AUSTRALIAN REGIONAL TOURISM LTD

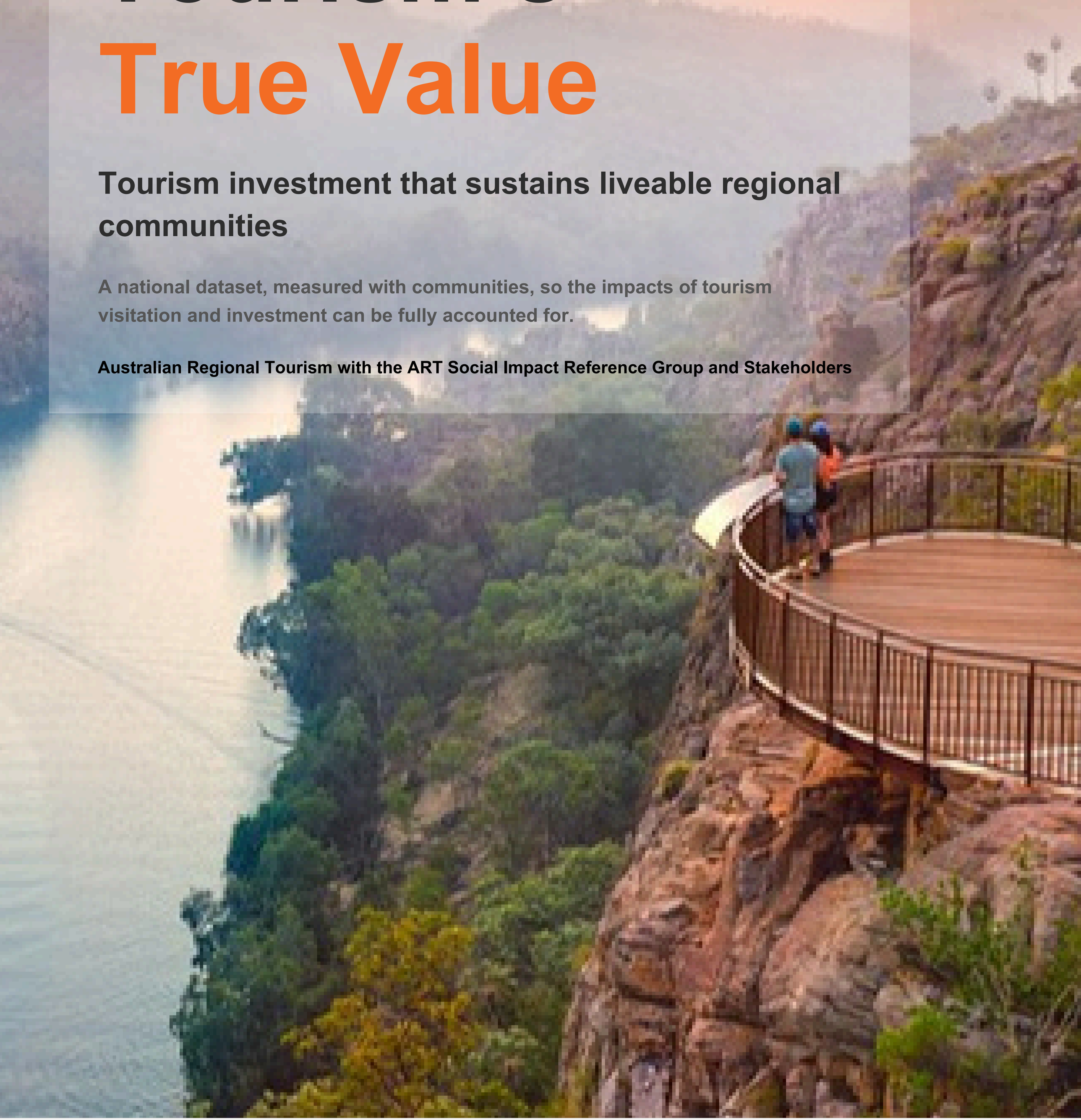
DRAFT FRAMEWORK FOR CONSULTATION · October 2026

Tourism's True Value

Tourism investment that sustains liveable regional communities

A national dataset, measured with communities, so the impacts of tourism visitation and investment can be fully accounted for.

Australian Regional Tourism with the ART Social Impact Reference Group and Stakeholders



Acknowledgement of Country

Australian Regional Tourism acknowledges the Traditional Custodians of the lands and waterways on which we live, work and gather, and pays respect to Elders past and present.

Tourism on Country carries a responsibility to communities and cultures. This framework must be developed with First Nations communities, not for them, and Indigenous cultural continuity is recognised as a social value to be protected.

Community wellbeing: an Indigenous approach

For First Nations peoples, wellbeing is relational, intergenerational and holistic. It is held in connection to Country, kin, culture and community, and what happens today is measured against what it means for those who come after.

That understanding shapes this framework. Prosperity that is shared. Connection that is cultural as well as social. Liveability that includes safety, belonging and the right to stay.
Some dimensions of social value may never translate into indicators or dollars. Any measurement must hold space for what it cannot quantify.

Any measurement must also hold space for what it cannot quantify.

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Executive summary

Australian tourism sells its communities. Beyond the scenery and the beaches, visitors come for main streets, culture, festivals, the welcome and towns that are alive and liveable.

Public money goes into tourism every year through infrastructure, events, marketing and destination development, and that investment shapes regional communities every day: the trails, galleries and pools it sustains, and the pressure it places on housing, services and amenity.

Today that investment is justified almost entirely on visitor volume and visitor spend. What visitation and investment do to the people who live in tourism regions goes unrecorded, in both directions.

Every business case for tourism investment therefore understates its own value, councils defend tourism spend to ratepayers on half the evidence, and the sector has no measure of what communities receive in return for the licence to operate they grant it.

The sector has asked for a solution. In 2026, Australian Regional Tourism surveyed 92 regional councils and regional tourism organisations. Most want to measure the social impact of tourism, few are doing it formally, and almost all would use a national framework that gave them a clear and consistent method. The barriers are tools, methodology and staff capacity.

The method already works. Over three years the Australian Social Value Bank has been applied to tourism in four Australian settings. Indigenous operators in Tourism Australia's Discover Aboriginal Experiences collective returned between $2.47 and $6.03 in social value for every dollar. A one-day festival in Glenlyon, run on $23,569, produced $1.5 million in net social value.

The 2026 National Agritourism Tracker became the first national tourism survey to report economic and social returns side by side. What is missing is a national method, applied consistently, so results can be compared over time and between places.

82%

of regional councils and RTOs want to measure the social impact of tourism

12%

are doing it formally today

90%

would use a national framework with a clear, consistent method

EXECUTIVE SUMMARY

This paper proposes that method: the matching social layer to the economic data Australia already collects, built the same way at national, state and local level.

The 1:3:6 framework has one outcome, Community Wellbeing; three domains, Community Prosperity, Community Connection and Liveability; and six indicators: Employment & Self-Worth, Shared Prosperity, Connection & Belonging, Social & Mental Health, Safety & Security, and Pride of Place. Every tourism region answers the same questions on a known cycle, and the indicators are built to detect decline as readily as improvement.

The people best placed to say what tourism is worth are the people who live with it. Residents and regional businesses will be asked, across ages and life stages, with deliberate effort to reach those least likely to answer a standard survey. Guidance is being sought first from the national First Nations tourism peak body, and governance, protocols and data authority will be co-designed before the framework is applied. Poor results will be reported to the people who can act on them, never as league tables.

The framework is honest about its starting point. It will show the state of community wellbeing where tourism operates and how it is trending. Proving that a dollar of investment produced a dollar of social return will take project-level appraisal or several waves of data, and the national survey instrument is still to be built.

Delivering it requires four things: a national platform, capability for councils and tourism organisations, three years of data capture, and national roll-out across all 76 tourism regions. Subject to funding, data capture would run from 2027 to 2029, with national reporting from 2030.

Tourism Social Impact Framework

1 · 3 · 6

one outcome, three domains, six indicators

PURPOSE

Tourism investment that sustains liveable regional communities

Visitors and the investment that attracts them shape regional communities: the trails, the galleries, the pools, the events calendar, the air routes, the main streets that still trade, and the pressure on housing and services. We measure the spend and little else.

This framework sets out how to change that. It proposes a national dataset, measured with the communities that host tourism, so the impacts of visitation and investment can be fully accounted for.
At its heart are six measures of community wellbeing. Every tourism region. Same questions. Repeated. Reported alongside the economic data we already collect.

What we are asking

This is the draft framework. We are asking whether it is right, whether your organisation would use it, and what it would take to adopt it.

Responses close Friday 4 December 2026.
Use the QR code to leave your feedback.

"Consistent measures around community wellbeing, liveability, and cultural preservation would help councils and RTOs advocate for investment and demonstrate the true value tourism brings to our region."

— Survey respondent, regional tourism organisation

THE CASE

Vibrant communities are the asset

Australian tourism is dependent on its communities. Beyond our scenery and beaches, it's our main streets, culture, festivals, the welcomes, and towns that are alive and liveable that are all part of our attraction. The thing a visitor is buying is a town that is loved by the people who live in it.

Public money goes into tourism through infrastructure, events, marketing and destination development. Today it is justified almost entirely on visitor volume and visitor spend and their economic impact.

Yet visitors, and the investment that brings them, shape those communities every day. They sustain the things that make a place good to live in: the walking and cycling trails, the gallery, the aquatic centre, the main street that still trades, the calendar of events, airport access, the cafe that survives the shoulder season. They also bring pressure, on housing, on services and on amenity, which falls on the same residents.

That liveability is the product. What Australia markets to the world is places with people in them. Vibrant communities are the asset. What visitors spend is counted. What visitation and investment do to the people who live there is not. Every business case for tourism investment therefore understates its own value, and tourism loses arguments to portfolios that count their co-benefits properly. Councils cannot defend tourism spend to ratepayers on economic evidence alone.

There is a second consequence. Communities grant tourism its licence to operate, and we have never measured what they get in return. Counting both returns puts figures on both sides of the exchange, and lets the sector make its case for investment alongside the communities that host it, rather than on their behalf.

Tourism makes two sets of impacts. But we only currently measure one. Economic.

The sector has already asked for this

In 2026, Australian Regional Tourism surveyed 92 regional councils and regional tourism organisations. The response was clear.

Eighty-two per cent want to measure the social impact of tourism. Only 12 per cent are doing it formally. Ninety per cent said they would use a national framework if it gave them a clear and consistent method.

The barrier is not appetite. Seventy per cent named the absence of tools or a clear methodology, and 72 per cent named staff time and capacity.

Respondents were just as clear about how they would use the data. Ninety-one per cent would use it to communicate what tourism does in their community, 88 per cent to support funding and grant applications, and 72 per cent to strengthen advocacy to state and federal government.

82%

Of RTOs and Local Governments in tourism surveyed want to measure social impact

12%

are doing it formally already.

90%

Said they would use a national framework

“Having consistent measures around community wellbeing, liveability, and cultural preservation would help councils and RTOs advocate for investment and demonstrate the true value tourism brings to our region.”

Survey respondent, regional tourism organisation

The sector asked for leadership on this. This framework is the answer to that request.

Source: Australian Regional Tourism (2026), Measuring the Social Impact of Tourism in Your Region: Regional Capability and Needs Survey, n=92.

The argument in six lines

1 What Australia sells is its communities. Beyond scenery alone: main streets, culture, festivals, feeling welcome, and local towns that are alive and liveable.

2 Visitors, and the public investment that attracts them, build and sustain those community assets. They also place pressure on the same towns.

3 We measure one side of it. Visitation and visitor spend is counted. What visitation and investment do to residents and regional liveability is invisible, in both directions.

4 So the communities that host tourism carry its costs visibly while its impacts go unrecorded, and investment decisions that shape those towns are made on half the evidence.

5 The people best placed to say what tourism is worth are the people who live with it. This sets up a framework and methodology to ask them, regularly.

6 This is measurable now. Australian pilots show the uncounted impacts are real and sizeable. What is missing is a national method, applied consistently.

Measuring both returns changes the business case. And because the impact runs in both directions, it also shows when visitor growth is outpacing benefit.

Image credit: [photographer / source]

THE EVIDENCE

The demand is established. The measurement works.

Over three years ART and Nourish Group have applied the Australian Social Value Bank to tourism in pilot Australian settings. Here we highlight four: Tourism Australia's Indigenous tourism collective, four community workshops in southern New South Wales, a one-day festival, and a national survey of farm tourism operators.

Each tells part of the story. Together they show that the uncounted impacts of tourism are real, sizeable and measurable now.

"A nice place to visit is also a nice place to live."

Survey respondent, regional local council

CASE STUDY · DISCOVER ABORIGINAL EXPERIENCES

Marketing that sustains culture

between

$2.47–$6.03 : $1

social value per dollar, across four operators

Johani Mamid runs Mabu Buru Tours out of Broome. He describes Tourism Australia's Indigenous tourism collective as his only route to international visitors: without it, he says, his business does not exist for that market. In 2025 the collective asked what its marketing was actually producing in the communities its members come from, using an Indigenous wellbeing framework and modelling social value operator by operator.

Mabu Buru returned $2.47 of social value for every dollar, alongside employment and cultural participation for nine community members. Mandingalbay returned $4.65 while employing fifteen people, and Wajaana Yaam Adventure Tours $6.03. The largest outcomes were not the jobs. They were the chance to practise culture while earning a living.

Why it matters. *Marketing investment produces social outcomes no economic measure captures, and a range of 2.47 to 6.03 is exactly why the method has to be consistent.*

CASE STUDY · DESTINATION SOUTHERN NSW

Communities chose what to measure

$14,443
Southern Tablelands

$36,593
Far South Coast

$29,370
Snowy Monaro

$18,675
Mogo and Batemans Bay

Four communities, in Queanbeyan, Eden, Jindabyne and Mogo, were asked a simple question in a room: what difference does tourism, or mountain biking, make to the people who live here? They chose the answers themselves: personal safety, a good neighbourhood, being physically active, feeling part of the community, and satisfaction with the work available. Surveys across six local government areas then tested those themes, producing a wellbeing value per person each year.

Why it matters. *Those four numbers cannot be compared, because each community answered a different question. They would become comparable the moment the same measures were repeated. This is the argument for a national method, demonstrated by its absence.*

CASE STUDY · RADICAL FIELDS HARVEST FESTIVAL, GLENLYON

A small festival, a big return

$1.5m
net social value from one day

$23,569
total festival budget

425
visitors, double the year before

$3,632
social value per local resident who came

A one-day festival in a paddock, with ten regional artists and six community groups. Every person surveyed said the day left them feeling more connected to others in the region, and more than eight in ten rated their sense of belonging to the local community at eight, nine or ten out of ten.

Why it matters. *The economic data on an event this size would never justify public support on its own. This is the decision a council makes when a small festival asks for a $20,000 grant, and until now it has made it blind.*

Together these two studies show both the promise and the gap. Social value is real and substantial wherever it is measured, yet without a common method the results cannot be compared, benchmarked or added up.

CASE STUDY · NATIONAL AGRITOURISM TRACKER 2026

Both returns, side by side

$1.09b
Annual economic impact of agritourism nationally

$893m
value added impact through non tourism and value chain spend.

8,385
full-time equivalent jobs

$22.0m
a year in wellbeing value to operators

The first national tourism survey in Australia to report both returns side by side. Economic contribution was modelled by Nova Economics; social return was calculated through the Australian Social Value Bank and reported separately, so nothing is counted twice.
Eighty-five per cent of operators said sharing their farm story had given them stronger pride in what they do. Sixty per cent said visitors gave them meaningful social contact they would not otherwise have. For a farmer on a quiet road, that is not a soft benefit.

Why it matters. *The two-lens model already works at national scale. The social return was roughly four per cent on top of direct value added: modest, conservative, and until someone measured it, invisible.*

From project appraisal to a national measure

Each of these measured gains, because each was applied to a program or an event designed to produce them. That is the limit of project-level appraisal. A national measure has to do the harder thing: report what is happening in a region whether the news is good or not.

Councils already see the value of that. Asked what they would use the data for, they described advocating for worker housing in tourism areas, and better measuring the positives and negatives of tourism development to achieve the right balance for communities and visitors.

“A clear measurement framework will ensure we understand how tourism affects local wellbeing, housing, infrastructure and community life.”
Survey respondent, regional local council

THE MISSING LAYER

A second lens, built the same way

Australia already has a three-tier data architecture for tourism. It is economic, it is well understood, and it works.

Nationally, Tourism Research Australia's visitor surveys and the Tourism Satellite Accounts measure visitation and its economic contribution. At state level, state and regional satellite accounts are contextualised by state tourism organisations. Locally, councils, regional tourism organisations and operators evaluate their own projects and programs.

We propose the matching social layer, built the same way, at the same three levels. A second lens, alongside the first.

Nationally, six indicators would be measured in all 76 tourism regions, repeated on a known cycle, so results compare over time and between places.

At state level, results would be contextualised for each jurisdiction, with two to four state-priority indicators added.

Locally, councils and RTOs would receive the baseline free, and use the same values to appraise their own trails, events and programs.

The tiers answer different questions. National and state results show the state of community wellbeing where tourism operates, and how it is changing. Local appraisal shows what a specific investment returned: this trail, this festival, this program.

3 Tiers

tiers of reporting: national, state and local, matching the economic data we already collect

INTERNATIONAL PRACTICE

Other countries already do this

Several countries already ask their residents what tourism means for them, and report the answers alongside their economic data.

Scotland added tourism sentiment questions to the Scottish Household Survey. They are official statistics, reported by local authority. In 2025, 8 per cent of Scottish adults said visitors put too much pressure on their area; in Orkney it was 48 per cent.

Canada's Wealth & Wellbeing Index, published by Destination Canada, uses more than 100 indicators across six dimensions, published provincially and built around residents rather than visitors.

New Zealand's Tourism Sentiment Survey, run by MBIE, is seasonal, weighted and covers all sixteen regions.

In Europe, a shared Resident Sentiment Index lets each city see its own trend and its position against peers.

The pattern is consistent. Ask residents. Use one instrument. Repeat it on a known cycle. Report it where decisions are made.
Australia has none of this. Individual councils have tried, each with their own method, so nothing can be compared, benchmarked or added up.

8%

of Scottish adults said visitors put too much pressure on their area

48%

In small regional Island, Orkney, this rises to 48% where culture, environment and way of life are under threat.



The 1:3:6 framework

One outcome. Three domains. Six indicators.



The six are fixed. Every region answers the same questions, so results compare over time and between places. Local measures sit on top.

Each indicator moves in either direction, and the framework is built to detect decline as readily as improvement. Liveability is where pressure usually shows first: housing, services, crowding, safety.

A framework that only shows good news is a marketing tool.

What each indicator measures

Employment & Self-Worth. Beyond the financial and economic impacts of work, employment supports so much more. this looks at the quality and dignity of work: retention, pathways and pride in work, rather than job counts and salaries. Regional workers and businesses are asked. An early signal is work becoming precarious, ahead of a visible skills shortage.

Shared Prosperity. Tourism often is perceived to only benefit a few, or sees profits removed back to cities or global headquarters. This looks at how broadly benefit flows through the regional economy, including the secondary tier. Regional businesses, including those outside tourism, are asked. The signal to watch is benefit concentrating in fewer hands.

Connection & Belonging. Cultural continuity, pride in local identity, arts, events and sense of place. Residents are asked, including First Nations and cultural communities. The signal is culture being practiced rather than just sustained .

Social & Mental Health. Social interaction, reduced isolation and community gathering. Residents are asked. The signal is the benefits of activity not reaching residents.

Safety & Security. Community confidence, safety, housing stability and access to services. Residents are asked. This is usually the first to move when growth outpaces housing and infrastructure.

Pride of Place. Whether residents think their community is worth visiting and worth staying in. All residents are asked. It is the leading indicator of social licence for tourism as an industry in local communities.

This is new data. It is not currently collected by the National or International Visitor Surveys, which measure travellers, not hosts.

Measured with communities

The people best placed to say what tourism is worth are the people who live with it. That is a method, not a courtesy or consultation, and it comes with four commitments.

Who is asked. Residents and regional businesses, not visitors. Samples should reflect the people impacted, across life stages and ages, not only the people most willing to speak about tourism. Deliberate effort will be made to reach those least likely to answer a standard survey.

First Nations. Guidance is being sought first from the national First Nations tourism peak body, with direct engagement with residents and operators as well as representative bodies. Governance, protocols and data authority will be co-designed before the framework is applied.

Poor results. Reported, not buried. Results go to the people who can act on them, compared against similar regions, never as a league table.

Feedback. Everyone who responds receives a summary of what was heard, what changed in the framework, and what was not taken up and why.

One survey respondent made the case for this care directly. Measuring social impact in First Nations communities, where much of our tourism occurs, is fundamentally different from measuring it in southern or eastern Australia. That is why regional typologies and First Nations co-design are part of the design, not an afterthought.

“We would love national measures, reported regularly, but done carefully so a one-size-fits-all national methodology doesn’t disadvantage remote regions like the Kimberley, Pilbara and the Northern Territory.”

Survey respondent, regional tourism organisation

Honest about the starting point

This framework will show the state of community wellbeing where tourism operates, and how it is trending.

It will not, at the outset, prove that a dollar of tourism investment produced a dollar of social return. That requires either project-level appraisal or several waves of data. Indicator definitions are directional. The national survey instrument does not yet exist. The pilots applied the method at project and regional scale; they did not test the six indicators as a national set.

We would rather say so than overstate it.

What it would take

Four things, in sequence. Costings will be developed with partners before any funding submission.

1. A platform: one national place to collect the data, calculate the indicators and share results.

2. Capability: training so councils and tourism organisations can interpret and act on results.

3. Three years of capture: enough to set a baseline, show change and test the indicators against real communities.

4. National roll-out: all 76 tourism regions, with state and local layers on top.

Measuring social impact of tourism on communities delivers to Australia's Tourism 2030 goals.

HAVE YOUR SAY

Tell us whether this is right

We are asking about this framework: whether it holds, whether you would use it, and whether you will endorse us to advocate for it.

Four questions. Ten minutes. Open until Friday 4 December 2026.

Use the QR code to leave your feedback.

4th Dec

consultation closes, Friday 4 December 2026

Timeline

October 2026. Draft framework released. Consultation opens, closing Friday 4 December.

Late 2026. Responses published. Framework finalised. First Nations co-design continues.

2027. Funding partners sought for the platform, capability and first three years.

2027–2029. Subject to funding, three years of data capture.

From 2030. National reporting across all 76 regions.

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Reference Group and sources

The ART Social Impact Reference Group met four times between July and September 2026.

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