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A U S T R A L I A N
REGIONAL
TOURISM
L T D

GROWING MOMENTUM FOR SOCIAL IMPACT REPORTING IN AUSTRALIAN REGIONAL TOURISM

DISCUSSION PAPER



Acknowledgements

Acknowledgement of Country

Australian Regional Tourism & Nourish Group acknowledge the traditional custodians of Country as the sovereign people of the lands and waterways on which we live, work and play. We acknowledge Elders - past and present and their ongoing connection with Country.

Australian Regional Tourism (ART) works in partnership with the **Australian Social Value Bank**.

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Definitions

Social Impact Reporting: The process of measuring and communicating the broader benefits that an activity or project has on a community, beyond its economic impact.

Social Value: The overall benefits to society, including improvements in wellbeing, safety, cultural preservation, and community cohesion.

Australian Social Value Bank: A tool that assigns monetary values to various dimensions of social impact, helping to quantify outcomes such as reduced crime or improved health.

Community Wellbeing: A measure of the quality of life within a community, including factors such as health, safety, social connections, and economic stability.

Destination Marketing Organisation (DMO): An organisation that promotes a destination to increase tourism and support local economic development.

Eco-Tourism: Tourism that focuses on experiencing natural areas in a responsible, sustainable way, with an emphasis on environmental conservation and benefiting local communities.



Introduction

A Paradigm Shift in Regional and National Tourism Measurement

For many years, tourism, particularly in regional Australia, has been measured primarily by visitor numbers and its direct economic impact. However, there is a growing recognition that tourism is more than just an industry that generates revenue; it is a powerful enabler of community development, cultural preservation, and improved quality of life. Social impact reporting shifts the focus from transactional metrics to measuring how tourism, and the programs of work we fund and support, influence the wellbeing of local residents and communities.

Beyond economic benefits, tourism improves regional livability by attracting investment in infrastructure, services, and amenities that benefit both visitors and residents. It fosters pride in place, strengthening local identity and celebrating cultural heritage, including First Nations heritage. At the same time, there is a growing need to better manage tourism's social and environmental impact, ensuring that growth is sustainable and that tourism continues to deliver long-term value to the communities that host it.

However, measuring social impact cannot be left to individual regions alone. There is a pressing need for a national, industry-wide approach to social impact reporting - one that allows for consistent measurement, benchmarking, and shared learning across states and territories. Without this, we risk a fragmented understanding of tourism's role in shaping Australian communities, leaving policymakers, councils, and tourism organisations with an incomplete picture of its real value.

This white paper explores the growing momentum behind social impact reporting in Australian tourism. It calls on councils, DMOs, and tourism operators to prioritise social impact alongside the economic contribution of tourism. By adopting a national approach to measurement - one that captures the broader benefits of tourism, such as increased local employment, enhanced community engagement, and improved social infrastructure - we can elevate the conversation about tourism's impact and create a more sustainable, inclusive, and resilient industry for the future.

This is the moment for the tourism industry to step up and lead the way in redefining success. The question is: will we continue to measure tourism by outdated metrics, or will we seize this opportunity to show its true value to Australia's communities and economy?

Aligning to THRIVE 2030

THRIVE 2030 is Australia's national tourism strategy, designed to drive post-pandemic recovery, industry resilience, and long-term growth. Recognising the vital role of regional communities, the strategy positions tourism as a key economic and social driver, creating jobs, supporting local businesses, and delivering essential services and infrastructure. By investing in regional accommodation, attractions, and visitor experiences, THRIVE 2030 aims to strengthen regional economies, ensuring they benefit from a sustainable and future-proofed tourism sector.

Governments and industry have a critical role in attracting investment and enabling regional tourism to reach its full potential. Well-planned tourism infrastructure not only enhances visitor experiences but also improves liveability, community wellbeing, and local services, reinforcing tourism's broader social and economic impact. As regional Australia continues to recover and grow, THRIVE 2030 provides the national framework to ensure tourism contributes to stronger, more resilient communities across the country.



Aligning to THRIVE 2030

Tourism Status

Total Tourism Consumption

\$ 198.5b

Australia's visitor economy is a significant contributor to GDP and a growing regional industry. In FY 23/24 the sector grew 8.2% on the previous year and 25% on FY19 pre COVID levels.

Employment

4.4%

tourism accounts for 4.4% or 1 in 23 jobs in the Australian economy.

Regional Tourism Businesses

100,000

Tourism is a major driver of regional employment, with SMEs the lifeblood of the visitor economy. Tourism supported an estimated 100,000 businesses regionally in FY22

THRIVE 2030 Target

\$ 230b

Sustainable growth is the target for 2030 with tourism forecast to become a \$23b industry by the end of the decade.

Regional Tourism Spend

57c/\$1

For every tourism dollar spent by visitors in Australia, 57 cents is spend in Regional Australia.

THRIVE 2030 Regional Target

\$ 100b

Regional tourism is also forecast to grow strongly from \$70b to \$100b by 2030.

State/Territory	Strategic Reference to Social Impact
AUSTRALDE	<u>THRIVE 2030 - Core Vision</u>
New South Wales	<u>Visitor Economy 2030 Review Paper - Social Impact as an Enabler to Growth</u>
Queensland	<u>Referenced in Tourism Toward 2032 - Community Impact, Social Licence</u>
Victoria	<u>Visitor Economy Master Plan - Social Licence to Operate</u>
Western Australia	<u>Waves 2033 - Social Value for Communities</u>
South Australia	<u>Visitor Economy Sector Plan 2030 - Promote the Value of Tourism to Communities</u>
Tasmania	<u>Visitor Economy 2030 - Protect Communities</u>



Turning the Lens Inward

Rethinking Australia's Tourism Metrics

Traditionally, tourism success has been measured by the number of visitors, spending levels, and direct job creation. While these metrics are important, they often fail to capture the full impact tourism has on communities. Measuring social impact means looking beyond economic activity to understand how tourism investments and initiatives shape the everyday lives of residents – supporting local businesses, strengthening First Nations culture, enhancing community cohesion, and improving services like education and health.

By turning the lens inward, regional leaders – and the industry at large – can better understand how tourism benefits people, not just economies. A tourism project designed to attract more visitors might also boost local pride, strengthen cultural traditions, or even contribute to improvements in public safety and social equity. However, without a framework for measuring these impacts, how do we know what is working and where we need to improve?

The shift towards measuring community outcomes is not just a trend – it is an imperative for securing tourism's long-term role in regional and national policy. Tourism must be able to demonstrate its impact in ways that align with the priorities of governments, investors, and decision-makers. Without social impact reporting, tourism risks being undervalued compared to other industries that have stronger measurement frameworks in place for social and community wellbeing.

This is why an industry-wide and national approach to social impact measurement is critical. It will allow tourism leaders to:

- Benchmark and compare across regions, enabling best-practice sharing and stronger collective advocacy.
- Attract funding and investment by demonstrating tourism's role in addressing key policy priorities such as regional development, social cohesion, and public health.
- Ensure equitable benefits so that tourism growth does not come at the expense of local wellbeing.

This is the next evolution of tourism strategy. We must move beyond the traditional outputs of visitors and expenditure and position tourism as a leader in community wellbeing and regional resilience. It is time to elevate the conversation about tourism's impact and take action to measure what truly matters.

Wellbeing Dimensions

Unpacking the Dimensions of Wellbeing

To measure the social impact of tourism effectively, it is essential to understand the different dimensions of community wellbeing. For example, The Australian Social Value Bank measures eight key dimensions that can be applied to regional tourism. These include:

- **Education:** Initiatives that drive improvement in levels of education achieved.
- **Employment:** Beyond job creation, these are programs that support higher quality and more sustainable employment opportunities and greater employment satisfaction.
- **Social and Community:** Programs that enhance community ties and cultural engagement as well as family cohesion.
- **Fitness:** Initiatives that encourages outdoor activities and supports personal movement.
- **Health:** Programs that support mental and physical health and resilience.

Other industries also consider:

- **Crime:** Programs designed to reduce crime rates and make safer communities.
- **Drug and Alcohol:** Initiatives that promote reduced dependencies and help mitigate issues related to substance abuse.
- **Home (Housing Security):** Programs designed to support local housing and housing security

Understanding and quantifying these dimensions helps to paint a full picture of how tourism contributes to a community's quality of life.

Instead of simply counting dollars spent or visitors generated, we measure outcomes that matter to residents, such as livability, reduced crime, better health, engagement and stronger community bonds.

While these wellbeing dimensions are referenced in the context of tourism, they are by no means exclusive to our industry. In fact, these measures apply across all sectors, offering a universal framework to evaluate how our programs and initiatives can address the challenges our communities face.

What can we impact in the future?

Traditionally, tourism programs have been designed to deliver outputs like increased visitor numbers, seasonal tourism spend, or improvements in community capability and skills. However, by looking at our initiatives through the lens of overall community wellbeing - encompassing aspects such as safety, health, and social cohesion - we are encouraged to move beyond our traditional vocabulary and ask **what could we impact?**

This shift is essential for aligning our language and reporting with the terminology used by high-level decision makers. This makes it easier for the tourism industry to compete with other sectors for funding and support.

This broader perspective may feel uncomfortable at first, but it ultimately paves the way for a more inclusive and sustainable approach to regional development.

Example: Canada Measures Wellbeing



In 2024, Destination Canada unveiled the Tourism Wealth & Wellbeing Index, a pioneering tool that evaluates tourism's many contributions beyond traditional metrics like visitor spending and arrivals. This comprehensive index assesses six interconnected components: Economy, Employment, Enablement, Environment, Engagement, and Experience. By integrating data from over 100 sources and 30 indicators, the index provides a nuanced understanding of tourism's role at national, provincial, and territorial levels, aligning with global standards such as the United Nations' Sustainable Development Goals.

The introduction of this index signifies a step change in Canada's approach to social impact measurement, positioning the country at the forefront of sustainable tourism practices. By offering a holistic framework, it enables industry leaders, policymakers, and businesses to make data-driven decisions that balance economic vitality with social equity and environmental stewardship. This leadership underscores a commitment to fostering thriving, resilient communities through tourism, setting a benchmark for how destinations can measure and enhance the true value of their tourism sectors.

Eco Tourism Australia Certified Destinations – Embedding Social Impact in Sustainable Tourism



Overview

Eco Tourism Australia's Certified Destination program is a leading framework that requires destinations to go beyond environmental sustainability and actively consider their social impact. This certification ensures that destinations are not just managing tourism in an eco-friendly way, but fostering positive outcomes for local communities, cultural heritage, and regional economies.

Social Impact as a Core Pillar

To achieve Eco Tourism Australia Certification, destinations must demonstrate how they:

- Engage with and support local communities, ensuring tourism benefits residents, not just visitors.
- Preserve and celebrate cultural heritage, including authentic First Nations storytelling and partnerships.
- Create meaningful employment and economic opportunities for local businesses and operators.
- Encourage responsible visitor behaviour that respects both the environment and the social fabric of the region.

Why This Matters

Traditionally, sustainable tourism has been focused on the environmental footprint—conserving landscapes, reducing waste, and minimising carbon emissions. However, true sustainability is about people too. Eco Tourism Australia's framework ensures that tourism is a force for good, strengthening local identity, social cohesion, and economic resilience.

Case Example: Australia's First Certified Destination

The Port Douglas-Daintree in Queensland was the first destination to receive Eco Tourism Australia Certification. As part of the process, the region committed to:

- Maximising the benefits of tourism for local communities, ensuring businesses, farmers, and cultural groups all saw direct positive impacts.
- Collaborating with First Nations communities, integrating their knowledge and stories into visitor experiences in a meaningful and respectful way.
- Developing tourism in a way that respects residents' quality of life, ensuring that growth does not come at the expense of local wellbeing.

The Bigger Picture: Why Destinations Should Prioritise Social Impact

Eco Tourism Australia's certification highlights a critical shift in the global tourism industry—where success is measured not just in visitor numbers, but in the wellbeing of the communities who host them. Destinations that fail to integrate social impact into their strategies risk community pushback, loss of social license, and unsustainable tourism growth.

By embedding social value into destination planning, certified destinations set themselves apart as leaders in responsible tourism—ensuring that the benefits of tourism are felt long after visitors have left.

Measurement

Tools and Methodologies: Quantifying Social Value

Measuring social impact requires tools that capture both quantitative data and qualitative insights. One such tool is the Australian Social Value Bank, which provides a framework to assign monetary values to these various dimensions of wellbeing. This approach transforms abstract benefits—like community cohesion or improved health—into measurable outcomes.

Data collection methods can include:

- **Workshops:** Interactive sessions with community members, local businesses, and stakeholders to provide deeper insights and inform survey designs,
- **Sentiment Surveys:** Simple, well-designed surveys can capture stakeholder and residents' perceptions of tourism's impact. For example, you might ask how strongly residents agree with statements like "Tourism improves my community's quality of life."

Once the data is collected, it is crucial to translate numbers into narratives. For instance, an improvement in employment related skills might be valued in monetary terms, but it also speaks to enhanced community capability and job satisfaction. This dual approach ensures that the data is both actionable and relatable.

Quantifying Social Impact

Capability and capacity building programs are a key part of local budgets. During a small-scale pilot of the Australian Social Value Bank with ART, one Victorian regional local council was able to quantify their Industry Development programs as having impacted nearly 1200 people during the financial year 2023/24, generating \$3.1 m of wellbeing value.

Applications

Real-World Applications: Insights for DMOs, Councils and Tourism Operators

Social impact reporting offers tangible benefits for councils, DMOs and tour operators. When councils align their strategic goals with community outcomes, they can make more informed decisions about where to invest resources.

For example, if a regional tourism project is found to improve employment and reduce local crime, these benefits can be used to support further investment and policy changes.

Use Cases Snapshots:

- A regional council might discover that a new eco-tourism initiative not only increases visitor numbers but also enhances community pride and reduces antisocial behaviour through structured community events.
- A DMO could use social impact data to tailor its marketing strategies to support challenges the community faces, highlighting the authentic experiences that benefit both visitors and locals.

In addition, partnerships between councils, DMOs, and local businesses can be strengthened through social impact reporting. By co-designing social impact frameworks, sharing insights and best practices, regions can build a collective approach to enhancing both tourism and community wellbeing. This collaboration ensures that tourism developments benefit all stakeholders, creating a more resilient and vibrant local economy.

Opportunities and Challenges

Navigating the Future

As more regions adopt social impact reporting, several opportunities and challenges emerge. On the opportunity side, the data collected can be a powerful tool for advocacy and policy-making. It enables councils to demonstrate the true value of tourism investments, potentially unlocking further funding and support from government and private investors.

However, there are also challenges. Collecting reliable and representative data can be difficult, especially in regions with limited resources. There may be initial resistance from stakeholders who are accustomed to traditional economic metrics. Furthermore, translating qualitative social benefits into quantifiable data requires careful methodology and robust analysis.

Despite these challenges, the move towards social impact reporting represents a necessary evolution in regional tourism. By focusing on both the benefits and potential downsides, councils can address community concerns, ensure sustainable growth, and build a tourism industry that truly benefits everyone. This balanced approach is essential for regions aiming to create long-term, inclusive strategies for development.

Why This, Why Now? The Power of Social Impact Data

Collecting social impact data isn't just about having another set of numbers – it's about putting true community wellbeing at the heart of tourism decisions. With this data, councils, DMOs and tourism operators can clearly see what's working and what's not, ensuring tourism investments genuinely benefit residents, not just visitors. It enables better policy-making, stronger funding cases, and smarter, more targeted interventions that improve quality of life. Without measuring social impact, we risk missing the warning signs – rising resident dissatisfaction, growing inequities, or unsustainable tourism development.

With social impact measurement, we can make real change. We can design tourism strategies that support local businesses, create meaningful jobs, strengthen cultural identity, and enhance social cohesion. Why now? Because the tourism landscape is shifting. Governments, investors, and communities are demanding more than just economic figures. Destinations and operators that embrace social impact reporting will be the ones that thrive – earning trust, securing funding, and building a tourism industry that delivers for everyone. This is the time to do things differently.

The question is – will we?

Conclusion

Crafting a Sustainable, Community-Driven Tourism Future

Growing momentum for National and regional level social impact reporting is reshaping the way we view tourism. Instead of focusing solely on the number of visitors or the revenue generated, a community-centric approach highlights the broader benefits that tourism brings to local areas. From improved public safety and enhanced health outcomes to stronger community ties and cultural preservation, the social impact of tourism is multi-faceted and far-reaching.

For councils and DMOs, embracing social impact reporting means investing in a future where tourism is co-designed with communities to be both economically beneficial and socially enriching. By adopting simple yet effective measurement tools, defining measurement frameworks and engaging with community stakeholders, regional leaders can ensure that future tourism plans are aligned with local needs and aspirations. This approach not only drives sustainable growth but also promotes a deeper sense of community pride and resilience.

As we look ahead, it's clear that social impact reporting will play an increasingly important role in regional development. By capturing the full range of benefits that tourism offers, we can build stronger, more inclusive destinations that stand the test of time. We invite councils, DMOs, and local businesses to join us in this journey toward a more sustainable, community-driven tourism future.



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ABOUT AUSTRALIAN REGIONAL TOURISM

Australian Regional Tourism (ART) is a leading national organisation dedicated to advancing the interests of regional tourism across Australia. It brings together tourism professionals, local governments, businesses, and communities to foster sustainable growth in regional destinations. ART plays a crucial role in advocating for the unique needs of regional areas, ensuring that tourism development aligns with environmental, social, and economic priorities.

ART supports its members by providing access to the latest industry research, best practices, and strategic insights. It offers a collaborative platform for knowledge exchange and innovation, helping to drive destination management, product development, and marketing initiatives that highlight the distinct offerings of regional Australia. Through advocacy and action, ART works to strengthen the tourism sector in regional areas, supporting long-term economic growth, job creation, and the wellbeing of local communities.

ABOUT NOURISH GROUP - DANA RONAN

Nourish Group, led by Dana Ronan, is a strategic consultancy dedicated to advancing tourism's role in community wellbeing, social impact, and destination resilience. With deep expertise in destination development, customer experience, and impact measurement, Nourish Group partners with governments, tourism organisations, and industry leaders to help them redefine success beyond economic metrics. Dana Ronan brings extensive experience in regional tourism, stakeholder engagement, and social value frameworks, positioning her as a leading voice in the movement toward measuring tourism's true impact on people and places.



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