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Australian Chamber- Tourism Pre-budget Submission 2020-21

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Australian Chamber
-Tourism

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Executive Summary

As the peak body for businesses operating in tourism, Australian Chamber – Tourism recommends the 2020-21 Budget include initiatives to support tourism growth in order to contribute to Australia’s future economic and social wellbeing and importantly spread the benefits across the country.

Tourism has enormous potential for future growth – provided the policy settings are right to support growth in a highly competitive international market. Investment from Government would enhance the opportunity of the visitor economy so that Australians can enjoy the jobs, growth and export income that the sector can generate.

Australian Chamber – Tourism, representing State and Territory tourism industry organisations and national industry associations with an interest in tourism, has identified a number of key policy initiatives for the Government’s consideration in order to maximise the potential of the visitor economy.

To stimulate productivity growth in a fiscally constrained environment, it is essential to ensure that spending initiatives generate economic activity. This will support the living standards Australians enjoy through keeping Australian enterprises competitive.

Australian Chamber – Tourism frames proposed budget initiatives under three key themes:

- International Competitiveness
- Product Development
- Labour and Skills

Taking action in each of these areas is essential if the Government’s tourism growth projections are to be achieved in a time of uncertainty for the global economy and fluctuating currency movements. Given the tight fiscal environment and our support for budget restraint, we propose that this investment be funded through reallocating existing funds or hypothecating funds from Passenger Movement Charge.

This submission provides the following recommendations:

Recommendation A: Improve international competitiveness

- Accelerate visa reform, including rapid rollout of streamlined and online visa processes.
- Improve the facilitation of passenger movements in and out of Australian ports and harbours through the funds collected from the Passenger Movement Charge.
- Reform the Tourist Refund Scheme.
- Lower visa fees.
- Restore Tourism Australia's funding in real terms.

Recommendation B: Develop Australian product

- Continue funding the Building Better Regions Fund program and expand access to all regional funds to develop infrastructure and drive tourism demand.
- Develop a Visitor Economy Development Fund, which includes capacity building as eligible projects.
- Integrate initiatives that build capacity in long term tourism strategies.
- Ensure there is timely, individual, predictive data available to be used to assess and grow the tourism sector.

Recommendation C: Labour and Skills Needs

- Implement the recommendations of the Austrade Tourism Labour and Skills Roundtable.
- Continue and expand the Working holidaymaker program.
- Ensure employer sponsored skilled migration is available and accessible to employers.
- Permanent migration levels be restored to the 190,000.
- Funding the Industry Outreach Officer Initiative within the Department of Home Affairs.
- Halve the SAF Levy for temporary and permanent employer nominated visas.
- Improve the refund policy for the SAF levy so that a refund is available in all cases where the application has not been successful.
- Remove the hypothecation of the SAF levy with VET and ensure VET is appropriately funded from consolidated revenue.

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1 The tourism economy

Tourism continues a strong growth trajectory reaching total visitor spend of \$131.4 billion (6.9 percent growth during 2017-18). International visitation grew at 6.2 percent and domestic visitor nights grew at 7 percent to achieve this result – driving growth in jobs and export earnings. International visitors to Australia are projected to grow by 64 percent in 2026-27 compared to 2017-18. Direct tourism output equals \$143 billion and 646,600 Australians are directly employed through tourism (up 4.6 percent on 2016-17).

Tourism is much more than just leisure and holidays. For example, travel for business purposes contributes significantly to overall tourism growth. Between 2018 and 2019, domestic and international visitor spend who listed business as the predominant reason for their visit grew by 20 percent. In the year ending December 2018, there were more than 25 million overnight trips undertaken by Australians domestically for business purposes (up 14.1 percent), making business travel a large part of the tourism sector's growth.

Domestic visitation grew by 11.7 percent to June 2019 and visitor expenditure accounted for \$77.4 billion or an increase of 14.7 percent in 2017-2018. This growth is particularly important because most domestic visitor spend occurs outside capital cities. According to 'Regional 2030 – Unlocking Opportunity', 45 cents from every dollar spent by both international and local visitors is spent in a regional area. Regional visitation has been on the rise with 56 percent of the New Zealand, European and North American market visiting regional Australia as compared to the capital cities and Gold Coast. Domestic overnight visitors were also most likely to disperse outside of the capital cities, with 63 percent of trips including regional Australia. However, more work needs to be done to attract international visitors from a range of markets.

By 2028-29, overall inbound tourism expenditure could generate \$94.9 billion in real terms. With domestic tourism expenditure also expected to grow to a total of \$110.1 billion. The visitor economy could be one of the biggest drivers of new jobs over the next decade.

2 International competitiveness

Australian tourism is currently in a strong competitive position in relation to areas such as airfares, security and our natural advantages, ranking an overall seventh in International Competitiveness on the World Economic Forum Travel and Tourism Competitiveness Report.

Australia's price competitiveness is of significant concern, given the exchange rate provides a significant price advantage for international visitors. Particular care needs to be taken to reduce and certainly not increase the price of travel to Australia. Australian Chamber – Tourism recommends that the Government consider the following initiatives to improve our international competitiveness.

2.1 Passenger Facilitation

Australia ranks 55 of 140 countries for its ground and port infrastructure. The definitions of ground and port infrastructure include the state of roads, road density, quality of rail and rail density, the

quality of port infrastructure, ground and water transport efficiency. Whilst these services impact international competitiveness, they also negatively affect the tourism experience of domestic visitors and outbound Australian travellers. Connective infrastructure is a clear priority to achieve both an internationally competitive Australian tourism industry and tourism experience for Australians that meets their needs. Infrastructure in ports and harbours, including airports, must aim to make passenger movements seamless.

The return to effective implementation of new generation of Smart Gates will greatly improve passenger movements. Whilst this transition is occurring, Gen 1 Smart Gates need to be maintained to ensure delays and frustration in international movements (both inbound and outbound) do not occur. Further trials of coordinated passenger identification, luggage handling, security screening and processing, including cooperation between ports, airlines and ships must be progressed as a matter of priority. Australia is losing competitiveness in the area of passenger facilitation in ports, which will affect our attractiveness as a destination.

Additionally, the recent decision by the Australian Border Force/Department of Home Affairs to pass on the full fixed and variable costs of facilitating passenger movements for all new commencing international services, to the ports themselves, is a disincentive to the growth of services and routes. Smaller airports wishing to commence international routes will not be able to fully fund on an ongoing basis the Border Force passenger facilitation charges, and thus will abandon the idea of expansion altogether, stymying tourism growth and dispersal to the regions. The International Port Operators Policy also perversely benefits the established ports in larger cities, which get a competitive advantage in comparison to other airports without current international routes.

The Australian Chamber-Tourism recommends the Government prioritise improving the facilitation of passenger movements in and out of Australian ports and harbours through the funds collected from the Passenger Movement Charge.

2.2 Visitor visas, taxes and charges

Australia's visa charges need to be more competitive – Australia ranks 130th of 140 countries for tourism price competitiveness. The component of this that creates this abysmal ranking is ticket taxes and airport charges. This includes the price of visas to come to Australia as well as the Passenger Movement Charge.

The Competitiveness report acknowledges Australia's improvements in visa conditions between 2013 and 2015, but still ranked Australia below the top five destinations for Chinese tourists. Since the index was released, the United States has added a 10-year visa for Chinese visitors costing US\$160, Germany has significantly reformed its visas and the United Kingdom has flagged reforms. In the absence of government action, Australia's 10-year visa for Chinese visitors will be at a cost more than four times higher than the United States. This is acknowledged in the 2019 index.

Australian Chamber – Tourism notes that contrary to international agreements, the Passenger Movement Charge is already being treated as general revenue by the Government and raises significantly more than the cost it was introduced to cover. Given the substantial additional revenue raised by growth in tourist numbers, it seems logical to re-invest a portion of the revenue into

increased capability, infrastructure and generating additional demand (which in turn generates additional revenue).

As visitors are price sensitive, it is recommended that visa fees be lowered across the board to compensate for the extremely high Passenger Movement Charge, which applies to all international travellers over 12 years of age. In particular, Australian Chamber – Tourism is concerned by the \$485 visa application charge for working holidaymakers (visa subclass 417 and 462). This market is essential to Australian tourism, given their dispersal, length of stay and their contribution to the workforce, particularly in the regions.

The Australian Chamber-Tourism urges accelerated visa reform, as promised in the 2019 Coalition Federal Election policy, including more rapid roll-out of streamlined and online visa processes for citizens in rapidly expanding markets such as China, India and Indonesia.

2.3 Reform the Tourist Refund Scheme

The antiquated Tourist Refund Scheme is an embarrassment to Australia. Departing tourists are being delayed by long queues while they wait for paper-based manual processing of their goods and services tax (GST) refunds. The system is delaying the departure of international flights and leaves a negative final impression of Australia.

Shopping is a key holiday attraction for many tourists particularly from Asia and our out-dated system is a deterrent to return visits and to increasing retail sales. This issue has been discussed for so many years while competitors have forged ahead with simple, quick, online processing.

Australian Chamber -Tourism strongly supports the Tourism Shopping Reform Group proposals to allow competition by private refund operators. This reform will release Border Force resources currently allocated to the government scheme to undertake frontline operations, while reducing delays at airports and improving the shopping experience for tourists.

2.4 Marketing Australia

Tourism Australia is a world leader when it comes to international destination marketing and it is critical that it remains a leader given the highly competitive international tourism market. Although in 2019 the Government gave a welcome record funding commitment to Tourism Australia announcing \$644.7 million over four years, Tourism Australia still lack sufficient funds to address all priority markets for Australia. Overall, there is still a decline in real levels of funding since it was established in 2004-05.

Tourism Australia has successfully marketed Australia to the booming Chinese market, attracting record number of visitors. However, this now only accounts for only 0.8 per cent of Chinese holidaymakers. Whilst the growth rate has slowed since the 2015 peak, the premium and free independent traveller sectors have huge potential, along with the more established segments.

Government should invest in programs that are expected to generate a high return on investment. Tourism Australia told the Productivity Commission that its activities generate tourism expenditure in a ratio of 15:1, converting into a benefit:cost ratio of 6:1 (after allowing for displacement effects, crowding out and the marginal cost of public funds).

The current success of Tourism Australia on a declining funding base in real terms is remarkable, but to continue without restoring real funding levels puts Australia at risk from increasingly competitive rivals such as New Zealand. Tourism New Zealand's funding is at NZ\$ 111.4 million for 2018-19 in addition to the existing NZ\$ 25 million per annum Tourism Infrastructure Fund. In the previous year, a one-time additional funding to the tune of NZ\$ 76 million was given to the NZ Department of Conservation to upgrade and develop tourist facilities on conservation land and to expand the great walks network. Destination Canada's annual funding for 2018-19 is CA\$ 95.5 million.

The current geopolitical international environment also creates opportunities for Australian tourism, which Tourism Australia should be well resourced to take advantage of. If Government priorities allow, Australian Chamber – Tourism believes that there is a strong case in the medium term to restore Tourism Australia's funding in real terms.

Recommendation A: Improve international competitiveness

- Use the Passenger Movement Charge to improve passenger facilitation at Australian ports.
- Accelerate visa reform, including rapid rollout of streamlined and online visa processes.
- Reform the Tourist Refund Scheme.
- Lower visa fees.
- Restore Tourism Australia's funding in real terms.

3 Developing Australian Product

Growing the number of domestic and international visitors presents the challenge of continuing to provide a diverse range of product that will attract new and repeat visitors, along with promoting geographic dispersal of visitors and ensuring that tourism infrastructure is up to the task. Federal governments have an inconsistent history when it comes to funding tourism-related and demand-driven infrastructure. Local grant programs appeal to governments and local members because they can produce valuable product. On occasion, they can fail to link properly with broader objectives. There is an ongoing need to fund tourism-related infrastructure including smaller projects that can drive demand and develop quality product by understanding existing and potential markets.

The Australian Chamber recommends the Government consult with industry in the allocation of tourism development funding and the infrastructure programs for tourism.

3.1 Building Better Regions Fund

In the 2018-19 Federal Budget, the Government announced round three of the Building Better Regions Fund (BBRF), which includes \$45 million to improve tourism-related infrastructure, supporting demand driven projects that ensure benefits are multiplied across the tourism sector in the regions. The BBRF is a dedicated regional fund and funding is thus limited to regions

outside the major capital cities of Sydney, Melbourne, Brisbane, Perth, Adelaide and Canberra. The Australian Chamber welcomes the dedicated \$45 million for tourism in the BBRF and will address:

- Issues of regional connectivity (both digital and physical), including roads and communications infrastructure that enable both locals and tourists to better connect between regions and connect to both the national and international economy.
- Boosting local tourism economies, including improvements in public (and not for profit owned) infrastructure that supports local attractions, convention and meeting facilities, and tourist information.

Improving infrastructure with the aim of boosting local tourism has wider benefits for an entire local community. Increasing the capacity of a regional conference centre, a road leading to a local attraction, improving facilities for tourism vessels such as houseboats or expanding a regional airport directly benefits not just tourism operators but the regional economy more broadly. Long-term projects such as these will increase local tourism numbers and deliver benefits to the wider community, directly and indirectly, year on year. The Australian Chamber – Tourism urges a prioritisation of ground and waterways infrastructure for tourism under the BBRF.

In addition to the BBRF, access to all regional funds, grants and loans needs to be made available for tourism. It is vital to tourism capacity to ensure that capacity building, particularly of operators, is able to be included in regional tourism development. Whilst product and infrastructure development is also important, if operators do not have the capacity to service or attract visitors, investment will not yield the necessary return.

3.2 Visitor Economy Development Fund

The Australian Chamber-Tourism recommends the creation of a Visitor Economy Development Fund by redirecting a portion of the revenue raised from the increase in the Passenger Movement Charge to fund new and additional visitor economy related programs, including research and development.

3.3 Building Capacity

The continuing attraction of Australia as a tourism destination to both domestic and international visitors is dependent upon a supply of quality experiences. The quality of tourism products is integral to attracting visitors, their experience, satisfaction and achieving greater spend.

The supply of quality product is an issue across the country but is particularly an issue in the regions. The quality of tourism product that is available needs to be promoted as part of promoting Australia and individual destinations. The gaps in available product need to be filled through the development of new or enhancement of existing operator capacity and product. Ongoing capacity building needs to be embedded in long-term tourism strategies.

The Australian Chamber calls on the Government to invest in building the capacity of tourism operators, particularly in relation to their export readiness and to facilitate investment in tourism product that builds tourism demand.

3.4 Need for Timely and useful data

Successful investment in tourism needs to effectively and appropriately target growth markets. To enable this, Government and business need accurate data in a timely manner, increasingly at an individual level. Tourism Research Australia already provides very useful information through the National Visitor Survey Results, International Visitor Survey Results and the State Tourism Satellite Accounts, however this data has proven to be relatively broad and simplistic in contrast to Australia's competitors. It is vital that Tourism Research Australia pursue new collection methodologies to ensure that timely, individual, predictive data is made available to industry and Tourism Australia and State/Territory tourism market bodies. It is also important that the relativity of the National Visitors Survey and International Visitors Survey time-series is maintained.

Significant investment is required to bring in third-party data to achieve this objective. The data sets must be able to determine search and booking behaviours, potential visitation and spend.

Recommendation B: Develop Australian product

- Continue funding the BBRF program and expand access to all regional funds to develop infrastructure and drive tourism demand.
- Develop a Visitor Economy Development Fund, which includes capacity building as eligible projects.
- Integrate initiatives that build capacity in long term tourism strategies.
- Ensure there is timely, individual, predictive data available to be used to assess and grow the tourism sector.

4 Meeting the visitor economy's skill and labour needs

In October 2015, Austrade projected a shortfall of 150,000 tourism workers by 2020. Significantly, this included a major gap in the skills needs of businesses and available workers.

Meeting the demand for labour requires government and industry to make a strong and strategic commitment to training and skills development, as well as attractive career paths, pay and conditions, promotion of careers in tourism and simple arrangements for skilled-entry and temporary workers.

The Australian Chamber-Tourism continues to participate in the Austrade Tourism Labour and Skills Roundtable (since 2017). The Roundtable has brought together industry and relevant Federal and some State departments to look for solutions to critical labour force and skills shortages and will result in recommendations to Ministers. The Government should commit to implement the recommendations of the Roundtable including providing funding to oversee the implementation.

Please refer to the Australian Chamber's comprehensive Pre-Budget Submission for 2020-21 for our position and recommendations on the Skills and Employment component. In the absence of immediate skills and labour in the economy, employers turn to Australia's migration program

to supply the required labour in the short and medium term. Both the temporary and permanent migration pathways are important for the tourism and hospitality sector. The Australian Chamber-Tourism's recommends improving access to employers who access Australia's migration program. Our key issues and recommendations are below.

4.1 Working Holidaymakers

Working holidaymakers are an important component of the visitor market. The working holidaymaker program encourages cultural exchange and closer ties between arrangement countries by allowing young people to have an extended holiday supplemented by short-term employment. According to the latest figures from the National Institute of Labour Studies at Flinders University, working holidaymakers created 23,000 jobs in the Australian economy, and spent two and a half times more than they earned, while 30% of working holidaymakers did not work at all. The flexibility and value of working holidaymakers to the seasonal labour needs of businesses, especially in regional Australia is substantial. The program deliver enthusiastic and mobile young workers particularly into the regions to provide the labour needed when it is most valuable. These workers generally have skills above the seasonal job requirements, which increases the productivity benefit. This seasonal work is often not attractive or suitable for young unemployed Australians who are looking for longer-term employment solutions.

The Australian Chamber calls for the program to be continued and supported, especially from our traditional source markets of UK and Germany, which have seen a decline of more than 5% year on year. In addition to continue to progress the reforms announced in 2019, the Australian Chamber urges the Government to continue to expand reciprocal caps in capped visa countries and to expand the age range to 35 (from 30) in all countries where bi-lateral arrangements exist.

4.2 Improving access to skilled migration

Treasury's statement on migration in 2018, 'Shaping a Nation', rightly highlights the economic and fiscal benefits of a strong permanent migration program. Young, skilled migrants deliver net economic and fiscal benefits and any reduction in the permanent migration intake (especially to the skilled migration component) will cost the Federal Budget. The decision of the government to reduce the permanent migration intake by 30,000 to 160,000 from 2019-20 is an unfortunate response to concerns around inadequate infrastructure and planning in our large cities, and seen by some as a response to ill-informed concerns that migrants take Australian jobs.

'Migration Works for All of Us', the 2018 Australian Chamber publication, sets out a detailed case demonstrating the benefits delivered by migration, particularly given the strong component in the intake that are younger skilled migrants. It also sets out a public interest case in favour of migration, which is sorely missing in the current debate where there seems to be very vocal opposition to any form of migration in sections of the media and society.

Caps for future years should be set according to the evidence of maximum benefit, including an assessment of economic, fiscal and demographic outcomes. The cap of 190,000, which was not met in the last few program years, was an appropriate level to maximise benefits and still control migration levels. The Australian Chamber recommends that permanent migration levels be restored to the 190,000 in order to maximise both economic and fiscal benefits.

4.3 Re-establish the Industry Outreach Officer Initiative in the Department of Home Affairs

With the introduction of new programs such as the Global Talent Employer Sponsored program and frequent changes to the standard employer sponsored migration program, including the new regional visas, labour agreements and the temporary skills shortage visa, employers are finding it hard to understand the process, eligibility and suitability of these various different offerings. It acts as a significant deterrent to business accessing the migration program, often at the cost of losing skills essential for their business or stymied growth. There is a role for the Department of Home Affairs to provide information and assistance to industries, especially those experiencing significant skills shortages so employers are aware of changes to the migration system and the application process.

Australian Chamber-Tourism recommends reinstating the industry outreach officers program within the Department of Home Affairs to support industry and business to navigate the increasingly complex employer nominated migration landscape. The industry outreach officers program, which was discontinued in 2014, also had a role in navigating barriers and providing support to ensure business are aware of their obligations and requirements as sponsors. This also helps build trust and an on-going relationship between industry and the Department.

Australian Chamber-Tourism recommends funding the Industry Outreach Officer Initiative within the Department of Home Affairs.

4.4 Skilling Australians Fund Migration Training Levy

Although a training levy was recommended by the 2014 457 Visa Integrity Review to replace the previous training benchmarks used in the migration program, the mechanism and quantum of the Skilling Australians Fund (SAF) migration training levy applying to skilled migration was an unwelcome surprise in the 2017 Budget. The amounts of \$1200 per year for small business and \$1800 per year for large business were well in excess of the Review's recommendation of \$400 per visa holder per annum for the temporary skills shortage visa. In addition, the SAF Levy is paid upfront for the whole term of the visa, which was also against the recommendation of the Integrity Review, which recommended annual invoicing. The 2017 Budget also included a levy for employers using the permanent Employer Nomination Scheme, \$3000 for small business and \$5000 for large business paid up front.

The quantum of these levies and how they are applied have had a material impact on access to the migration program. Although there was some shift in the refund policy in the 2018 budget, it is still inequitable that a sponsoring employer cannot obtain a refund of the training levy if their application is unsuccessful other than on health or character grounds. A refund of the training levy should be available in all cases where the application has not been successful. If the nomination or application is unsuccessful, no migrant enters Australia and the justification for the training levy no longer exists as it was collected solely for the purpose of training Australians as a balance against accessing foreign skilled workers.

The hypothecation of the training levy to the SAF, was never intended to be a replacement for monies already invested by the Federal Government on VET. The use of the fund to strike a new

COAG skills partnership agreement given that the previous agreement was funded out of consolidated revenue was an illustration of the decline in investment in VET by the Federal Government. The connection between the training levy and the partnership agreement has not worked – it was poor policy from the outset, and the outcomes have demonstrated this. It created funding uncertainty, which impacted the outcomes of the negotiations for a partnership agreement. This hypothecation also creates a problem in addressing the quantum of the levies, which should be half of what they are currently.

Recommendation C: Labour and Skills Needs

- Implement the recommendations of the Austrade Tourism Labour and Skills Roundtable.
- Continue to expand the Working holidaymaker program.
- Ensure employer sponsored skilled migration is accessible and affordable for employers.
- Permanent migration levels be restored to the 190,000.
- Funding the Industry Outreach Officer Initiative within the Department of Home Affairs.
- Halve the SAF Levy for temporary and permanent employer nominated visas.
- Improve the refund policy for the SAF levy so that a refund is available in all cases where the application has not been successful.
- Remove the hypothecation of the SAF levy with VET and ensure VET is appropriately funded from consolidated revenue.

5 About Australian Chamber - Tourism

Australian Chamber – Tourism is a part of the Australian Chamber of Commerce and Industry, Australia’s largest business advocacy network. Australian Chamber – Tourism represents one in eight Australian businesses engaged in the visitor economy. It brings together key participants in the tourism sector to advocate better policies, including in the areas of tax, regulation, tourism marketing, research, labour supply, visas and infrastructure.

The Australian Chamber of Commerce and Industry speaks on behalf of Australian business at home and abroad.

We are the largest and most representative business advocacy network in Australia.

We represent more than 300,000 businesses of all sizes, across all industries and all parts of the country, employing over four million Australian workers.

Our membership comprises all state and territory chambers of commerce and leading national industry associations. Individual businesses are also members of the Australian Chamber’s Business Leaders Council.

The Australian Chamber strives to make Australia a great place to do business in order to improve our standard of living and sustain and create jobs.

We seek to create an environment in which businesspeople, employees and independent contractors can achieve their potential as part of a dynamic private sector. We encourage entrepreneurship and innovation to achieve prosperity, economic growth and jobs.

We focus on issues that impact on business, including economics, industry policy, trade, workplace relations, work health and safety, and employment, education and training.

We advocate for Australian business in public debate and to policy decision-makers, including ministers, shadow ministers, members of parliament, ministerial policy advisors, public servants, regulators and other national agencies. We represent Australian business in international forums.

We represent the broad interests of the private sector rather than individual clients or narrow sectional interests.

OUR MEMBERS



CHAMBER



INDUSTRY ASSOCIATION

