

THE IMPORTANCE OF THE GLOBAL YOUTH SECTOR

Youth is a vital segment of Australian tourism.

Tourism Australia defines the youth segment as people aged between 15 and 29 years. The youth market contributes 25 per cent of all visitor arrivals to Australia and 46 per cent of all visitor spend.

For the year ending June 2017, youth arrivals increased by 8.6 per cent to 2.1 million, while youth visitor spend reached \$18.7 billion, up 12.2 per cent for the same period.

Youth travellers spend more than any other leisure travel segment in Australia mainly due to higher than average length of stay and propensity to combine work, visiting friends and family, and holiday/leisure experiences.

The Working Holiday Maker program allows young adults (18 to 30) from eligible partner countries to work in Australia while having an extended holiday.

YOUTH BY NUMBERS



\$18.7bn

spend per year

2,100,000

Youth travellers arrived in Australia in 2016



* Percentages refer to share of total youth.

\$7,900



spend per trip

63

average nights stayed

34%



visit 3-7 locations

12%



more than 8 locations

WORKING HOLIDAY MAKERS BY NUMBERS



\$3.4bn

spend per year

333,000

Working Holiday Makers [WHM] arrived in Australia in 2016



* Percentages refer to share of total WHM.

\$10,100+



spend per trip

151

average days stayed

42%



visit 3-7 locations

28%



visit more than 8 locations

OUR JOURNEY TO 2020

Youth travel is one of the fastest growing and most dynamic markets of global tourism, accounting for a quarter of all international travel.

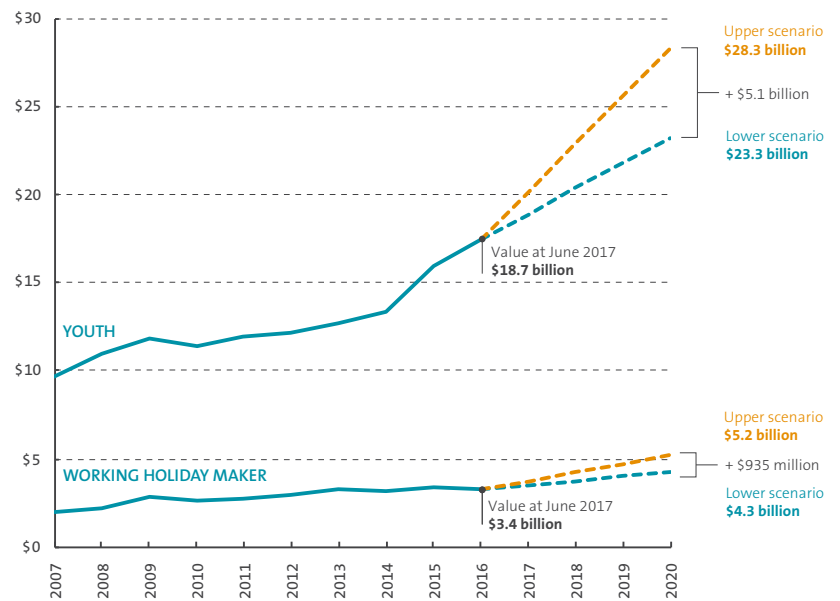
According to UNWTO forecasts, by 2020 there will be almost 300 million international youth trips per year.

The youth segment constitutes a key pillar of Tourism Australia's international marketing activities, presenting significant opportunities towards the achievement of the industry's Tourism 2020 objectives.

Based on growth trends and with the renewed focus we are placing on the segment, we believe that we can grow the global youth market from its current \$18.7 billion to as much as \$28.3 billion by 2020.

In that same time period, we believe we can grow the global Working Holiday Market to between \$4.3 to \$5.2 billion by 2020.

YOUTH POTENTIAL FOR OVERNIGHT TOURISM EXPENDITURE TOWARDS 2020



WHERE WE'RE HEADING

\$23.3-\$28.3
billion

Potential spend by
youth visitors in 2020

3.1
million

Potential youth visitors to
Australia in 2020

\$4.3-\$5.2
billion

Potential spend by
Working Holiday Makers in 2020

460,000

Potential Working
Holiday Makers to Australia in 2020



Luncheon Bay, Hook Island, Queensland

HOW WILL WE REACH THE YOUTH SEGMENT'S POTENTIAL?

The six areas pivotal to achieving the youth segment's potential and winning market share are:

1. Knowing the customer
2. A dedicated geographic strategy
3. Delivering quality Australian tourism experiences
4. Partnerships
5. Distribution platforms
6. Industry engagement



Melbourne, Victoria

KNOWING THE CUSTOMER

Supported by additional Government funding and spearheaded by an exciting new global youth campaign, we plan to reinvigorate the youth sector by promoting Australia as one of the world's most memorable and desirable youth destinations.

The focus on youth is the latest chapter in Tourism Australia's evolving *There's Nothing Like Australia* campaign, which we believe is equally appealing to youth as it is to other segments.

Our latest campaign features a dedicated youth news channel called **Aussie News Today**, highlighting uniquely Australian destinations and experiences available to youth travellers and Working Holiday Makers (WHM) in Australia.

The campaign builds upon targeted WHM marketing activities carried out by Tourism Australia during 2016/17 in key western and eastern markets, but with a broader youth focus.

A DEDICATED GEOGRAPHIC STRATEGY

Australia is taking a strategic approach to selling Australia to the global youth audience, focusing on those markets which demonstrate the greatest opportunities for growth and return on investment.

Tourism Australia's new **Aussie News Today** campaign will initially focus on four of Australia's top youth and WHM markets – the UK, France, Germany and Italy – before being extended to other markets next year.

DELIVERING QUALITY AUSTRALIAN TOURISM EXPERIENCES

Australia has some of the best youth experiences on offer in the world, a selection of which you can read about on page 4 and 5.

Australia's rich diversity of youth product and experiences span the entire country and offer both rural and urban as well as passive and active experiences, catering to the wide-ranging tastes of the savvy youth traveller.

Through our marketing and distribution channels, Tourism Australia will continue to tell Australia's youth story, through curating great content on australia.com, our social media platforms, PR, media hosting and our trade events programme.

PARTNERSHIPS

Partnership is critical to Tourism Australia's approach to promoting youth. Working with partners such as STA Travel, Student Universe, Student Work Abroad Program, Kilroy, USIT, HM Touristik, Australie Autrement, Interpark, EZ Travel and I.S. Education, we've been able to stimulate interest and increase youth holiday packages and WHM bookings.

The WHM marketing activities carried out by Tourism Australia during 2016/17 comprised the most comprehensive package of youth focused travel offers we've ever had in market at one time.

DISTRIBUTION PLATFORMS

Tourism Australia coordinates and participates in a number of international trade shows and events to promote Australia as a premier travel destination for youth. Events held in Australia such as the Australian Tourism Exchange (ATE) and in key source markets overseas bring together the Australian tourism industry, with decision makers from travel distributors including travel agents and travel wholesalers from around the world.

This year more than 20 youth-focused tourism businesses attended the World Youth and Student Travel Conference (WYSTC) in Montreal, Canada, in a coordinated team

approach led by Tourism Australia. By participating in these events, we are helping to connect buyers of Australian tourism product with sellers in Australia and overseas.

Tourism Australia's **Aussie Specialist Program** now includes a dedicated interactive training module focused on educating agents regarding Australia's youth travel experiences, in addition to itinerary suggestions, fact sheets, and industry news.

INDUSTRY ENGAGEMENT

Tourism Australia engages actively with industry, state, regional and local tourism organisations to ensure our work reflects the needs of the industry. Tourism Australia's Industry Relations team has a role dedicated to engaging with youth-focused industry operators, seeking their input and feeding it back into the business. The team participates in various government and industry briefings and events to build awareness and understanding of Tourism Australia's strategic direction with respect to the youth sector. This includes attending and speaking at relevant youth-focused events such as the ABIC Backpacker Conference and WYSE Exchange Australia.

Tourism Australia draws from the expertise and insights of the Australian youth travel industry via a **Youth Industry Advisory Group**. The group contains representatives from hostel groups, tour providers, transportation companies and WHM work specialists, including the likes of YHA, BYTAP, Adventure Tours Australia and Topdeck Travel.



Esperance, Western Australia

Popular Youth Products and Experiences



Divers Den, Tour Operator, Cairns and Port Douglas, Queensland

www.diversden.com.au

"Our social media pages have had the greatest positive influence on our scuba and snorkel market. Fortunately, our website has seen an increase in direct bookings – from the UK, USA, Germany, Japan, Korea and South America – despite strong competition from other destinations such as Thailand, the Philippines and Bali." (Katherine Cutler, Sales Manager, Divers Den)

Divers Den has been operating for over 40 years, making it the longest established Great Barrier Reef Operator in Cairns. Due to greater demand, the company expanded its operations in July, 2017 to Port Douglas, including a new dive shop and vessel. Divers Den has dedicated various efforts to targeting youth travellers, including conducting presentations at universities, schools and Language Centres, and placing greater focus on its social media pages. The company's social media strategy has involved working with a variety of bloggers, vloggers and influencers in order to align with the decision making process undertaken by youth travellers.



The Job Shack, Employment Assistance, Darwin, Northern Territory

www.thejobshack.com.au

"The Northern Territory has unlimited opportunities for those seeking work, travel and play. Free from the hustle and bustle of the big cities, here you can ease yourself into the Aussie way of life. If you're travelling with a valid Working Holiday Visa, The Job Shack will make your travelling experience easy. We help you with the lot, so you don't need to worry about a thing!" (Deb Turner, General Manager, The Job Shack)

The Job Shack specialises in assisting travellers and permanent residents with everything they need to know to find work in the Northern Territory, Australia. The desk is run by an Australian citizen who has been in the Territory for the past 15 years. In addition to assisting with finding employment opportunities, The Job Shack assists with securing accommodation, setting up a bank account, organising a Tax File Number, resume reconstruction, visa applications, and staying in touch with family. Employment opportunities range from working in construction or hospitality to pearling, working on a farm or in office administrative roles.



Let's Go Surfing, Tour Operator, Bondi Beach, New South Wales

www.letsgosurfing.com.au

"Travellers from Eastern markets are seeking more authentic and adventurous activities like surfing. These FIT markets are rapidly changing and increasingly want to mix in and meet locals, and speak in and be spoken to in English." (Julia Volz, Business Development Manager, Let's Go Surfing)

Let's Go Surfing is Bondi's only officially licenced surf school, offering tailored private and group surfing lessons across various Sydney locations. Traditionally attracting youth travellers from markets such as the UK, Europe and North America, the company has evolved its offering over the last few years in response to a rapid increase of youth travellers from markets such as China, South Korea and Japan. For example, the company has teamed up with YHA to create surf and stay packages and partnered with online travel agency providers in Eastern markets to target youth travellers. Additionally, Let's Go Surfing has recently redesigned its website to keep pace with the way in which youth travellers prefer to research and book activities.



Nullarbor Traveller, Tour Operator, Adelaide, South Australia

www.nullarbortraveller.com.au

"We love our backyard here on South Australia's wild Eyre Peninsula and sharing our piece of paradise with travellers from all over the world is our absolute passion! We might not have any 'tourism icons' but we do have some breathtaking scenery and experiences that will create memories of a lifetime." (Anna Heaton, Business Development and Marketing Manager, Australian Wildlife Adventures)

Nullarbor Traveller, under the Australian Wildlife Adventures brand, is an Australian family owned and operated company which promises authentic experiences, world class wildlife encounters and a level of unparalleled service to free-spirited, 18-35 year old travellers. Offerings range from 3-10 day camping tours to untouched regions of Australia between Adelaide and Perth, including national icons such as the Flinders Ranges, Kangaroo Island and Esperance. Travellers sleep in swags under the stars, swim with wild sea lions and dolphins, hike pristine national parks and learn about Indigenous culture. The company is a host for Willing Workers on Organic Farms (WWOOF), offering hard-working travellers a unique opportunity to offset their carbon footprint while in Australia.



Travellers Autobarn, Campervan and Car Rentals, Australia-wide

www.travellers-autobarn.com.au

“Once there was a clearly defined ‘backpacker community and backpacker economy’ which has now blended into the background as youth travel more like locals. Not only are youth today the higher yielding top end tourists of tomorrow, they are the first adopters. Tourism Australia are leading the way and ensuring Australia stays relevant and authentic in an ever changing world.” (Peter Burke, Managing Director, Travellers Autobarn)

Travellers Autobarn offers a range of self-drive options specifically targeting the budget/youth market and the time-rich, with locations in Sydney, Melbourne, Cairns, Brisbane, Perth and Darwin. Travellers Autobarn’s targeted approach and keen focus on this specific demographic underpins the company’s growth and success. Benefits include free maps and camping guides with access to free campgrounds, 24-hour roadside assistance and special discounts through its partner network. Travellers Autobarn’s app (available from the iTunes App Store or Google Play) has proven most popular with backpackers, providing pre-check in, how to videos, campground information and links to on-road care. App developments include integrated social media platforms, Spotify, WeChat and even streaming services like Netflix.



Visitoz, Training and Work Placement Service, Springbrook Farm, Queensland

www.australianworkingadventures.com

“Visitoz is a programme that guarantees access to a range of extraordinary working experiences You will be expected to work hard, apply yourself and earn the respect of your employers and colleagues. And when you do, you will understand what so many young people before you have discovered; Australia can be the working experience of a lifetime.” (Joanna Burnet, General Manager, Visitoz)

Visitoz is the original provider of Australian Working Adventures, playing host to young people from over 70 countries for 26 years. Visitoz is a multi-award winning, family run business based in Southeast Queensland which has been preparing and placing young people in rural and outback jobs since 1991. In addition to providing guaranteed jobs from a database of approximately 2,000 rural employers, Visitoz provides a five-day safety training course and induction package to prepare travellers for rural and outback work. Travellers learn how to work with livestock, ride tractors, how to navigate in the bush and change a tyre. Additionally, they are provided with a choice of guaranteed jobs to suit their skills and experience – whether that be in agriculture, hospitality, childcare or teaching.



Wildlife Tours Australia, Tour Operator, Melbourne, Victoria

www.wildlifetours.com.au

“We’ve got so much to offer in this country, from its natural aesthetic beauty, to endemic wildlife, safe environment and plenty of friendly smiles. Here at Wildlife Tours, we pride ourselves on giving people the best quality experiences that will create lifetime memories. We know what people want because we are travellers ourselves.” (Paul Beames, Founder, Wildlife Tours Australia)

Wildlife Tours Australia is an award-winning Melbourne coach tour operator, offering one of the largest selection of small group tours departing Melbourne. The company operates smaller 24-seat minibuses to provide guests with a more intimate and personalised experience. The Wildlife Tour Australia brand is promoted and distributed throughout all hostels in Australia. The company has a strong affiliation with YHA and partners with accommodation providers with a similar target market. Wildlife Tours Australia also works closely with international tour operators, international student organisations, and backpacker travel agencies around the country.



YHA Australia, Network of Backpacker Hotels, Australia-wide

www.yha.com.au

“The heart of hostel accommodation is still the personal and human touch through communal experience. We position YHA as the brand leader through authentic stories and experiences across all channels.” (Janet McGarry, Head of Marketing, YHA Australia)

YHA Australia is part of the world’s largest budget travel organisation, Hostelling International. As a not for profit membership body, it boasts 80 hostels around Australia which offer the chance for young international travellers to meet a community of like-minded visitors. YHA’s website is a market-leading accommodation site with strong booking functionality as well as a wealth of travel information. The website has been rolled out in English, Japanese, Mandarin and Korean languages. YHA Australia also has a strong social media presence on Facebook, Twitter, YouTube and Instagram, providing additional opportunities for like-minded travellers to connect with each other.

AUSTRALIA MAKING HEADLINES WITH NEW YOUTH CAMPAIGN

A dedicated news channel and a world-first content partnership with BuzzFeed are spearheading Tourism Australia's latest youth campaign, aimed at putting Australia back on the map as one of the world's most memorable and desirable youth destinations. The new youth campaign is part of a A\$10m package of measures introduced by the Australian Government in FY2016/17 aimed at increasing Australia's attractiveness as a Youth and Working Holiday Maker destination.

AUSSIE NEWS TODAY

Delivering its first bulletin from the top of the Sydney Harbour Bridge, Tourism Australia has launched a dedicated, tongue-in-cheek news channel serving up 'good news' from across Australia as part of its latest youth campaign.

Aussie News Today will deliver sometimes irreverent but always positive stories from around Australia, broadcasting them directly into the news feeds of potential young travellers around the world.

"We want to put a smile on young people's faces by finding fun and uplifting stories from across Australia and serve them up to the youth of the world as an endless news stream of reasons to visit," said Tourism Australia Managing Director John O'Sullivan.

Aussie News Today will be co-presented by three young and charismatic Aussies - Wallabies rugby union star Nick Cummins (aka 'The Honey Badger'), TV presenter Teigan Nash and former Home and Away actor Lincoln Lewis.

Content will be gathered from across the country and shared globally using Tourism Australia's digital and social media channels, including dedicated Aussie News Today pages on Facebook and Australia.com.

Australian tourism businesses are being encouraged to submit news ideas via #AussieNewsToday.

CONTACT

Visit www.tourism.australia.com/tnla for campaign updates, and www.tourism.australia.com/youth for information about the youth sector. Learn more about the Working Holiday Maker program at www.australia.com/workingholiday.



'The Honey Badger' Nick Cummins, Sydney Harbour Bridge, New South Wales



Lincoln Lewis, Cable Beach, Western Australia



Teigan Nash, Airlie Beach, Queensland

BuzzFeed

Additional youth content will be created as part of a world-first content partnership with BuzzFeed which will see eight young travellers from the UK and Europe sent on a road trip of a lifetime around Australia to report on some of Australia's very best youth experiences.

The BuzzFeed Mates will head off-the-beaten-track to discover some of Australia's very best local culture, festivals, surf breaks, food and wine offerings. They will be given a bespoke itinerary filled with things that appeal to the young traveller, like swinging on the world's fastest Minjin jungle swing in Cairns, enjoying world class music acts at one of Australia's many summer festivals or discovering ancient watering holes in Kakadu National Park.

"As far as working holidays go, I think you'd have to go a long way to beat this. It's the road trip to end all road trips," said John O'Sullivan, Tourism Australia's Managing Director.

For updates on how to get involved, subscribe to Tourism Australia's industry newsletter Essentials, or follow us on LinkedIn or Twitter (@TourismAus).

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Sources: International Visitor Survey, Tourism Research Australia, June 2017; Global Report on the Power of Youth Travel, UNWTO, 2016.