



Inbound Youth Tourism Action Plan

Sydney &
Regional New
South Wales
2011 - 2014

An integrated strategic plan to support the growth and sustainability of the youth tourism industry in Sydney and regional New South Wales.

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Executive Summary

Young, independent and adventurous travellers and students account for 43% of all international inbound visitors to Australia. The youth travel market, stay up to 9 times longer and spend up to 6 times more than any other inbound or domestic leisure or business travel segment - contributing over \$5 billion dollars to New South Wales' economy annually.¹

With the high Australian Dollar, travellers are choosing cheaper international and domestic destinations and shortening their length of stay in Sydney and regional New South Wales. This has resulted in New South Wales facing increased competition for market share from other proactive states, particularly Victoria, Queensland and Western Australia.

Consistent, integrated investment in youth tourism product and promotion is required to maintain NSW's dominance as the preferred destination for young, independent and adventurous international travellers into Australia.

As a response to the National "2020 Tourism Industry Potential" initiative released in November 2010, and "Tourism Towards 2020, the NSW Tourism Industry Plan", BOA proposes a 3 year action plan to set the foundations to invest in and grow the youth travel market in New South Wales.

The Youth Tourism Action Plan lays out an integrated industry development program to increase youth arrivals and nights by targeted marketing initiatives, drive investment in youth tourism product and focus resources on sector development across the State.

This plan provide a framework for BOA and its members to work collaboratively with Government, Destination New South Wales and NSW Industry and Development over the next 3 years. The plan builds on existing strategic planning initiatives by Tourism NSW, including the 2008 youth strategy "Sydney: travel > work > study > play", developed for World Youth Day and 2009 "Surf strategy". BOA supports the strategic execution of "Sydney: travel > work > study > play", developed for World Youth Day and 2009 "Surf strategy" plans and aims to work with Destination NSW to gain transparency, consistency, focus and agility.

This plan proposes a focus on key inbound youth tourism markets, investing annual promotional funds proportionate to inbound tourism value to maximise the State's tourism export return on investment. As a show of industry support, BOA proposes various initiatives, calling for matched dollar for dollar funding over a 3 year period.

The Association calls on its members and Government to endorse this action plan to invest in proactive industry development and destination promotion programs to ensure Sydney and New South Wales is consistently positioned as Australia's number one choice for young, independent and adventurous international visitors to study, work, travel and play.

1. Youth Tourism Action Plan

1.1. Objectives

- Increase visitor numbers and nights in New South Wales by focussing initiatives on key international youth travel market segments.
- Improve New South Wales' tourism experiences, services and infrastructure by developing iconic work and travel experiences, specifically in regional areas.
- Enhance youth tourism industry skills, knowledge, collaboration and professionalism.

1.2. Grow visitor numbers & nights

Grow the youth tourism market: working holiday, student/education and leisure travel by young, independent & adventurous travellers, workers and students aged 16 to 30 years.

3.2.1 Improve promotion and positioning of Sydney and regional New South Wales as "Australia's work, study and travel destination". Tourism New South Wales to promote "Sydney: travel > work > study > play", featuring timely availability of short and long term work, vocational, internship opportunities, study opportunities and travel experiences in Sydney and regional New South Wales.

- Focus international youth campaign activity in key mature youth tourism markets (UK, Germany, France, Scandinavia, USA) and scope trade development & investment in emerging markets (China, Brazil, Argentina, Mexico). International marketing initiatives must focus on youth specific messaging and local, distribution channels and strategic partnerships.
- Implement campaigns in key international markets to encourage more Work & Holiday / Working Holiday visitors.
- Seek and develop partnerships with industry and Tourism Australia to develop youth specific digital assets including mobile applications, mapping, geotagging and innovative cooperative marketing campaigns. This includes specific funding for the development of global digital campaigns and ongoing "drip fed" social media engagement initiatives.
- Work in consultation with key youth tourism industry stakeholders to ensure messaging effectiveness, with quarterly feedback on future marketing activity and industry partnership opportunities.
- Tourism New South Wales to promote the diversity of regional NSW experiences focussing on: key youth travel destinations, youth specific events, and experiential work and travel activities (rural work or internships, adventure

sports and experiences, voluntourism, aboriginal, nature based tourism) to inspire more travellers to stay longer in regional NSW.

- Specific funding to develop and promote NSW youth tourism consumer and trade websites (including integrated digital mapping and mobile assets) to feature work, study and tourism operators in a single resource for youth tourism in NSW.
- Specific funding to improve timeliness and consolidated digital resources for skilled workers and working holiday makers to access information about skilled work and state sponsored migration program availability in Sydney and regional NSW including <http://www.sydneyaustralia.com/en/> and <http://www.business.nsw.gov.au/live-and-work-in-nsw/visa-and-migration/skills-in-demand>

3.2.2 Specific, annual funding for youth trade marketing initiatives (refer annual budget attached):

- Support operators to attend the annual World Youth & Student Travel Conference WYSTC (international) and associated international trade missions conducted by Tourism Australia (TA) or the Australian Tourism Export Council (ATEC).
- Provide specific funding to sponsor joint Tourism NSW / BOA representation at trade and industry expos.
- Champion and support international famil programs for international youth travel agents in NSW coinciding with ATEC and TA initiatives.
- Match funding with BOA for the development of international youth tourism trade collateral for industry development and destination promotion.
- Create trade collateral & registry for all youth relevant market ready product (contacts, product summary, images), including working holiday and volunteer experiences

1.3. Improve New South Wales' tourism experiences, services and infrastructure

Specific funding to develop new market ready product in regional NSW areas, in particular NSW South Coast and Outback regions

- 3.3.1 Provide training and support for NSW youth tourism operators to become export-ready, working in collaboration with BOA regional educational activities (BOA Talks).
- 3.3.2 Drive industry development and cohesion to develop suitable locations for recreational overnight camping and 'primitive camping grounds' ; experiential and voluntourism experiences; natural/environmental, aboriginal and uniquely Australian outback/farm experiences.
- 3.3.3 Consider young travellers, students and workers in development of Visitor Information services in Sydney and regional New South Wales.

- 3.3.4 Work collaboratively with operators to develop touring itineraries and routes specifically for the youth market.

1.4. Enhance tourism industry skills, knowledge and professionalism

- 1.4.1. Work collaboratively with operators to develop touring itineraries and routes specifically for the youth market.
- 1.4.2. Improve industry communication and dissemination of new product / services
- 1.4.3. Fund appointments of human resources to grow the youth tourism sector in NSW.
- Match funding for part time appointment of Sector Promotion Officer as shared part time resource with BOA.
 - Fund Market Development Officer (full time) with direct responsibility for the development of the youth tourism industry in NSW.
- 3.4.4 Produce quarterly industry research showing youth arrival trends and travel habits (based on demographics, not overnight stays in backpacker accommodation) in Sydney and key NSW regions, including comparative data to other Australian States, forecast international inbound arrivals, student arrivals and approved visas from key source countries and employment fact sheets.

Appendix: Youth Tourism Statistics

Unless otherwise specified, all stats from International Visitors Survey, September 2010

HOW MANY INTERNATIONAL VISITORS?

	Visitors
Total Visitors to Australia	5,381,510
Student Travel & Education Market	430,160
Working Holiday Makers (WHM visa grants 09/10)	183,161
Young Independent & Adventurous Travellers (backpackers)	585,000
Holiday	2,467,038
Employment	121,992
Business	840,418
Total Visitors to NSW	2.8 million
Student Travel & Education Market	167,000
Working Holiday Makers	53,000
Young Independent & Adventurous Travellers (backpackers)	459,000
Holiday	1,088,000
Employment	43,000
Business	422,000
Total Visitors to Sydney	2.6 million
Student Travel & Education Market	154,000
Working Holiday Makers	n/a
Young Independent & Adventurous Travellers (backpackers)	440,000
Holiday	1,041,000
Employment	35,000
Business	401,000

HOW MUCH DO THEY SPEND?

		Ave. spent per person	Ave. per night
Total Spend in Australia (1)			
Student Travel & Education Market (2)	\$5.5 billion	\$14,788	\$ 107.00
Working Holiday Makers (3,4)	\$2.4 billion	\$13,218	\$ 53
Independent & Adventurous Travellers (Backpackers)	\$3.2 billion	\$5,612	\$ 78
Total Youth Travel spend in Australia	\$5 billion	\$ 11,206	\$ 79
<i>Compared to:</i>			
Holiday traveller	3.9 billion	\$2,414	\$ 95
Business	\$1.7 billion	\$2,164	\$ 160

Total Spend in NSW (1)	
Student Travel & Education Market (2)	\$2.2 billion
Working Holiday Makers	\$750 million
Independent & Adventurous Travellers (Backpackers)	\$1.1 billion
Total Youth Travel spend in NSW	\$4.05 billion
<i>Compared to:</i>	
Holiday traveller	\$5.5 billion
Business	\$605 million

HOW LONG DO THEY STAY?

Total Nights in Australia ('000) & average duration		Ave. length of stay
Student Travel & Education Market	50,829	139 nights
Working Holiday Makers (3)	45,424	248 nights
Independent & Adventurous Travellers (Backpackers)	42,086	72 nights
Total Youth Travel Nights in Australia ('000)	138,339	153 nights
<i>Compared to:</i>		
Holiday traveller (main purpose of visit = holiday/leisure)	35,547	25 nights
Business	10,718	14 nights

Total Nights in New South Wales ('000) & average duration		% share of total visitors
Student Travel & Education Market	19,183	30%
Working Holiday Makers (3)	20,087	31%
Independent & Adventurous Travellers (Backpackers)	13,934	22%
Total youth tourism nights in NSW ('000)	53,204	28%
<i>Compared to:</i>		
Holiday traveller	12,844	20%
Business	3694	6%

(1) Source: Modelled international overnight visitor expenditure in Australia's regions, YE Sep 10, TRA

(2) Excluding package tours and prepaid international airfares.

(3) Estimated from average nights data from "Evaluation of Australia's Working Holiday Maker (WHM) Program" 2009 Dr Y.Tan, Prof. S. Richardson, Dr L. Lester, Dr T. Bai, Ms L. Sun

(4) "Working Holiday and Work & Holiday Visa Grants 2005-06 to 2009-10 Program Years" Department of Immigration & Citizenship

Survey of travellers visiting the Melbourne Adventure & Travel Expo 2011

Survey of 529 travellers who visited the BOA Expo stand:

- 83% had been to NSW
- 23% were International travellers
- 33% said Sydney was their favourite place in NSW
- 54% were under 30 years old

For full results:

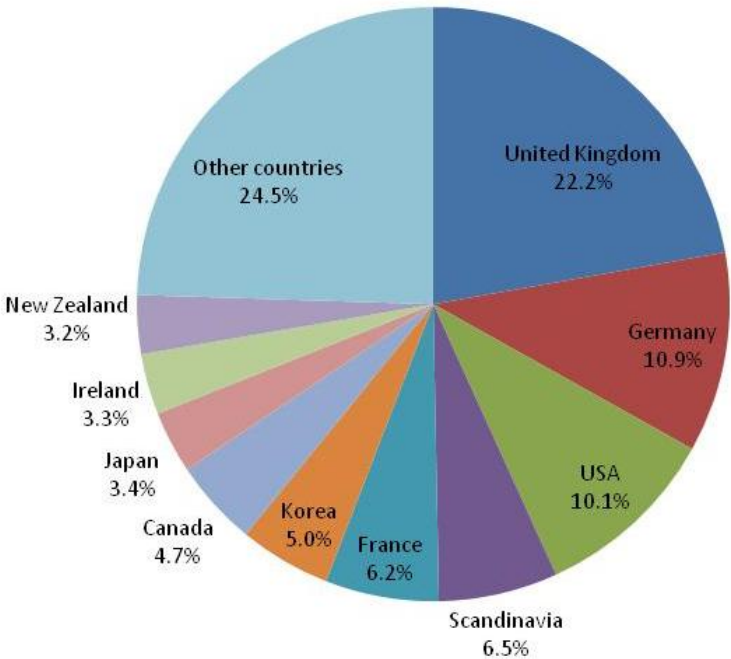
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Backpackers Uncovered – What travellers actually think of Australia

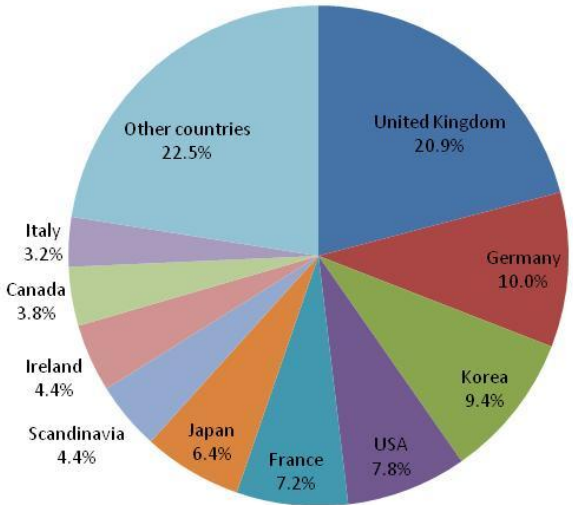
Jo Farquhar, Head of sector for Travel & Leisure, TNS Global

In 2011, Tourism Australia and BTAP undertook a benchmarking survey conducted by TNS Global to gauge what our customers really think. The survey outlines backpacker trends and expectations. To review full results: http://www.atec.net.au/29776_hostel_final2.pdf

**Top 10 International youth arrivals
staying in backpacker accommodaiton
in New South Wales
year end June 2010**



**Top 10 International youth nights
in Backpacker accommodation
in New South Wales
year end June 2010**



1 Unless otherwise referenced, all figures from International Visitors Survey, year end September 2010.



The Backpacker Operators Association NSW Inc. (BOA) is the peak industry body and voice of the youth tourism industry in New South Wales and the Australian Capital Territory.

BOA represent the interests of the Youth tourism industry, in particular BOA’s 100+ members - individuals or small, medium or large operators from all sectors of the industry including hostel and budget accommodation; tour, transport and adventure operators; employment, job placement, immigration and visa specialists; wholesalers, inbound travel agents and tour desks; university, vocational training colleges and language schools; media publishers and communication providers; attractions, bars, clubs, entertainment and suppliers to the tourism and hospitality industry.

International travellers, workers and students (16 years to 30 years) stay up to 9 times longer and spend up to 6 times more than any other international or domestic leisure or business travel segment, providing the lifeblood a broad cross section of NSW businesses:

The Association, driven by a voluntary Executive Committee, actively encourages partnerships with Industry and Government, particularly Tourism New South Wales.

BOA aims to develop the youth travel segment, raise industry standards and promote industry cohesion to ensure Sydney and New South Wales is positioned as Australia’s place to work, study and play.

