, Nyamba Buru Yawuru, Committee Hansard, 21 August 2023, p. 2 and Mr William, Committee Hansard, 16 August 2023, p. 3.

> I think that'll help close that [gap] because there'll be something in Perth of significance that will showcase not just Noongar culture but the rest of the state's Aboriginal culture. I think the Museum Boola Bardip does quite a good job at the moment with some of the work that Tourism WA have been doing there with Nyumbi…[83]

3.63 Speaking generally on the topic of city-based First Nations cultural experiences, Mr Hall of the ATIC remarked:

> I do think there is a need for Aboriginal cultural experiences in places our visitors turn up in large numbers, which are the capital cities, first and foremost, even if it's the point of arrival and part of that experience…
>
> I think that would be a worthwhile investment, if it were done well and absolutely designed with the visitor in mind.[84]

3.64 Mr Taylor went on to say that if connections are made with other Aboriginal communities, then a successful city-based attraction should be successful in getting people out into regional Australia. In the case of international visitors, this might not occur until their second or third visit.[85]

3.65 While not a capital city development, Mr Scott Lovett of the Northern Territory Government remarked on the significance of establishing the Aboriginal and Torres Strait Islander Art Gallery of Australia in Mparntwe Alice Springs. Scheduled for opening in 2027, Mr Lovett noted that with 74 per cent of international travellers to the Northern Territory looking for an Aboriginal cultural experience:

> Being able to showcase this culture in the home of the western dessert [sic] art will be a significant windfall for international visitors coming into the Territory.[86]

Creating awareness of First Nations experiences

3.66 TA and most State Tourism Organisations (STOs) have dedicated programs to promote and grow the First Nations tourism sector. TA launched its Discover Aboriginal Experiences marketing collective in 2018, noting that the program has been 'designed to support smaller and owner-operated tourism businesses – especially in remote areas'.[87] TA noted:

> Australia's Indigenous cultures and peoples are also at the heart of the story in the new *Come and Say G'day* campaign. Multiple Indigenous Australian languages are spoken in the work. The campaign also includes a cover of the classic Aussie anthem Down Under by up-and-coming Australian band King

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83 Mr Robert Taylor, Chief Executive Officer, Western Australian Indigenous Tourism Operators Council (WAITOC), Committee Hansard, 22 August 2023, p. 18.

84 Mr Evan Hall, Chairperson, ATIC, Committee Hansard, 13 September 2023, pages 8–9.

85 Mr Robert Taylor, Chief Executive Officer, WAITOC, Committee Hansard, 22 August 2023, p. 19.

86 Mr Scott Lovett, Deputy Chief Executive Officer, Department of Industry, Tourism and Trade, Northern Territory Government, Committee Hansard, 17 April 2024, p. 64.

87 TA, Submission 60, p. [20].

> Stingray, who sing in both English and Yolnu Matha, an Indigenous language from Northeast Arnhem Land Northern Territory.[88]

3.67 Nevertheless, OLALC questioned whether there was enough information on the products available in remote areas, arguing First Nations experiences were often not well promoted.[89] The SAATOC also raised concerns at 'the manner in which Aboriginal people are portrayed [in international marketing]'.[90]

3.68 WAITOC CEO Mr Taylor suggested TA could be more effective if it had First Nations members on its board and staff. He also recommended TA should devote more resources to product development in addition to marketing. This would provide confidence that the businesses that are being marketed will provide quality experiences to visitors, particularly international visitors.[91]

3.69 The Committee also heard Australia could learn about effective marketing of First Nations tourism by considering approaches of other countries. Canada and New Zealand were specifically mentioned.[92] In relation to Canada, it was noted:

> Canada, through a national body they created just before COVID—they did have some challenges through COVID—actually worked with their Tourism Australia equivalent in introducing Aboriginal tourism as the first thing you get when you market their country, and that increased their visitation by 25 per cent in the first year. It did make a big difference because, as I said before, 80 per cent of internationals want that experience and only a small proportion are getting it, and it's usually because those experiences are more regional. We have just done some market research around what people look for when they're looking at marketing and found that if you have a picture of a city underneath 'Aboriginal experiences' compared to a backdrop of a national park or something, the national park wins hands down.[93]

3.70 EA suggested a way forward to support improved development and marketing of First Nations tourism would be:

> In close consultation with, and guided by, First Nations communities and organisations [to] create approved and supportive interpretation tools and assets that can assist the broader tourism industry to engage with Traditional Owners and their stories and aspirations.[94]

88 TA, Submission 60, p. [20].
89 Ms Annette Steele, Chief Executive Officer, OLALC, Committee Hansard, 26 June 2023, p. 36.
90 Mr Haydyn Bromley, Chair, SAATOC, Committee Hansard, 20 February 2024, p. 37.
91 Mr Robert Taylor, Chief Executive Officer, WAITOC, Committee Hansard, 22 August 2023, p. 20.
92 Mr Robert Taylor, Chief Executive Officer, WAITOC, Committee Hansard, 22 August 2023, p. 17.
93 Mr Robert Taylor, Chief Executive Officer, WAITOC, Committee Hansard, 22 August 2023, p. 17.
94 EA, Submission 117, p. 10.

Ensuring success – an effective leadership mechanism

3.71 Austrade commented upon the complex policy and governance landscape surrounding First Nations tourism:

> The diversity in First Nations tourism is also reflected in the complex policy and program landscape that surrounds it. There is a range of representative bodies, disparate levels of state and territory priorities and investment, and varied Federal agency involvement, which can result in lack of coordination and support across this part of the visitor economy.[95]

3.72 Austrade noted there was an opportunity to develop a Visitor Economy Policy that takes a whole-of-sector approach through a partnership model that would elevate First Nations voices and inform development of future initiatives.[96] The NIAA noted it was working with Austrade on a design process to determine an appropriate partnership model.[97]

3.73 Mr Taylor from WAITOC provided critical insights into how collaboration is crucial to building success for First Nations tourism. WAITOC has been recognised as a leader in progressing First Nations tourism in Australia and has been commended in other states for its approach. WAITOC has assisted other state-based organisations to establish similar entities and programs. Mr Taylor explained WAITOC's success as coming from 'grassroots buy-in' and focusing on training and development for First Nations tourism businesses.[98] This has been its focus since inception in 2002.

3.74 In cooperation with Tourism Western Australia, WAITOC has established the Jina Aboriginal Tourism Action Plan and, with Breakaway Tourism as a commercial partner, the Aboriginal Tourism Academy. Mr Karl Millard of WAITOC explained the Academy to the Committee:

> From the Aboriginal Tourism Academy, which is an intensive mentoring program, we have the business support hub to teach them those critical administrative skills and business skills to set up an effective framework, resilience and sustainability within the business. We're also building training platforms … [to] … speak to Aboriginal people within the tourism industry… in language which people understand, in a conversational way which they find easy to take in.[99]

3.75 Mr Millard went on to explain the importance of the Academy's mentoring programs:

> The mentoring programs are quite in-depth, in what we go through with them … We talk about intergenerational wealth, but intergenerational intellectual wealth is really important too; that's sadly missing from the case, so we are making sure that gap is filled in. The business support hub is intended to work with them

95 Austrade, Submission 73, p. 20.
96 Austrade, Submission 73, p. 20.
97 NIAA, Submission 120, p. 6.
98 Mr Robert Taylor, Chief Executive Officer, WAITOC, Committee Hansard, 22 August 2023, p. 27.
99 Mr Karl Millard, Memberships Manager, WAITOC, Committee Hansard, 22 August 2023, p. 19.

> closely and take on a lot of that administrative burden within the first three months and then gradually divest that to the business as well. We are trying to ensure that we are not creating dependency on any of our systems at any stage but always transferring that responsibility and ownership through to the business. That's resulted in a large number of businesses being created through WAITOC and a very small failure rate for those businesses.[100]

Committee comment

3.76 The Committee was inspired by the high level of interest and demand for First Nations tourism experiences, and the reflections about benefits of First Nations tourism to First Nations people reflected in their evidence.

3.77 First Nations tourism is a significant opportunity to support the social, economic and cultural empowerment of First Nations peoples and contribute to broader reconciliation efforts. However, given the high level of demand and structural issues impacting greater supply of authentic products, the Committee is concerned that visitor demand will go unmet, or that potentially the sector could be undermined by inauthentic or sub-standard product. The Committee also has reservations for the autonomy of First Nations suppliers, and believes there is a need for constructive engagement between government, First Nations communities, and the industry to deliver authentic, sustainable, and culturally appropriate experiences, and ensure there is adequate financial benefit to First Nations tourism operators who choose to share their cultural knowledge.

3.78 The Committee considers a national First Nations tourism body must be established to provide advice and coordination to develop and support strategies to advance First Nations tourism. Critically, this includes supporting First Nations peoples to develop and deliver products and experiences that are culturally authentic, and to progress enabling policies and programs that support quality service delivery. The Committee commends the work underway, led by Austrade and the NIAA, to explore the creation of such a body and acknowledges the appropriate and respectful manner in which this is occurring through a co-design process.

3.79 The Committee did not hear evidence of a comprehensive national First Nations strategy for tourism having ever been developed, nor plans for one in the future. The Committee believes that a new First Nations tourism body should consider conducting an encompassing review of issues facing First Nations tourism development and developing a national strategy to set a direction and priorities.

3.80 The Committee is of the view those engaged in creating the new national body must ensure there are mechanisms to connect with grassroots communities and operators, many of whom are in remote locations, to ensure their priorities are identified and appropriate solutions are developed. The Committee also encourages the new body to develop strategies and assistance that build capacity in both non-First Nations

[100] Mr Karl Millard, Memberships Manager, WAITOC, Committee Hansard, 22 August 2023, p. 19.

tourism operators and in tourism agencies to engage with First Nations people to appropriately incorporate First Nations histories and cultures into their offerings.

3.81 The Committee also formed the view that the new body should also examine opportunities to improve management of tourism in Indigenous Protected Areas and National Parks. The body should work with Parks Australia and other relevant lands management agencies to investigate how this could be done including sharing of successful practices across locations as appropriate. The Committee also refers to its examination and comment in relation to tourism in National Parks in Chapter 4.

3.82 The Committee was particularly impressed with the work of the WAITOC over its 20 plus years of operation, especially its efforts to build capability within First Nations businesses through its training and mentoring programs. The Committee encourages others who are setting up similar state and regional bodies to model their operations on WAITOC. Likewise, the Committee encourages those involved in establishing the new national First Nations body to reflect on WAITOC successes. The Committee commends WAITOC's efforts to assist other state-based bodies and hopes to see similar success by those other bodies.

3.83 The Committee believes there is a need to continue funding programs to support First Nations tourism, but funding mechanisms and management should be tailored to suit the circumstances of recipients and the unique operating environments they are in. The Committee considers bodies such as Land Councils and Indigenous Corporations can play a role in supporting grant recipients to have a greater prospect of success by providing ongoing support and advice to build management and operational capability. The Committee sees merit in this 'wraparound support' concept advocated by some witnesses where existing First Nations organisations provide support to First Nations tourism businesses.

3.84 Improving and promoting the viability of tourism as a sustainable career for First Nations people is an issue the new national First Nations tourism body should consider. The Committee was concerned by reports of workforce challenges facing First Nations tourism businesses in regional locations. Added to the general workforce shortages and housing issues confronting the broader tourism industry (which is further considered in Chapter 5), First Nations businesses face the additional challenge of finding sufficient First Nations people from within their community who have the connection and unique understanding to deliver authentic experiences to visitors. First Nations peoples must also be supported to engage in the tourism visitor economy in a way that accommodates their cultural needs and practices.

3.85 The Committee is deeply concerned by accounts of the existence and impact of inauthentic First Nations experiences and products, particularly artwork. While the Committee is encouraged to hear the Australian Government is progressing actions to better protect First Nations knowledge and art, more steps could be taken to implement and enforce quality standards across the sector. The Committee encourages further work in this space, including investigation of a robust quality standard system that establishes and enforces standards and practices, and includes penalties for non-compliance.

3.86 Further, the Committee was concerned by reports First Nations cultures were not always promoted in an appropriate manner or represented meaningfully in marketing strategies and materials. The Committee encourages increased engagement with First Nations by marketing organisations and greater representation on the boards and management of promotional bodies of First Nations people, including in Tourism Australia, to enable First Nations people to more effectively participate in marketing and representation strategies. Marketing bodies should look for other opportunities to draw in First Nations expertise, for example the establishment and use of industry advisory panels.

3.87 Finally, the Committee notes stakeholder views that establishing high quality First Nations cultural centres in metropolitan locations may lead to greater visitor engagement with First Nations cultures and art, increased financial benefit to First Nations groups for their held and developing cultural knowledge, and encourage further visitation including into regions. The Committee notes the importance of First Nations peoples' involvement in design and use of these centres, including establishing and maintaining linkages to regional locations.

3.88 The Committee also notes that on 27 March 2024 the Minister for Indigenous Australians at the time, the Hon Linda Burney MP, referred an inquiry into economic self-determination and opportunities for First Nations Australians to the Joint Standing Committee on Aboriginal and Torres Strait Islander Affairs. This Committee hopes the evidence and recommendations regarding First Nations tourism opportunities and challenges in this report will be considered in that inquiry as well.

Recommendations

Recommendation 1

3.89 The Committee recommends the Australian Government establishes a national First Nations tourism body to represent the interests of First Nations businesses and communities in visitor economy policy and program development.

3.90 The Committee recommends the terms of reference of the new body are informed by the strategies and successful activities of the Western Australian Indigenous Tourism Operators Council (WAITOC), particularly WAITOC's approach to community engagement, business capability development, and fostering employment opportunities for First Nations people.

Recommendation 2

3.91 The Committee recommends that once the First Nations tourism body referred to in Recommendation 1 is established, it should consider:

- **A review into the current state of the First Nations tourism sector with the aim to make recommendations to government and industry on the short-,**

medium- and long-term actions to build a stronger and sustainable First Nations tourism sector and enable First Nations peoples to derive real financial benefit from appropriately sharing their cultural knowledge in the tourism sector;

- **Preparation of a National First Nations Visitor Economy Strategy; and**
- **Development and implementation of programs that educate non-First Nations tourism operators on how to engage and ethically partner with First Nations people in their local communities and how to appropriately collaborate with First Nations people and showcase cultural product in their business and services.**

Recommendation 3

3.92 The Committee recommends the Australian Government continues to implement grant programs that support First Nations tourism businesses to design and deliver authentic, culturally appropriate experiences including in ethical partnerships with established operators. In implementing these programs, the Government should engage with the new national First Nations tourism body proposed in Recommendation 1.

Recommendation 4

3.93 The Committee recommends the membership of Tourism Australia's board should include at least one or more First Nations people.

Recommendation 5

3.94 The Committee recommends the Board of Tourism Australia establishes a First Nations advisory panel under section 28(1) of the *Tourism Australia Act 2004* (Cth). The purpose of the panel would be to advise Tourism Australia on appropriate representation of First Nations in marketing strategies and campaigns. The membership of the panel should comprise a majority of First Nations peoples.

Recommendation 6

3.95 The Committee recommends relevant Australian Government agencies work with the tourism industry and First Nations representatives to develop partnerships and implement a robust accreditation scheme that supports and promotes the integrity and authenticity of First Nations tourism products, experiences and partnerships.

4. Broadening horizons – other tourism opportunities for Australia

4.1 This chapter considers a number of other key opportunities raised in the evidence, in addition to First Nations tourism covered in Chapter 3, to grow Australia's tourism sector and keep it positioned as a world leading destination. The common link across these opportunities is Australia's ability to leverage its strengths and attributes.

4.2 Australia's regions offer remarkable and diverse experiences, as well as opportunities to explore some of the most treasured geography on the planet. Further, Australia's regions have the potential to grow underdeveloped or emerging sectors such as nature-based tourism and agritourism that are becoming increasingly attractive to domestic and international travellers alike. However, it is apparent there is a 'dispersal challenge' to overcome to deliver more regional visitation.[1]

4.3 While the term was not used by witnesses, many of the challenges and opportunities outlined in this chapter are also relevant to peripheral urban areas, or 'peri-urban' areas, which are areas between built-up suburbs and more regional or rural areas, for example the Blue Mountains, Darwin, the Gold Coast, and Geelong.[2] As such, Chapters 4 and 5 consider evidence received about issues in peri-urban areas under the broader discussion about regional areas.

4.4 This chapter also highlights the importance and opportunity offered by international market diversification. Recent history revealed the drawbacks of relying heavily on a small number of markets. That aside, growing wealth and populations around the world, particularly in Asia, represent enormous opportunity to grow the sector through higher yielding international travellers. At the same time, this growth must occur in a sustainable way, and this chapter also examines how Australia can be positioned to implement and promote its sustainability credentials.

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1 Australian Trade and Investment Commission (Austrade), Submission 73, p. 21.

2 See NSW Government, *Peri-urban areas*, undated, https://www.movementandplace.nsw.gov.au/design-principles/supporting-methods/place-contexts/peri-urban-areas, viewed 24 September 2024 and Department of Infrastructure, Transport, Regional Development, Communication and the artist, *Updated definition of peri-urban fringe definition*, 5 July 2024, https://www.infrastructure.gov.au/department/media/publications/updated-definition-peri-urban-fringe-definition, viewed 24 September 2024.

Regional Australia – opening more of Australia to the world

4.5 Most states and regions in Australia lay claims to outstanding geography, unique wildlife, and other attractions that drive international visitation. For example, the South Australian Tourism Commission (SATC) noted the experiences on offer in regional areas in its state:

> The promotion of regional Australia as a world class international destination is a major opportunity. There are amazing natural assets and experiences for new markets in regional South Australia that appeal to international visitors. For example, Kangaroo Island, the Flinders Rangers, Port Lincoln, the Murray River.[3]

4.6 Tourism Australia (TA) research shows international visitors prioritise activities related to natural beauty, aquatic and coastal, and wildlife.[4] These experiences are typically found in regional areas. Submissions to the inquiry also noted that post-COVID-19 research showed people were placing a higher value on uncrowded destinations, were more likely to take an outdoor trip, and wanted to experience nature.[5]

4.7 However, while there is a large volume of domestic tourism into regional areas, international visitors generally concentrate in Australia's capital cities, and do not disperse to many of the regions.[6] This section of the report considers the challenges of achieving a greater visitor dispersal around Australia, which will spread the economic benefit of tourism to more of the country. It also reports on some opportunities highlighted to the Committee that, if acted upon, may help achieve that.

The 'dispersal challenge'

4.8 The tourism sector and regional Australia have a strong reciprocal and symbiotic relationship. Regional Australia has many geographic, cultural, historic and man-made attractions that drive visitation, and communities in regional Australia derive enormous social and economic benefits from tourism. The Tourism and Transport Forum (TTF) described tourism as the 'lifeblood' of many local and regional communities.[7] The Australian Trade and Investment Commission (Austrade) noted:

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3 South Australian Tourism Commission (SATC), Submission 23, p. [5].

4 Tourism Australia (TA), *Consumer Profiles*, undated, https://www.tourism.australia.com/en/insights/consumer-research/consumer-profiles.html, viewed 7 June 2024.

5 See for example SATC, Submission 23, p. [2]; and Tourism and Transport Forum (TFF), Submission 11, p. 2.

6 Austrade, Submission 73, p. 21.

7 Mrs Margy Osmond, Chief Executive Officer, TFF, Committee Hansard, 2 March 2023, p. 39.

> The visitor economy makes a greater proportional contribution to regional communities than to capital cities, contributing 4.1 per cent to gross domestic product in regions, compared to 2.7 per cent in capital cities.[8]

4.9 However, Austrade informed the Committee of a great 'dispersal challenge' faced by regional Australia. While when measured across the board, regional Australia shows significant economic benefits from tourism, Austrade notes that international visitor dispersal to regional Australia is 'limited and shallow'. It cites the following statistics (which are for the last full calendar year, 2019, prior to the pandemic):

- Cities receive the vast majority (84 per cent) of international visitor expenditure.
- Regions receive more than 90 per cent of their visitor expenditure from domestic travellers, and only 10 per cent from international visitors.
- Only two non-capital city tourism regions (Gold Coast and Tropical North Queensland) achieved more than 10 per cent of total visitation from international visitors.
- The top 10 regional destinations account for 68 per cent of international spend in the regions (and the top two account for 41 per cent).[9]

4.10 In summary on this point, Austrade submitted:

> In effect, most regions are almost completely dependent on domestic travellers. Or put another way, international visitors are not dispersing in great numbers into regions.[10]

4.11 A report by Tourism Research Australia (TRA) investigating regional dispersal noted regional dispersal for international and domestic visitors was shallow, concentrated in destinations close to capital cities and coastal centres. Visiting friends and relatives, exploring nature or 'bucket list' holidays are the key drivers for international visitors to visit regional areas in Australia. The main constraints on regional travel are time and cost, with most regional visitations being in the form of day trips rather than overnight stays.[11]

Pandemic impact on the regions

4.12 With international borders closed during the pandemic, visitation by Australians into regions soared as vast numbers of Australians who were unable or unwilling to travel overseas for much of 2020 and 2021 chose to travel within Australia instead. This trend continued into 2022, with Austrade noting a surge in visitor expenditure in regions compared to capital cities (up 46 per cent in regions in August 2022 compared to August 2019, compared to only 12 per cent in capital cities). It also noted the balance of total visitor expenditure tipped in favour of regions during the

8 Austrade, Submission 73, p. 21.
9 Austrade, Submission 73, p. 21.
10 Austrade, Submission 73, p. 21.
11 Tourism Research Australia (TRA), Austrade, *The Beach, Bush and Beyond: Understanding Regional Dispersal of Australian Tourists*, October 2019, p. 3.

pandemic, increasing to as high as 63 per cent in regional Australia compared to a normal level of about 44 per cent.[12]

4.13 While this increased flow of domestic tourists propped up some businesses, others saw visitor numbers reach record highs. Mr Tim Booth, Chief Executive of Mudgee Region Tourism, asserted:

> We benefited from COVID, as did a lot of regional centres, as weird as that might sound'.[13]

4.14 Dr Gabby Walters from the University of Queensland put forward there had been a 'revival' of regional tourism during the COVID-19 period:

> We saw people going out to the regions. We saw towns being visited by tourists that had never been visited by tourists before. An opportunity came out of that time in that our regional tourism destinations really came alive…[14]

4.15 The Tourism Industry Council South Australia (TICSA) also described how many tourists from migrant communities travelled to regional areas for the first time during the COVID-19-related travel restrictions, stating: '[i]t was absolutely one of the upsides of COVID'.[15]

4.16 While the regions did see a spike in visitation and expenditure from tourists during and in the immediate aftermath of the pandemic, evidence suggests visitation patterns began to normalise in 2023. TRA recently reported the regional share of domestic visitor expenditure was easing back as travel to capital cities had picked up pace relative to the regions.[16]

Regional challenges

4.17 Despite the recent surge and benefits accruing to regions from increased domestic visitation, the Committee received evidence from many witnesses who expressed concern about a range of challenges to growing tourism in regional areas. These challenges generally fell under the following four categories:

1 Greater investment in tourism products, assets and infrastructure.

2 Improved transport access.

3 A bigger and more skilled tourism workforce, requiring greater efforts to address housing shortages.

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12 Austrade, Submission 73, p. 38.

13 Mr Tim Booth, Chief Executive, Mudgee Region Tourism, Committee Hansard, 26 June 2023, p. 38.

14 Dr Gabby Walters, Associate Professor in Tourism, University of Queensland, Committee Hansard, 17 May 2023, p. 38.

15 Mr Shaun de Bruyn, Chief Executive Officer, Tourism Industry Council of South Australia (TICSA), Committee Hansard, 20 February 2024, p. 31.

16 TRA, Austrade, *State of the Industry: Australia's tourism sector in 2023*, 14 June 2024, p. 44, https://www.tra.gov.au/en/economic-analysis/state-of-the-industry, viewed 17 June 2024.

4 Improved promotion of regional destinations.

Investment in tourism products, assets and infrastructure

4.18 Evidence received by the Committee pointed to the critical need for quality tourism products, assets and infrastructure to drive regional tourism. The Australian Tourism Export Council (ATEC) submitted that:

> Regional Australia needs infrastructure and fresh, capable product offering in order to meet the demands of the international traveller.[17]

4.19 Australian Regional Tourism (ART) concurred, stating in its submission:

> A lack of targeted investment and support in the regions for industry and product development has resulted in limited quality products and experiences that meet the demand of international visitors.[18]

4.20 Mr Danial Rochford of Tourism Central Australia explained it in simple terms:

> Page 1, chapter 1 of turning a tourism destination around is product development…
>
> It's getting new experiences and new things. We've seen it, in the last year and a half, with Wintjiri Wiru and the light towers. Whenever new experiences come online for a destination, it gives us the hook to be able to advance it and … yell from the rooftops and say, 'Hey! Look at this!'[19]

4.21 When asked to nominate the top issues for creating a more sustainable sector, Mr Evan Hall from the Australian Tourism Industry Council (ATIC) raised industry investment, explaining that:

> … the third most important task really is the capacity for the industry to invest in its own product. That includes staff, and it includes either built form, if we're talking about accommodation or attractions, or the other one that's often forgotten about, which is vehicles and vessels…
>
> We've had very little investment in that product, for a range of reasons.[20]

4.22 Dr Walters from the University of Queensland highlighted the broader benefits of infrastructure investments, and argued that more regional investment would support both visitors as well as local residents and communities.[21] Orange360, a regional development body in Central-West New South Wales, emphasised the need for

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17 Australian Tourism Export Council (ATEC), Submission 44, p. 4.

18 Australian Regional Tourism (ART), Submission 41, p. 3.

19 Mr Danial Rochford, Chief Executive Officer, Tourism Central Australia, Committee Hansard, 17 April 2024, p. 25.

20 Mr Evan Hall, Chairperson, Australian Tourism Industry Council (ATIC), Committee Hansard, 13 September 2023, p. 7.

21 Dr Gabby Walters, Associate Professor in Tourism, University of Queensland, Committee Hansard, 17 May 2023, p. 41.

funding for arts and cultural events in regional areas, arguing such products are a significant opportunity for regional destinations to attract visitors.[22]

4.23 In its submission, Austrade noted research by TA that listed the challenges and possible solutions to drive greater investment in regional tourism assets to include:

- existence of sufficient demand drivers;
- managing seasonal demand;
- sufficient transport;
- higher construction and operating costs;
- labour supply; and
- multiple layers of development regulation.

4.24 Austrade outlined the following as possible actions to address the above challenges: effective marketing, growing aviation and improving transport linkages, reducing or streamlining regulatory barriers, and providing incentives for development. It concluded that greater regional investment could be achieved by having state and territory governments working with regional tourism organisations and industry to develop enhanced destination management plans that incorporate the recommendations above.[23]

Improved transport access

4.25 Evidence received suggests improving access to regional Australia is needed to drive growth in regional visitation, including to access First Nations experiences and facilitate more international visitation. Mr Hall from ATIC implored:

> In a nation that has huge geographic distances, improvement of aviation capacity, quality and competition in services is significantly important. Policies that are designed to make it more affordable, particularly domestically as well, are critical…
>
> It can be very, very difficult for a regional destination to grow without aviation access. The whole system is not terribly well designed for regional routes.[24]

4.26 The Australian Capital Territory (ACT) Government submitted the success of regional Australia was dependent on ease of access to the regions for international visitors.[25] The ATEC agreed that there were 'aviation issues' impeding regional tourism. In particular, it noted:

> Whilst there are many regional centres across Australia that are well-known for their international service delivery such as Kangaroo Island and Cairns, there are aviation issues that are impeding the recovery of regional tourism. Key inbound-

22 Ms Nerida Sweetapple, General Manager, Orange360, Committee Hansard, 26 June 2023, p. 19.
23 Austrade, Submission 73, p. 22.
24 Mr Evan Hall, Chairperson, ATIC, Committee Hansard, 13 September 2023, p. 4.
25 Australian Capital Territory (ACT) Government, Submission 51, pages [2 and 4].

> favoured domestic routes such as Yulara-Cairns and Kangaroo Island flights are significantly hampering the movement of international visitors to the highly sought-after regional destinations, which in turn impacts the offering, demand and ultimately, conversion.[26]

4.27 Similarly, the SATC in its submission noted:

> Air access is a critical factor for tourism and economic growth, and in a competitive post-COVID environment we are working hard to re-build direct access from key markets as quickly as possible.[27]

4.28 Destination Central West asserted the importance of regional aviation access, noting:

> …[f]or regional airports, the quality of the airlines, the quantity of the flights and the consistency of pricing make it challenging for international visitors.[28]

4.29 The dispersal challenge was identified as an issue affecting the development and sustainability of First Nations tourism businesses by Mr Robert Taylor, Chief Executive Officer, Western Australian Indigenous Tourism Operators Council (WAITOC):

> Our state is obviously quite large, so connectivity across the state is quite difficult for international visitors, due to the cost of flights and things like that, to get around the state and the distance they have to travel…
>
> That is one of the challenges we face in the work we do in creating more Aboriginal tourism businesses in the regions where we know they can come first and then grow out, whereas the north has got a very high percentage of our members in the Aboriginal tourism sector in WA, in the Kimberley and the East Kimberley. The challenge is getting the international visitors there.[29]

4.30 Evidence was not limited to aviation, but also touched on road and rail, which are important to access supplies and workers, as well as facilitating travel by visitors. Regional Development Australia Kimberley (RDA-K) argued improvements to road infrastructure would improve accessibility across the region and help reduce costs for tourism businesses in the Kimberley.[30]

4.31 Transport was nominated as one of the biggest barriers to growing international tourism on the Gold Coast, according to Major Events Gold Coast.[31] Pointing to the

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26 ATEC, Submission 44, pages 4–5.
27 SATC, Submission 23, p. [2].
28 Mr Sean Haylan, General Manager, Destination Central West NSW, Committee Hansard, 26 June 2023, p. 13.
29 Mr Robert Taylor, Chief Executive Officer, Western Australian Indigenous Tourism Operators Council (WAITOC), Committee Hansard, 22 August 2023, p. 17.
30 Regional Development Australia Kimberley (RDA-K), Submission 116, pages 2–3.
31 Mrs Jan McCormick, Chief Executive Officer, Major Events Gold Coast, Committee Hansard, 17 May 2023, p. 32.

benefits of investing in transport infrastructure, it described the Gold Coast Light Rail (tram) line as 'phenomenal' for the region.[32]

4.32 ART told the Committee high regional airfares and limited infrastructure were impediments to the growth of tourism in regional Australia, and argued there was no clear strategy for dispersing international visitors across the regions.[33]

Workforce capacity and accommodation

4.33 The significant challenge of workforce capacity and capability shortages across Australia in the tourism sector was voiced by many making submissions to this inquiry. While workforce issues are dealt with more fully in Chapter 5, this section considers specifically regional issues, as the Committee was advised workforce shortages were reportedly more pronounced in regional areas than urban centres.[34]

4.34 Ms Rachelle Robb from the Orange City Council pointed to workforce shortages limiting the development of tourism products in regional areas such as Orange in New South Wales.[35] In the Mudgee region, witnesses reported workforce shortages had prevented some businesses from taking on more visitors.[36] The City of Geraldton described workforce shortages as 'the biggest problem for most tourism and hospitality providers' in the Mid West region.[37]

4.35 The interconnectedness of labour shortages and a shortage of housing in regional areas was raised by several stakeholders during the inquiry. RDA-K pointed to severe workforce and housing shortages across its region as impediments to the growth of regional tourism.[38] The SATC noted:

> Regional Australia can only be world class if the tourism product or offering is well staffed plus there is enough accommodation for both visitors and employees alike.[39]

4.36 The SATC went on to state that in looking for and implementing solutions to labour shortages (for example through migration changes), it is important for dispersal of labour across Australia 'particularly when it comes to regions'.[40]

4.37 Mr Keith Williams from the Shire of Broome emphasised the impact of housing in remote and rural areas, noting that building and insurance costs are major factors

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32 Mrs Jan McCormick, Chief Executive Officer, Major Events Gold Coast, Committee Hansard, 17 May 2023, p. 32.
33 ART, Submission 41, p. 3.
34 Mr John Hart, Executive Chair, Tourism, Australian Chamber of Commerce and Industry (ACCI), Committee Hansard, 8 March 2023, p. 3.
35 Ms Rachelle Robb, Director, Corporate and Commercial Services, Orange City Council, Committee Hansard, 26 June 2023, p. 18.
36 Mr Tim Booth, Chief Executive, Mudgee Region Tourism, Committee Hansard, 26 June 2023, p. 41.
37 City of Geraldton, Submission 133, p. [3].
38 RDA-K, Submission 116, p. 2.
39 SATC, Submission 23, p. [5].
40 SATC, Submission 23, p. [3].

driving up costs and driving down the supply of accommodation.[41] Mr Bill Tatchell, CEO of Australia's North West Tourism agreed that housing and workforce development had 'a critical impact on the development of tourism' in regional areas:

> The high cost of living, getting workers up to the region—these are all impacts on our operators being able to fill their business objectives and provide a quality experience which makes our destination competitive and marketable.[42]

4.38 Mr Williams told the Committee the single biggest factor in staff turnover across the Broome region was the cost of housing: 'We lose staff because we can't afford housing on a regular basis… It's really damaging our ability to retain staff and to attract new staff,' he said.[43]

4.39 CEO of Western Australian Indigenous Tourism Operators Council (WAITOC), Mr Robert Taylor, similarly pointed to housing costs as a significant challenge for First Nations tourism operators across the state.[44]

4.40 Small business owner, Mr Ashley Munn described housing affordability and availability as a major issue affecting the pilots he attempts to recruit for his aviation business:

> There are pilots that come to Broome looking for jobs, but we've found that pilots aren't coming in the droves they used to because they get here and they can't afford to stay here. They don't want to take that risk of coming to Broome, trying to find a job and being short on accommodation and short on funds… we've had four or five people that we've given job offers to this year who have accepted the job offers and then turned around and declined them because they couldn't find any accommodation—or, if they did, they couldn't afford it. They simply said, 'I can't come to Broome; the cost of living is ridiculous.'[45]

4.41 In its submission to this inquiry, Austrade noted the impact of a lack of affordable housing in regional Australia, pointing the Committee to a number of Government reviews into structural challenges facing the sector.[46]

4.42 Workforce challenges are not just related to volume of workers. The ATEC noted skill levels were also a factor, emphasising that:

> We need to invest in international-ready training and trade engagement training in order to upskill regional operators and broaden their offering.[47]

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41 Mr Keith Williams Director, Development Services, Shire of Broome, Committee Hansard, 21 August 2023, p. 9

42 Mr Bill Tatchell, CEO, Australia's North West Tourism, Committee Hansard, 21 August 2023, p. 9

43 Mr Keith Williams Director, Development Services, Shire of Broome, Committee Hansard, 21 August 2023, p. 15.

44 Mr Robert Taylor, CEO, Western Australian Indigenous Tourism Operators Council, Committee Hansard, 22 August 2023, p. 17.

45 Mr Ashley Munn, Owner and Chief Executive Officer, Air Kimberley, Committee Hansard, 21 August 2023, p. 19.

46 Austrade, Submission 73, p. 15.

47 ATEC, Submission 44, p. 5.

4.43 Lack of a skilled workforce for First Nations tourism was considered in Chapter 3, and more generally across Australia is also discussed in Chapter 5.

Awareness and promotion

4.44 The Committee heard regional Australia was not currently sufficiently promoted to international markets. Regional representatives noted that international campaigns were often dominated by Australian 'icons', and that international advertising does not sufficiently accommodate regional attractions and 'nuance'.[48]

4.45 The Australian Airports Association (AAA) expressed that:

> Improving the visibility of regional Australia to international travellers is essential to any national tourism strategy.[49]

4.46 The ATEC added that regional operators faced limitations in promoting themselves internationally and were strongly reliant on the tourism network for effective promotion:

> Regional tourism operators are almost entirely dependent on distribution in order for them to have international visibility so it's important that any promotion of regional Australia is done with the support of the trade network.[50]

4.47 TA contended it does ensure regional destinations are profiled across its marketing programs. For example, it noted that regional destinations across all states and territories are featured in its latest *Come and Say G'Day* campaign and on its consumer website, and that it conducts trade and media familiarisations in regional areas. It also highlighted its $12 million National Experience Content Initiative (NECI) which helped tourism businesses across Australia improve their marketing through quality photographic and video content. NECI covered more than 60 regions, and deliberately targeted small and medium operators who are often less able to create high quality content needed to market themselves on a global stage.[51]

4.48 In response to some of these challenges, Austrade recommended that international marketing emphasise regional destinations to encourage more international tourists to travel to regional Australia. It also called for reduced barriers, improved transport links including increased aviation capacity, and greater incentives for development in regional areas.[52]

4.49 Research from TRA noted the importance of awareness and promotional activities as possible solutions to the dispersal challenge, providing the following suggestions:

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48 See for example Mr Paul Seaman, Chair, Visit Northern Tasmania, Committee Hansard, 1 May 2024, p. 25 and Mayor Mathew Garwood, Mayor, City of Launceston, Committee Hansard, 1 May 2024, p. 32.

49 Mr James Goodwin, Chief Executive, Australian Airports Association (AAA), Committee Hansard, 29 March 2023, p. 2.

50 ATEC, Submission 44, p. 4.

51 TA, Submission 60, p. [22]; TA, Submission 60.1, p. [3].

52 Austrade, Submission 73, p. 22.

- Show visitors what is on offer in regions – provide potential visitors with more information on the extensive range of activities, attractions and unique experiences regional Australia offers.
- Demystify time and distance – give potential visitors the facts on time and distance so they can make informed decisions.
- Create tailored itineraries – put pieces of the regional experience together for potential visitors to ease their decision-making process.[53]

4.50 The SATC recommended another approach to efficiency in international marketing by partnering across states and regions to create and promote combined product offerings. It cited an example of partnering with the Northern Territory and Tourism Australia to promote combined product offerings to certain markets.[54]

Regional opportunities

Nature-based tourism

4.51 Australia's natural environment is a unique asset providing enormous appeal to visitors, with a fifth of Australia's landmass protected and the world's largest number of UNESCO Natural World Heritage Sites.[55]

4.52 TA noted more than a third of global travellers want to get in touch with nature.[56] The TTF described how following the pandemic, consumer demands had shifted to seeking out outdoor experiences and pointed to Australia's comparative advantage in nature-based tourism, but questioned whether Australia was well positioned to capitalise on this changing demand, given infrastructure constraints and other challenges.[57]

4.53 Ecotourism Australia (EA) highlighted that nature-based tourism earned Australia more than $45 billion in 2019, representing more than a quarter of Australia's total tourism earnings.[58] EA stressed the importance of protecting Australia's natural assets including national parks, marine areas and Indigenous Protected Areas, and noted the need across federal and state agencies to implement best practice compliance to support 'appropriate tourism operations'.[59]

4.54 EA recommended the introduction of a national best practice standard in National Parks and sensitive areas, and pointed to the success of the existing program run by the Great Barrier Reef Marine Park Authority for 'High Standard Tour Operators':

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53 TRA, Austrade, *The Beach, bush and beyond: understanding regional dispersal of Australian tourists*, October 2019, p. 4.
54 Ms Emma Terry, Chief Executive, SATC, Committee Hansard, 20 February 2024, p. 27.
55 Ecotourism Australia (EA), Submission 117, p. 4.
56 TA, Submission 60, p. [19].
57 Mrs Margy Osmond, Chief Executive Officer, TTF, Committee Hansard, 2 March 2023, p. 38; and TTF Submission 11, p. 2.
58 EA, Submission 117, p. 3.
59 EA, Submission 117, p. 7.

> The best practice example of supporting appropriate tourism operations in parks demonstrated in the Great Barrier Reef Marine Park Authority's (GBRMPA) program where they link longer licenses, preferential marketing opportunities and access to training for operators certified to a global standard. These programs are all designed to encourage tour operators to manage a sustainable business, deliver high quality experiences and provide accurate information to guests in an engaging manner.[60]

4.55 The Australian Outdoor Industry described adventure activities as 'a point of difference' for Australia internationally but similarly observed a lack of regulation and standards. It also recommended the Australian Government partner with industry to support sector-wide accreditation for adventure tourism providers.[61]

Agritourism

4.56 ART submitted that agritourism is a major opportunity in regional Australia but argued 'red tape' and government regulation were a barrier. It called for leadership and investment from the Australian Government to unlock the potential in agritourism, submitting that the sector was predicted to grow from $7.4 billion to $18.6 billion by 2030.[62]

4.57 The Australian Chamber of Commerce and Industry agreed, noting:

> Agritourism is a key opportunity for developing product in regional Australia…
>
> Developing Agritourism will provide our visitors with unique, distinctly Australian experiences. While investment in required for product development in agritourism, equally of importance is the need to consider red tape reduction that enables innovation and growth.[63]

4.58 Airbnb told the Committee its short-stay platform was helping to connect agritourism and farm stay businesses with customers.[64]

Market diversification – opening the world to Australia

4.59 Several organisations made strong representations to the Committee about the need to diversify Australia's mix of inbound international visitor markets. The ATEC identified market diversification as a 'key opportunity' for the Australian tourism sector.[65] Austrade agreed, noting:

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60 EA, Submission 117, p. 9.
61 Australian Outdoor Industry, Submission 31, pages [4 and 6].
62 ART, Submission 41, p. 2.
63 ACCI, Submission 80, p. [4].
64 Airbnb, Submission 56, p. 5.
65 ATEC, Submission 44, p. 3.

> In the aftermath of the pandemic and with ongoing global economic uncertainties, maintaining a broad spread of markets is a prudent strategy. This also aligns with the Australian Government's broader trade diversification agenda…[66]

4.60 The purpose and benefits of market diversification in tourism are outlined in a recent Austrade Discussion Paper:

> Diversifying is about attracting a broader set of travellers from new and emerging markets to help future proof the Australian visitor economy, should future shocks or disruptions to traditional major traveller markets occur.[67]

4.61 This section of the report considers the international market opportunities that exist, after briefly considering Australia's recent international market diversification performance.

Pre-pandemic international market diversification performance

4.62 As noted in Chapter 1, international visitors are economically vital to Australia. In 2019, tourism was the country's fourth biggest export earner, with 36 per cent of total visitor expenditure coming from international visitors. More significantly, international visitors add more value to the economy than domestic visitors.

4.63 However, in its submission, Austrade noted Australia's admirable international performance was driven by reliance on a small number of markets, particularly China. Although it did add that other emerging markets such as Vietnam, Brazil, Taiwan, India and the Philippines were recording strong growth.[68]

4.64 By 2019, China was Australia's number one international market by both visitor numbers and expenditure, with its share of total international spend sitting at nearly 27 per cent. The next most significant market was the United States, sitting a long way behind at just 9 per cent.[69]

4.65 Other international visitation trends over the decade to 2019 are illuminating. Austrade analysis found that the growth of China and Eastern markets saw Asia's share of visitor expenditure increase from 39.7 per cent to nearly 57.5 per cent. In aggregate, visitor numbers from Asia grew by 131 per cent. By comparison, the growth in visitors from all other countries (including Australia's 'traditional' markets of New Zealand, North America, Europe and the United Kingdom) was only 34 per cent.[70]

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66 Austrade, Submission 73, p. 17.

67 Austrade, *Discussion Paper: International Diversification Strategy for the Visitor Economy*, 2023, p. 3, https://www.austrade.gov.au/en/how-we-can-help-you/working-groups-and-engagement/international-diversification-strategy-for-australias-visitor-economy, viewed 19 June 2024.

68 Austrade, Submission 73, p. 17.

69 Austrade, Submission 73, p. 37.

70 Austrade, Submission 73, p. 35.

International market opportunities

4.66 A major research report by Austrade in 2021 looking at opportunities for the Australian visitor economy after the COVID-19 pandemic extensively examined Australia's international source markets. A key opportunity identified was:

> Post-pandemic, the Visitor Economy should seek to achieve a well-balanced inbound market by nurturing its traditional sources (English-speaking and other Western markets) and doubling down on fast-growing Asian markets.[71]

4.67 This opportunity was embedded into the Australian Government's national long-term strategy for the visitor economy, THRIVE 2030. A key action of the strategy is to develop an international diversification strategy to identify emerging markets for travel and education.[72]

4.68 In its submission, Austrade highlighted that the Southeast Asia and India markets offer growth opportunities, noting each market would likely require unique products and promotions to encourage travel to Australia.[73] Subsequently, Austrade has issued a discussion paper providing a more extensive list of the 10 markets that show potential for growth beyond current levels. Of these, five are already TA priority markets, with the other five being: Vietnam, Taiwan, Philippines, Thailand and Brazil.[74]

4.69 Access to international markets is also important as it helps the sector manage seasonality throughout the year, including in the regions. For example, Ms Strathhearn from Tourism Tropical North Queensland noted how important the Chinese inbound market was for North Queensland:

> It bridge[s] a gap during our low season or off season through their travel with the Chinese New Year.[75]

4.70 Supporting these conclusions, the ATEC pointed to growing demand in India, Indonesia, and Vietnam.[76] At a local level, destinations such as Broome see huge potential from opening up to international markets, including in Asia. Ms Mills from the Yawuru Prescribed Body Corporate commented in evidence to the Committee:

> Broome is on the cusp of transformational change in the tourism industry, with some key projects, such as the Kimberley Marine Support Base, due to come

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71 Austrade, *Opportunities for the Visitor Economy*, June 2021, p. 48.

72 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, March 2023, p. 74, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

73 Austrade, Submission 73, p. 2.

74 Austrade, *Discussion Paper: International Diversification Strategy for the Visitor Economy*, 2023, p. 3 https://www.austrade.gov.au/en/how-we-can-help-you/working-groups-and-engagement/international-diversification-strategy-for-australias-visitor-economy, viewed 19 June 2024.

75 Ms Elannah Strathearn, General Manager, Marketing, Tourism Tropical North Queensland, Committee Hansard, 15 August, p. 18.

76 ATEC, Submission 44, p. 3.

> online in 2025. The size and the volume of cruise vessels stopping in Broome will increase significantly. Likewise, proposed direct international flights from Singapore will open up the region to the world, increasing international tourism visitation opportunities.[77]

4.71 While there was optimism for growth from new markets, other stakeholders cautioned on the need to be ready for more visitors from emerging markets. Mr Booth from Mudgee Region Tourism cautioned that travellers from different international markets require different products, arguing that tourism operators inexperienced with these markets would need cultural training and new product offerings tailored to new markets.[78]

4.72 Various submissions and witnesses discussed opportunities for new and emerging markets, while others highlighted the potential to further grow existing markets. For example, the ACT Government highlighted the opportunity to grow the New Zealand market, particularly for major events, by promoting the ease of travel between the two countries.[79] The TTF recommended Australia continued to progress initiatives with New Zealand, including a 'Seamless Trans-Tasman border', for easier travel between the two countries.[80]

The role of Australia in the Asia-Pacific region

4.73 Various submissions also reflected on the role of Australia as a hub in support of tourism in the Asia-Pacific region, both in terms of advocacy, development aid and capacity building and from the cultural exchange and nation-to-nation connections tourism facilitates.[81]

4.74 The Queensland Tourism Industry Council (QTIC) advocated that Australia be seen as a tourism support hub within the Asia-Pacific region.[82] Austrade talked about Australia's 'leadership role to support tourism growth and address issues of mutual interest,' including industry sustainability and resilience, streamlining visa arrangements, building workforce capacity, improving aviation access and sustainable aviation fuel.[83]

4.75 The Department of Foreign Affairs, Defence and Trade (DFAT) advised how the Australian Government engages with multilateral bodies in the Asia-Pacific region and more broadly on tourism policy, the challenges and needs of the tourism industry, and how Australia can support capacity building in the region.[84] The AAA

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77 Ms Ninielia Mills, Chief Executive Officer, Nyamba Buru Yawuru, Committee Hansard, 21 August 2023, p. 2.
78 Mr Tim Booth, Chief Executive, Mudgee Region Tourism, Committee Hansard, 26 June 2023, p. 43.
79 ACT Government, Submission 51, pages 2 and 5.
80 TTF, *Seamless Trans-Tasman border is first step to quicker, easier travel*, 24 July 2023, https://www.ttf.org.au/seamless-transtasman-border-first-step/, viewed 19 June 2024.
81 Austrade, Submission 73, p. 22.
82 Queensland Tourism Industry Council (QTIC), Submission 39, p. 3.
83 Austrade, Submission 73, p. 23.
84 Department of Foreign Affairs, Defence and Trade (DFAT), Submission 63, p. 2; see also Austrade, Submission 73, pages 22–23.

submitted Australia's airports were already playing a role building the capacity of airports across the South Pacific and called for government efforts to support and coordinate this engagement.[85]

4.76 The Australian Federation of Travel Agents (AFTA) commented that:

> Outbound travel diplomacy also provides an opportunity for Australia to consolidate its role in the Asia-Pacific region and create mutual benefits with our neighbours through increased tourism in the region that will grow and improve development outcomes.[86]

4.77 The Broome Chamber of Commerce and Industry Inc (BCCI) emphasised the 'untapped potential' of visitors from the Asia-Pacific, telling the Committee the Kimberly region was hindered by logistical limitations, but otherwise was 'ideally situated to facilitate strong connections with Asia'. The BCCI told the Committee that, if first-point-of-entry status was granted for its ports, and if international flights could be facilitated to Broome, the Kimberley would be able to leverage its proximity to Asia to become a 'dynamic conduit for cultural exchange and economic growth'.[87]

4.78 Reflecting on the opportunity for Australia to work with its Pacific neighbours to overcome the distance barrier for many international tourists, the TTF recommended:

> Our geographic location should be leveraged in a range of innovative ways, such as stop-over incentives, package offerings and streamlined travel movements. Australia should continue to closely engage with New Zealand policymakers across a range of issues including the progression of joint visa offerings and potentially the opportunity to visit two to three other countries within the Pacific region as part of this visa reform.[88]

Other opportunities for growing the visitor economy

4.79 In addition to the key opportunities identified in the previous chapter and above in this chapter to grow Australia's visitor economy, a number of other opportunities were also identified during the course of this inquiry and are outlined below.

Sustainable tourism

4.80 THRIVE 2030 identified advancing sustainable tourism as a key policy objective of the strategy, noting, 'sustainable tourism is central to the visitor economy's future success.' Austrade defines sustainable tourism as preserving Australia's natural and

85 AAA, Submission 76, p. 5.
86 Australian Federation of Travel Agents (AFTA), Submission 92, p. 17.
87 Broome Chamber of Commerce and Industry Inc (BCCI), Submission 115, p. 7.
88 TTF, Submission 11, p. 3.

cultural assets; respecting and nurturing cultures; and creating positive social impact.[89]

4.81 Austrade submitted that Australia's tourism industry nearly doubled over the past two decades, presenting challenges with balancing the economic benefits of the sector with the social, cultural, and environmental impacts it creates.[90]

4.82 Austrade advised the Committee that visitors were 'increasingly demanding more sustainable travel options.' Austrade also noted:

> There is an increasing expectation by visitors and communities that visitor economy businesses will be responsible in their practices to preserve our natural and cultural environment.[91]

4.83 EA echoed this view, telling the Committee that amid growing global environmental awareness there was growing consumer interest in the sustainability of tourism businesses.[92]

4.84 Booking.com's latest sustainable travel survey noted the continuing desire and demand for sustainable travel with 83 per cent of travellers confirming sustainable travel is important to them. The report also confirmed an increase from 66 per cent to 71 per cent of travellers between 2023 and 2024 who say they want to leave a place better than what they found it. Seventy-five per cent of travellers said they want to travel more sustainably over the next 12 months.[93] This points to the opportunity, if not the necessity, for Australian travel providers to embrace sustainability.

4.85 The Committee was encouraged by Australia's ranking on the World Economic Forum's Travel and Tourism Development Index that measures factors and policies to enable sustainable and resilient development in the tourism sector. For 2024, Australia was ranked number 5 of 119 countries covered by the Index. On environmental sustainability and socioeconomic impact measures, Australia ranked favourably compared to the pillar mean score.[94]

4.86 EA stated the significance and interconnectedness of sustainability with tourism in its evidence to the Committee:

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89 Austrade, *Sustainable tourism*, undated, https://www.austrade.gov.au/en/how-we-can-help-you/programs-and-services/thrive-2030-strategy/sustainable-tourism, viewed 5 April 2024.

90 Austrade, Submission 73, p. 20.

91 Austrade, Submission 73, pages 18–19.

92 EA, Submission 117, p. 2.

93 Booking.com, *Sustainable Travel 2024*, April 2024 https://www.sustainability.booking.com/_files/ugd/6b9913_6659f345409e498491ba8ef987fb13e1.pdf, viewed 20 June 2024.

94 World Economic Forum, *Travel and Tourism Development Index 2024 Insight Report*, May 2024, pages 11 and 35, https://www3.weforum.org/docs/WEF_Travel_and_Tourism_Development_Index_2024.pdf, viewed 16 July 2024.

> Intrinsically, tourism is about sustainability. It is about protecting the product, protecting our assets and protecting local communities. There is a real opportunity for Australia in this space.[95]

4.87 The TTF submitted that nearly half (47 per cent) of consumers want their next trip to be in nature and more than four in five travellers (83 per cent) prioritise sustainable travel. It recommended Australia therefore position itself as 'the leading environmentally sustainable destination of choice'.[96]

4.88 In its submission, Austrade noted that while THRIVE 2030 has begun the journey for a sustainable future in tourism, challenges for tourism businesses will only grow. In view of the world's climate and environmental crises, embracing sustainability challenge is the only option. Austrade noted the following as key measures to be considered to improve sustainability in tourism:

- Enhancing industry resources and tools to assist sustainability adaptation, including measurement methods and tools.
- Regular reporting against visitor economy industry sustainability benchmarks.
- Supporting industry-led initiatives to drive sustainability within the sector.[97]

4.89 In November 2023, Austrade released the National Sustainability Framework for the Visitor Economy (Framework) in partnership with state and territory governments, TA, and following consultation with industry, First Nations, and government stakeholders. The Framework points to the following benefits from advancing sustainable tourism:

- improved profitability and reduced costs;
- improved reputation, customer and employee satisfaction, and competitiveness, with improved relationships with customers, employees, local communities, and suppliers;
- a reduced carbon footprint and environmental impact, whilst helping to preserve iconic and natural attractions that underpin the tourism industry; and
- improved adaptability and resilience to climate change.[98]

4.90 The SATC identified sustainability as both an opportunity for Australia as well as a challenge, highlighting increasing reticence among some travellers to undertake long-haul travel, particularly by air.[99] Witnesses spoke of a notion described as 'flight shaming' that is gathering momentum in many overseas markets. This refers to international travellers being criticised for taking long air flights as it is seen as

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95 Ms Elissa Keenan, Chief Executive Officer, EA, Committee Hansard, 15 August 2023, p. 18.

96 TFF, Submission 11, pages 2 and 3; see also Mrs Margy Osmond, Chief Executive Officer, TTF, Committee Hansard, 2 March 2023, p. 45.

97 Austrade, Submission 73, p. 21.

98 Austrade, *National Sustainability Framework for the Visitor Economy*, 24 November 2023, p. 5, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/national-sustainability-framework-for-the-visitor-economy, viewed on 16 July 2024.

99 SATC, Submission 23, p. [2].

undesirable to contribute to the vast carbon emissions generated by aircraft. Witnesses in Cairns stated they have seen evidence of flight shaming in northern hemisphere markets including Europe, the United Kingdom and North America, but also in markets geographically closer such as Japan and China.[100]

4.91 The SATC recommended increased efforts to explore alternative sustainable fuels as well as investment to grow electric vehicles.[101] The TTF recommended investment in sustainable technologies, including aviation biofuels, and cautioned that Australia was not well prepared to meet the increased demand for sustainable travel without significant investment.[102]

4.92 Singapore Airlines (SIA) Group noted sustainability was 'an increasing area of focus' for its customers, stakeholders, shareholders, and employees.[103] SIA Group told the Committee it was working to achieve net zero emissions by 2050 through new generation aircraft, sustainable aviation fuels, low-carbon technologies, higher operational efficiencies, and high-quality carbon offsets.[104]

4.93 EA highlighted the need for a national sustainability standard in Australia aligning to global sustainability principles that tourism businesses could be certified against. Without this, EA cautioned that it would be hard for visitors to be confident of the veracity of sustainability claims made by tourism operators.[105] It also highlighted the need to support small and medium-sized tourism enterprises in their implementation of sustainable practices.[106]

4.94 EA also submitted that sustainability would improve the resilience of the sector (see also Chapter 5):

> It is evident that the tourism industry needs to continue [to] develop new ways to improve and embrace sustainability to deliver positive environmental, socio-economic and cultural impacts to bring benefit to local communities and the destination whilst being economically sustainable to withstand shocks over time.[107]

4.95 The Tasmanian Government noted an extension to sustainable travel that is appealing to consumers demanding sustainability – referred to as 'positive impact travel'. It identified this as an opportunity for Tasmania for market positioning.[108] 'Positive impact travel' refers to travel where visitors leave a destination better than

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100 Ms Elannah Strathearn, General Manager, Marketing, Tourism Tropical North Queensland, Committee Hansard, 15 August 2023, p. 18.
101 SATC, Submission 23, p. [2].
102 Mrs Margy Osmond, Chief Executive Officer, TTF, Committee Hansard, 2 March 2023, pages 43, 45, 47 and 48.
103 Singapore Airlines (SIA) Group, Submission 128, p. [2].
104 SIA Group, Submission 128, p. [3].
105 EA, Submission 117, p. 6.
106 Ms Elissa Keenan, Chief Executive Officer, EA, Committee Hansard, 15 August 2023, p. 21.
107 EA, Submission 117, p. 2.
108 Tasmanian Government, Submission 67, p. 1.

they found it. Tasmania is exploring this through a social, cultural and environmental regenerative pilot project on Flinders Island.

Business and events tourism

4.96 The business events industry was heavily affected by the COVID-19 pandemic. According to the Business Events Council of Australia (BECA), more than 350 international events were cancelled due to border closures and health restrictions.[109] It noted the business events industry had been slow to recover due to long lead times between bookings and major events being held.[110] Recently released data from the TRA indicates that in 2023, international business event visitor numbers had reached 71 per cent of 2019 pre-pandemic levels.[111]

4.97 Many submitters emphasised the value of business and events tourism in driving recovery and growth within the tourism sector. Austrade noted events drove over 10 million visitors in 2019.[112] BECA argued the business events industry could:

> … reignite the post-COVID-19 economy [as a] … critical catalyst for the business-led, post-pandemic recovery.[113]

4.98 Austrade research found event visitors tend to spend more than other visitors, generating more jobs and investment. It showed that those attending an event spend about double as much per night as holiday visitors.[114]

4.99 BECA also pointed out that business events benefit regional Australia. Approximately half of all international delegates participate in pre and post event tours which typically involve visits to the regions. International corporate incentive programs are often delivered in regional Australia.[115] Austrade told the Committee these events offer opportunities to bring further investment in the tourism sector, attract talent, and develop new businesses.[116]

4.100 Destination Gold Coast emphasised the value of business events in driving weekday visitations and flattening the seasonal demand curve, particularly in regional areas.[117] Austrade, AAA, QTIC, and the Victorian Chamber of Commerce & Industry (VCCI) pointed to the importance of large sporting events in spurring international arrival numbers.[118]

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109 Business Events Council of Australia (BECA), Submission 64, p. [1].
110 BECA, Submission 64, p. [2].
111 Austrade, TRA, *State of the Industry Australia's tourism sector in 2023*, 14 June 2024, p. 41, https://www.tra.gov.au/en/economic-analysis/state-of-the-industry, viewed 17 June 2024.
112 Austrade, Submission 73, p. 9.
113 BECA, Submission 64, pages [1 and 2].
114 Austrade, *Opportunities for the Visitor Economy*, June 2021, p. 70.
115 BECA, Submission 64, pages [3].
116 Austrade, Submission 73, p. 9.
117 Destination Gold Coast, Submission 14, p. [3].
118 Austrade, Submission 73, p. 9; AAA, Submission 76, p 5; QTIC, Submission 39, p. 3; and Victorian Chamber of Commerce and Industry (VCCI), Submission 58, p. [4]. See also Destination Gold Coast, Submission 14,

4.101 According to Mrs Jan McCormick, Chief Executive Officer of Major Events Gold Coast, events held in regional areas such as the Gold Coast are 'a big deal'. She told the Committee there is often plenty of media coverage for events and participants are made to 'feel really special'.[119]

4.102 Noting the benefits of events tourism, the TTF called for policymakers to ensure events were 'appropriately leveraged' to incentivise visitors to continue their travels in Australia after the events end.[120]

4.103 However, Orange City Council warned accommodation shortages in regional areas were limiting the scale at which events could operate.[121] Mr Booth from Mudgee Region Tourism similarly cautioned:

> … [w]ithout proper planning, events can cause as much disruption as they cause benefit.[122]

4.104 Airbnb submitted that its short-stay online platform helps meet the surge in demand generated by events tourism in markets where accommodation supply is usually inelastic (see Chapter 5 for more on short-stay accommodation).[123]

4.105 TA highlighted the high yield nature of business events and advised it has a dedicated unit, Business Events Australia, to market Australia as a business events destination.[124] TA also administers the Australian Government's Business Events Bid Fund which provides financial assistance at the bidding stage to attract large scale events. In its submission, TA noted the success of the Bid Fund:

> Since commencing in July 2018, the Bid Fund has helped win 76 events for Australia, with a combined value of over $606 million to the economy to date. Research conducted by Deloitte in 2020 indicated that 75 per cent of these wins would not have been secured without Bid Fund support.[125]

4.106 However, BECA lamented reduction in funding for the program and called on the Australian Government to boost and expand the program.[126]

Accessible and inclusive tourism

4.107 Recently published research from TRA highlights the potential that exists for tourism operators by better catering for people with disability. In 2018, there were 4.4 million

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p. [2]; TTF, Submission 11, p. 2; Ms Emma Terry, Chief Executive, SATC, Committee Hansard, 20 February 2024, p. 27.

119 Mrs Jan McCormick, Chief Executive Officer, Major Events Gold Coast, Committee Hansard, 17 May 2023, p. 30.

120 TFF, Submission 11, p. 2.

121 Councillor Jason Hamling, Mayor, Orange City Council, Committee Hansard, 26 June 2023, p. 22.

122 Mr Tim Booth, Chief Executive, Mudgee Region Tourism, Committee Hansard, 26 June 2023, p. 45.

123 Airbnb, Submission 56, pages 6–7.

124 TA, Submission 60, p. [13].

125 TA, Submission 60, p. [13].

126 BECA, Submission 64, p. [3].

Australians (17.7 per cent of the population) with a disability.[127] For the period TRA examined (June quarter, 2023) there were 18.5 million trips valued at $6.8 billion taken by travellers with accessibility needs. This accounted for 23 per cent, or nearly a quarter, of all trips in that quarter. At a qualitative level, TRA reported:

> The tourism industry provides benefits to both its providers and consumers. While the benefits to tourism providers can be quantified in financial terms, the benefits to consumers are more intangible, but no less important. Such benefits may include improved health and quality of life. For people with disabilities or long-term health conditions, these benefits may be especially important.[128]

4.108 The QTIC highlighted the importance of inclusive tourism, submitting,

> … equity, inclusivity, and diversity should permeate all aspects of the visitor economy.[129]

4.109 It noted that 2023 was the Queensland Year of Accessible Tourism, aimed at encouraging and promoting industry education, best practice, and to improve tourism offerings for people with disability. QTIC suggested a more inclusive tourism sector would offer opportunities for workforce growth, and that initiatives to improve tourism offerings for people with disabilities and impairments would support a 'wider spectrum of visitors and workers'.[130]

4.110 EA advocated for support to help business cater better for visitors with accessibility needs, and noted the benefits and visibility generated by Queensland's Year of Accessible Tourism.[131]

4.111 The Tasmanian Government submitted that the state had worked with the disability sector to develop more innovative and inclusive tourism experiences and aspired to become a national leader in this space. It also noted the significant opportunity associated with inclusive tourism, whereby people with a disability make up around a fifth of Australia's population and around 15 per cent of people globally.[132]

4.112 THRIVE 2030 recognises the importance of improving accessibility, and highlighted strategy actions to improve accessibility.[133] In May 2024, Austrade released a guide for tourism operators to make their products and experiences more accessible.

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127 TRA, Austrade, *Travellers with accessibility needs in Australia*, May 2024, p. 4, https://www.tra.gov.au/content/dam/austrade-assets/global/wip/tra/documents/travellers-with-accessibility-needs-in-australia.pdf, viewed 16 July 2024.

128 TRA, Austrade, *Travellers with accessibility needs in Australia*, May 2024, p. 3, https://www.tra.gov.au/content/dam/austrade-assets/global/wip/tra/documents/travellers-with-accessibility-needs-in-australia.pdf, viewed 16 July 2024.

129 QTIC, Submission 39, p. 3.

130 QTIC, Submission 39, p. 3.

131 EA, Submission 117, p. 10.

132 Tasmanian Government, Submission 67, p. 2.

133 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022 to 2030*, March 2023, pages 50 and 81, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 20 September 2024.

Called the *WELCOME Framework*, the guide contains simple practical tips to help business be more accommodating of people with disability.[134]

Committee comment

Regional tourism

4.113 The Committee sees huge opportunity for Australia's regional areas to tap into international markets if the 'dispersal challenge' and other supply and demand impediments can be addressed. The Committee heard and saw first-hand how Australia's regions showcase the country's rich histories and cultures and offer incredible experiences for tourists. Regional tourism also brings significant economic and social benefits to local communities.

4.114 The Committee is convinced that to be more successful, regional tourism businesses must continually develop new products and build capacity to deliver high quality services that satisfy the needs of the diverse array of international visitors, as well as domestic visitors. Experience from the pandemic illustrates that while Australians want to visit regional areas, the attractions may not be strong enough to drive regional visitation when considered against international travel options.

4.115 The Australian Government and local and state governments can assist in building supply by continuing to streamline planning and development regulations, and prioritising labour and skilling policies that encourage workers into regional areas. The Committee believes tourism businesses in regional communities must work individually and collectively across locations to together build a greater mix of quality experiences that appeal to an array of visitors. The Committee also encourages tourism training provers to provide more accessible and targeted training to regional tourism operators, particularly First Nations businesses, to build skills and capacity within individuals and regional communities and improve the quality, management and promotion regional tourism offerings.

4.116 The Committee was concerned to hear regularly about the low quality of some accommodation and other tourism assets in regional and areas. In some areas, the Committee also heard tourism business owners express fear and uncertainty about the sustainability of their businesses and the flow on implications for their employees and communities. Ongoing investment by governments at all levels in enabling infrastructure and services, such as aviation, roads and rail to facilitate efficient movement of visitors not only supports regional communities and tourists, but can drive private investment into new and refreshed tourism infrastructure that will encourage increased visitation. The Committee sees a clear role for the Australian Government to co-invest in regional tourism stock to support this vital industry and Australian regional communities.

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134 Austrade, *The WELCOME Framework*, May 2024, https://www.austrade.gov.au/content/dam/austrade-assets/global/wip/austrade/documents/the-welcome-framework.pdf, viewed 16 July 2024.

4.117 The Committee firmly believes improving aviation access into regions is crucial to growing regional tourism, including First Nations tourism, nature-based tourism and agritourism. Limited services and the high cost of flights into the regions are significant impediments to higher regional visitation. While decisions on which routes to fly and pricing are ultimately for airlines to make, governments can enable greater supply and competition through policy settings and improving air infrastructure. The Committee was pleased to see the aviation reforms recently announced by the Australian Government to enable greater domestic airline competition including into the regions (see Chapter 5) and encourages the Australian Government to explore more opportunities for regulatory reform in aviation with the implementation of its Aviation White Paper.

4.118 The potential offered by nature-based tourism was apparent to the Committee. However, it was also apparent that opening up National Parks and other protected areas to increased visitations brings risk of environmental degradation. The Committee believes it vital that governments lead development of nationally consistent standards for businesses operating in protected areas, noting there are already solid global standards and existing programs which can be drawn from.

4.119 The Committee was also struck by the need for more direction from governments and action by businesses to address the dispersal challenge, and to better understand and increase demand from international markets into regions within and around Australia. This can be facilitated by improved coordination between all levels of government, regional tourism bodies and business for both destination planning and destination marketing, as well as between the Australian Government and the governments of neighbouring countries, including New Zealand. This could be achieved through a 'bottom up' approach, with regions providing greater input into planning, development and marketing facilitated by planning tools, communications mechanisms and governance structures. Such an approach could be taken to further develop opportunities for nature-based tourism and agritourism.

4.120 The Committee also expects many of the challenges outlined above are also relevant to peri-urban areas. As such, the Committee considers it appropriate that Tourism Australia and Austrade take steps to determine the extent to which these recommendations may also apply in such areas.

Market diversification

4.121 The Committee notes the significant economic and cultural benefits of increasing the number and source of international visitors to Australia. The Committee agrees there was cause for concern regarding market concentration that built up over the decade to 2019, with over a quarter of Australia's international tourism earnings coming from one country – China. The Committee believes pursuing a greater number of markets will help diversify the sector, reducing risk should particular markets decline.

4.122 The Committee commends the industry and governments for striving to achieve a broader portfolio and more balanced mix of international markets through Austrade's forthcoming International Diversification Strategy.

4.123 The industry must be prepared to provide the products and services that will be expected by visitors from countries Australia chooses to target. The Committee encourages governments and industry to ensure these issues are also addressed in the International Diversification Strategy.

Other opportunities

4.124 The Committee notes the growing demand for sustainable travel. While it is vital to maintain natural attractions for the future of the tourism sector, it is also critical the sector plays its part in mitigating climate change and is environmentally responsible. The protection of natural and cultural assets is intrinsically linked to the future success and sustainability of the tourism sector.

4.125 Australia is already viewed as a world leader on sustainability in tourism. This position must be maintained. Efforts in this regard are even more crucial given impediments for large and remote countries, including from 'flight shaming'. The Committee was persuaded that there is a strong need for a consistent national standard and certification system to encourage and guide the implementation of sustainable practices. This would also provide visitors certainty regarding the sustainability credentials of operators.

4.126 The Committee acknowledges the value of events, including business events, to the tourism sector, regional economies, and the Australian economy. The Committee encourages stakeholders to continue their work and collaboration to drive event visitation from both domestic and international participants. Governments and the events sector should consider strategies and promotional activities that highlight steps the sector is taking to minimise the environmental impacts of events.

4.127 With an ageing population in Australia and a significant percentage of the population living with disability, the Committee commends industry and government efforts to make tourism more accessible. The Committee encourages tourism businesses to continue exploring and improving ways to allow increased and respectful engagement of this part of the population with tourism experiences that are open to the wider public. In addition to being more inclusive, this opens tourism businesses up to a significantly sized potential market. The Committee also acknowledges the other benefits that can arise from growing this sector, including through employment opportunities for those with a disability and greater social inclusion.

Recommendations

Recommendation 7

4.128 The Committee recommends that Austrade develops, in consultation with Tourism Australia, State Tourism Organisations and Regional Tourism Organisations, a Regional Dispersal Strategy to drive greater domestic and international visitation into more of Australia's regions.

Recommendation 8

4.129 The Committee recommends that tourism training providers make training more accessible for regional tourism operators, particularly through culturally appropriate partnership with First Nations businesses, in order to support innovation.

Recommendation 9

4.130 The Committee recommends that the Australian Government supports the sustainability of the tourism sector in regional communities, and the development of both accommodation and attractions in regional areas.

4.131 Where appropriate, the Australian Government should consider incentives to promote development, co-investment in tourism stock and other mechanisms to promote development in regional areas.

Recommendation 10

4.132 The Committee recommends that the Australian Government, in the context of implementing the Aviation White Paper, prioritises policies that will achieve more accessible and affordable regional air access for travellers across Australia.

Recommendation 11

4.133 The Committee recommends that in developing its International Diversification Strategy, Austrade includes actions that build industry capability to meet the needs of visitors coming from the new markets identified in the Strategy.

Recommendation 12

4.134 The Committee recommends Austrade supports industry to develop and implement national standards and certification systems to promote best practice and deliver quality service outcomes for identified sectors. These standards should be aligned with global standards where applicable. The Committee recommends that Austrade and industry consider the following sectors as priorities for standards development:

- **sustainable practices within the tourism sector; and**
- **tourism activities in national parks and other protected areas, including Indigenous Protected Areas.**

Recommendation 13

4.135 The Committee recommends the Australian Government prioritise the development of policies which improve regional transport and infrastructure, in coordination with state and local governments.

Recommendation 14

4.136 The Committee recommends that the Australian Government considers the expansion of first-point-of-entry status for ports, in order to promote access to regional tourism.

Recommendation 15

4.137 The Committee recommends the Australian Government engage with the government of New Zealand and the governments of other neighbouring countries to develop and implement innovative initiatives and opportunities to encourage tourists to visit multiple countries in the region; for example joint visa offerings.

Recommendation 16

4.138 The Committee recommends that the Australian Government works with states and territories to support the promotion of regional tourism initiatives through effective marketing, improving transport linkages, streamlining regional development and providing incentives for investment.

4.139 This should be informed by enhanced destination management plans developed by state and territory governments in collaboration with regional tourism operators

Recommendation 17

4.140 The Committee recommends the Australian Government seeks opportunities to promote nature-based tourism and agritourism in combination with developing policies directed at enhancing international tourism to regional areas, including through streamlining approval processes with state and national parks and the *Environment Protection and Biodiversity Conservation Act 1999* (Cth).

Recommendation 18

4.141 The Committee recommends the Australian Government works with State and Regional Tourism Organisations to promote the inclusion of people with a

disability in the tourism sector, including through inclusion on national and state tourism organisation boards.

5. Enabling a prosperous and resilient visitor economy

5.1 This chapter considers the key tourism policy and sectoral management issues that the Committee heard need addressing to enable the sector's sustainable growth and maximise its potential. This includes how well the sector collaborates and communicates to manage supply and demand; the importance of data; workforce, transport and infrastructure issues; and climate and disaster resilience and insurance.

5.2 The Committee notes that some of these challenges – like workforce and transport – are not specific to the tourism sector, and they impact across the economy. They are often complex problems, solutions for which go beyond the scope of this inquiry. However, the report nonetheless highlights them to provide a complete picture of challenges facing the sector. The chapter concludes with the Committee's views on these matters and a series of recommendations.

Improving collaboration

5.3 Chapter 2 described the complex ecosystem that is the tourism sector and noted the importance of all parts working seamlessly to deliver quality visitor experiences. This requires strong collaboration and effective governance structures. This section outlines stakeholder views on current collaboration and suggestions for improvement.

'Supply-side' collaboration – enabling industry growth and development

5.4 Many witnesses stressed that it is local operators and officials who understand their products and operating environment best, with the inference that federal, state and territory government agencies should listen more to local voices in addressing industry challenges such as infrastructure needs, transport access to feed into development of policy and programs. Dr Gabby Walters, Associate Professor in Tourism at the University of Queensland observed:

> Tourism is best managed at the local level because you've got people who know the area, know their market and know their product.[1]

[1] Dr Gabby Walters, Associate Professor in Tourism, University of Queensland, Committee Hansard, 17 May 2023, p. 42.

5.5 Ms Alina Bain, Chief Executive Officer at the Launceston Chamber of Commerce also stressed the need to have local industry voices at the table to develop strategies and solve problems:

> I say to government and to council, invite industry into the room … [T]here may be solutions that you're unable to think of, or maybe it's not for government to provide that solution. The other piece to that is that if you bring industry and business to the table sooner rather than later they can see what's coming down the pipeline and they can gear up for it.[2]

5.6 Ms Bain also expressed frustration about the 'vast number of strategies, policies and plans in the state government' and how it is unreasonable to expect small tourism operators to work their way through this complexity.[3]

5.7 The Australian Capital Territory (ACT) Government submitted that the greatest impact on Australia's visitor economy would come from a nationally agreed approach to tourism, in which the Australian Trade and Investment Commission (Austrade), Tourism Australia (TA), and state and territory tourism organisations are aligned. The ACT Government suggested such areas would include promotion to priority markets, investment in research, and in the development of specific products and experiences tailored to international markets.[4]

5.8 'Comprehensive Collaboration' is the first policy pillar of the Australian Government's THRIVE 2030 national strategy. The 'THRIVE 2030 collaboration framework' cuts across three levels of government, and provides for industry input through an implementation advisory group and two technical working groups. THRIVE 2030 notes the complexity of collaboration at the regional level due to the large number of local government agencies across Australia. To address this, it states it will leverage the Regional Development Australia (RDA) network to facilitate regional engagement.[5]

'Demand side' (destination marketing) collaboration

5.9 Evidence received regarding current arrangements for collaboration on marketing is considered in the next section on destination marketing.

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2 Ms Alina Bain, Chief Executive Officer, Launceston Chamber of Commerce, Committee Hansard, 1 May 2024, p. 26.

3 Ms Alina Bain, Chief Executive Officer, Launceston Chamber of Commerce, Committee Hansard, 1 May 2024, p. 26.

4 Australian Capital Territory (ACT) Government, Submission 51, p. [4].

5 Australian Trade and Investment Commission (Austrade), *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, March 2023, p. 28, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

Destination marketing

5.10 Due to the competitive nature of markets for international and domestic visitation, well-resourced destination marketing organisations (DMOs) are critical to position Australia as a desirable choice. This section of the report considers the roles the many DMOs in Australia includes the reflections of inquiry participants on Australia's national DMO, TA, and its most recent marketing campaign.

The complicated 'destination marketing' landscape

5.11 There are multiple levels of DMO's in Australia. As outlined in Chapter 2, TA is the national DMO, and focusses on international visitor attraction with domestic marketing being 'within the remit of the States and Territories'.[6] The objects and functions of TA are outlined in the *Tourism Australia Act 2004* (Cth), which emphasise TA's destination marketing role to drive overseas and domestic visitation.[7] There are also objects to foster a sustainable tourism industry, increase the economic benefits to Australia from tourism, and research, reporting, and communicating to the tourism industry.

5.12 Under the Act, the Minister for Tourism can give direction to TA regarding its functions via a Statement of Expectation. In addition to reinforcing its focus on marketing, the current Statement of Expectation (dated 11 July 2014) directs TA to support non-marketing issues including product development, tax and regulation, developing tourism infrastructure, and support tourism investment.[8] However, the Committee noted from TA's evidence that it engages in non-marketing issues, including tourism policy and programs such as visas and air service agreements (see Chapter 2).

5.13 Each state and territory has its own DMO, referred to as a State Tourism Organisation (STO). In addition to STOs, there are numerous Regional Tourism Organisations (RTOs) around Australia which perform a range of functions including marketing (mainly for domestic visitation) and capability development. At the local level, the Committee also heard from councils and local government authorities (LGAs) who can also take a role in tourism marketing.

5.14 Mr Shane O'Hare, Chief Executive Officer of Launceston Airport explained the multi-layered marketing approach in the state of Tasmania:

> The job of Tourism Tasmania is to promote 'brand Tasmania', if you like, and then the role of the regional tourist offices, like Visit Northern Tasmania, is more

6 Tourism Australia (TA), Submission 60, p. [1].

7 *Tourism Australia Act 2004* (Cth), sections 6 and 7.

8 See Minister for Trade and Investment, Letter to Mr Geoff Dixon Chair TA – Statement of Expectations, 14 July 2014, https://www.tourism.australia.com/content/dam/digital/corporate/documents/tourism-australia-statement-of-expectation.pdf, viewed 27 June 2024.

> to promote the products of those particular regional tourism offices, and we do have a number of those here in Tasmania as well.[9]

5.15 The Committee heard examples of where the delineation between agencies and functions has been flexible. TA explained it temporarily undertook domestic marketing during COVID-19 but upon re-opening of borders, its focus returned to the international market.[10] The Committee also noted the higher quality of domestic tourism marketing that occurred during the pandemic when compared to pre- or post-COVID-19, potentially as a result of this heightened integration.

5.16 The Committee also heard that while TA has the lead role in international marketing, STOs also participate in this space. TA advised it:

> … works closely with the state and territory tourism organisations (STOs) through our 'one voice' strategy to foster a whole-of-country approach to destination marketing. Tourism Australia offers all STOs the opportunity to partner on all campaigns.[11]

5.17 Mr Brenton Cox, Managing Director at Adelaide Airport stressed the important role of TA as a 'brand spearhead', noting that TA should not try to be 'too many things'. He asserted:

> It is powerful to have that brand spearhead and to do that really well. I think it's critical that we continue to value the role that Tourism Australia has to play there, because, again, they're competing with some very well-funded international competitors.[12]

Reflections on destination marketing collaboration

5.18 It was not a surprise that the Committee heard of the need for stronger collaboration and coordination between destination marketing organisations, given their large numbers. This was more evident from RTOs and LGAs, with STO's generally reflecting on their positive working relationship with TA. For example, the South Australian Tourism Commission (SATC) noted a close working relationship and an alignment of international market strategies,[13] and Mr Scott Lovett, Deputy Chief Executive Officer at the Northern Territory Government spoke of close relationship between STOs and TA.[14]

5.19 The perspective from the regions was often different. There was also concern that TA was not always well informed about regional tourism products, with the result

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9 Mr Shane O'Hare, Chief Executive Officer, Launceston Airport, Committee Hansard, 1 May 2024, p. 42.
10 TA, Submission 60, p. [1].
11 TA, Submission 60, p. [14].
12 Mr Brenton Cox, Managing Director, Adelaide Airport, Committee Hansard, 20 February 2024, p. 54.
13 South Australia Tourism Commission (SATC), Submission 23, p. [3].
14 Mr Scott Lovett, Deputy Chief Executive Officer, Department of Industry Tourism and Trade, Northern Territory Government, Committee Hansard, 17 April 2024, pages 59–60.

campaigns do not capture the 'nuance and regional gems' of regional Australia, and that campaigns are:

> … often dominated by icons and don't reflect regional attractions or differences.[15]

5.20 For example, the Orange City Council stated that TA's campaigns were:

> … all about kangaroos, the opera house and the Sydney Harbour Bridge.[16]

5.21 However, Australian Regional Tourism (ART) told a more positive story about regional engagement, submitting that TA had:

> … a well-developed relationship with the regions and a good understanding of product and need.[17]

5.22 It also suggested there was a missing piece of 'handing over' international tourists to RTOs and STOs to encourage regional visitation.[18] Destination Central West NSW requested more information about upcoming TA opportunities so it could leverage opportunities, and called for an increased focus on domestic marketing to drive international visitors to the region.[19] It also raised concerns that TA was not adequately staffed to engage with regions.[20]

5.23 Other witnesses pointed to the need to complement international campaigns with funding to support and maintain local tourism products – particularly authentic First Nations experiences and regional operators (see also Chapters 3 and 4).[21]

5.24 Destination Central West NSW suggested greater alignment and coordination was needed to avoid duplication between STOs and TA,[22] with Mr Sean Haylan, General Manager at Destination Central West NSW noting the presence of staff from both TA and STOs in overseas marketing roles.[23]

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15 Mr Paul Seaman, Chair, Visit Northern Tasmania, Committee Hansard, 1 May 2024, p. 25.

16 Mr Glenn Mickle, Tourism Manager, Orange City Council, Committee Hansard, 26 June 2023, p. 20; and Councillor Jason Hamling, Mayor, Orange City Council, Committee Hansard, 26 June 2023, p. 22.

17 Australian Regional Tourism (ART), Submission 41, p. 3.

18 Mr Glenn Mickle, Tourism Manager, Orange City Council, Committee Hansard, 26 June 2023, p. 22.

19 Mr Sean Haylan, General Manager, Destination Central West NSW, Committee Hansard, 26 June 2023, pages 14 and 23.

20 Mr Sean Haylan, General Manager, Destination Central West NSW, Committee Hansard, 26 June 2023, p. 19.

21 See for example, Ms Nerida Sweetapple, General Manager, Orange360, Committee Hansard, 26 June 2023, pages 14 and 15; Mr Sean Haylan, General Manager, Destination Central West NSW, Committee Hansard, 26 June 2023, p. 14; Ms Rachelle Robb, Director, Corporate and Commercial Services, Orange City Council, Committee Hansard, 26 June 2023, p. 16; Ms Nerida Sweetapple, General Manager, Orange360, Committee Hansard, 26 June 2023, p. 19.

22 Mr Sean Haylan, General Manager, Destination Central West NSW, Committee Hansard, 26 June 2023, p. 23; see also Mrs Jan McCormick, Chief Executive Officer, Major Events Gold Coast, Committee Hansard, 17 May 2023, p. 33.

23 Mr Sean Haylan, General Manager, Destination Central West NSW, Committee Hansard, 26 June 2023, p. 23.

5.25 TA submitted it works closely with STOs 'through [its] "one voice" strategy to foster a whole of country approach to destination marketing', [24] and involves them in campaign planning, intergovernmental forums, and co-locates with STO representatives in offshore offices. For regional engagement, TA noted it has an industry relations team that engages across regional Australia including with RTOs, councils, industry associations and directly with operators.[25]

Tourism Australia campaign effectiveness

5.26 In this section, the Committee reflects on evidence received on effectiveness of TA's campaigns since international borders re-opened in February 2022. The SATC submitted that 'repositioning' Australia's brand post-COVID-19 was a significant opportunity, and recommended efforts focus on key markets, highlighting safety as well as its environmental and sustainability.[26]

5.27 Evidence on TA's performance in its primary international marketing role was overwhelmingly positive. Sector peak bodies,[27] STOs and RTOs[28] were amongst those praising TA's performance. Many called for TA's funding to be increased to $200 million per year[29] or higher[30] given the fiercely competitive market and rising costs. Mr Evan Hall Chairperson of the Australian Tourism Industry Council (ATIC) noted that TA has suffered from a lack of funding increases over a long period:

> One of the challenges that we've had is that Tourism Australia—which on the whole I would describe as a fairly effective organisation—in doing that destination marketing role has not had a real increase in budget for about 15 years…
>
> Again, that is in a highly globally competitive market, so the ability for Tourism Australia to cut through is critical to the success of the industry. Frankly, they simply don't have the resources that they used to have to attract the market that we used to receive.[31]

5.28 In October 2022, TA's launched its post-COVID-19 international campaign headlined by the description and slogan '*Come and Say G'day'*. The campaign was designed to re-introduce Australia to the world after two years of closed borders. It follows Ruby, a computer-generated kangaroo, voiced by Australian actress Rose Byrne, and Louie, a toy unicorn representing international tourists. The multi-channel campaign

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24 TA, Submission 60, p. [14].
25 TA, Submission 60.1, p. [3].
26 SATC, Submission 23, p. [2].
27 See for example, Australian Tourism Export Council (ATEC), Submission 44; Australian Chamber of Commerce and Industry (ACCI), Submission 80; ART, Submission 41.
28 See for example Mr Scott Lovett, Deputy Chief Executive Officer, Department of Industry Tourism and Trade, Northern Territory Government, Committee Hansard, 17 April 2024, p. 60; Mr Danial Rochford, Chief Executive Officer, Tourism Central Australia, Committee Hansard, 17 April 2024, p. 24.
29 See for example, ATEC, Submission 44, p. 3; ACCI, Submission 80, p. [3].
30 Tourism and Transport Forum (TFF), Submission 11, p. 2.
31 Mr Evan Hall, Chairperson, Australian Tourism Industry Council (ATIC), Committee Hansard, 13 September 2023, p. 3.

features Ruby visiting various Australian locations, with the intent of building knowledge of, and interest in, places in Australia.[32]

5.29 There has been widespread praise for the campaign. The Australian Tourism Export Council (ATEC) noted it had been 'extremely well received' and expressed confidence in the campaign.[33] The Backpacker & Youth Tourism Advisory Panel (BYTAP) 'commended' the campaign's effectiveness,[34] with the Tourism and Transport Forum (TTF) noting the campaign had 'hit the mark' internationally.[35]

5.30 The Embassy of the Philippines in Australia suggested that future campaigns be tailored to specific markets,[36] but the Australian Chamber of Commerce and Industry (ACCI) noted TA does have effective tailored messaging which had 'yielded incredible results', particularly in India, which had seen a 126 per cent increase in visitation.[37]

The importance of data

5.31 The THRIVE 2030 strategy highlights the importance of data and research for the success of the visitor economy:

> Relevant, robust and timely data and insights that are easily accessible, discoverable and cost-effective are critical tools that underpin decision-making, business growth and investor confidence. They are also important for measuring industry performance, monitoring trends and informing government policy development. In some cases, more granular data is needed to guide specific business activity or for decisions regarding particular geographic locations.[38]

5.32 Several witnesses highlighted the value of data in tailoring products and tracking in real time. Mr Tim Booth, Chief Executive at Mudgee Region Tourism, for example, argued a need for more real-time data:

> … we need to be data informed so we're not left in a position where we're unsure of what's going on, on the ground…
>
> Without that data it leaves a lot of regional areas pretty vulnerable.[39]

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32 TA, *Come and say G'day*, 2024, https://www.tourism.australia.com/en/resources/campaign-resources/come-and-say-gday.html, viewed 1 July 2024.

33 Mr Peter Shelly, Managing Director, ATEC, Committee Hansard, 2 March 2023, p. 48.

34 Backpacker & Youth Tourism Advisory Panel (BYTAP), Submission 20, p. [2].

35 Mrs Margy Osmond, Chief Executive Officer, TTF, Committee Hansard, 2 March 2023, p. 48.

36 Embassy of the Philippines, Submission 131, p. 2.

37 Mr John Hart, Executive Chair, Tourism, ACCI, Committee Hansard, 8 March 2023, p. 10.

38 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, March 2023, p. 34, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

39 Mr Tim Booth, Chief Executive, Mudgee Region Tourism, Committee Hansard, 26 June 2023, p. 46.

5.33 Ms Adrienne Readings, Chair of Destination Gold Coast said that data was often six months old when released, adding that real-time data was needed to enable agility.[40] Ms Karen Bollinger, Interim Chief Executive of Destination Gold Coast told the Committee that real-time data and data that tells operators how visitors are spending their money is 'something that the industry is crying out for', and said she was aware that this is something THRIVE 2030 is looking at.[41]

5.34 Dr Walters from the University of Queensland identified gaps in tourism data for the pre and post travel stages. Dr Walters advised that more data is needed about visitor travel preferences and visitor experiences, noting:

> They [Tourism Australia and STOs] come up with findings like Australia is ranked in the top five most desired destinations. But my question would be: what about those who didn't put Australia in the top five desired destinations? Why? They're the ones we need to know about…
>
> When people are leaving this country, are they satisfied? What was their experience like? What did they like about their experience? What didn't they like?[42]

5.35 The Committee was also alerted to a gap in data for First Nations tourism. The National Indigenous Australians Agency (NIAA) told the Committee that there is uncertainty about the exact number of First Nations tourism operators given the lack of First Nations business identifiers in national data sets. The NIAA went on to say:

> Significant gaps in data on the First Nations tourism sector presents challenges for business growth and investment decision making.[43]

5.36 The Committee was also made aware of the confusion that exists with data on the interaction between the tourism and international education. Various data points were provided as to the proportion of international tourism attributable to international students. In its original submission, Austrade stated that international education contributed $40 billion (or 68 per cent) to the international tourism sector's $59 billion of earnings in 2019.[44] Subsequently, Austrade clarified that students in Australia for more than 12 months are not technically counted as 'visitors' for the definition of tourism. On a more technical interpretation, international students comprise only 39 per cent of international tourism.[45]

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40 Ms Adrienne Readings, Chair, Destination Gold Coast and General Manager, Gold Coast Convention and Exhibition Centre, Committee Hansard, 17 May 2023, p. 49.

41 Ms Karen Bolinger, Interim Chief Executive, Destination Gold Coast, Committee Hansard, 17 May 2023, p. 49.

42 Dr Gabby Walters, Associate Professor in Tourism, University or Queensland, Committee Hansard, 17 May 2023, p. 42.

43 National Indigenous Australians Agency (NIAA), Submission 120, p. 4.

44 Austrade, Submission 73, p. 31.

45 Austrade, Submission 73.1, p. 2.

5.37 Austrade informed the Committee that, as part of THRIVE 2030, it has completed an investigation of data needs through a data working group.[46] The working group's report made three recommendations that are relevant here:

- Explore if financial data can provide visitor estimates for geographic locations.
- Develop mobility data which can improve domestic visitor statistics and produce event measurement and information on travel paths and trips.
- Expand research on environmental and social measures of tourism.[47]

5.38 The Committee notes that Tourism Research Australia (TRA) has released the first of its mobility data products in September 2023, with an interactive dashboard that allows users to see changes in movements for domestic tourism across states and territories. The data will be expanded in the future to include tourism regions.[48]

Workforce and skills

5.39 'A skilled, quality workforce of sufficient size to support world class service levels' is critical for the success of the tourism sector, according to Austrade.[49] Many submissions spoke of a chronic workforce shortage among both skilled and non-skilled workers in the tourism sector that is slowing the sector's growth. Austrade noted that the visitor economy has faced significant workforce and skills challenges over recent years, and that these challenges were exacerbated by the pandemic.[50] The workforce challenges discussed in Chapters 3 and 4 are in large part caused by the broader issues discussed below.

5.40 In terms of workforce shortages, the ACCI noted a gap of around 370,000 workers in March 2023.[51] The Australian Outdoor Industry submitted that adventure tourism operators lost half of its workforce during the pandemic, many of whom were foreign nationals on a working holiday or a student visa.[52]

5.41 In a recent report, TRA advised that while workforce numbers improved significantly over the course of 2022 and 2023, skills shortages remain. It reported the number of tourism filled jobs is still 13 per cent below pre-pandemic levels as at December 2023 and that skills shortages remain elevated relative to the pre-pandemic period,

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46 Austrade, Submission 73.2, p. 5.

47 Tourism Research Australia (TRA), Austrade, *Industry Data and Expert Analysis (IDEA) Working Group Recommendations Report April 2022-April 2023*, October 2023, pages 13–14, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-industry-data-and-expert-analysis-idea-working-group-final-report, viewed 16 July 2024.

48 Austrade, *THRIVE 2030 Implementation Reporting (November 2023)*, November 2023, p. 7, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-strategy-implementation-update-november-2023, viewed 28 June 2024.

49 Austrade, Submission 73, p. 15.

50 Austrade, Submission 73, p. 15.

51 Mr John Hart, Executive Chair, Tourism, ACCI, Committee Hansard, 8 March 2023, p. 1.

52 Australian Outdoor Industry, Submission 31, p. [1].

especially for particular roles such as waiters and chefs.[53] It also noted that seven occupations on the Australian Government's Skills Priority List are relevant to the visitor economy, including accommodation and hospitality managers; air transport professionals; train drivers; cooks, chefs, bakers, pastrycooks; waiters; travel consultants and; tour guides.[54]

5.42 The City of Gold Coast identified the shortage of talent and an inability to retain talent as a major challenge.[55] The Queensland Tourism Industry Council (QTIC) noted that the pandemic coupled with widespread demand had 'critically compounded pre-existing workforce issues', telling the Committee that workforce casualisation, a perceived lack of a career path, lack of affordable housing, low wages, and a slow return of short-term migrants with working visas were key issues.[56] In response, QTIC called for 'supportive frameworks' such as targeting workers from the Asia-Pacific region, build broader sector resilience, and clearer pathways for career progression.[57]

5.43 Tourism Western Australia noted that much of the work to strengthen the workforce of the tourism sector is being duplicated across the states and territories, and suggested this work could benefit from greater coordination.[58]

5.44 A 2021 report by Austrade investigated the sector's long-term structural workforce weaknesses, and found they are caused by the combination of a high reliance on part-time staff, job seasonality and insecurity, and lower average pay. It concluded:

> The transient, seasonal, and low-pay nature of the Visitor Economy workforce are structural weaknesses that are likely to undermine the health of the Visitor Economy itself.[59]

5.45 Austrade's report made some suggestions on how to address challenges around:

> … how best to nurture the workforce as a competitive advantage; the best formal and informal means to develop the necessary mix of cognitive, social and technology skills; how best to enhance national mechanisms to assess the state of the labour market and suggest actions to match demand with supply; and how best to draw on more diverse and underemployed labour supplies, including people with a disability and older Australians.[60]

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53 TRA, Austrade, *State of the Industry Australia's tourism sector in 2023*, 14 June 2024, p. 65, https://www.tra.gov.au/en/economic-analysis/state-of-the-industry, viewed 17 June 2024.

54 TRA, Austrade, *State of the Industry Australia's tourism sector in 2023*, 14 June 2024, p. 65, https://www.tra.gov.au/en/economic-analysis/state-of-the-industry, viewed 17 June 2024.

55 Ms Tanya Lipus, Manager of City Economy, City of Gold Coast, Committee Hansard, 17 May 2023, p. 74.

56 Ms Esther Anderson, Senior Research and Policy Officer, Queensland Tourism Industry Council (QTIC), Committee Hansard, 17 May 2023, p. 61.

57 Ms Esther Anderson, Senior Research and Policy Officer, QTIC, Committee Hansard, 17 May 2023, p. 61.

58 Tourism Western Australia, Submission 10, p. 1.

59 Austrade, *Opportunities for the Visitor Economy*, June 2021, p. 79, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/opportunities-for-the-visitor-economy-report, viewed 19 June 2024.

60 Austrade, *Opportunities for the Visitor Economy*, June 2021, p. 78, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/opportunities-for-the-visitor-economy-report, viewed 19 June 2024.

5.46 THRIVE 2030 highlights workforce as one of its seven priorities and established a working group in 2022 to identify gaps and provide practical solutions to workforce challenges.[61] The working group developed the 2023 Visitor Economy Workforce and Skills Interim Action Plan which lays the groundwork for an upcoming long-term strategy that links in with other government reviews into migration and employment. In its submission, Austrade outlined a range of workforce initiatives it has already implemented including: grants to promote tourism as a career of choice, funding an employment portal, and leveraging economy wide measures such as the Australian Government's Work Bonus for Older Australians.[62]

The importance of flexible and seasonal workers

5.47 The Committee consistently heard how the sector relies heavily on temporary migrants to fill casual and seasonal workforce vacancies. These include primarily working holiday makers (WHMs), international students, and overseas residents entering Australia under the Pacific Australia Labour Mobility (PALM) scheme. This has arisen due the sector's historical reliance on seasonal, casual and lower-paid cohorts of workers.[63]

Working holiday makers

5.48 The Department of Home Affairs described the WHM program as follows:

> The Working Holiday Maker visa allows young adults from certain countries to have a 12-month holiday in Australia, during which they can undertake short-term work and study. Extensions are available to WHM holders who undertake certain work in regional Australia.[64]

5.49 The program allows eligible persons from 48 countries to travel, work, and study in Australia.[65] WHMs contribute as both workforce and consumer whilst travelling. Austrade noted that WHMs – typically younger visitors on longer trips – are 'an important visitor cohort', with 308,000 arrivals spending about $2.6 billion in 2019.[66]

5.50 During the pandemic, WHM numbers dropped significantly, with fewer than 40,000 WHM visas granted in 2020–21. By 2022–23, this figure had climbed to over

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61 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, March 2023, p. 36, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

62 Austrade, Submission 73.2, pages 6–7.

63 Austrade, *Reimagining the Visitor Economy – Expert Panel Report*, September 2021, p. 28, https://www.austrade.gov.au/content/dam/austrade-assets/global/wip/austrade/documents/reimagining-the-visitor-economy-expert-panel-report.pdf, viewed 16 July 2024.

64 Commonwealth of Australia, Department of Home Affairs, *Review of the Migration System: Final Report*, March 2023, p. 54, https://www.homeaffairs.gov.au/reports-and-pubs/files/review-migration-system-final-report.pdf, viewed 16 July 2024.

65 Department of Home Affairs, *Working Holiday Maker (WHM) program*, undated, https://immi.homeaffairs.gov.au/what-we-do/whm-program/overview, viewed 8 April 2024.

66 Austrade, Submission 7, p. 9.

220,000.[67] The BYTAP described WHMs as 'integral to rebuilding tourism in both urban and regional Australia', noting their propensity to disperse and help address regional workforce shortages:

> WHM's dispersal is especially critical in filling casual temporary jobs in tourism & hospitality in regional areas, supporting these industries to be able to operate at full capacity.[68]

5.51 Regional Development Australia-Kimberley (RDA-K) described workforce shortages across the tourism industry in the Kimberley and highlighted that many major accommodation providers rely on WHMs and PALM workers.[69]

5.52 The ATEC concurred with the BYTAP regarding the benefits from WHMs like dispersal and a much-needed temporary workforce,[70] although the SATC cautioned that there is an ongoing challenge for dispersal of WHMs to the regions.[71] The SATC detailed its initiative to offer 200 subsidised flights to Australia for WHM applicants, resulting in over 2,000 applicants.[72]

5.53 The Embassy of the Philippines noted the recently agreed Memorandum of Understanding to establish WHM arrangements between Australian and the Philippines, which it claimed would boost tourism, trade, and people-to-people connections.[73]

5.54 Some witnesses expressed criticisms of the WHM program. Adventure Queensland submitted that recent WHM application fee increases had been detrimental, noting that Australians using reciprocal schemes in partner countries pay only 'a fraction' of that paid by WHMs coming to Australia.[74] The ATEC submitted that fee hikes had made Australia's WHM visa the most expensive among comparable overseas programs, claiming that high fees 'have directly and definitively impacted visitation',[75] with the ACCI warning WHMs are highly price sensitive.[76]

5.55 BYTAP and Adventure Queensland pointed to other factors limiting WHM numbers, including age limits, eligibility criteria for second and third year visas, visa caps, and English language requirements.[77] The ATEC recommended a temporary reduction in WHM fees and an expansion of the definition of 'eligible work'.[78]

5.56 In March 2023, the Department of Home Affairs released a review of the migration system, which recommended WHM visas be limited to one year to ensure the

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67 BYTAP, Submission 20.1, p. [1].
68 BYTAP, Submission 20, p. [1].
69 Regional Development Australia (RDA), Submission 116, p. 5.
70 ATEC, Submission 44, p. 3.
71 SATC, Submission 23, pages [2 and 5].
72 SATC, Submission 23, p. [4].
73 Embassy of the Philippines, Submission 131, p. 2.
74 Adventure Queensland, Submission 121, p. [1].
75 ATEC, Submission 44, p. 3.
76 Mr John Hart, Executive Chair, Tourism, ACCI, Committee Hansard, 8 March 2023, p. 3.
77 BYTAP, *Submission 20*, p. [1]; and Adventure Queensland, *Submission 121*, pages [1–2].
78 ATEC, Submission 44, p. 3.

primary focus remains cultural exchange rather than employment or migration.[79] The report pointed to the potential negative impact of WHMs (and international students) on youth and local unemployment in Australia, as well as the potential for worker exploitation.[80] Accommodation Australia cautioned against these changes, arguing it was important the program 'retains structural incentives for WHMs to work in the regions'.[81] Adventure Queensland cautioned that limiting WHM visas to one year would lead to the loss of around 40,000 WHMs each year. It further argued:

> The subsequent loss to regional tourism in particular, will be huge given this sector work and stay in regional areas for long periods of time and experience many tourism activities while there.[82]

5.57 In December 2023, the Australian Government released its Migration Strategy, stating it would evaluate regional migration settings and the WHM program to better support regional Australia, whilst ensuring migration pathways do not contribute to worker exploitation.[83] The Committee noted a 2024 Department of Home Affairs Discussion Paper that confirms the Australian Government is not considering limiting the WHM visa to one year, and will be looking at how to address exploitation.[84]

International students

5.58 International students contribute a vital workforce to the tourism sector, as detailed in the Committee's Interim Report focusing on the international education sector.[85] Accommodation Australia described the tourism sector as a 'strong beneficiary' of the international education sector, emphasising the value of their travel within Australia and their contributions to the tourism workforce – particularly the accommodation sector.[86]

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79 Commonwealth of Australia, Department of Home Affairs, *Review of the Migration System: Final Report*, March 2023, p. 9, https://www.homeaffairs.gov.au/reports-and-pubs/files/review-migration-system-final-report.pdf, viewed 16 July 2024.

80 Commonwealth of Australia, Department of Home Affairs, *Review of the Migration System: Final Report*, March 2023, p. 59, https://www.homeaffairs.gov.au/reports-and-pubs/files/review-migration-system-final-report.pdf, viewed 16 July 2024.

81 Accommodation Australia, Submission 122, pages 3 and 8.

82 Adventure Queensland, Submission 121, p. 1.

83 Commonwealth of Australia, *Migration Strategy: Getting migration working for the nation*, December 2023, pages 84–88, https://immi.homeaffairs.gov.au/programs-subsite/migration-strategy/Documents/migration-strategy.pdf, viewed 16 July 2024.

84 Commonwealth of Australia, Department of Home Affairs, *Supporting strong and sustainable regions, Review of Regional Migration Settings Discussion Paper – June 2024*, June 2024, p. 12, https://www.homeaffairs.gov.au/reports-and-pubs/PDFs/supporting_strong_and_sustainable_regions.pdf, viewed 16 July 2024.

85 Joint Standing Committee on Foreign Affairs, Defence and Trade, Parliament of Australia, *Inquiry into Australia's tourism and international education sectors, 'Quality and Integrity – the Quest for Sustainable Growth: Interim Report into International Education'*, October 2023, https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Foreign_Affairs_Defence_and_Trade/Tourismandeducation/Interim_Report_-_Inquiry_into_Australias_International_Education_Sector, viewed 16 July 2024.

86 Accommodation Australia, Submission 122, pages 18–19.

5.59 BYTAP submitted that international students bolster the tourism sector as students typically travel when on study breaks or after concluding their courses.[87] ATEC pointed to a 'multiplier effect', whereby the families and friends of international students often visit Australia.[88] The New South Wales (NSW) Government noted that prior to COVID-19, international students accounted for over 40 per cent of international visitor expenditure, with their friends and relatives who visited contributing further.[89]

5.60 The Victorian Chamber of Commerce and Industry (VCCI) called for efforts to attract and retain international students, and recommended more investment in paid internships and other work experience. It also advocated an online platform to connect students and employers, and short courses to rapidly upskill international students to help address skills shortages.[90] QTIC similarly called for more favourable policies and clearer pathways for international students to enter the workforce.[91]

5.61 During the pandemic, student visa work conditions were relaxed and then completely removed to allow visa holders to work over the fortnightly limit of 40 hours. A cap of 48 hours per fortnight was re-instated in July 2023. The City of Geraldton expressed concern that this was shrinking labour supply, negatively affecting service quality, and jeopardising business viability – particularly in regional areas.[92] The ATEC also called for new provisions to allow graduates from a wider range of degrees to stay and work longer to boost the workforce.[93]

5.62 The Committee reiterates its alarm at the evidence of workplace exploitation of students, reported on in its Interim Report. It made several recommendations to address this unacceptable conduct.[94] The Committee was pleased however to hear more encouraging evidence regarding student experiences from the ACT.[95]

Pacific Australian Labour Mobility (PALM) workers

5.63 The PALM scheme is an Australian Government program that allows eligible Australian businesses to hire workers from nine Pacific Island countries and Timor-Leste to fill specified roles when there are not enough local workers available.

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87 BYTAP, Submission 20, p. [1].
88 ATEC, Submission 44, p. 5.
89 New South Wales (NSW) Government, Submission 51, p. 3.
90 Victorian Chamber of Commerce and Industry (VCCI), Submission 58, pages [6 and 8].
91 QTIC, Submission 39, p. 4.
92 City of Geraldton, Submission 133, p. [3].
93 ATEC, Submission 44, p. 5.
94 Joint Standing Committee on Foreign Affairs, Defence and Trade, Parliament of Australia, *Inquiry into Australia's tourism and international education sectors, 'Quality and Integrity – the Quest for Sustainable Growth: Interim Report into International Education'*, October 2023, Chapter 5, https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Foreign_Affairs_Defence_and_Trade/Tourismandeducation/Interim_Report_-_Inquiry_into_Australias_International_Education_Sector, viewed 16 July 2024.
95 Ms Kareena Arthy, Deputy Director-General, Chief Minister, Treasury and Economic Development, ACT Government, Committee Hansard, 15 May 2024, p. 4.

5.64 While the scheme fills labour market gaps, particularly in the agricultural sector, it is also an important opportunity for building capacity in the Pacific workforce and enables employees to support their families and communities back home. The latest update, from June 2023, reports there were 39,644 PALM scheme workers in Australia working for 423 approved employers. Long-term workers sent an estimated $168 million in remittances to their home countries between July 2018 and May 2023. Short-term workers send an average $1,061 a month in remittances.[96]

5.65 Some submissions noted the opportunities presented by the PALM scheme as a source of low skilled workers in regional areas. The ACCI praised the scheme, and noted it had 'fairly significant integrity measures' underpinning it.[97] However, Tourism Western Australia submitted that operators often struggled to access the program due to labour market testing and the requirement for extensive participant support.[98]

5.66 Representatives from PALM source countries recommended improvements to the program, including mitigating the loss of workers from home countries, and increasing education and skills development for participants while in Australia.[99]

Workforce capability – skilled workers and skill development

5.67 As noted above, while workforce numbers (capacity) improved significantly in 2022 and 2023, skills (capability) shortages remain. Submitters identified two key solutions to the issue of workforce capability: education and training, and skilled migration.

Education and training - upskilling and reskilling

5.68 The ACCI's submission summarised that training and skill development in the tourism sector is addressed through four avenues: direct entry into skilled roles; training in blended pathways (apprenticeship/ traineeship); upskilling the existing workforce, and; reskilling the existing workforce to adapt to changing customer needs and trends.[100]

5.69 The ACCI outlined that its December 2022 submission to the Government's Employment White Paper addressed the direct entry pathway, noting the central role of vocational education and training (VET), and the importance of funding for that sector. It stressed that funding must cover both public and private VET providers and be responsive to skill shortages and to skill needs. It highlighted that travel and hospitality remain substantially unfunded at the State level, and is advocating that entry-level Certificate I – III programs be funded by States as part of the National

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96 Parliament of Australia, *The Pacific Australia Labour Mobility scheme: a quick guide*, September 2023, https://www.aph.gov.au/About_Parliament/Parliamentary_departments/Parliamentary_Library/pubs/rp/rp2324/Quick_Guides/PALMscheme, viewed 1 July 2024.

97 Mr John Hart, Executive Chair, Tourism, ACCI, Committee Hansard, 8 March 2023, pages 5–6.

98 Tourism Western Australia, Submission 10, p. 1.

99 See for example, Her Excellency Ms Hinauri Petana, High Commissioner, Samoa High Commission, Committee Hansard, 7 February 2024, pages 6–7.

100 ACCI, Submission 80, p. 12.

Agreement for Skills and Workforce Development (NASWD).[101] Accommodation Australia agreed, noting many hospitality qualifications have not always been funded and, like the ACCI, lamented the restriction of funds to public providers (including TAFE), noting the important role of private providers in the sector.[102]

5.70 Maximising direct entry requires attracting participants to the sector in the first place. To help this, Austrade and Tourism Industry Council South Australia (TICSA) stressed the need for tourism to be seen as a viable 'career of choice,'[103] to attract and retain workers.[104]

5.71 Sector peak bodies highlighted the criticality of apprenticeships and traineeships to building a skilled workforce. The ACCI noted the need for apprenticeship support for both skills development and school transition pathways. It called for government provided wage subsidies without limitation by skill priority lists, and the reinstatement of fixed monetary completion incentives to employers to assist retention.[105]

5.72 The TTF called for incentives for young Australians to join the tourism workforce, including reduced fees for skills and training programs.[106] Accommodation Australia recommended consideration be given to funding micro-credential (or skill set) courses because:

> With unemployment low, there is less incentive for a job seeker or existing employee to undertake a full qualification, but economic outcomes and productivity would be improved if they undertake some immediate skills development.[107]

Skilled migration

5.73 Skilled migrants are also a critical component of the tourism sector's skilled workforce. The TTF contended that 'attract[ing] international skilled workers' is critical to address a 'major supply constraint' on skilled labour. They explained:

> There is a misconception that the tourism industry is just cooks and chefs. It is a wide spread of professions including skilled workers in tourism management positions and highly skilled hospitality workers from overseas who have made the sector a lifelong career. Other areas that require focus include logistics, management, design and sustainability technology (i.e., in biofuels).[108]

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101 ACCI, *ACCI Tourism Employment White Paper Submission,* December 2022, https://www.australianchamber.com.au/wp-content/uploads/2023/04/2022-12-07-ACCI-Tourism-Employment-White-Paper-Final.pdf, viewed 25 June 2024.

102 Accommodation Australia, Submission 122, p. 13.

103 Austrade, Submission 73, pages 12 and 15.

104 Mr Shaun de Bruyn, Chief Executive Officer, Tourism Industry Council of South Australia (TICSA), Committee Hansard, 20 February 2024, p. 29.

105 ACCI, *ACCI Tourism Employment White Paper Submission*, December 2022, https://www.australianchamber.com.au/wp-content/uploads/2023/04/2022-12-07-ACCI-Tourism-Employment-White-Paper-Final.pdf, viewed 25 June 2024, pages 12–13.

106 TTF, Submission 11, p. 2; see also Australian Federation of Travel Agents (AFTA), Submission 92, p. 9.

107 Accommodation Australia, Submission 122, p. 13.

108 TTF, Submission 11, p. 1.

5.74 Evidence highlighted other issues in accessing skilled migrant workers, including delays processing visitor visas and airfare costs.[109]

5.75 Accommodation Australia told the Committee that skilled occupation lists on which these migration pathways rely are produced at the national level. It argued that skills demands are often local and therefore not identified through national analysis.[110] More generally, it called for flexibility in the jobs that could be facilitated through employer-sponsored migration pathways and recommended greater mobility for temporary skilled migrants to reduce risks of exploitation by employers.[111]

New workforce cohorts

5.76 To boost workforce capacity, Austrade recommended seeking workforce participation from 'under-represented cohorts', including mature workers, First Nations peoples, people with disability, younger workers, and women.[112]

5.77 The Committee notes the Australian Government has taken some steps in this area through the Work Bonus program for older Australians and the Tourism Local Navigator Pilot Program to encourage employment of people with disability. The potential to increase participation by First Nations peoples was considered in Chapter 3. The Committee also noted the NIAA's efforts to leverage employment for First Nations People by transitioning the Community Development Program to a new remote jobs program.[113]

Transport

5.78 Australia is a vast and remote country, making affordable, accessible and efficient transport critical. Given the significance of aviation and cruises in accessing Australia from both overseas and within Australia, this section concentrates on the challenges and concerns the Committee heard in relation to those two modes of transport.

Air travel

5.79 The SATC submitted that direct access by air for international visitors from key markets was 'a critical factor for tourism and economic growth', and emphasised it has a focus on ensuring easy and affordable access to South Australia from overseas and other Australian destinations.[114] Destination Gold Coast described the aviation sector as:

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109 TTF, Submission 11, p. 1.
110 Accommodation Australia, Submission 122, p. 8.
111 Accommodation Australia, Submission 122, pages 8 and 9.
112 Austrade, Submission 73, p. 15.
113 Austrade, *THRIVE 2030 Implementation Reporting (November 2023)*, November 2023, p. 12, https://www.austrade.gov.au/content/dam/austrade-assets/global/wip/austrade/documents/Thrive/thrive-2030-implementation-report-november-2023.pdf, viewed 26 June 2024.
114 SATC, Submission 23, p. [2].

> … essential infrastructure for both tourism and the broader community.[115]

5.80 Austrade explained the criticality of travel by air to Australia's tourism sector:

> Aviation is vital to bringing international visitors to Australia and moving Australians around the country. The ultimate objective is for a competitive, reliable and regular aviation network, both inbound and within Australia, that is well linked with other modes of transport.[116]

5.81 The Australian Airports Association (AAA) submitted that COVID-19 had a 'catastrophic' impact on Australian airports.[117] It told the Committee that aviation was already experiencing a slowdown prior to the onset of the pandemic which it said was due to low wages growth, a softening economy, and the maturity of travel and tourism markets in Australia. It predicted the aviation sector would continue to experience slow growth amid ongoing inflationary and cost of living pressures, and the high cost of aviation fuel.[118]

5.82 Austrade noted that the Australian Government's Aviation White Paper would provide a policy agenda out to 2050 to achieve a safe, reliable, competitive and environmentally friendly aviation sector.[119]

5.83 A recent update from TRA reveals that there has been a solid recovery in aviation capacity as at the end of June 2023 with further increases expected to be reported for 2024. TRA reports that domestic seat capacity was sitting at 94 per cent of pre-pandemic (2019) levels, with international capacity lagging a little further behind at 84 per cent.[120] The Bureau of Infrastructure and Transport Research Economics reported that in 2022–23, there were 29.8 million revenue passengers on international flights into Australia, having reached a peak of 42.1 million passengers in 2018–19. The figures for domestic flights were 55.3 million passengers and 71.1 million passengers respectively.[121]

5.84 Evidence received during the inquiry pointed to three major factors undermining air access to Australia for international visitors: capacity; costs; and concerns over the environmental impact of air travel.

5.85 Mr Dean Long, Chief Executive Officer of the Australian Travel Industry Association (ATIA), told the Committee that capacity is the number one constraint preventing a

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115 Destination Gold Coast, Submission 14, p. [2].

116 Austrade, Submission 73, p. 15.

117 Australian Airports Association (AAA), Submission 76, p. 1; see also Mr James Goodwin, Chief Executive, AAA, Committee Hansard, 29 March 2023, p. 1.

118 AAA, Submission 76, p. 3; see also QTIC, Submission 39, p. 3.

119 Austrade, Submission 73, p. 15.

120 TRA, Austrade, *State of the Industry Australia's tourism sector in 2023*, 14 June 2024, p. 61, https://www.tra.gov.au/en/economic-analysis/state-of-the-industry, viewed 17 June 2024.

121 Bureau of Infrastructure and Transport Research Economics (BITRE), *Yearbook 2023: Australian Infrastructure and Transport Statistics, Statistical Report*, 2023, p. 21, https://www.bitre.gov.au/sites/default/files/documents/bitre-yearbook-2023.pdf, viewed 16 July 2024.

full recovery of aviation in Australia. He went on to note that the main factor causing capacity constraint is regulatory disjointedness, explaining:

> We don't have a single place where decisions that directly impact supply of aviation seats to this country are made … [W]e need to bring that together. The ACCC [Australian Competition and Consumer Commission] is the right body to have that because they can have a look at what impact the bilateral would have on consumer price, how that overlays with an authorisation to competition law that's been provided and what the ultimate impact is going to be on those businesses. We need more supply, and that's really critical. We also need to review the competition settings that allow those authorisations to occur. I think what we need to see is making sure that the ultimate consumer is in the front and centre in that.[122]

5.86 Mr James Goodwin, AAA Chief Executive, attributed capacity constraints to physical constraints at airports, such as slots and terminal capacity; regulatory constraints, including movement caps and curfews; and network constraints, such as air traffic control and flight paths. He insisted these constraints,

> … present challenges in building increased connectivity to growth markets.[123]

5.87 On domestic capacity, the ATIA said the landing slot management system at Sydney Airport is:

> … fundamentally the handbrake on growth for our industry.[124]

5.88 The ATIA noted the current system dates back to a 1940s convention and it desperately needs reform.[125]

5.89 The Committee noted the Australian Government's announcement in February 2024 of a major package of reforms to the Sydney Airport demand management scheme that will modernise compliance, increase transparency, introduce penalties for anti-competitive behaviour, and improve connectivity for regional communities.[126]

5.90 Austrade and the TTF recommended that aviation capacity be increased by negotiating new and more flexible Air Service Agreements and building new infrastructure.[127] Western Sydney Airport similarly argued for a more liberal approach to bilateral air service agreements:

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122 Mr Dean Long, Chief Executive Officer, Australian Travel Industry Association (ATIA), Committee Hansard, 18 October 2023, pages 3–4.

123 Mr James Goodwin, Chief Executive, AAA, Committee Hansard, 29 March 2023, p. 1.

124 Mr Dean Long, Chief Executive Officer, ATIA, Committee Hansard, 18 October 2023, p. 3.

125 Mr Dean Long, Chief Executive Officer, ATIA, Committee Hansard, 18 October 2023, p. 3.

126 The Hon Catherine King MP, Media Release: 'Reforming Sydney Airport slots to boost efficiency, competition and consumers outcomes', 21 February 2024, https://minister.infrastructure.gov.au/c-king/media-release/reforming-sydney-airport-slots-boost-efficiency-competition-and-consumers-outcomes#:~:text=The%20Government%20is%20modernising%20the,field%20in%20slot%20allocation%20processes, viewed 16 July 2024.

127 Austrade, Submission 73, p. 3; and TFF, Submission 11, pages 1–2.

> Enabling airlines to make decisions on whether and how to service a route based on commercial and operational drivers, rather than regulatory considerations, promotes competition in aviation markets. This has flow-on benefits for Australian consumers, tourism and trade.[128]

5.91 Witnesses highlighted the potential of increasing the number of non-capital city airports that can receive international flights as a way to increase capacity. In the Kimberley, the Broome Chamber of Commerce & Industry (BCCI) and RDA-K highlighted the potential of Broome International Airport to bring more international visitors to the region, and called for the permanent provision of Australian Border Force personnel to service international flights.[129] The BCCI also pointed to the limited number of direct flights from major cities to Broome as a 'direct barrier to an increase of domestic tourism'.[130]

5.92 The AAA also highlighted opportunities to build direct routes to large regional airports, like Broome, that are already capable of receiving international flights. It noted an additional 13 airports across Australia could take international aircraft if they were serviced by Border Force personnel.[131]

5.93 The ACCI and the TTF pointed to the correlation between air capacity and airfares (cost).[132] The TTF also noted that some carriers had been reluctant to maintain air routes due to soaring costs that were anticipated to reduce demand.[133]

5.94 From an airline's perspective, Singapore Airlines (SIA) Group noted the factors an airline considers in deciding when and how much capacity to give to an airline route: an assessment of demand for travel between markets, schedule timings, aircraft type, manpower and the ability of airports to handle airline requirements.[134]

5.95 Accommodation Australia highlighted the value of increased airline access to Australia, arguing that more capacity would create competition and reduce airfares. It also called for an urgent review of the July 2023 decision to deny Qatar Airways' request to operate more flights to Australia, which it views as 'a major concern'.[135]

5.96 Many witnesses saw cost as a key constraint to travel, for example the City of Gold Coast identifying it as a barrier for long-haul travel.[136] The AAA conceded that Australia's remoteness leads to increased costs for international visitors, but submitted Australia's isolation is also part of the appeal for many tourists.[137] Dr

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128 Western Sydney Airport Submission 114, p. [2].

129 Broome Chamber of Commerce & Industry (BCCI), Submission 115, p. 6; and RDA, Submission 116, p. 4; see also Mr James Goodwin, Chief Executive, AAA, Committee Hansard, 29 March 2023, p. 2.

130 BCCI, Submission 115, p. 6.

131 Mr James Goodwin, Chief Executive, AAA, Committee Hansard, 29 March 2023, p. 3.

132 Mr John Hart, Executive Chair, Tourism, ACCI, Committee Hansard, 8 March 2023, p. 7.

133 TFF, Submission 11, pages 1–2.

134 Singapore Airlines (SIA) Group, Submission 128, p. [1].

135 Accommodation Australia, Submission 122, p. 15.

136 City of Gold Coast, Submission 105, p. [2]; and Ms Tanya Lipus, Manager of City Economy, City of Gold Coast, Committee Hansard, 17 May 2023, p. 74.

137 AAA, Submission 76, p. 3.

Walters told the Committee that prices for flights to Australia from key destinations had increased since the pandemic by as much as 50 per cent due to fuel costs and efforts by airlines to recoup costs incurred during COVID-19.[138] The QTIC cautioned that rising costs threatened to put Australia's brand at risk.[139]

5.97 While the price of flights is primarily a commercial decision by airlines, the AAA pointed to governments' role through regulation and infrastructure to create an economic environment that can help keep costs down. For example, regulations on caps and curfews, providing quality infrastructure, and negotiating bilateral air service agreements are all areas where governments can exercise influence.[140]

5.98 Destination Gold Coast called for investment in a national aviation attraction fund or subsidised flights to incentivise travel.[141] The NSW Government highlighted its Aviation Attraction Fund, designed to 'improve access and build aviation capacity in the state'.[142] The AAA recommended greater coordination across levels of government to attract and retain international air routes.[143] The TTF described these funds as 'vital to the return of capacity'.[144]

5.99 Ms Readings of Destination Gold Coast suggested aviation attraction efforts should be coordinated with destination marketing to ensure both demand for additional capacity as well as its supply to meet demand.[145]

5.100 Carbon emissions from aviation were noted as an increasing deterrent to air travel, particularly to long-haul travel. The SATC pointed to a desire among many travellers to reduce their carbon footprint, which it claimed was deterring some from choosing Australia.[146] As mentioned in Chapter 4, some witnesses referred to the 'flight shaming' phenomenon where air travel is demonised due to its contribution to emissions.[147] Austrade noted that the Australian Government's Aviation White Paper is expected to address the need for improved sustainability of air travel, including how to reduce emissions.[148]

5.101 Mr Goodwin of the AAA outlined efforts within the airport sector to meet net-zero commitments noting:

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138 Dr Gabby Walters, Associate Professor in Tourism, University of Queensland, Committee Hansard, 17 May 2023, p. 38.
139 Ms Esther Anderson, Senior Research and Policy Officer, QTIC, Committee Hansard, 17 May 2023, p. 61.
140 AAA, Submission 76, pages 5–6.
141 Destination Gold Coast, Submission 14, pp. [2–3]; Ms Karen Bolinger, Interim Chief Executive Officer, Destination Gold Coast, Committee Hansard, 17 May 2023, p. 46.
142 NSW Government, Submission 53, p. 3.
143 AAA, Submission 76, pages 3–4.
144 Mrs Margy Osmond, Chief Executive Officer, TTF, Committee Hansard, 2 March 2023, p. 37.
145 Ms Adrienne Readings, Chair, Destination Gold Coast and General Manager, Gold Coast Convention and Exhibition Centre, Committee Hansard, 17 May 2023, p. 47.
146 SATC, Submission 23, p. [4].
147 Ms Karen Bolinger, Interim Chief Executive Officer, Destination Gold Coast, Committee Hansard, 17 May 2023, p. 54.
148 Austrade, Submission 73, p. 15.

> We need to make sure that Australia, Australian tourism and the Australian economy are not disadvantaged as we transition to net zero.[149]

Cruise sector

5.102 According to Cruise Lines International Association Australasia (CLIA Australasia), around 1.3 million Australians took an ocean cruise prior to the COVID-19 pandemic, contributing around $5 billion to the Australian economy and supporting over 18,000 jobs.[150] Evidence to the Committee pointed to the growth in the demand for cruise tourism and the subsequent opportunities it presents – particularly for regional areas that are otherwise harder to reach for international visitors. CLIA Australasia argued that cruises bring widespread economic benefits to regional Australia, as well as to major cities.[151]

5.103 However, several submitters raised challenges that undermine the cruise sector's ability to deliver higher visitor numbers. For example, CLIA Australasia identified infrastructure was needed in Sydney to accommodate more cruise ships,[152] and called for regulatory certainty to support greater regional dispersal of passengers:

> With the right regulatory settings and infrastructure the cruise sector is confident it can support more Australians to travel within Australia and can offer international visitors longer cruise holidays that visit more Australian destinations.[153]

5.104 The Committee also heard about regulatory issues related to cruise ship arrival approvals. Cruise ships can only enter Australia at ports that are designated first-points-of-entry (FPOE), unless granted special approval to dock elsewhere. The Australian Government notes this ensures that vessels entering Australia can only do so at a locations that can manage biosecurity risks.[154] RDA-K submitted that requesting alternative port approval can be 'onerous, complex and time consuming'.[155] CLIA Australasia called for more border agency staff to clear cruise passengers arriving at Australian ports, as well as offering *en route* clearances.[156]

5.105 The BCCI, RDA-K, and the Shire of Broome advocated that ports in the Kimberley region, specifically Broome and Wyndham, be designated as FPOE for cruise ships.[157] BCCI told the Committee the lack of FPOE determination meant that

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149 Mr James Goodwin, Chief Executive, AAA, Committee Hansard, 29 March 2023, pages 2 and 6.
150 Cruise Lines International Association (CLIA) Australasia, Submission 27, p. [1].
151 CLIA Australasia, Submission 27, pages [1–2].
152 CLIA Australasia, Submission 27, pages [3 and 5].
153 CLIA Australasia, Submission 27, p. [5].
154 Department of Agriculture, Fisheries and Forestry, 'First points of entry and non-non first points of entry', May 2024, https://www.agriculture.gov.au/biosecurity-trade/aircraft-vessels-military/vessels/first-point-entry-and-non-first-point-entry, viewed 10 April 2024.
155 RDA-K, Submission 116, p. 4.
156 CLIA Australasia, Submission 27, pages [2 and 6].
157 BCCI, Submission 115, p. 6; RDA, Submission 116, p. 4; and Shire of Broome, Submission 123, p. 2.

international visitors had to pass through larger gateway cities before travelling to the region and were limited to day tours only, deterring visitors. BCCI claimed:

> This adversely affects the local economy, as Broome misses out on the economic benefits of tourism expenditure that would be generated if it were the point of disembarkation and the initial point of arrival for international vessels.[158]

5.106 The Shire of Broome also called for investment in air and seaport facilities (including customs and immigration services), to allow for more visitors.[159] The Committee notes that in February 2024, the Australian Government approved efforts to expand the Port of Broome and to work towards FPOE status for the port.[160]

5.107 The Australian Federation of Travel Agents (AFTA) called for an ongoing strategy and funding structure that has a wholistic perspective, in response to the:

> … risk that Australia has a two-tiered approach one for airports and another for seaports.[161]

5.108 In keeping with the demand for sustainable tourism discussed above in relation to air travel, CLIA Australasia called for investments in new cruise infrastructure that would eliminate carbon emissions whilst ships are berthed.[162]

Passenger movement charge

5.109 Stakeholders highlighted the Australian Government's passenger movement charge (PMC) as an impediment to cost efficient transport access into Australia. The Government levies the PMC on the departure of every person from Australia (with some exemptions), both residents and non-residents. The charge is currently $70 per person and is collected by a carrier (airline, shipping company) when a ticket is sold to a passenger.[163] The AFTA estimates that the PMC was generating $1.2 billion in revenue each year prior to the pandemic.[164]

5.110 Stakeholders told the Committee they see the PMC as an impediment to inbound tourism as it increases traveller costs. AFTA expressed concern also on the high rate of the charge compared to other countries. It submitted that Australia's PMC is the

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158 BCCI, Submission 115, p. 6.

159 Shire of Broome, Submission 123, p. 2.

160 Government of Western Australia, 'Green light toward enhanced border services at Port of Broome', *Joint media statement,* 26 February 2024, https://www.wa.gov.au/government/media-statements/Cook-Labor-Government/Joint-media-statement---Green-light-toward-enhanced-border-services-at-Port-of-Broome-20240225#:~:text=Broome%2C%20Western%20Australia.-,The%20Australian%20Government%20has%20given%20the%20green%20light%20for%20work,for%20the%20Port%20of%20Broome, viewed 16 July 2024.

161 AFTA, Submission 92, p. 14.

162 CLIA Australasia, Submission 27, p. [6].

163 Australian Border Force, *Crossing the border*, 1 July 2024, https://www.abf.gov.au/entering-and-leaving-australia/crossing-the-border/passenger-movement/passenger-movement-charge-(pmc)#:~:text=The%20Passenger%20Movement%20Charge%20(PMC,the%20person%20returns%20to%20Australia, viewed 8 July 2024.

164 Mr Dean Long, Chief Executive, AFTA, Committee Hansard, 18 October 2023, p. 3.

second highest in the world and is estimated to reduce passenger traffic to Australia by 4.2 per cent per year.[165]

5.111 The Committee heard repeated calls that the revenue from the PMC should be reinvested back into the industry, for example through improvements to transport infrastructure or improving visa processing.[166] This was summed up by Mr Long of the AFTA:

> We're not against a departure tax in all settings. We just believe there is sufficient revenue being raised through that tax already that is covering total cost of facilitation and also the cost of biosecurity. But, because of the way that it's being accounted for, it means those departments that have those services aren't actually able to receive that income. So, fundamentally, if we cap it at where it is today and we say no more increases, there'd be easily another five to 10 years where no increases will be needed. If that money was given back to the departments that ran those services, where we believe it should go, that would be a great outcome.[167]

Visa reform

5.112 Much of the evidence gathered during this inquiry on visitor visas pointed to the need for reforms that would make it easier and more affordable for travellers to access visas. The Committee also notes the evidence and recommendations in its Interim Report regarding improvements to the student visa system, in particular to strengthened compliance of work rights and preventing exploitation of international students working in Australia (see Chapter 5 of the Committee's Interim Report[168]).

5.113 Austrade submitted that reforms to tourist visas were required to:

> … ensure Australia remains competitive in attracting international visitors.[169]

5.114 In particular, Austrade cautioned that protracted visa processing times could make Australia less competitive as a destination,[170] noting:

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165 AFTA, Submission 92, p. 13.

166 See for example TTF, Submission 11, p. 3; ACCI, Submission 80, [p. 6]; AFTA, Submission 92, p. 13; Mr Shaun de Bruyn, Chief Executive Officer, TICSA, Committee Hansard, 20 February 2024, p. 26; Ms Karen Bolinger, Interim Chief Executive Officer, Destination Gold Coast, Committee Hansard, 17 May 2023, p. 46.

167 Mr Dean Long, Chief Executive, AFTA, Committee Hansard, 18 October 2023, p. 3.

168 Joint Standing Committee on Foreign Affairs, Defence and Trade, Parliament of Australia, *Inquiry into Australia's tourism and international education sectors, 'Quality and Integrity – the Quest for Sustainable Growth: Interim Report into International Education'*, October 2023, pages 104–147, https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Foreign_Affairs_Defence_and_Trade/Tourismandeducation/Interim_Report_-_Inquiry_into_Australias_International_Education_Sector, viewed 16 July 2024.

169 Austrade, Submission 73, p. 3.

170 Austrade, Submission 73, pages 3 and 15.

> … processing delays had impacted the pace of Australia's post-COVID recovery.[171]

5.115 The ACCI warned in March 2023 that the visa processing backlog occurring at that time was 'a deterrent to people to come to Australia'.[172]

5.116 Mr Long from the ATIA was also critical of inefficiency in Australia's visa system:

> We have one of the world's worst visa systems in regard to efficiency. It's very effective and it keeps us very safe, but the efficiency of it, I think, according to all the international league tables for the last 15 or 20 years, hasn't been world leading.[173]

5.117 Mr Cox from Adelaide Airport stressed the need to consider the visa process through the customer lens, as well as border security issues, noting Australia needs to think strategically about how it can make each step in the visa process as easy as possible relative to our competitors, without risking border security.[174] The City of Gold Coast advocated measures to address lengthy visa processing times, calling for, at a minimum, families and groups to be approved for travel at the same time.[175] Austrade also highlighted the barriers to travel from electronic travel applications being offered only to a limited number of countries and not available in languages other than English.[176]

5.118 Similarly, the TTF called for streamlining of Australia's visa system and making them more attractive to visitors from key markets.[177] Further, the ACCI expressed support for multiple-entry visas for visitors from low-risk countries.[178] The AAA also called for faster and more streamlined visa processes and also recommended multiple entry visas for emerging tourism markets, particularly China and India.[179]

5.119 The Embassy of the Philippines called for streamlined visa procedures for 'strategic partners', like the Philippines.[180] Representations of Pacific neighbour countries also pointed out that the time taken to obtain a visa was a concern. The High Commissioner of Vanuatu in Australia noted:

> When you talk to people back home, they will tell you that the biggest hurdle is not so much about having to pay for the airfare but the visa process, taking so

171 Austrade, Submission 73, p. 17.
172 Ms Ingrid Fraser, Associate Director, Workforce and Tourism Policy, ACCI, Committee Hansard, 8 March 2023, p. 3; and Mr John Hart, Executive Chair, Tourism, ACCI, Committee Hansard, 8 March 2023, p. 7.
173 Mr Dean Long, Chief Executive Officer, ATIA, Committee Hansard, 18 October 2023, p. 3.
174 Mr Brenton Cox, Managing Director, Adelaide Airport Ltd, Committee Hansard, 20 February 2024, p. 55.
175 City of Gold Coast, Submission 105, p. [2].
176 Austrade, Submission 73, p. 17.
177 Mrs Margy Osmond, Chief Executive Officer, TTF, Committee Hansard, 2 March 2023, p. 47.
178 Mr John Hart, Executive Chair, Tourism, ACCI, Committee Hansard, 8 March 2023, p. 3.
179 AAA, Submission 76, pages 4–5.
180 Embassy of the Philippines, Submission 131, p. 1.

> long for them to obtain a visa. Sometimes they miss important events with their families and relatives here.[181]

5.120 Pacific representatives also raised with concern the lack of reciprocal arrangements in Australia of 'visas on arrival' for Pacific country citizens.[182] It was also noted that with the large number of Pacific Island citizens in Australia under the PALM Scheme, there could be greater visitation from families if there was easier access to visitor visas.[183]

5.121 Austrade also highlighted that lowering visa costs relative to international counterparts could make Australia more appealing to potential travellers.[184] It noted that whilst Australia offers fee-free visas for many traditional markets (Western Europe and the United States), visitors from emerging markets in Southeast Asia, for example, pay for tourist visas. It recommended expanding the number of countries eligible for multi-year entry visitor visas and expanding the length of stay for visitor visas from three months to six months.[185]

5.122 The ACCI also noted Australia is ranked 130 out of 140 countries in terms of price competitiveness for tourism, and suggested visa costs were a contributing factor to Australia's lack of competitiveness.[186] Destination Gold Coast called for the Federal Government to reconsider raising the cost of tourism visas.[187] Austrade suggested that 'holistic reforms' may be required to improve Australia's competitiveness as a destination.[188]

5.123 In addition to affecting international visitor numbers, as discussed earlier in this chapter, Australia's visa regime impacts foreign nationals who travel to Australia to work in the tourism sector, and consequently impacts the sector's workforce. Submitters and witnesses repeatedly pointed to the need for visa reforms that would help address the sector's chronic workforce issues.

Investment and infrastructure

5.124 The Committee heard that Australia must build and maintain quality hard infrastructure to provide travellers a positive tourism experience, including responding to consumer preferences, needs and trends. As submitted by Austrade:

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181 HE Mr Samson Vilvil Fare, High Commissioner, Vanuatu High Commission, Committee Hansard, 7 February 2024, p. 6.

182 See for example HE Ms Hinauri Petana, High Commissioner, Samoa High Commission, and; HE Mr Robert Sisilo, High Commissioner, Samoa High Commission, Committee Hansard, 7 February 2024, pages 4 and 6

183 HE Mr Robert Sisilo, High Commissioner, Samoa High Commission, Committee Hansard, 7 February 2024, p. 7.

184 Austrade, Submission 73, p. 17.

185 Austrade, Submission 73, p. 17.

186 Mr John Hart, Executive Chair, Tourism, ACCI, Committee Hansard, 8 March 2023, p. 7.

187 Ms Karen Bolinger, Interim Chief Executive Officer, Destination Gold Coast, Committee Hansard, 17 May 2023, p. 46.

188 Austrade, Submission 73, p. 17.

> Delivering world-class tourism experiences requires high-quality visitor infrastructure. Product providers and investors also must ensure that infrastructure meets the quality and practical needs of consumers, including accessibility needs.[189]

5.125 The ACCI highlighted the infrastructure needs of regional areas, and noted that infrastructure built for tourists provides amenity not only to visitors, but to local communities, noting road improvements and regional airport upgrades as examples.[190] The challenges to investment in regions were outlined in Chapter 4.

5.126 On private sector investment, the Committee listened with concern about the lack of investment to create and refresh tourism assets. The Committee heard that these investment decisions are for commercial consideration, and predominantly driven by rates of return on investment. The cost of investment was pointed out as a key factor, with labour and input costs relatively high in Australia.[191] The cost and delay of obtaining development approvals was also raised in evidence.[192] Mr Andrew Bullock Councillor from the Australian Hotels Association South Australia noted 'it is ridiculously difficult to get through the planning process'.[193] Ms Joanne Birley, Industry Development Manager of Great Ocean Road Regional Tourism noted there has been no major hotel investment in the region for over 10 years, with at least two projects stalling in the development stage.[194]

5.127 The TTF called out the need to invest in national parks and nature-based tourism assets, noting the growing demand for nature-based tourism. The TTF pointed to the broader societal benefit of these investments, citing:

> environmental and social benefits through improved conservation and by respectfully engaging with traditional owners, ensuring nature-based experiences focus on indigenous culture.[195]

5.128 However, Mr Hall of the ATIA noted regulatory barriers for investment in nature-based product subject to the *Environmental and Biodiversity Conservation Act 1999* (Cth) (EPBC Act):

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189 Austrade, Submission 73, p. 15.

190 ACCI, Submission 80, p. [4].

191 See for example Mrs Carolyn Turnbull, Chief Executive Officer, Tourism Western Australia, Committee Hansard, 22 August 2023, p. 46; Mr Andrew Bullock, Councillor, Australian Hotels Association, South Australian Branch, Committee Hansard, 20 February 2024, p. 68; Mr Terry Karamaloudis, Manager of Tourism and Major Events, City of Greater Bendigo, Committee Hansard, 4 October 2023, p. 20.

192 Mr David O'Malley, Chief Executive Officer, Australia's Coral Coast, Committee Hansard, 22 August 2023, p. 45.

193 Mr Andrew Bullock, Councillor, Australian Hotels Association, South Australian Branch, Committee Hansard, 20 February 2024, p. 68.

194 Ms Joanne Birley, Industry Development Manager, Great Ocean Road Regional Tourism, Committee Hansard, 3 October 2023, p. 10.

195 TTF, Submission 11, p. 2.

> Many a small tourism business with a fantastic sustainable product has absolutely failed to invest because they cannot get through the dual processes of approval at a national park level within a state government and the EPBC Act.[196]

5.129 In its submission, the QTIC summed it up as follows:

> There is no confidence to invest in the industry from both operators and financial institutions without clear leadership, coordination between all levels of government and between departments to address operational issues and regulatory complexities.[197]

5.130 The QTIC recommended a Co-ordinator General or similar model to assist business navigate the approval process. The Committee heard that Tasmania has a Co-ordinator General who has been successful in attracting new hotel investment.[198] Other suggestions to address the lack of private investment were government grant funding for asset development, or government guarantees for investors.[199]

Short-stay accommodation

5.131 On the value of short-stay accommodation to the tourism sector, Airbnb submitted:

> The sharing economy helps build resilient communities where locals can create supplementary income, and robust economies that are supported by increased visitation and spending by Airbnb guests—often in areas that do not traditionally benefit from the tourist dollar. As a result, Airbnb helps empower communities to share in the benefits of tourism and welcome new visitors to their neighbourhoods…[200]

5.132 Airbnb claimed their guests contributed $10 billion, spent a further $8 billion in the communities in which they stayed, and supported 90,000 jobs.[201] Airbnb also emphasised the 'crucial role' short-term accommodation plays in regional Australia, which it told the Committee makes up nearly a third of nights booked via Airbnb.[202]

5.133 Tourism Western Australia submitted that long-stay rentals in parts of the state that had once accommodated workers had been converted into short-stay holiday homes during the COVID-19 pandemic. They stated that some accommodation providers had reduced their operational capacity in response to workforce shortages, whilst others had 'taken advantage of high demand' to 'substantially' increase their prices.

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196 Mr Evan Hall, Chairperson, ATIC, Committee Hansard, 13 September 2023, p. 3.
197 QTIC, Submission 39, p. 2.
198 Mr Sarah Clark, Chief Executive Officer, Tourism Tasmania, Committee Hansard, 1 May 2024, p. 48.
199 Mr Andrew Bullock, Councillor, Australian Hotels Association, South Australian Branch, Committee Hansard, 20 February 2024, p. 67.
200 Airbnb, Submission 56, p. 1.
201 Airbnb, Submission 56, p. 1.
202 Airbnb, Submission 56, p. 4.

Tourism Western Australia cautioned these developments may lead to reputational damage and reduced demand among tourists.[203]

5.134 The City of Gold Coast were critical of the lack of regulations governing online accommodation providers and limited data available on its impact. It called for policies to ensure better data to support informed decision-making and regulations.[204]

5.135 Accommodation Australia similarly noted that while commercial accommodation providers are highly regulated, short-term rental providers in most jurisdictions are not. It further claimed that short-stay accommodation has resulted in a 'gross under-utilisation' of accommodation during the current housing crisis, particularly in higher tourist areas where staff working in the tourism sector may struggle to find accommodation. It called for more consistent and effective national regulation of short-stay accommodation.[205]

Building resilience in the visitor economy

Climate adaptation and disaster preparedness

5.136 A spate of natural disasters over recent years and the COVID-19 pandemic demonstrated the vulnerability of Australia's tourism sector to shocks. With micro, small and medium sized businesses dominating the sector, businesses often lack the time and resources to invest in building resilience. Austrade cautioned that these small businesses are particularly vulnerable to shocks and need external support to become more resilient.[206]

5.137 Echoing this concern, Ecotourism Australia (EA) cautioned that eco and nature-based tourism is dependent on the natural environment, making it particularly vulnerable to increasing natural disasters like bushfires, floods, and cyclones.[207] EA called for greater efforts to protect the sector from natural disasters:

> While natural disaster recovery is not new to us or our sector, the scale, intensity and international impact of future environmental catastrophes requires a continued and significant national response for, and by, our industry.[208]

5.138 The City of Geraldton submitted that Cyclone Seroja, which hit the Mid West in April 2021, led to closure of 16 businesses that mostly operated in the tourism sector, and a decrease in accommodation to around two-thirds of pre-cyclone levels. Whilst recovery was supported by the National Disaster Recovery Fund, the City told the

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203 Tourism WA, Submission 10, p. 2.

204 City of Gold Coast, Submission 105, p. [3]; and Ms Tanya Lipus, Manager of City Economy, City of Gold Coast, Committee Hansard, 17 May 2023, p. 74.

205 Accommodation Australia, Submission 122, p. 17.

206 Austrade, Submission 73, p. 16; see also Ms Esther Anderson, Senior Research and Policy Officer, QTIC, Committee Hansard, 17 May 2023, p. 61.

207 Ecotourism Australia (EA), Submission 117, p. 4.

208 EA, Submission 117, p. 5.

Committee this only enabled communities to replace what had been lost, rather than to rebuild more resilient structures.[209]

5.139 Austrade noted that there are a range of government and industry resources to help businesses build resilience, including industry specific tools to create risk management plans.[210] THRIVE 2030 has a dedicated action to drive resilience and crisis management capability.[211]

5.140 In the climate resilience space, the Committee also noted work underway at a national level on the Australian Government's *National Climate Resilience and Adaptation Strategy 2021-2025*. The Australian Government is also developing Australia's first National Climate Risk Assessment and National Adaptation Plan which will help government and business understand risks and impacts from climate change and provide guidance on how to respond.

Insurance availability and costs

5.141 Taking out insurance cover helps a business maintain continuity and manage resilience. The availability, affordability, and adequacy of insurance for businesses in the visitor economy was raised by many witnesses. The Australian Small Business and Family Enterprise Ombudsman (ASBFEO) described an 'insurance-market dysfunction' was present for the sector, and noted businesses surveyed in New South Wales and Queensland identified insurance cover as among their largest concerns.[212]

5.142 The QTIC described what it sees as an 'insurance market failure', and called for:

> … a tourism insurance policy plan that makes it affordable for tourism industries that are small and micro.[213]

5.143 The TICSA noted insurance availability and cost had been an issue for some time, with the COVID-19 pandemic and an increasing number of natural disasters amplifying the problem.[214] The ASBFEO also partially attributed lack of affordable insurance cover to increased climate risks.[215] EA agreed, and cautioned many operators had been unable to secure appropriate insurance coverage. It provided the Committee with details of one operator whose insurance premiums had risen by

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209 City of Geraldton, Submission 133, p. [5].

210 Austrade, *THRIVE 2030 Implementation Reporting (November 2023)*, November 2023, p. 22, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-strategy-implementation-update-november-2023, viewed 28 June 2024.

211 Austrade, *THRIVE 2030: The Re-Imagined Visitor Economy. A national strategy for Australia's visitor economy recovery and return to sustainable growth 2022-2030*, March 2023, p. 68, https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/thrive-2030-revised-the-re-imagined-visitor-economy-strategy, viewed 28 May 2024.

212 Australian Small Business and Family Enterprise Ombudsman (ASBFEO), Submission 135, pages 1–2.

213 Ms Esther Anderson, Senior Research and Policy Officer, QTIC, Committee Hansard, 17 May 2023, p. 61.

214 Mr Shaun de Bruyn, Chief Executive Officer, TICSA, Committee Hansard, 20 February 2024, p. 29.

215 ASBFEO, Submission 135, p. 2.

more than four times over five years to constitute a quarter of its operating revenue in 2022-23.[216]

5.144 Austrade pointed to the availability and affordability of insurance – particularly public liability and natural disaster cover – as a 'key challenge' for many small tourism operators, due predominantly to lower profitability and reduced risk appetites among insurers and re-insurers.[217]

5.145 The Australian Outdoor Industry noted there were only a few insurers approved by the Australian Prudential Regulation Authority (APRA), the statutory authority regulating the financial services industry, that offer cover for adventure activities. Some providers rely on non-APRA-approved providers, placing themselves and customers at risk. The Australian Outdoor Industry recommended the Australian Government look for ways to ensure certainty of insurance products for tourism providers, particularly for adventure activities.[218]

5.146 Appearing before the Committee, the Insurance Council of Australia (ICA) provided some insight on the problems facing the sector. It noted, more generally, there has been a 'hard insurance market characterised by rising premiums and reduced insurance capacity' across a range of insurance products.[219] This, it said, has been driven by providers paying out more in claims than they take in premiums.

5.147 The ICA outlined the three factors driving insurance premiums: risk, number of claims, and the quantum of claims. It noted in the case of public liability insurance, premium increases have mainly been driven by the cost of personal injury claims.[220] Both the ICA and Austrade advised they have been working closely with the tourism sector to educate it on how insurance works and how to better manage risk. Austrade noted it delivered workshops in 2023 on measures businesses can take to reduce their risk profile and enhance access to insurance.[221]

5.148 The ICA nominated other areas for reform that may help reduce the costs of insurance more generally. These include: civil liability law reform, more mitigation infrastructure, and removing state taxes on insurance premiums, thought to be worth about $6 billion annually.[222]

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216 EA, Submission 117, pages 4–5.
217 Austrade, Submission 73, p. 17.
218 Australian Outdoor Industry, Submission 31, pages [4 and 6].
219 Ms Alexandra Hordern, General Manager, Regulatory and Consumer Policy, Insurance Council of Australia (ICA), Committee Hansard, 27 March 2024, p. 1.
220 Ms Alexandra Hordern, General Manager, Regulatory and Consumer Policy, ICA, Committee Hansard, 27 March 2024, p. 2.
221 Austrade, Submission 73.3, pages 2–3.
222 Ms Alexandra Hordern, General Manager, Regulatory and Consumer Policy, ICA, Committee Hansard, 27 March 2024, p. 1.

Committee comment

Collaboration

5.149 It is clear to the Committee that despite the significant goodwill within the tourism sector, the 'connective tissue' between the different levels of government and various agencies who oversee, regulate and support the sector could be improved to produce better outcomes more efficiently. The Committee is concerned that this connective deficiency ultimately manifests at the local level where operators do not receive timely or sufficient information and the advice they need to grow their businesses, and feel they do not have an effective mechanism to input into policy development and government decisions.

5.150 Given the sector's complexity it is the Committee's view that there needs to be a clearer delineation and understanding of roles and responsibilities. For example, it was apparent that some stakeholders thought TA has primary responsibility for industry development and representing the industry on policy issues like aviation and visas, when these are the purview of Austrade and other federal government agencies. Further, some sectoral issues span multiple levels of government, resulting in confusion for operators as to who to approach for information and assistance.

5.151 Compounding this, the Committee is convinced of a 'disconnect' between regional bodies like RTOs and LGAs and Australian Government agencies regarding marketing and industry development responsibilities. It is imperative that the disconnect is rectified, given tourism operators 'at the coalface' are likely to have most interaction with their RTOs and LGAs, rather than state and federal agencies. Federal and state agencies could also be better informed of the tourism products available and in the pipeline in regions, and of the development and regulatory concerns of operators on the ground. The Committee therefore believes it would be beneficial to implement improved engagement and communication mechanisms between federal, state and territory government agencies with regional and local government agencies and operators to better communicate policies and programs, and for government agencies to hear more directly from operators about their ideas, needs and concerns.

5.152 It is the Committee's view that the sector would benefit from a document that clearly communicates the respective responsibilities of government agencies at different levels. These agencies should also have an agreed 'communication protocol' that is well understood by staff which ensures that no matter which agency is approached for assistance by an operator, they can get a clear and consistent response about who and where to go. The Committee refers to this as a 'no-wrong-door' approach to sector support.

Destination marketing

5.153 The Australian tourism sector has a complex and overlapping DMO arrangement. While there is general agreement that TA's primary role is international destination

marketing, the Committee is concerned about expectations that TA should perform many other functions. For example, various stakeholders stated that TA should be undertaking product development, including with First Nations input, and addressing aviation supply.

5.154 The Committee's view is that TA should focus on its primary objective to drive demand, and not on industry development and policy issues that are the remit of Austrade and government agencies. The Committee therefore believes that the Minister for Tourism should issue an updated Statement of Expectation for TA that confirms this focus. Further, domestic marketing should be left to STOs, RTOs and LGAs who are all performing this function.

5.155 It is also apparent to the Committee that at the local level there is misunderstanding or a lack of communication about international marketing strategies. The Committee encourages TA and STOs to communicate and explain their international marketing methods clearly to RTOs and operators, and to continue to advise them of strategies operators can take to leverage their campaigns.

Data

5.156 The Committee is firmly of the view that data and research are critical for informed decision making by governments and businesses. With ever evolving trends in visitation, it is imperative that tourism providers can easily access quality data to enable them to make business decisions and tailor products that meet customer needs. While there is currently significant historical and trend data available on visitor arrivals and expenditure and pull factors that drive visitation to Australia, there is a general view that this information is not sufficiently contemporary or granular for business needs.

5.157 The Committee has concluded that the wide array of data that is available is often not apparent, easily accessible, or easily interpreted by the average small to medium sized tourism business. A good example of this is the confusing nature of total tourism expenditure and how much is attributable to international students. While the Committee is encouraged that there appears to be no shortage of data in this area, it observes that the information could be presented and explained in more user-friendly ways.

5.158 The Committee was pleased to hear that official tourism data products are evolving and encourages relevant research agencies to widely promote and assist tourism operators understand the applicability of these products to their business. Delivering data that better meets the needs of users and delivering it in a way that is easily accessible and understood could be improved by a regular survey of tourism businesses and other data users. This is a stepping stone to making better data more available to tourism operators.

Workforce

5.159 The Committee notes the short and long-term workforce challenges facing the sector but is encouraged by the initiatives under way to address these challenges. The pandemic highlighted the sector's vulnerability from its heavy reliance on temporary migrants. When borders opened, stakeholders were quick to advocate to access to these cohorts. While recognising the vulnerability, the natural attraction and interlinkages of the tourism sector with these cohorts for their demand for low and semi-skilled workers is understandable. On short term challenges, the Committee acknowledges the contribution by temporary workers like WHMs, workers sponsored under the PALM scheme, and international students and encourages the Australian Government as part of its ongoing migration reforms to factor this into its considerations.

5.160 The Committee reinforces comments made in its Interim Report regarding deep concerns about workplace exploitation of international students and other temporary work visa holders.[223] The Committee further notes that programs implemented by the ACT Government to foster inclusivity and security in the community for international students could be considered by governments in other jurisdictions.

5.161 Regarding longer-term challenges, the Committee is encouraged by the number of actions underway to promote greater participation and skills development in the tourism sector, and more broadly across the economy. It encourages stakeholders to participate in ongoing inquiries into workforce access and development and to take advantage of programs available to improve worker participation in the tourism sector.

Transport

5.162 The Committee notes with concern that there are many ongoing challenges to facilitate competitive and efficient transport for international and domestic visitors, particularly with air transport given the complexity of international airline regulation. However, it also notes that airline capacity is very close to reaching pre-COVID-19 levels. It also is encouraged by recent announcements regarding capacity management at Sydney Airport which will look to improve accessibility, affordability, and reliability of air travel. The Committee commends the decision to have the Australian Competition and Consumer Commission monitor the prices, costs and profits of major domestic airlines through to December 2026.

5.163 The Committee urges the Government to use the opportunity of the Aviation White Paper to implement policies to increase the competitiveness, accessibility and

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223 Joint Standing Committee on Foreign Affairs, Defence and Trade, Parliament of Australia, *Inquiry into Australia's tourism and international education sectors, 'Quality and Integrity – the Quest for Sustainable Growth: Interim Report into International Education'*, October 2023, pages 104-147, https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Foreign_Affairs_Defence_and_Trade/Tourismandeducation/Interim_Report_-_Inquiry_into_Australias_International_Education_Sector, viewed 16 July 2024.

environmental friendliness of air travel into and around Australia, and continues to pursue increased capacity on international routes.

5.164 The Committee heard strong concerns regarding the Australian Government's passenger movement charge (PMC), particularly how high it is in comparison to other countries, and how it can negatively impact a price sensitive market. Given the PMC was recently increased, the Committee urges the Government to refrain from any further increases while the sector stabilises itself on the return to sustainable growth.

5.165 The Committee also commends the Australian Government's commitment to exploring First-Point-of-Entry (FPOE) status for the port of Broome for cruise vessels, and encourages opportunities for further FPOE expansion around Australia, where appropriate, to improve the potential for more cruise ship visitation to regional areas.

Visitor visas

5.166 The Committee repeatedly heard that obtaining a visa to visit Australia is one of many barriers facing potential visitors and the visitor economy workforce. The Committee believes there are opportunities to explore visitor visa reform by both improving processing efficiency and to, where appropriate on a balanced risk management approach, further liberalise access to visas. For example, the Committee heard suggestions to expand multi-year visas to more countries and increase reciprocity arrangements for 'visa on arrival' access. The Australian Government should consider these issues as part of its ongoing reforms of the migration system as highlighted by the December 2023 Migration Review.

5.167 The Committee is encouraged to see that the Australian Government is taking steps to improve visitor visa access, including increasing resourcing to the Department of Home Affairs, streamlining visa application for Pacific countries, expanding SmartGate access at airports, and increasing access to the Frequent Travellers Stream to visitors from Indonesia.

Investment and infrastructure

5.168 Various stakeholders expressed concerns about the lack of new investment in accommodation and experiences, and updating and refreshing these assets, particularly in regional areas. The Committee is concerned that, left unchecked, tourism assets, particularly in regions, may disappear, leading to decline of the tourism sector in regional Australia. The Committee also noted that the rise of the short-stay accommodation industry has both benefits and disadvantages for the sector and communities, including potential negative impacts on housing availability.

5.169 These are issues not easily addressed and have an impact beyond the tourism sector and the scope of this report. It is the Committee's view that these issues should be addressed at a higher level, looking at the impact on regions holistically. In the tourism context, governments and industry must work together at a regional level to identify and agree on suitable tourism products that will attract visitors in large enough numbers to make investment viable. The Committee believes that

governments can leverage grant programs to provide enabling infrastructure, drive demand and facilitate visitor access. Having these deliberations at the regional level will garner community support and ensure local knowledge of what is wanted, possible and practical can drive design and implementation.

5.170 The Committee is of the view that all levels of government should continue to drive reform of development regulation to make it less complex and time consuming for investors. Jurisdictions can also learn from one another about programs that are successful in assisting investment attraction and facilitation. Inclusive destination management planning can also assist reduce objections raised in development applications for new projects.

5.171 The Committee notes the lack of national data and research regarding the impact of short-stay accommodation on the tourism sector. As this is a matter primarily for state, territory and local governments, the Committee has not investigated further, but encourages policy makers in those jurisdictions to commission and consider data before introducing new regulation. The Committee also notes the obvious benefits that flow from nationally consistent regulation.

Resilience, including insurance cover

5.172 Building resilience in the tourism sector is crucial given the sector's inherent vulnerability to natural, economic and health disasters. The Committee was encouraged to see a wide acknowledgement of the issue and the steps being taken to improve resilience.

5.173 The Committee was concerned to hear how the lack and high cost of insurance, particularly public liability and natural disaster cover, is impacting tourism businesses, and that ongoing cost pressures could result in more tourism businesses closing or not offering certain experiences. This impacts Australian tourism's attractiveness and competitiveness internationally.

5.174 Insurance markets are multi-layered and complex, and are impacted by diverse international and domestic factors. While it is beyond the scope of this inquiry to address these complexities, the Committee encourages the ongoing work of tourism bodies and the ICA to educate businesses about insurance markets.

5.175 The Committee also encourages Treasury to engage with community, insurance and tourism stakeholders in its efforts to improve insurance affordability. The Committee is also hopeful that ongoing advocacy from bodies like the ICA to insurance providers and the global insurance industry regarding high safety standards and regulation in Australia will convince insurance providers of the reduced risk present in the Australian market, and that this is reflected in lower premiums.

Recommendations

Recommendation 19

5.176 The Committee recommends that the Minister for Tourism issue a new Statement of Expectation to Tourism Australia reinforcing its primary focus on marketing to drive demand from international visitors.

Recommendation 20

5.177 The Committee recommends increased communication and flexibility among agencies in the tourism sector on both state and federal levels to improve integration and cooperation.

Recommendation 21

5.178 The Committee recommends that Austrade, in collaboration with Tourism Australia, State Tourism Organisations and Regional Tourism Organisations, collectively develop a charter that explains and delineates the responsibilities each level has in the tourism sector to improve clarity, communication and accountability between the agencies.

5.179 This charter should be promoted and communicated effectively to ensure it is easily understood by new and established stakeholders across the sector. Organisations should take active steps to ensure that stakeholders understand the charter and have easy pathways to ask for clarification if necessary.

Recommendation 22

5.180 The Committee recommends more effective communication and regular interaction with local and Regional Tourism Organisations to foster effective knowledge sharing and to enable productivity gains. Austrade, Tourism Australia and State Tourism Organisations are recommended to implement a new engagement mechanism to achieve more effective communication with Regional Tourism Organisations and Local Government Authorities regarding government policies and programs. This will also improve the capacity for federal, state and territory governments to understand the needs and concerns of regions and regional tourism businesses.

5.181 This mechanism, in conjunction with the charter developed in Recommendation 21, will foster a 'no wrong door' environment for tourism operators seeking assistance or advice.

Recommendation 23

5.182 The Committee recommends that Austrade, in consultation with Tourism Australia and State Tourism Organisations, undertakes surveys of tourism businesses every three years to understand their data and research needs, including how data and research should be presented and accessed.

Recommendation 24

5.183 The Committee recommends the Australian Government, through the Aviation White Paper, prioritise implementation of policies to increase the competitiveness, accessibility and environmental friendliness of air travel into and around Australia, and continues to pursue increased capacity on international routes, including consideration of further 'open skies' agreements, consistent with our national interests.

Recommendation 25

5.184 The Committee recommends that Treasury engages with Austrade and the tourism sector to improve access and affordability of insurance for tourism businesses.

Recommendation 26

5.185 The Committee recommends that Austrade work with the tourism sector, in particular Regional Tourism Organisations, to develop resilience plans to make them less susceptible to 'shocks'.

6. Opportunities for international education

Overview

6.1 This chapter reports on issues related to international education in regional Australia, as well as commentary on the challenges facing the international education sector more broadly. This chapter supplements the evidence, findings and recommendations in the Committee's *Inquiry into Australia's tourism and international education sectors, 'Quality and Integrity – the Quest for Sustainable Growth: Interim Report into International Education'* (Interim Report), tabled in October 2023.[1]

6.2 The Committee heard from a range of government departments, peak bodies, higher education institutions and student representatives, tourism organisations and individuals across Australia about opportunities and challenges facing the international student sector during the inquiry. Many submitters and witnesses agreed on the importance of the regions with regards to international education and the interconnectedness between international education and tourism. This chapter reflects the further witness statements and submissions the Committee received after October 2023.

The regional perspective

6.3 This section explores the evidence received about the importance of international students to regional Australia, particularly with regards to the benefits to regional labour markets and economies. The Committee heard that a more equal spread of students between metropolitan areas and the regions will deliver the benefits more broadly, and received suggestions for increased promotion of the regions and changes to visa, migration and admission settings to enable increased numbers of international students to choose to study in regional areas.

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1 Joint Standing Committee on Foreign Affairs, Defence and Trade, Parliament of Australia (JSCFADT), *Inquiry into Australia's tourism and international education sectors, Quality and Integrity – the Quest for Sustainable Growth: Interim Report into International Education*, October 2023, https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Foreign_Affairs_Defence_and_Trade/Tourismandeducation/Interim_Report_-_Inquiry_into_Australias_International_Education_Sector, viewed 16 July 2024.

Regional labour markets

6.4 The benefits of international students being located in regional areas was consistently raised in evidence put to the Committee. Evidence received in Darwin reinforced this point and reflected that regional placement has a reciprocal benefit for both international students seeking employment and regional labour markets with labour shortages.

6.5 Professor Scott Bowman AO, Vice-Chancellor of Charles Darwin University (CDU), stressed that the Northern Territory is desperate for people in its labour market.[2] He noted that one of the attractions for international students to the Northern Territory was that they were likely to get a job in their area of study due to demands for labour. Professor Bowman claimed that:

> … if they come here and study IT, they will get a job working in IT. In fact, most of our IT graduates have got jobs at least six months before their course ends. If they come and do hospitality courses, they've probably got a job as they walk off the plane…
>
> So really international education is absolutely fundamental to the Territory. And I say again, if it's fundamental to the Territory, it is to northern Australia and it is to Australia.[3]

6.6 The Australian Local Government Association (ALGA) emphasised that university campuses were a drawcard for some regional towns. A sample of policies from several councils that each hosted a major university campus found that a main focus of local governments seemed to be on the retention of university graduates within that local community, allowing them to retain skilled workers for the local workforce. This was noted as a top priority for these councils in light of ongoing skills shortages across regions.[4]

6.7 Ms Kareena Arthy, the Deputy Director-General at the Directorate of the Chief Minister, Treasury and Economic Development in the Australian Capital Territory (ACT) Government noted that the Canberra 'business community are also very engaged with our international students because they're an important source of labour'.[5]

6.8 Mr Malcolm Wise, the Principal of the Australian Maritime College (AMC) at the University of Tasmania (UTAS), noted a few measures that would not only help AMC but also other regional universities to meet workforce demand. These measures included 'targeted visa processing, prioritisation of courses and location of study.' Mr Wise stated that modest adjustments to the current settings for international

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2 Professor Scott Bowman AO, Vice Chancellor and President, Charles Darwin University (CDU), Committee Hansard, Darwin, 17 April 2024, p. 3.

3 Professor Scott Bowman AO, Vice Chancellor and President, CDU, Committee Hansard, Darwin, 17 April 2024, p. 4.

4 Australian Local Government Association (ALGA), Submission 132, p. 2.

5 Ms Kareena Arthy, Deputy Director-General, Chief Minister, Treasury and Economic Development, ACT Government, Committee Hansard, 15 May 2024, p. 4.

students would be of assistance in lifting the supply of a 'trained and educated workforce, both domestic and international'.[6]

6.9 Professor Ian Anderson AO, Deputy Vice-Chancellor, Academic, UTAS submitted that UTAS was working with the Regional Australian Institute to develop a quota model, a managed market in the international student space.[7] Mr Robert Wilson, Executive Director of Recruitment and Engagement at UTAS, explained that managed markets would enable universities to build a critical mass of international students from particular countries in regional locations. Currently, he argued, the settings for regional Australia and the migration policies make it difficult for universities like UTAS to attract students.[8]

6.10 Mr Wilson from UTAS further explained the idea of a more managed system and what it may mean to regions if they could have students trained in the regions with the aim of keeping them in the regions. Mr Wilson stated that an open and free market meant that students gravitated towards major cities and the current system did not deliver with regards to keeping students in the regions. A managed system, he argued, would take into account issues such as population, workforce needs and infrastructure.[9] It was further noted that something to consider would be to align international and domestic entry requirements across universities, to ensure that requirements are equal and fair for both sets of students.[10]

6.11 Professor Anderson from UTAS emphasised the need to retain international students to build regional workforce, and to ensure students are 'educated in Tasmania to meet local, regional needs and to understand the regional communities,' as compared with trying to get international students who have studied in Sydney or Melbourne to move to a region after they graduate. He noted:

> It's very hard to attract [international students] into regional economies once they [have lived in Sydney or Melbourne] because the reasons to stay are significant — there are jobs in Melbourne, they are understood in Melbourne and there are probably family connections in Melbourne.[11]

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6 Mr Malcolm Wise, Principal, Australian Maritime College (AMC), University of Tasmania (UTAS), Committee Hansard, 1 May 2024, pages 2–3.

7 Professor Ian Anderson AO, Deputy Vice-Chancellor, Academic, UTAS, Committee Hansard, 1 May 2024, p. 2.

8 Mr Robert Wilson, Executive Director, Recruitment and Engagement, UTAS, Committee Hansard, 1 May 2024, p. 4.

9 Mr Robert Wilson, Executive Director, Recruitment and Engagement, UTAS, Committee Hansard, 1 May 2024, p. 8.

10 Mr Robert Wilson, Executive Director, Recruitment and Engagement, UTAS, Committee Hansard, 1 May 2024, p. 9.

11 Professor Ian Anderson AO, Deputy Vice-Chancellor, Academic, UTAS, Committee Hansard, 1 May 2024, p. 2.

6.12 Professor Anderson also noted the responsibility of the university in ensuring that regional employers have the necessary tools and knowledge needed to provide international students with inclusive jobs.[12]

Regional economies

6.13 The Committee heard that international students are likely to have friends or family visit them during their study or in the event they choose to remain in Australia after they graduate. This presents another economic benefit to regional areas of attracting international students and graduates. The ALGA submitted that regional councils recognised that visiting friends and relatives (VFRs) are an important part of their visitor economies and that many specifically focus on the VFR market when formulating their economic plans.[13] Ms Arthy noted that the ACT Government also has a strong focus on visiting friends and relatives.[14]

6.14 Professor Anderson from UTAS also emphasised the importance of international students to the economy, and the need for that benefit to be more equally shared between metropolitan and regional areas. He posited there has been a 'two-speed system' approach to international education between regional and metropolitan universities over the past decade that has impacted negatively on regional universities, which in turn impacts on regional economies and communities.[15]

6.15 Professor Anderson also stated that in 2020, five metropolitan universities received 50 per cent of the international student revenue, with a decline in the revenues for regional universities seen. It was concluded that with fewer international students coming to Tasmania, there would be an impact on regional economies as a result.[16]

6.16 The small size of the Northern Territory population was noted as a challenge to the operation and sustainability of operating a successful regional university. As such, regional universities offer distance education as a way of attracting students and increasing their numbers. Professor Bowman of CDU indicated that the university would not be a viable option without students from outside the Northern Territory, even as a dual university that provides vocational courses.[17]

Choosing regional

6.17 Along with a lack of employment opportunities, the Committee heard about other challenges to the international student market that may influence whether an

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12 Professor Ian Anderson AO, Deputy Vice-Chancellor, Academic, UTAS, Committee Hansard, 1 May 2024, p. 2.

13 ALGA, Submission 132, p. 1.

14 Ms Kareena Arthy, Deputy Director-General, Chief Minister, Treasury and Economic Development, ACT Government, Committee Hansard, 15 May 2024, p. 3.

15 Professor Ian Anderson AO, Deputy Vice-Chancellor, Academic, UTAS, Committee Hansard, 1 May 2024, p. 1.

16 Professor Ian Anderson AO, Deputy Vice-Chancellor, Academic, UTAS, Committee Hansard, 1 May 2024, p. 2.

17 Professor Scott Bowman AO, Vice Chancellor and President, CDU, Committee Hansard, Darwin, 17 April 2024, p. 9.

international student chooses to study in an Australian regional or metropolitan location.

6.18 Professor Anderson of UTAS identified 'international policy changes in China which strongly incentivised Chinese students to go to the global top 100 universities',[18] which are primarily in metropolitan locations.

6.19 Such changes to designated regional areas, as well as changes to visa processing settings, were also argued to further incentivise international students to choose metropolitan universities over a regional option. Mr Wilson of UTAS gave the example of Perth and the Gold Coast being designated as regional destinations in 2019. It was claimed that Hobart with its much smaller population is now in competition with Perth as a regional destination for international students.[19]

6.20 The Committee heard that a further challenge to recruiting international students to the regions was the necessity of

> … building the critical mass of students in a regional area so that they can be connected to a community.[20]

6.21 Mr Wilson of UTAS asserted that international students were drawn to cities such as Melbourne and Sydney due to the large number of other international students in those areas, enabling them to find communities and support each other.[21]

Intersection between international education and tourism

6.22 Witnesses consistently highlighted the intersection between international education and tourism, how they complement one another and bring one another benefit.

6.23 Ms Arthy from the ACT Government explained the intersection between international education and tourism, and the importance of both to the Canberra economy:

> What we find, though, with international visitors is that they make up about one in 33 of all visitors to the ACT; however, the spend is significant. So one in every eight dollars spent in the ACT comes from an international visitor. When it comes to international students, they might only be six per cent of the total of international visitors that we have at the moment, but they represent 53 per cent of the spend that comes into the territory from the contribution international markets made to the territory. [22]

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18 Professor Ian Anderson AO, Deputy Vice-Chancellor, Academic, UTAS, Committee Hansard, 1 May 2024, p. 2.

19 Mr Robert Wilson, Executive Director, Recruitment and Engagement, UTAS, Committee Hansard, 1 May 2024, p. 9.

20 Mr Robert Wilson, Executive Director, Recruitment and Engagement, UTAS, Committee Hansard, 1 May 2024, p. 4.

21 Mr Robert Wilson, Executive Director, Recruitment and Engagement, UTAS, Committee Hansard, 1 May 2024, p. 4.

22 Ms Kareena Arthy, Deputy Director-General, Chief Minister, Treasury and Economic Development, ACT Government, Committee Hansard, 15 May 2024, p. 3.

6.24 Ms Arthy went on to explain that the multiple levels of government, peak student networks and the universities work together to promote Canberra as a desirable destination for international students and tourists, with the ACT Government providing 'all sorts of toolkits to help universities promote Canberra.'[23]

6.25 Visitor data in South Australia showed that India is the second largest international visitor market to the state, driven by international students and their VFRs.[24] Ms Jane Johnston, CEO of StudyAdelaide emphasised that:

> … [a] strong international tourism sector is underpinned by a thriving international education sector.[25]

6.26 Evidence received in Adelaide pointed to a proactive approach to getting international students to explore beyond the capital city and into the regions. One example given of students engaging more deeply in tourism was a program run by the University of Adelaide, Discover Adelaide, which provided students with the opportunity to take part in activities across the state, spending time in different regions and attending festivals.[26]

6.27 Mr Matt Schultz, Director, International Recruitment, Flinders University spoke of getting students into the regions via an immersion program run for international students during orientation week, as well as opportunities for students to visit other parts of the state throughout their study.[27]

6.28 The Committee received evidence of StudyAdelaide's collaboration with the tourism industry in South Australia. It provided an example of how the international education sector and international tourism work together. By taking international students on regional careers tours, students are exposed to regional South Australia and can then share these experiences with family and friends back home.[28] This then feeds into the VFR market with students promoting regional destinations based on their experiences.

6.29 In its evidence TAFE SA noted that international students can take part in a Bachelor's Degree that focuses on hospitality and international tourism. The program is delivered within the Barossa Valley and Adelaide regions, with students contributing to the tourism workforce. This program allows students to engage with both tourism activities and work with various providers, including in a regional setting.[29]

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23 Ms Kareena Arthy, Deputy Director-General, Chief Minister, Treasury and Economic Development, ACT Government, Committee Hansard, 15 May 2024, p. 9.

24 Ms Jane Johnston, Chief Executive, StudyAdelaide, Committee Hansard, Adelaide, 20 February 2024, p. 18.

25 Ms Jane Johnston, Chief Executive, StudyAdelaide, Committee Hansard, Adelaide, 20 February 2024, p. 18.

26 Dr Jessica Gallagher, Deputy Vice-Chancellor, External Engagement, University of Adelaide, Committee Hansard, Adelaide, 20 February 2024, p. 2.

27 Mr Matt Schultz, Director, International Recruitment, Flinders University, Committee Hansard, Adelaide, 20 February 2024, p. 4.

28 Ms Jane Johnston, Chief Executive, StudyAdelaide, Committee Hansard, Adelaide, 20 February 2024, p. 18.

29 Mr David Coltman, CEO, TAFE SA, Committee Hansard, Adelaide, 20 February 2024, p. 3.

6.30 Her Excellency Dr Chanborey Cheunboran, the Ambassador of Cambodia to Australia, noted in her evidence the intersectionality between tourism and education exchanges. Ambassador Cheunboran emphasised these are an important part of global connectivity and in fact serve as a link between South-East Asia and Australia. Ambassador Cheunboran also emphasised that the Cambodian community in Australia, around 75,000 to 80,000 people, is one of the main drivers behind the increase of tourists to Australia and that many who visit Australia also explore education opportunities here for loved ones.[30]

6.31 Her Excellency Mrs Maria Hellen de la Vega, the Ambassador of the Philippines to Australia, enforced the need for bodies such as StudyAdelaide, Study NT and Study Melbourne to market regional Australia to international students. Ambassador de la Vega stated this would resonate with students from rural and regional areas of the Philippines as many Filipino students were from non-metropolitan areas. It was observed that for many students in the Philippines, the vision of Australia is Sydney, Melbourne, Brisbane, Perth and Adelaide, and that it was important to promote studying and working in regional areas of Australia.[31]

Alumni, scholarships and regional collaboration

6.32 Her Excellency Ms Arjaree Sriratanaban, the Ambassador of Thailand to Australia, noted that Australia had surpassed the US and the UK as the destination of choice for Thai students. As of 2022, Thai students represented the sixth largest group of international students in Australia. Ambassador Sriratanaban articulated that greater collaboration between Australian and Thai higher education institutions would be a means of promoting education exchanges between the countries, with greater collaboration possibly leading to more student exchanges.[32]

6.33 Ambassador Sriratanaban also emphasised to the Committee the benefit of using existing mechanisms such as the joint working group between the Thai Ministry of Education and the Australian Department of Education, as a way to further promote cooperation.[33]

6.34 Flinders University told the Committee that Australia's continued provision of scholarships within the Asia-Pacific region is important to:

> … safeguard Australia's ties with countries where their strategic interest remain strong in a geopolitically challenging environment.[34]

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30 Ambassador Dr Chanborey Cheunboran, Royal Embassy of Cambodia, Committee Hansard, Canberra, 29 November 2023, p. 1.

31 Ambassador Maria Hellen de la Vega, Embassy of the Philippines, Committee Hansard, Canberra, 15 November 2023, p. 5.

32 Ambassador Arjaree Sriratanaban, Royal Thai Embassy, Committee Hansard, Canberra, 29 November 2023, pages 2–3.

33 Ambassador Arjaree Sriratanaban, Royal Thai Embassy, Committee Hansard, Canberra, 29 November 2023, pages 2–3.

34 Flinders University, Submission 134, p. 2.

6.35 The work of the university's alumni network is also noted as facilitating mentorship and collaboration opportunities. It was stated that:

> The connections built on the Australian experience through overseas alumni significantly contributes to the people to people links that are so important for leveraging opportunities in the ASEAN [Association of Southeast Asian Nations] and Pacific regions.[35]

6.36 His Excellency Mr Anil Kumar Nayar, the High Commissioner of Singapore to Australia, emphasised the importance of better using Australian alumni of higher education institutions as a resource for influence in their home countries. High Commissioner Nayar remarked that over time more than 200,000 Singaporean students have studied in Australia and now work in various sectors in Singapore. He observed that the alumni would be a valuable resource for domestic Singaporean students with regards to hearing about their experiences. It was asserted that this method of communicating to prospective students would outmatch 'any slick PR campaign'.[36]

6.37 Chapter 2 of the Interim Report reported on the importance of alumni influence. The Committee recommended that the government work with the education sector to create a more systematic approach to tracking and supporting alumni networks, with a focus on priority countries and strengthening Australia's international research networks and partnerships.[37]

6.38 Mr Wise of UTAS noted the value of education in connecting Australia with the Pacific. The connections built through Pacific Islander students studying in Australia could be powerful, particularly from an economic perspective. He emphasised that education could be used to support Australia's current desire to 'strengthen our position and relationship with our pacific neighbours'.[38]

The student experience

6.39 Evidence received during the inquiry noted that the student experience begins before international students arrive in Australia, with recruitment and visa processing acknowledged as part of the experience. Further, the wellbeing of students, their experiences while in Australia, opportunities presented to them while studying, and post study options all informed student experiences.

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35 Flinders University, Submission 134, p. 2.

36 High Commissioner Anil Kumar Nayar, High Commission of the Republic of Singapore, Committee Hansard, Canberra, 15 November 2023, p. 5.

37 JSCFADT, Parliament of Australia, *Inquiry into Australia's tourism and international education sectors, Quality and Integrity – the Quest for Sustainable Growth: Interim Report into International Education*, October 2023, p. 43, https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Foreign_Affairs_Defence_and_Trade/Tourismandeducation/Interim_Report_-_Inquiry_into_Australias_International_Education_Sector, viewed 16 July 2024.

38 Mr Malcolm Wise, Principal, AMC, UTAS, Committee Hansard, 1 May 2024, p. 10.

6.40 The Committee heard that the international education sector is not seen as perfect and various factors including government policy settings, university fees, visa settings, airfares, and working rights for students are noted as contributors affecting Australia's competitiveness internationally.[39] Dr Jessica Gallagher, Deputy Vice-Chancellor of External Engagement at the University of Adelaide gave evidence that the sector requires:

> … innovative ideas, effective measures and positive experiences to ensure it continues to deliver its full potential for the sector, the students who choose to study here and the country more broadly.[40]

Safety and wellbeing

6.41 Safeguarding the rights and welfare of international students while they are in Australia was repeatedly raised as a concern throughout the inquiry. Evidence given to the Committee emphasised that a range of further measures are necessary to implement, including affordable and appropriate housing, cultural integration programs, avenues for employment, and support systems such as mental health services to attract and retain students in Australia.[41]

6.42 Australia's reputation as a relatively safe destination for international students was noted throughout the inquiry. His Excellency Dr Siswo Pramono, the Ambassador of Indonesia to Australia, advised the Committee that Australia's reputation as a safe place is one factor why overseas students choose to study in Australia.[42]

6.43 Ms Arthy from ACT Government explained to the Committee that 'what sets Canberra apart from most other cities is that we have a reputation for being safe.' She elaborated that:

> While there are isolated incidents, by and large we are considered a safe destination. We're also considered a fairly inclusive destination, so we don't get reports of the challenges that are faced in other cities that you would see with students. We have a program called Study Canberra, where one of our very first actions is to welcome everyone into Canberra as part of Enlighten, where we make it very clear that we are really an engaged, welcoming city.[43]

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39 Dr Jessica Gallagher, Deputy Vice-Chancellor, External Engagement, University of Adelaide, Committee Hansard, Adelaide, 20 February 2024, p. 1.

40 Dr Jessica Gallagher, Deputy Vice-Chancellor, External Engagement, University of Adelaide, Committee Hansard, Adelaide, 20 February 2024, p. 1.

41 See Chapter 4 of the interim report for more detail. JSCFADT, Parliament of Australia, *Inquiry into Australia's tourism and international education sectors, Quality and Integrity – the Quest for Sustainable Growth: Interim Report into International Education*, October 2023, https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Foreign_Affairs_Defence_and_Trade/Tourismandeducation/Interim_Report_-_Inquiry_into_Australias_International_Education_Sector, viewed 16 July 2024.

42 Ambassador Siswo Pramono, Embassy of the Republic of Indonesia, Committee Hansard, Canberra, 15 November 2023, p. 7.

43 Ms Kareena Arthy, Deputy Director-General, Chief Minister, Treasury and Economic Development, ACT Government, Committee Hansard, 15 May 2024, p. 4.

6.44 The Committee also heard how the ACT Government works with the universities to support the wellbeing of new international students. Mrs Kate Starick, Executive Group Manager, Policy and Strategy, Chief Minister, Treasury and Economic Development, ACT Government stated:

> We also work closely with the universities to provide kits to international students when they arrive—like a welcoming kit on how to access different services in the ACT, information about our parks and access to nature, different access to CALD community supports—and we distribute those through the universities.[44]

6.45 The evidence received from international students during the inquiry was overwhelmingly positive. However, there were some negative aspects to student experiences that were covered in the Interim Report.

6.46 Racism and crime were again raised as issues faced by students in evidence received following the publication of the Interim Report. Ms Ya Wen Chang, an international student from the AMC at UTAS, noted incidences of racist abuse in the streets and supermarket, which she stated were traumatising. She also gave the example of students from Malaysia who returned home after their studies because of racism they experienced in Australia.[45]

6.47 The issue of crime and safety for international students was raised in evidence received in Darwin. Professor Bowman of CDU detailed an incident that made national news of an international student from Bangladesh who was fatally attacked in his bed. He emphasised that:

> … victim of crime thing is one thing that we are dealing with all the time. I think at the moment we're pretty okay on it, but [it] is a difficult issue. But the feedback in general is very good.[46]

6.48 Ms Arthy from the ACT Government explained that the universities in Canberra work together in how they manage international student wellbeing and experience. She outlined that:

> We don't have a strategy for ANU, for UC or for UNSW; they all come together when it comes to working with international students and providing great experiences. It's a difficult question to answer in terms of whose responsibility is what because we work together to make sure that whatever one happens with students is a good one.[47]

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44 Mrs Kate Starick, Executive Group Manager, Policy and Strategy, Chief Minister, Treasury and Economic Development, ACT Government, Committee Hansard, Canberra, 15 May 2024, p. 10.

45 Ms Ya Wen Chang, International Student, AMC, UTAS, Committee Hansard, Launceston, 1 May 2024, p. 19.

46 Professor Scott Bowman AO, Vice Chancellor and President, Charles Darwin University, Committee Hansard, Darwin, 17 April 2024, p. 8.

47 Ms Kareena Arthy, Deputy Director-General, Chief Minister, Treasury and Economic Development, ACT Government, Committee Hansard, 15 May 2024, p. 4.

Accommodation and the cost of living

6.49 The Committee received evidence highlighting student accommodation as a major challenge for students and education providers. The need for purpose-built student accommodation (PBSA) was examined and reported on in the Interim Report, with the Committee recommending the urgent need for the government to encourage expansion of the PBSA sector.[48]

6.50 Evidence received since the publication of the Interim Report highlighted that the scale of the challenges around student accommodation varies between states and territories. Ms Johnston of StudyAdelaide noted that South Australia did not have the same accommodation pressures that were present in other states, and that there was still some capacity in the system. It was acknowledged that students are finding that they need to pay more for their accommodation, or they need to be further out from the city.[49]

6.51 Ms Johnston of StudyAdelaide articulated that they offer a free student accommodation advisory service, which provides information to parents, students and education networks about costs of accommodation. The service allows students to look at various accommodation options to suit their budget and provides advice on their rights, and the pros and cons of the different options. Ms Johnston emphasised that in South Australia, there were more PBSAs coming out of the pandemic than prior to it, and that StudyAdelaide was actively seeking to attract more of that type of accommodation.[50]

6.52 Flinders University submitted that due to high demand and price structures, PBSAs may not always meet demand and that students were finding the private rental market increasingly difficult to access. Students, both international and domestic, reported price to be the main barrier to accessing accommodation.[51]

6.53 As in Adelaide, evidence from Darwin claimed that the accommodation challenge was less of a problem than in other states. CDU submitted that while there was a shortage of housing in the Northern Territory, there were still beds available and opportunities for more. Professor Bowman of CDU highlighted the StudyStays program used by the university to explore accommodation vacancies in the Northern Territory.[52]

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48 JSCFADT, Parliament of Australia, *Inquiry into Australia's tourism and international education sectors, Quality and Integrity – the Quest for Sustainable Growth: Interim Report into International Education*, October 2023, p. 94, https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Foreign_Affairs_Defence_and_Trade/Tourismandeducation/Interim_Report_-_Inquiry_into_Australias_International_Education_Sector, viewed 16 July 2024.

49 Ms Jane Johnston, Chief Executive, StudyAdelaide, Committee Hansard, Adelaide, 20 February 2024, p. 19.

50 Ms Jane Johnston, Chief Executive, StudyAdelaide, Committee Hansard, Adelaide, 20 February 2024, pages 19–20.

51 Flinders University, Submission 134, p. 3.

52 Professor Scott Bowman AO, Vice Chancellor and President, Charles Darwin University, Committee Hansard, Darwin, 17 April 2024, p. 6.

6.54 Flinders University also stated that to support its new city campus, the university had formed a partnership with a purpose-built student accommodation provider, The Switch, to offer student accommodation options. Mr Schultz of Flinders University remarked that maintaining accommodation in the capital as well as sourcing regional accommodation was a challenge for students looking to do placements in regional areas.[53]

6.55 Ms Arthy from the ACT Government advised that as Canberra is a university town, international student accommodation is a focus for the universities and is funded by multiple sources, meaning there is potentially less pressure on the housing market. For example, Ms Arthy noted that the ANU is continually investing in 'high quality accommodation', including investment from Singapore.[54]

6.56 The cost of living issue was a common thread throughout the evidence on how international students make a decision about where to study. Ambassador Sriratanaban agreed that cost of living was a consideration for Thai students in whether they choose Australia, and that affordable housing was an issue raised by students, especially those not offered accommodation by their places of study. She emphasised that this was an area requiring innovative methods and support across different levels of government and places of higher education.[55]

6.57 Homestay programs is another accommodation option accessed by international students. However, the Committee was told that the pandemic had affected its availability in multiple ways. Ms Johnston of StudyAdelaide submitted that during the pandemic while students were unable to return to their home countries, many families providing homestay accommodation were heavily involved in the program without a break. Since then, some of those families have stepped away from the homestay program for respite but there are efforts to re-engage them with the program. [56]

6.58 The Committee was also informed that coming out of the pandemic, many homes are being utilised differently than in the pre-pandemic period, affecting the availability of rooms for homestay.[57] For example, spare rooms are now being used as home offices. This evidence compliments the evidence on the impact of the pandemic on homestay programs that was previously reported on in the Interim Report.

Employability and work initiatives

6.59 The availability and quality of internships, work placements and employment options for international students have been recurring themes throughout the inquiry. Chapter 3 of the Interim Report explored in-depth the issues raised in relation to international

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53 Mr Matt Schultz, Director, International Recruitment, Flinders University, Committee Hansard, Adelaide, 20 February 2024, pages 2–4.

54 Ms Kareena Arthy, Deputy Director-General, Chief Minister, Treasury and Economic Development, ACT Government, Committee Hansard, 15 May 2024, p. 8.

55 Ambassador Arjaree Sriratanaban, Royal Thai Embassy, Committee Hansard, Canberra, 29 November 2023, pages 2–7.

56 Ms Jane Johnston, Chief Executive, StudyAdelaide, Committee Hansard, Adelaide, 20 February 2024, p. 21.

57 Ms Jane Johnston, Chief Executive, StudyAdelaide, Committee Hansard, Adelaide, 20 February 2024, p. 21.

students accessing work in Australia post-degree, as well as issues around work integrated learning. The Committee also made a recommendation for the government to create a national work-integrated framework with oversight of work-integrated learning placements.[58]

6.60 The University of Adelaide spoke of its partnership with Deloitte in providing opportunities for both domestic and international students after graduation. Dr Gallagher of the University of Adelaide emphasised that Deloitte viewed the partnership as a talent attraction initiative for the Asia-Pacific region as a whole and not just Australia or South Australia.[59]

6.61 Professor Robyn Aitken, Dean of the Rural and Remote Health College of Medicine and Public Health at Flinders University, noted international students in medical programs do not have the same opportunities as domestic students in terms of support and placements. She argued that if the same conditions were offered to international students, it would provide:

> … a pipeline of Australian educated students to add to our local students for the Northern Territory workforce.[60]

6.62 Mr Schultz of Flinders University noted that they were a large provider of tertiary health courses but constrained by the Australian Health Practitioner Regulation Agency (AHPRA) on the number of international students they can enrol. Mr Schultz asserted that Flinders University would be able to enrol students in its nursing program four times over, with demand not being the issue. The problem, he argued, was linked to accreditation issues, that is, nursing students are required to do placements as part of their course for accreditation and they couldn't necessarily be guaranteed one.[61]

6.63 StudyAdelaide highlighted to the Committee its regional career tours as a way of getting international students out of the city and into the regions, connecting them with regional employers. Ms Johnston of StudyAdelaide stated that the tours aimed to align the areas of study to the areas of skill needed in that particular region. The initiative involves working with the students before they go into the regions and also involves working with employers in those communities in an effort to explain the visa conditions of students and how they can be employed. Ms Johnston noted that:

> … students have reported at the beginning they were 34 per cent interested in a regional opportunity. Having done the tours, that sits at 92 per cent.[62]

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58 JSCFADT, Quality and Integrity, the Quest for Sustainable Growth, Interim Report into International Education, p. 73.

59 Dr Jessica Gallagher, Deputy Vice-Chancellor, External Engagement, University of Adelaide, Committee Hansard, Adelaide, 20 February 2024, p. 5.

60 Professor Robyn Aitken, Dean, Rural and Remote Health College of Medicine and Public Health, Flinders University, Committee Hansard, 17 April 2024, p. 3.

61 Mr Matt Schultz, Director, International Recruitment, Flinders University, Committee Hansard, Adelaide, 20 February 2024, p. 14.

62 Ms Jane Johnston, Chief Executive, StudyAdelaide, Committee Hansard, Adelaide, 20 February 2024, p. 21.

6.64 Ms Johnson also outlined the Job Shop platform, hosted by StudyAdelaide, which is aimed at connecting students to South Australian employers. She stated that there were various categories of organisations listed including 11 tourism and hospitality businesses.[63]

6.65 Mrs Starick of the ACT Government advised that in supporting international students to connect with local businesses:

> There are programs we're doing with the universities on work integrated learning, to connect placements for international students into local companies—so working with local businesses around how to provide that support and an environment for international students to do their study and work related placements as well. [64]

6.66 Ms Chang, a logistics student at the AMC at UTAS, noted that as she transitions from study, finding employment is a barrier, despite there being demand in the logistics and supply chain industry. It was stated that opportunities were not available to her because she was neither an Australian citizen nor a permanent resident. She stressed that:

> … many job postings implicitly discourage applications from international students due to the temporary nature of our potential contribution, which is the two-year work limitation of the graduate visa.[65]

6.67 Mr Shrenik Bhalla, an international student at the AMC at UTAS, told the Committee of the ongoing challenges he faces around continued work rights in Australia when attempting to secure a graduate role, despite having completed internships related to his area of study. He expressed that employers have reservations about training someone who may not remain in the country long term.[66]

6.68 Working rights was a theme throughout the inquiry and identified by international students as a barrier to them finding employment after completing their degrees. Ms Chang also noted that sometimes companies were not welcoming of international students from other countries, which could discourage potential students from choosing Australia as a place to study.[67]

6.69 In its Interim Report, the Committee recommended the Australian Government engage with both the international education sector and industry to develop targeted campaigns to educate employers on the opportunities to hire international student graduates in sectors with 'high skilled job vacancies'.[68]

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63 Ms Jane Johnston, Chief Executive, StudyAdelaide, Committee Hansard, Adelaide, 20 February 2024, p. 18.

64 Mrs Kate Starick, Executive Group Manager, Policy and Strategy, Chief Minister, Treasury and Economic Development, ACT Government, Committee Hansard, Canberra, 15 May 2024, p. 10.

65 Ms Ya Wen Chang, International Student, AMC, UTAS, Committee Hansard, Launceston, 1 May 2024, p. 12.

66 Mr Shrenik Bhalla, International Student, AMC, UTAS, Committee Hansard, Launceston, 1 May 2024, p. 13.

67 Ms Ya Wen Chang, International Student, AMC, UTAS, Committee Hansard, Launceston, 1 May 2024, p. 17.

68 Joint Standing Committee on Foreign Affairs, Defence and Trade, Parliament of Australia, *Inquiry into Australia's tourism and international education sectors, Quality and Integrity – the Quest for Sustainable Growth: Interim Report into International Education*, October 2023, p. 73,

Visas

6.70 A 'one-size-fits-all' Australian Government approach to migration and international students that does not take account of institution or study location was highlighted as a key challenge faced by regional universities. Professor Bowman of CDU argued that the relatively small size of the international student population in Darwin compared to other states is adversely affected by this approach.[69]

6.71 The Department of Tourism, Industry and Trade for the Northern Territory Government argued that the Australian Government should consider the relative size of markets for international students. It argued that a one-size-fits-all approach was most likely not appropriate for a small market like the Northern Territory when making decisions about international student numbers. Ms Valerie Smith, Executive Director of Industry Development for the Northern Territory Government argued that:

> The number of international students we have in the Northern Territory is less than one per cent of the number that's in Australia overall. You could argue that whatever happens here has no material impact on Australia's migration outcomes, unfortunately, from a national perspective, but changes made at the national level can have a really big impact on a small destination like us.[70]

6.72 Professor Bowman further noted that previously the university was achieving 98 per cent acceptance on visas, but due to vetting procedures in 2023, this number had dropped to 50 per cent. Thus the university's risk ranking was stated as being in danger as it was not getting the number of students anticipated. It was also asserted that as the smallest university in Australia, 'the one -size-fits-all policy to reduce migration is having a devastating effect on the Northern Territory's university'.[71]

6.73 On the issue of visas, Dr Gallagher noted that the University of Adelaide was also finding delays with visa assessments a challenge, which has led to genuine students not being able to begin their studies. She emphasised that the perceived message that Australia was not welcoming or accessible was going out to the international market.[72]

6.74 Mr Shultz of Flinders University raised concerns to the Committee about the current visa settings and argued that while Austrade is doing a good job of promoting Australia as a study destination, the current visa outcomes do not always support these efforts. Flinders University, in its written submission, submitted that a migration

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https://www.aph.gov.au/Parliamentary_Business/Committees/Joint/Foreign_Affairs_Defence_and_Trade/Tourismandeducation/Interim_Report_-_Inquiry_into_Australias_International_Education_Sector, viewed 16 July 2024.

69 Professor Scott Bowman AO, Vice Chancellor and President, CDU, Committee Hansard, Darwin, 17 April 2024, p. 2.

70 Ms Valerie Smith, Executive Director of Industry Development, Department of Tourism, Industry and Trade, Northern Territory Government, Committee Hansard, Darwin, 17 April 2024, p. 65.

71 Professor Scott Bowman AO, Vice Chancellor and President, CDU, Committee Hansard, Darwin, 17 April 2024, p. 5.

72 Mr Matt Schultz, Director, International Recruitment, Flinders University, Committee Hansard, Adelaide, 20 February 2024, p. 8.

policy that creates a welcoming environment for international students is key and involves streamlining visa processes and providing post-study work opportunities. With this in mind, Flinders University advised that the specific needs of states and territories as well as priority industries:

> … need to be considered and accounted for within federal government policy settings for the broader sector.[73]

6.75 UTAS' witnesses also stated that the visa processing times for some of their markets had been impacted by slower processing times and lower approval rates. It was noted that large universities with greater revenue had greater processing abilities, with staff located in target countries. UTAS proposed a centralised model for the processing of genuine students and the interview process, so that '40 universities aren't interviewing the same student'. Mr Wilson further explained that there would be challenges with this model but that:

> It's a very inefficient use of time for all universities to be interviewing the same student, to try to understand if they're genuine and should be coming to Australia. It's not a good use of money for anyone.[74]

Committee Comment

6.76 The Committee's Interim Report, released in October 2023, contained 29 recommendations for the international education sector based on the evidence received at that point. Since then, the Committee has received further evidence that reinforces the issues reported on in the Interim Report, and the recommendations it made.

6.77 The Committee encourages the Australian Government to pursue the implementation of those recommendations, with a particular view to supporting universities in regional areas. The Committee notes the Australian Government has yet to respond to the recommendations in the October 2023 Interim Report, as it is required to do within three months of tabling, and urges the Government to immediately table its response in Parliament.

6.78 Since the Interim Report was released, the Australian Government has announced changes in the policy for international education, which will take time to be fully developed and implemented, and to see measurable results. The Committee continues to encourage the Australian Government to proactively engage with education institutions, industry, peak organisations, and all levels of government in the refinement and implementation of these measures to ensure the settings and policy for the international education sector are beneficial for both international students and for Australia.

6.79 The Committee notes the concerns from the higher education sector that visa settings are impacting their ability to recruit international students. The Committee

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73 Flinders University, Submission 134, p. 2.

74 Mr Robert Wilson, Executive Director, Recruitment and Engagement, UTAS, Committee Hansard, 1 May 2024, p. 9.

believes that concerns expressed by smaller universities of the impact on their risk ratings, through a one-size-fits-all approach, needs to be taken into serious consideration. A diversified international student sector, with students recruited from various markets, is important in creating a healthy and sustainable international student sector in Australia.

6.80 The Committee is of the view that while the Australian Government works to reform the international student sector, it should avoid a one-size-fits-all policy that may undermine regional and smaller universities and inadvertently favour larger, metropolitan universities. This action may lead to some regional communities with universities experiencing negative economic impacts, including workforce shortages. The economic impact could extend from a potential reduction in international student numbers, to a drop in economic activity due to loss of visiting friends and relatives.

6.81 The Committee acknowledges that international students who seek to work in Australia and contribute to Australian society continue to face difficulties in securing appropriate accommodation and post-study opportunities.

6.82 The Committee urges the Australian Government to develop and implement policies and initiatives to improve the accessibility and affordability of appropriate housing for both international students and for people working in the tourism sector. The Committee heard this is particularly critical for regional areas which are potentially more reliant on tourism and international students, but face additional challenges in providing suitable and reliable accommodation compared to major cities, thus making it difficult for regional tourism operators to attract staff and for regional education providers be seen as destinations of choice for international students.

6.83 The Committee also continues to support reforms to Australia's migration system that will support clearer pathways to skilled worker visas in areas of critical skill needs, including in the tourism sector, which continues to face workforce shortages.

6.84 The Committee reiterates its support for the international education sector to work with key stakeholders to support the wellbeing of students and better prepare international students and businesses with the required knowledge, skills and experiences, to provide international students with opportunities to transfer into work areas for which they are qualified.

Recommendations

Recommendation 27

6.85 The Committee urges the Australian Government to consider the recommendations from the Committee's Interim Report on the international education sector, with a particular emphasis on implementing policies and actions that support regional education providers.

6.86 This consideration of the Interim Report should take into account updated government policy settings in the sector, to ensure that the adoption of recommendations aligns with their intent.

Recommendation 28

6.87 The Committee recommends the Australian Government promotes the accessibility and affordability of appropriate housing in regional areas and supports policies which will increase housing stock more broadly to improve the availability of housing for international students and workers in the tourism sector.

Senator Deborah O'Neill
Chair
Trade Subcommittee
24 September 2024

Hon Shayne Neumann MP
Chair
Joint Standing Committee on Foreign Affairs, Defence and Trade
24 September 2024

A. Submissions

1 Leaders Institute Pty Ltd

2 James Cook University

3 Australian Council of Graduate Research

4 Mr Kyle Jardeau

- 4.1 Supplementary to submission 4

5 Australian Chamber of Commerce and Industry

- 5.1 Supplementary to submission 5
- 5.2 Supplementary to submission 5

6 Professor Gui Lohmann

7 Australian Catholic University

8 Mr Simon Cole

9 NEAS Australia

- 9.1 Supplementary to submission 9

10 Tourism Western Australia

11 Tourism and Transport Forum

12 Group of Eight Universities

13 Australian Geoscience Council Inc

14 Destination Gold Coast

15 Charles Darwin University

16 Bond University

17 University of Canberra

- 17.1 Supplementary to submission 17

18 Duolingo

19 University of Wollongong

20 Backpacker & Youth Tourism Advisory Panel (BYTAP)

- 20.1 Supplementary to submission 20

21 The University of Adelaide

- 21.1 Supplementary to submission 21

22 University of New South Wales **(**UNSW) Sydney

- 22.1 Supplementary to submission 22

23 South Australian Tourism Commission

24 La Trobe University

25 Monash University

26 Regional Universities Network

27 Cruise Lines International Association Australasia

28 National Tertiary Education Union (NTEU)

- 28.1 Supplementary to submission 28

29 International Student Education Agents Association Limited (ISEAA)

- 29.1 Supplementary to submission 29
- 29.2 Supplementary to submission 29
- Attachment 1

30 University of Technology Sydney

31 Outdoors NSW & ACT Limited

32 Victorian TAFE Association

33 RMIT University

- 33.1 Supplementary to submission 33

34 Innovative Research Universities

- 34.1 Supplementary to submission 34

35 Griffith University

- 35.1 Supplementary to submission 35

36 Australian Business Deans Council

37 Symphony Services Australia

38 Navitas

39 Queensland Tourism Industry Council

- 39.1 Supplementary to submission 39

40 TasTAFE

41 Australian Regional Tourism

42 Townsville Enterprise Limited & Study Townsville

43 Department of Education

- 43.1 Supplementary to submission 43
- 43.2 Supplementary to submission 43

44 Australian Tourism Export Council

- 44.1 Supplementary to submission 44
- Attachment 1

45 Australian Technology Network of Universities (ATN)

- 45.1 Supplementary to submission 45

46 National Association for the Visual Arts Ltd

47 Queensland University of Technology

48 ISANA International Education Association

49 Student Accommodation Council - Property Council of Australia

- 49.1 Supplementary to submission 49
- Attachment 1

50 English Australia

- 50.1 Supplementary to submission 50
- 50.2 Supplementary to submission 50

51 ACT Government

- 51.1 Supplementary to submission 51

52 Council of Australian Postgraduate Associations and the National Aboriginal and Torres Strait Islander Postgraduate Association

53 NSW Government

- Attachment 1
- Attachment 2
- Attachment 3

54 TEQSA (Tertiary Education and Quality Standards Agency)

- 54.1 Supplementary to submission 54

55 Women Can Australasia (WCA)

56 Airbnb

57 Independent Schools Australia

58 Victorian Chamber of Commerce and Industry

59 Universities Australia

60 Tourism Australia

- 60.1 Supplementary to submission 60
- 60.2 Supplementary to submission 60

61 Murdoch University

- 61.1 Supplementary to submission 61
- 61.2 Supplementary to submission 61

62 The University of Melbourne

63 Department of Foreign Affairs and Trade

- 63.1 Supplementary to submission 63

64 Business Events Council of Australia

- 64.1 Supplementary to submission 64
- Attachment 1
- Attachment 2

65 IDP Education

66 The Tourism CoLab

- 66.1 Supplementary to submission 66

67 Tasmanian Government

68 The Central Victorian Goldfields World Heritage Bid

- 68.1 Supplementary to submission 68
- 68.2 Supplementary to submission 68

69 Independent Tertiary Education Council Australia (ITECA)

- 69.1 Supplementary to submission 69

70 Online Education Services (OES)

71 StudyAdelaide

72 Australian Academy of Science

73 Austrade

- 73.1 Supplementary to submission 73
- 73.2 Supplementary to submission 73
- 73.3 Supplementary to submission 73

74 The Indigenous Art Code Ltd, The Copyright Agency Ltd and Arts Law Centre of Australia

75 Commonwealth Ombudsman

- 75.1 Supplementary to submission 75
- Attachment 1

76 Australian Airports Association

- 76.1 Supplementary to submission 76

77 Department of Home Affairs

- 77.1 Supplementary to submission 77
- 77.2 Supplementary to submission 77
- Attachment 1
- Attachment 2
- Attachment 3

78 StudyPerth

- 78.1 Supplementary to submission 78

79 Australian Skills Quality Authority (ASQA)

- 79.1 Supplementary to submission 79
- 79.2 Supplementary to submission 79
- 79.3 Supplementary to submission 79

- 79.4 Supplementary to submission 79

80 Australian Chamber - Tourism

81 Migrant Justice Institute

82 Queensland Government

83 Independent Higher Education Australia (IHEA)

84 International Education Association of Australia

85 Confidential

86 Sydney University Postgraduate Representative Association

87 Bathurst Regional Council

88 Victorian Government Department of Jobs, Skills, Industry and Regions

- Attachment 1

89 Destiny Rescue Ltd

90 CQUniversity Australia

- 90.1 Supplementary to submission 90

91 STUDY AND WORK

92 Australian Federation of Travel Agents

- 92.1 Supplementary to submission 92

93 *Name Withheld*

94 Queensland Airports Limited

- 94.1 Supplementary to submission 94

95 Mr Tirtha Khatiwada

96 Study Gold Coast

97 The Social Research Centre

- 97.1 Supplementary to submission 97
- 97.2 Supplementary to submission 97

98 National Union of Students

99 The University of Sydney

100 Australian Psychology Accreditation Council

101 Engineers Australia

102 MyStay International

103 Dr Joanne Barker

104 Department of Employment and Workplace Relations

105 City of Gold Coast

- 105.1 Supplementary to submission 105
- Attachment 1

106 Primary Industries Skills Council

107 Mitchell Institute

108 Mudgee Wine growers

109 Confidential

110 Professor Catherine Hawke

111 Charles Sturt University

112 Confidential

113 New Caledonia

114 Western Sydney Airport

115 Broome Chamber of Commerce and Industry Inc

116 Regional Development Australia (RDA) Kimberley

117 Ecotourism Australia

118 Tourism Tropical North Queensland (TTNQ)

119 TAFE Queensland International Education

120 National Indigenous Australians Agency

121 Adventure Queensland

122 Accommodation Australia

123 Shire of Broome

124 The University of Western Australia

125 Nyamba Buru Yawuru

- Attachment 1

126 Edith Cowan University

127 Western Australian Government Department of Jobs, Tourism, Science and Innovation

128 Singapore Airlines

129 Confidential

130 Ms Birute Don

- 130.1 Supplementary to submission 130

131 Embassy of the Philippines

132 Australian Local Government Association

133 A City of Greater Geraldton

134 Flinders University

135 Australian Small Business and Family Enterprise Ombudsman

136 Mr Deepak Chhetry

137 Insurance Council of Australia

- Attachment 1

138 Launceston Airport

139 Maged Mohamed

140 Tourism Tasmania

- Attachment 1
- Attachment 2

141 University of Tasmania

142 Canberra Airport

143 Qantas Group

B. Exhibits

1	*Opportunities and challenges for international graduates in Australia's workforce*, Presentation by Jobs and Skills Australia to Council for International Education, Professor Peter Dawkins AO
2	Four academic papers on the tourism sector provided by Associate Professor Gabby Walters

C. Public Hearings

Thursday, 2 March 2023 - Sydney

Round table of Universities

- Ms Kirsten Andrews, Vice-President, External Engagement, University of Sydney
- Mr Iain Watt, Deputy Vice-Chancellor, and Vice-President (International), University of Technology Sydney
- Professor Merlin Crossley, Deputy Vice-Chancellor Academic Quality, University of New South Wales
- Professor Alex Frino, Senior Deputy Vice-Chancellor (Innovation, Enterprise and External Relations), University of Wollongong
- Ms Lee-ann Norris, Chief Student Recruitment Officer, Global and Domestic, Macquarie University

ELICOS peak bodies/associations

- Mr Brett Blacker, Chief Executive Officer, English Australia
- Dr Patrick Pheasant, Chief Executive Officer, NEAS Australia

Round table of International Students

- Ms Joy (Jiacong) Xu, International Student Officer 2023, University of Technology Sydney (UTS)
- Mr Weihong Liang, President, Sydney University Postgraduate Representative Association, University of Sydney
- Mr Yinfeng (Benny) Shen, Fellow of the Senate, University of Sydney
- Ms Katja Strehle, International Student, Western Sydney University
- Ms Samanda Mularachchi, Student, Western Sydney University
- Ms Inuli Subasinghe, Student Casual, Arc@UNSW

Migrant Justice Institute

- Dr Laurie Berg, Co-Executive Director

Round table of tourism peak bodies

- Mrs Margy Osmond, Chief Executive Officer, Tourism and Transport Forum
- Mr Peter Shelley, Managing Director, Australian Tourism Export Council
- Ms Anna Taylor, National Policy Manager, Australian Tourism Export Council

Wednesday, 8 March 2023 - Canberra

Australian Chamber of Commerce and Industry

- Mr John Hart, Executive Chair, Tourism
- Ms Ingrid Fraser, Associate Director, Workforce & Tourism Policy
- Ms Natalie Heazlewood, Senior Policy Adviser

Wednesday, 22 March 2023 - Canberra

University of Canberra

- Professor Geoff Crisp, Deputy Vice-Chancellor (Academic) and Vice-President

Wednesday, 29 March 2023 - Canberra

Australian Airports Association

- Mr James Goodwin, Chief Executive
- Mr Scott Martin, Director of Policy and Advocacy

Tuesday, 18 April 2023 - Melbourne

International Education Association of Australia

- Hon Mr Phil Honeywood, Chief Executive Officer, International Education Association of Australia

Round table of university peak bodies

- Ms Vicki Thomson, Chief Executive, The Group of Eight
- Mr Luke Sheehy, Executive Director, Australian Technology Network of Universities
- Ms Bethany Keats, Marketing and Media Advisor, Innovative Research Universities
- Mr John Preston, Government Relations and Policy Advisor, Innovative Research Universities
- Mr Peter Chesworth, Deputy Chief Executive, Universities Australia
- Mr Kelly Smith, IRU International Group, Innovative Research Universities; and Pro-Vice-Chancellor International, Murdoch University

Round table of private provider peak bodies

- Mr Troy Williams, Chief Executive, Independent Tertiary Education Council Australia
- Mr Felix Pirie, Deputy Chief Executive – Policy & Research, Independent Tertiary Education Council Australia
- Dr Peter Hendy, Chief Executive Officer, Independent Higher Education Australia

Round table of TAFE peak bodies

- Ms Judith Uren, Director International, Victorian TAFE Association
- Mr Bruce Bradfield, International Marketing Manager, William Angliss Institute of TAFE (member of the Victorian TAFE Association)
- Ms Lyndal Manson, Director, Governance, Policy and Projects, TAFE Directors Australia

Round table of education agents bodies

- Mr Brian Smith, Head of Global Stakeholder Engagement, IDP Education
- Ms Kim Dienhoff, Head of Government Relations, IDP Education
- Mr Robert Parsonson, Executive Officer, International Student Education Agents Association

Victorian Chamber of Commerce and Industry

- Mr Dylan Broomfield, General Manager, Policy and Advocacy
- Ms Sarah Rillo, Manager, Campaigns and Advocacy

Wednesday, 19 April 2023 - Melbourne

Round table of union/ professional associations

- Mr Kieran McCarron, Policy and Research Officer, National Tertiary Education Union
- Dr Terri MacDonald, Director Public Policy and Strategic Research, National Tertiary Education Union
- Ms Sharon Cook, National President, ISANA International Education Association
- Ms Danielle Hartridge, Vice President, Professional Development, ISANA International Education Association

Round table of student accommodation organisations

- Mr Geoff Denison, President, Student Accommodation Association
- Ms Torie Brown, Executive Director, Student Accommodation Council – Property Council of Australia
- Ms Anouk Darling, President, Student Accommodation Council – Property Council of Australia
- Mr David Bycroft, Founder and Chief Business Development Officer, MyStay International

Round table of accreditation bodies

- Ms Kathryn Baird, Director, Skilled Migration Services, Australian Nursing and Midwifery Accreditation Council

- Ms Samantha Zdjelar, General Manager, Student and Graduate Membership, Engineers Australia
- Ms Bernadette Foley, General Manager, Professional Standards, Engineers Australia
- Dr John Dunn, Chair, Australian Psychology Accreditation Council

Wednesday, 10 May 2023 - Canberra

Business Events Council of Australia

- Mr Andrew Hiebl, Company Secretary
- Dr Leo Jago OAM, Chair

Monday, 15 May 2023 - Canberra

Roundtable: International Education Data Insights

- Ms Lisa Bolton, Director, QILT Research and Strategy, Social Research Centre
- Mr Simon Walker, Managing Director, National Centre for Vocational Education Research
- Mr Jeffrey Smart, Director & Co-Founder, The Lygon Group
- Dr Angela Lehmann, Head of Research, The Lygon Group
- Ms Varsha Devi Balakrishnan, Head of Student Insights and Strategy, The Lygon Group
- Ms Karen Sandercock, First Assistant Secretary, International Division, Department of Education
- Ms Alison Cleary, Acting Assistant Secretary, International Quality Branch, Department of Education
- Ms Rachel Lloyd Assistant Secretary, International Policy Branch, Department of Education

Roundtable: Education Agents

- Mr Robert Parsonson, Executive Officer, International Student Education Agents Association
- Ms Sharon Cook, National President, ISANA International Education Association
- Ms Danielle Hartridge, Vice President Professional Development, ISANA International Education Association, Department of Home Affairs
- Ms Kim Dienhoff Head of Government Relations, IDP Education
- Ms Jane Li, Area Director Australasia, IDP Education
- Ms Bronwyn Markey, Senior Professional Services Manager, Migration Institute of Australia
- Ms Catriona Jackson, Chief Executive, Universities Australia

- Hon Mr Phil Honeywood, Chief Executive Officer, International Education Association of Australia
- Mr Charlie Shandil, Assistant Secretary, Immigration Policy & Planning Branch, Department of Home Affairs
- Ms Alison Garrod, Assistant Secretary, Temporary Visas Program Branch, Department of Home Affairs
- Ms Karen Sandercock, First Assistant Secretary, International Division, Department of Education
- Ms Alison Cleary, A/g Assistant Secretary, International Quality Branch, Department of Education
- Ms Rachel Lloyd Assistant Secretary, International Policy Branch, Department of Education

Roundtable: Work Integrated Learning, Skilled Work and Graduates

- Ms Anna Faithfull, Deputy Secretary, Skills and Training Group, Department of Employment and Workplace Relations/ Australian Apprenticeship Support Network
- Ms Laura Angus, First Assistant Secretary, Department of Employment and Workplace Relations/ Australian Apprenticeship Support Network
- Mr Cliff Bingham, Assistant Secretary, Jobs and Skills Australia
- Professor Peter Dawkins, Director, Jobs and Skills Australia
- Ms Alison Garrod, Assistant Secretary, Temporary Visas Program Branch, Department of Home Affairs
- Hon Mr Phil Honeywood, Chief Executive Officer, International Education Association of Australia
- Mr Robert Thomason, Executive Director, VETASSESS
- Professor Denise Jackson, President, Australian Collaborative Education Network
- Ms Karen Sandercock, First Assistant Secretary, International Division, Department of Education
- Ms Alison Cleary, A/g Assistant Secretary, International Quality Branch, Department of Education
- Ms Rachel Lloyd Assistant Secretary, International Policy Branch, Department of Education

Roundtable: Innovation, Transnational, Diversity and Hybrid Futures

- Ms Claire Field, Private Capacity
- Mr David Linke, Managing Director, EduGrowth
- Ms Marnie Watson, Chief Commercial Officer, Acumen (Part of Sannam S4Group)

- Mr Jonathan Chew, Global Head of Insights and Analytics, Navitas
- Mr Simon Finn, Head of Strategic Engagement and Government Relations, Navitas
- Mr John Molony, Vice President, International, Deakin University
- Hon Mr Phil Honeywood, Chief Executive Officer, International Education Association of Australia
- Ms Karen Sandercock, First Assistant Secretary, International Division, Department of Education
- Ms Rachel Lloyd, Assistant Secretary, International Policy Branch, Department of Education
- Ms Elizabeth Wilde, First Assistant Secretary, Department of Foreign Affairs and Trade
- Mr Aedan Whyatt, Assistant Secretary, Global Programs and Partnerships Branch, Development Policy Division, Department of Foreign Affairs and Trade
- Ms Edwina Betts, A/g Assistant Secretary, Education and Integration Branch, Office of the Pacific, Department of Foreign Affairs and Trade
- Mr Luke Hartley, Assistant Director, Global Programs and Partnerships Branch, Development, Policy Division, Department of Foreign Affairs and Trade
- Ms Melissa Banks, Head of International Education Centre of Excellence, Austrade
- Mrs Helen Kronberger, Manager International Education (Global Engagement), Austrade

Roundtable: Soft Power and Building Resilience

- Dr Joanne Barker, Private Capacity
- Ms Susannah Patton, Chief Executive Officer, International Education Association of Australia
- Mrs Elizabeth Wilde, First Assistant Secretary, Department of Foreign Affairs and Trade
- Mr Aedan Whyatt, Assistant Secretary, Global Programs and, Partnerships Branch, Development Policy Division, Department of Foreign Affairs and Trade
- Mr Ray Marcelo, Assistant Secretary, Southeast Asia Strategy Economic, and Communications Branch, Office of Southeast Asia, Department of Foreign Affairs and Trade
- Ms Edwina Betts, A/g Assistant Secretary, Education and Integration Branch, Office, of the Pacific, Department of Foreign Affairs and Trade
- Mr Luke Hartley, Assistant Director, Global Programs and, Partnerships Branch, Development Policy Division, Department of Foreign Affairs and Trade

- Mrs Helen Kronberger, Manager International Education (Global Engagement), Austrade
- Ms Karen Sandercock, First Assistant Secretary, International Division, Department of Education
- Ms Rachel Lloyd, Assistant Secretary, International Policy Branch, Department of Education

Roundtable: Student Experience

- Professor Ly Tran, Deakin's Research for Educational Impact Centre, Deakin University
- Ms Danielle Hartridge, Team Member, Best Practice International Student Engagement, Deakin University
- Dr Carolyn Evans, Vice Chancellor and President, Griffith University
- Ms Caroline Hartnett, Deputy Director, Study Melbourne and International Education
- Ms Jane Johnston, Chief Executive, Study Adelaide
- Ms Karen Sandercock, First Assistant Secretary, International Division, Department of Education
- Ms Rachel Lloyd, Assistant Secretary, International Policy Branch, Department of Education
- Mr Jiahao Li, National Postgraduate Officer, Council of International Students Australia

Tuesday, 16 May 2023 - Canberra

Roundtable: Quality and Integrity

- Hon Mr Phil Honeywood, Chief Executive Officer, International Education Association of Australia
- Mr Menelaos (Mel) Koumides, Managing Director, Australian Academy of Vocational Education and Trades Pty Ltd t/as Academia International
- Ms Christina Bolger, Deputy Chief Executive Officer, Australian Skills Quality Authority
- Ms Kellie Spence, Executive Director, Australian Skills Quality Authority
- Mr Alistair Maclean, Chief Executive Officer, Tertiary Education Quality and Standards Agency
- Ms Jenny Dodd, Chief Executive Officer, TAFE Directors Australia
- Ms Klara Major, Assistant Director, Industry Investigations Team, Office of the Commonwealth Ombudsman
- Ms Emma Cotterill, Senior Assistant Ombudsman – Investigations, Office of the Commonwealth Ombudsman

- Ms Alison Garrod, Assistant Secretary, Temporary Visas Program Branch, Department of Home Affairs
- Ms Karen Sandercock, First Assistant Secretary, International Division, Department of Education
- Ms Alison Cleary, A/g Assistant Secretary, International Quality Branch, Department of Education
- Ms Rachel Lloyd, Assistant Secretary, International Policy Branch, Department of Education

Roundtable: Marketing to International Students

- Mr Jay Meek, General Manager Trade, Trade and Investment, Austrade
- Mrs Helen Kronberger, Senior Global Engagement Manager, Trade and Investment, Austrade
- Ms Jessica Hamilton, General Manager, Communication & Marketing, Austrade
- Mrs Melissa Banks, Head of International Education, Austrade
- Mr Felix Pirie, Deputy Chief Executive, Policy & Research, Independent Tertiary Education Council Australia
- Hon Mr Phil Honeywood, Chief Executive Officer, International Education Association of Australia
- Mrs Saskia Loer Hansen, Deputy Vice-Chancellor, International & Engagement, RMIT University
- Mrs Derryn Belford, Chief Executive Officer, StudyPerth

Wednesday, 17 May 2023 - Gold Coast

International Education Roundtable

- Ms Jennine Tax, Acting Chief Executive Officer, Study Gold Coast
- Mrs Cheryl Jolliffe, Vice President, Future Students, Bond University
- Professor Sarah Todd, Vice President, Global, Griffith University
- Mr Dean Gould, Chief Marketing Officer, Southern Cross University
- Mr Troy Yue, Chief Executive Officer, National Institute of Education and Technology Group Pty Ltd
- Mr Pablo Carpio, Director, Owner, The Language Academy
- Ms Kylie Cooper, Acting Executive Director, Study Queensland Directorate

Mayor’s Student Ambassadors Roundtable

- Ms Mary Shanice Saavedra, Mayor's Student Ambassador 2022, Study Gold Coast
- Ms Mrisha Upadhyay, Mayor's Student Ambassador 2023, Study Gold Coast

- Mrs Nikol Slynkova, Mayor's Student Ambassador 2021, Study Gold Coast

Australian International Student Tours

- Ms Tanya Ferguson, Director

Major Events Gold Coast

- Mrs Jan McCormick, Chief Executive Officer

The University of Queensland

- Dr Gabby Walters, Associate Professor in Tourism

International Tourism Roundtable

- Ms Karen Bolinger, Interim Chief Executive Officer, Destination Gold Coast
- Mrs Sarah Colgate, Board Member, Destination Gold Coast; and Head, Strategic Relationships, Hot Air Balloon Gold Coast and Cairns
- Ms Adrienne Readings, Chair, Destination Gold Coast; and General Manager, Gold Coast Convention and Exhibition Centre
- Mrs Amanda Byrne, General Manager, Aviation Business Development, Queensland Airports Limited
- Ms Lauren Horner, Brand Manager, The Tour Collective
- Mr Greg Yong, Chief Executive Officer, Ardent Leisure

Tourism and Industry Roundtable

- Ms Gayle O'Brien, General Manager, Queensland Department of Tourism, Innovation and Sport
- Mr Nick Elliott, Group Executive, Corporate and Industry, Tourism and Events Queensland
- Ms Melanie Anderson, General Manager, Strategy & Advocacy, Queensland Tourism Industry Council
- Dr Esther Anderson, Senior Research and Policy Officer, Queensland Tourism Industry Council
- Ms Maxine 'Rhonda' Appo, Indigenous Program Manager, Queensland Tourism Industry Council

City of Gold Coast

- Ms Tanya Lipus, Manager of City Economy
- Mr Darren Stewart, Manager of City Projects

Monday, 26 June 2023 - Orange

Roundtable - Universities

- Ms Julia Andrews, Director, External Engagement, Bathurst and Orange, Charles Sturt University
- Mr Mike Ferguson, Pro Vice-Chancellor, International, Charles Sturt University, Charles Sturt University
- Professor Catherine Hawke, Head of Clinical School, School of Rural Health Dubbo/Orange, University of Sydney

Round table – Regional tourism

- Ms Nerida Sweetapple, General Manager, Orange360
- Councillor Jason Hamling, Mayor, Orange City Council
- Ms Rachelle Robb, Director, Corporate and Commercial Services, Orange City Council
- Mr Glenn Mickle, Tourism Manager, Orange City Council
- Ms Charlotte Gundry, Executive Officer, Orange Region Vignerons Association
- Mr Sean Haylan, General Manager, Destination Central West NSW

Mr Jie Hou, Private capacity

Roundtable – First Nations tourism

- Ms Annette Steele, Chief Executive Officer, Orange Local Aboriginal Land Council
- Mr Michael (Mick) Madden, Justice Officer, Orange Local Aboriginal Land Council
- Mr Gerald Power, General Manager and Owner, Indigenous Cultural Adventures

Round table – Mudgee/ Bathurst tourism

- Mr David Lowe, Committee Member, Business Mudgee; and Member Representative, Mudgee Wine Association
- Ms Julia Andrews, Director, External Engagement, Bathurst and Orange, Charles Sturt University
- Mr Tim Booth, Chief Executive Officer, Mudgee Region Tourism
- Mr David Flude, Manager, Economic Development, Bathurst Regional Council

Wednesday, 2 August 2023 - Canberra

Blue Mountains Tourism - videoconference

- Mr Jason Cronshow, President
- Mrs Anthea Hammon, Vice President

Wednesday, 9 August 2023 - Canberra

Western Sydney International Airport

- Mr Simon Hickey, Chief Executive Officer
- Ms Alison Webster, Executive General Manager, Commercial and Strategy

Tuesday, 15 August 2023 - Cairns

International Education Roundtable

- Ms Danelle Parker, Executive Officer, Study Townsville
- Mr Shehan Thampapillai, International Director, Central Queensland University Australia
- Ms Shelley Lewis, Director of International Engagement, TAFE Queensland

International Tourism and Peak Bodies Roundtable

- Ms Elannah (Lani) Strathearn, General Manager, Tourism Tropical North Queensland
- Ms Peta Zietsch, Chair, Adventure Queensland
- Ms Elissa Keenan, Chief Executive Officer, Ecotourism Australia
- Mr Gareth Phillips, Chief Executive Officer, Association of Marine Park Tourism Operators

Regional Economic Development

- Mrs Lisa Woolfe, Director Visitor Economy and Marketing, Townsville Enterprise
- Dr Dianne Dredge, Director, The Tourism CoLab

Experience and Adventure Tourism

- Mrs Angela Freeman, Director and Co-owner, Hartley's Crocodile Adventures
- Mr Steve Edmondson, Owner - Operator and Director, Sailaway Port Douglas
- Ms Laurie Pritchard, Owner and Managing Director, Small World Journeys

Wednesday, 16 August 2023 - Cairns

First Nations Tourism Roundtable

- Mr James William, Chief Executive Officer, Torres Strait Island Regional Council
- Ms Julia (Jules) Taylor, Senior Legal Officer, Coordinator, Future Acts Mining and Exploration Unit, North Queensland Land Council NTRB Aboriginal Corporation
- Mr Dale Mundraby, Operations Manager, Mandingalbay Authentic Indigenous Tours
- Mr Darrell Harris, General Manager, Cairns Indigenous Art Fair Limited

Monday, 21 August 2023 - Broome

First Nations Tourism

- Ms Ninielia Mills, Chief Executive Officer, Nyamba Buru Yawuru
- Ms Ellen Smith, Chief Business Development Officer, Nyamba Buru Yawuru

Regional Economic Development

- Mr Glenn Moore, Director, Destination Broome
- Mr Keith Williams, Director Development Services, Shire of Broome
- Mrs Kim Brown, Acting Director, Regional Development Australia Kimberley
- Mr Glen Chidlow, Director, Industry and Infrastructure, Kimberley Development Commission
- Mr Samuel Shaw, Executive Support Officer, Broome Chamber of Commerce and Industry
- Mr Martin Pierson-Jones, President, Broome Chamber of Commerce and Industry
- Mr Bill Tatchell, Chief Executive Officer, Australia's North West Tourism
- Ms Paula O'Brien, Destination Marketing, Digital Executive and Projects, Australia's North West Tourism
- Ms Melanie Virgo, General Manager, Broome Visitor Centre

Experience and Adventure Tourism

- Ms Clancy McDowell, Executive Director, Kimberley Arts Network
- Mr Paul Cripps, General Manager, HeliSpirit
- Mr Ashley Munn, Owner, Air Kimberley

Airlines and Cruises

- Mr Vincenzo Foti-Cuzzola, Commercial Manager, Broome International Airport
- Mr Criag Shaw, Chief Executive Officer, Broome International Airport
- Mr Michael McConachy, Managing Director, HM Consolidated Group
- Mr Shayne Murray, Chairman, Cruise Broome

Tuesday, 22 August 2023 - Fremantle

International Education Roundtable

- Mr David Harrison, Pro-Vice Chancellor, Communications and Engagement, University of Notre Dame Australia
- Mr Justin de Sousa, National Director, International, University of Notre Dame Australia

- Professor David Sadler, Deputy Vice-Chancellor Education, University of Western Australia
- Professor Xiaotian Zhang, Associate Deputy Vice-Chancellor, Curtin University
- Mr Kelly Smith, Pro-Vice Chancellor, International, Murdoch University
- Dr Marija Petrovska, Senior International Adviser, Logistics, Edith Cowan University
- Mr Jake Garman, Deputy Vice-Chancellor International, Edith Cowan University
- Ms Derryn Belford, Chief Executive Officer, StudyPerth

First Nations Tourism Roundtable

- Mr Robert Taylor, Chief Executive Officer, Western Australian Indigenous Tourism Operators Council
- Mr Karl Millard, Memberships Manager, Western Australian Indigenous Tourism Operators Council

WA Department of Jobs, Tourism, Science and Innovation

- Mrs Robyn Robb, Director International Education
- Dr Alex King, Executive Director, Strategic Policy

International Tourism Roundtable

- Mrs Carolyn Turnbull, Managing Director, Tourism Western Australia
- Ms Sonja Mitchell, Chief Executive Officer, Destination Perth
- Dr Lianne Cretney-Barnes, Chairperson, Australia's South West Regional Tourism Organisation
- Ms Kym Francesconi, Chair, Australia's North West Tourism Inc
- Mr Marcus Falconer, Chief Executive Officer, Australia's Golden Outback
- Mr David O'Malley, Chief Executive Officer, Australia's Coral Coast

Accommodation and Transport Industry

- Mr Bradley Woods, Chief Executive Officer and Executive Director, Australian Hotels Association WA
- Ms Angela Beechey, Strategic Policy Manager, Tourism, Accommodation and Workforce Development, Australian Hotels Association WA
- Mrs Carol McCracken, Chief Executive Officer, Caravan Industry Association Western Australia

Wednesday, 13 September 2023 - Canberra

Australian Tourism Industry Council

- Mr Evan Hall, Chairperson

- Ms Erin McLeod, Chief Executive Officer

Tuesday, 3 October 2023 – Port Campbell

Mr Marcus Clarke, CEO, Eastern Maar Aboriginal Corporation

Great Ocean Road Tourism Board

- Dr Jeremy Johnson, Chairman
- Ms Joanne Birley, Industry Development Manager

Wildlife Wonders

- Ms Lizzie Corke OAM, Co-Founder, Conservation Ecology Centre

Wednesday, 4 October 2023 - Ballarat

The Victorian Goldfields Heritage Bid

- The Hon John Brumby AO - Co Patron - Victorian Goldfields World Heritage Bid, former Premier of Victoria
- Ms Susan Fayad - World Heritage and Regional Development, Lead City of Ballarat
- Mr Trevor Budge AM, World Heritage Strategic Projects Officer, City of Greater Bendigo

Tourism Roundtable

- Ms Sarah Pilgrim, Executive Manager, Tourism Midwest Victoria
- Mr Terry Karamaloudis, Manager, Tourism and Major Events, City of Bendigo, Bendigo Tourism (via teleconference)

Djaara (Dja Dja Wurrung Clans Aboriginal Corporation)

- Mr Rodney Carter, Group CEO

Tourism Businesses

- Ms Katrina Nitschke, Deputy CEO, Sovereign Hill Museums Association
- Mr Timothy Canny, Owner/Operator, Sovereign Park Motor Inn

Wednesday, 4 October 2023 - Ballarat

La Trobe University

- Dr Stacey Farraway, Deputy Vice-Chancellor, Future Growth (via teleconference)

Federation University Australia

- Associate Professor Jason Giri, Dean, Global Professional School

Online Education Services

- Ms Sue Kokonis, Chief Academic Officer

Australian Catholic University

- Mr Chris Riley, Pro-Vice-Chancellor, Global and Education Pathways (via teleconference)

Wednesday, 18 October 2023 - Canberra

Australian Travel Industry Association

- Mr Dean Long, Chief Executive Officer

Wednesday, 15 November 2023 - Canberra

Her Excellency Mrs Ma. Hellen B. De La Vega, Ambassador, Republic of the Philippines

His Excellency Mr Anil Kumar Nayar, High Commissioner, Republic of Singapore

His Excellency Dr Siswo Pramono, Ambassador, Republic of Indonesia

Wednesday, 29 November 2023 - Canberra

His Excellency Dr Chanborey Cheunboran, Ambassador, Cambodia

Her Excellency Ms Arjaree Sriratanaban, Ambassador, Thailand

Wednesday, 7 February 2024 - Canberra

Pacific Island Forum:

- Dr Yves Lafoy, Counsellor and Official Representative of New Caledonia to Australia, Embassy of France
- Her Excellency Ms Hinauri Petana, High Commissioner, Samoa High Commission
- His Excellency Mr Robert Sisilo, High Commissioner, Solomon Islands High Commission
- His Excellency Mr Samson Vilvil Fare, High Commissioner, Vanuatu High Commission

Tuesday, 20 February 2024 - Adelaide

University and Vocational Education and Training roundtable

- Mr David Coltman, Chief Executive, TAFE SA
- Mrs Shirley Chung, Executive Director, Future Students, University of Adelaide
- Dr Jessica Gallagher, Deputy Vice-Chancellor, External Engagement, University of Adelaide
- Mr Matt Schultz, Director, International Recruitment, Flinders University

StudyAdelaide

- Ms Jane Johnston, Chief Executive

Tourism Industry

- Mr Shaun de Bruyn, Chief Executive Officer, Tourism Industry Council of South Australia
- Mr Haydyn Bromley, Chair, South Australian Aboriginal Tourism Operators Council
- Ms Emma Terry, Chief Executive, South Australian Tourism Commission
- Ms Chantal Ward, General Manager, Global Markets and Trade, South Australian Tourism Commission

Arts and culture

- Ms Justyna Jochym, Chief Executive Officer, Festival City Adelaide
- Ms Inca Lee, Chief Executive, South Australian Wine Industry Association
- Ms Joanne O'Callaghan, Executive Committee Member, Arts Industry Council of South Australia Inc.

Adelaide Airport Ltd

- Mr Brenton Cox, Managing Director

Tourist Operators in Adelaide

- Mrs Elaine Bensted, CEO, Zoos SA
- Ms Tori Dixon-Whittle, CEO, The Cedars, Hans Heysen Foundation
- Mr Jason Simpson, Tourism Manager, Zoos SA

Hospitality/Accommodation

- Mr Andrew Bullock, Councillor, Accommodation Australia, Australian Hotels Association - South Australia Branch
- Mr Ian Horne, Consultant, Australian Hotels Association, South Australia Branch

Wednesday, 28 February 2024 - Canberra

Backpacker & Youth Tourism Advisory Panel

- Ms Wendi Aylward, Chair

Wednesday, 27 March 2024 - Canberra

Insurance Council of Australia

- Ms Alexandra Hordern, General Manager, Regulatory and Consumer Policy
- Mr Thomas Lunn, Senior Policy Manager, Regulatory and Consumer Policy

Wednesday, 17 April 2024 - Darwin

Education

- Professor Robyn Aitken, Professor and Dean, Rural and Remote Health, College of Medicine and Public Health, Flinders University
- Professor Scott Bowman, AO, Vice-Chancellor and President, Charles Darwin University
- Professor James Smith, Deputy Dean, Rural and Remote Health Northern Territory, College of Medicine and Public Health, Flinders University

Student Ambassadors

- Mr Engeldis (Engelo) Bano, Student Ambassador, Study NT
- Mr Deepak Chhetry, Student Ambassador, Study NT
- Mrs Sabrina Doha, Student Ambassador, Study NT
- Mr Maged Mohamed, Student Ambassador, Study NT

Regional tourism organisations roundtable

- Mrs Samantha Bennett, General Manager, Tourism Top End Incorporated
- Mr Danial Rochford, Chief Executive Officer, Tourism Central Australia

Arts and events tourism

- Mr Trevor Cox, Head, Strategy and Acquisition, Northern Territory Major Events Company
- Ms Louise Partos, Assistant Director, Museum and Art Gallery Northern Territory
- Ms Claire Summers, Executive Director, Darwin Aboriginal Art Fair Foundation

Adventure and nature tourism

- Ms Lisa Creelman, Sales and Marketing Manager, Uluru Camel Tours (via teleconference)
- Mrs Penny Priest, Chief Executive Officer, Crocosaurus Cove

First Nations tourism roundtable

- Mr Matthew Cameron-Smith, Chief Executive Officer, Voyages Indigenous Tourism Australia
- Mr Victor Cooper, Owner Operator, Ayal Aboriginal Tours Kakadu

Department of Industry, Tourism and Trade, Northern Territory Government

- Mr Scott Lovett, Deputy Chief Executive Officer
- Ms Valerie Smith, Executive Director Industry Development

Wednesday, 1 May 2024 - Launceston

Education

- Professor Ian Anderson, Deputy Vice-Chancellor, Academic, University of Tasmania
- Mr Robert Wilson, Executive Director, Recruitment and Engagement, University of Tasmania
- Mr Malcolm Wise, Principal, Australian Maritime College, University of Tasmania

International Students

- Mr Shrenik Bhalla, Student, Australian Maritime College, University of Tasmania
- Ms Chang, Student, Australian Maritime College, University of Tasmania
- Mr Ashan Perera, Student, Australian Maritime College, University of Tasmania

First Nations tourism

- Mr Clyde Mansell, Chairperson, wukalina Walk (via teleconference)

Business and tourism

- Ms Alina Bain, Chief Executive Officer, Launceston Chamber of Commerce
- Mr Paul Seaman, Chair, Visit Northern Tasmania

Tourism operators

- Mayor Matthew Garwood, Mayor, City of Launceston
- Mr Patrick Kelly, Chief Executive Officer, Museum of Old and New Art (via teleconference)

Launceston Airport

- Mr Shane O'Hare, CEO, Launceston Airport
- Mr Steve Pickering, Head of Commercial, Launceston Airport

Tourism Tasmania

- Ms Sarah Clark, Chief Executive Officer, Tourism Tasmania

Tasmanian Government

- Ms Jenna Cairney, Acting Deputy Secretary, Department of State Growth

Wednesday, 15 May 2024 - Canberra

ACT Government

- Ms Kareena Arthy, Deputy Director-General, Chief Minister, Treasury and Economic Development
- Mr Jonathan Kobus, Executive Branch Manager, Visit Canberra, Chief Minister, Treasury and Economic Development

- Mrs Kate Starick, Executive Group Manager, Policy and Strategy, Chief Minister, Treasury and Economic Development,

National Capital Authority

- Ms Karen Doran, Chief Executive
- Mr Adam Robbins, Director, Visitor Experience, Marketing and Events