

The value of the youth travel sector

July 2026

● WILSONS PROM

Who is a young leisure traveller?

1. Adult

2. Between the ages of 18-29 (stretching to 35 for some WHV)

3. Who in the Australian context are:

- Holiday travellers between the ages of 18-29;

OR

- Working Holiday Makers, here on a visa subclass 417 or 462 whose ages range from 18 to 35

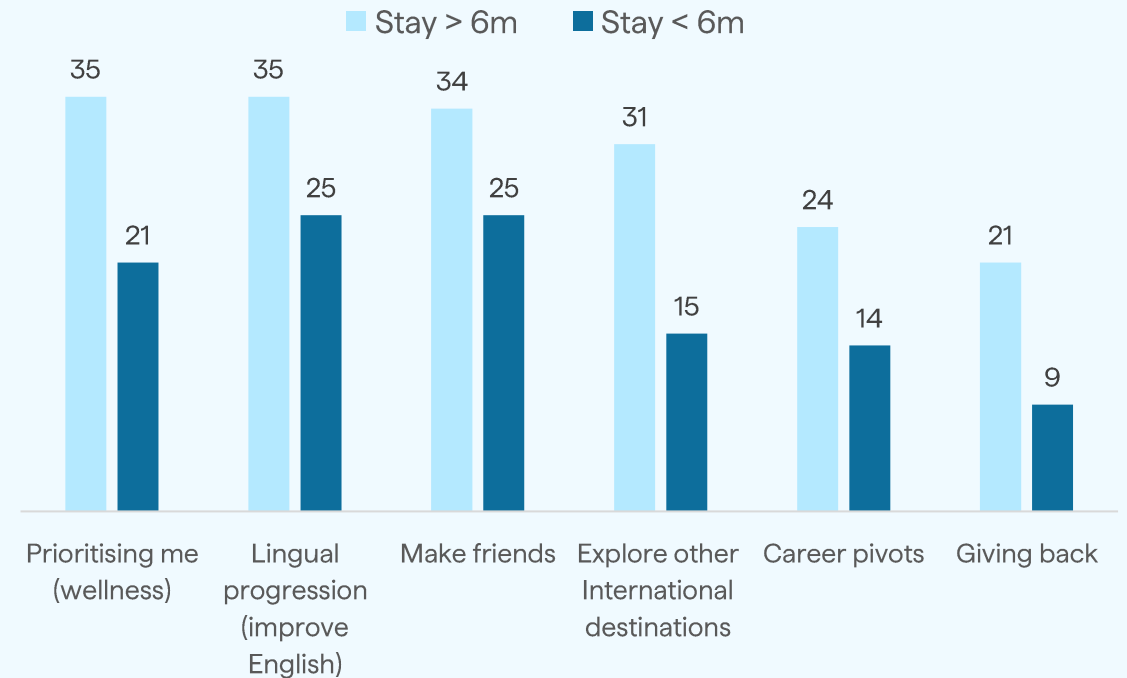
Why does a young person travel?

The 5 Cs:

1. **Curiosity** new experiences, bucket list driven
2. **Culture** authentic, self discovery
3. **Community** meeting like minded people
4. **Character** growing independence in key life stages
5. **Career**, new experience, attractive salaries/sponsorship opportunities

Reasons for travel

Source: Painted Dog Research 2025

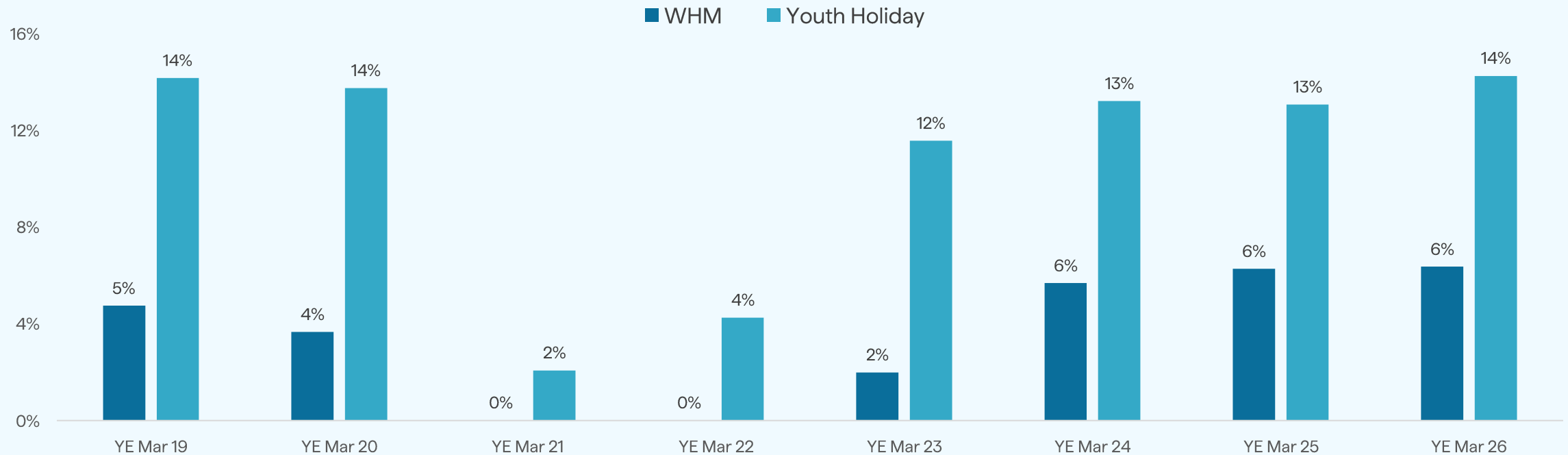


Why do they matter to Australia? Volumes.

Youth and working holidays account for 21% of inbound leisure arrivals (+2pp since 2019)

Share of leisure international visitors to Australia

Source: TRA IVS YE March 2026



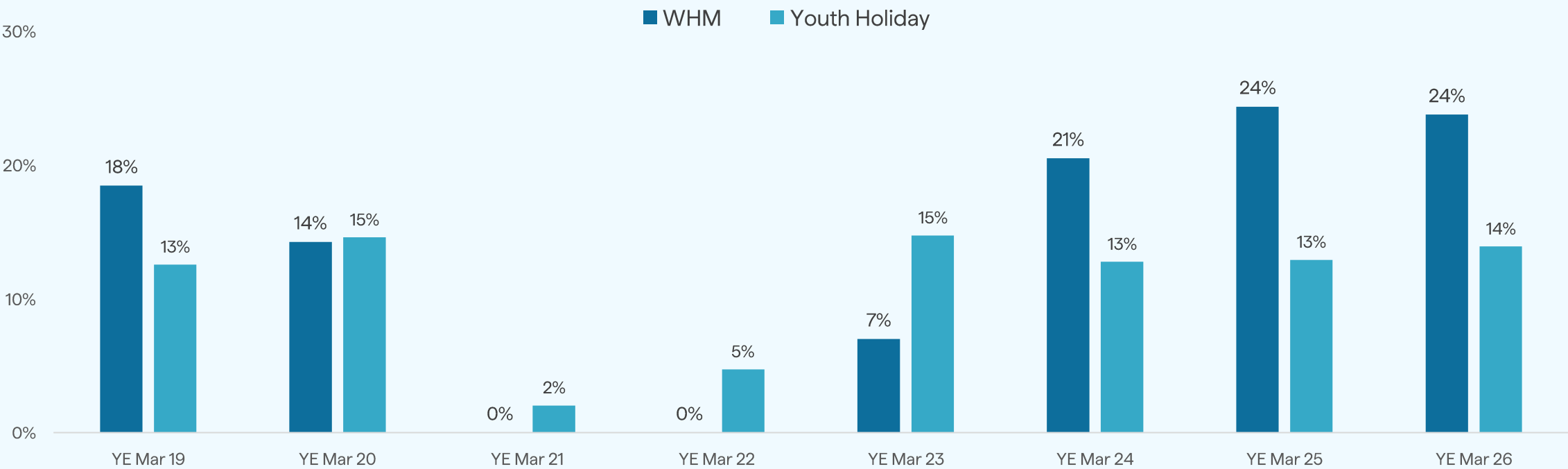
Why do they matter to Australia? Spend.

38% of inbound leisure expenditure (+7pp since 2019)



Share of leisure international spend in Australia

Source: TRA IVS YE March 2026



WHM and Youth
present different
opportunities.



Double the arrivals for youth, double the expenditure for WHM

Working Holiday Maker

415K
+13% YoY

Total arrivals

\$4.5B
+16 YoY

Spend in Australia

\$5.6B
+12% YoY

Total trip spend
(inclusive of airfares)

Youth leisure traveller

878K
+20% YoY

Total arrivals

\$2.6B
+28 YoY

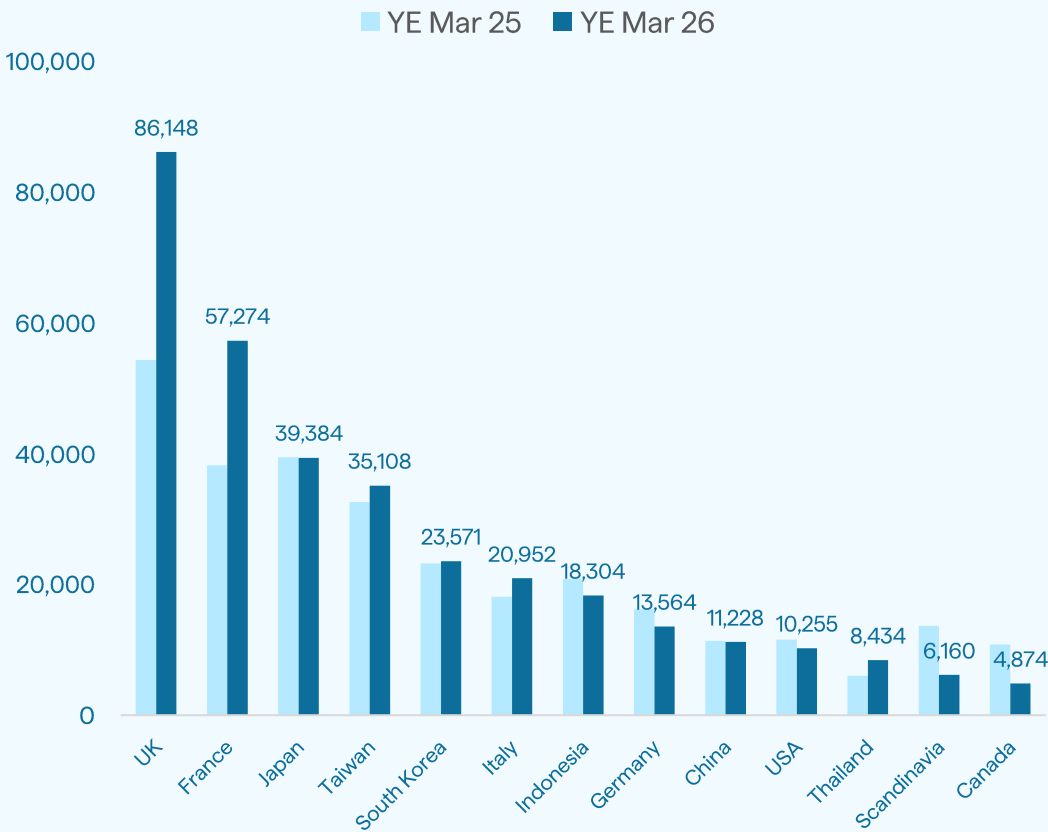
Spend in Australia

\$4.0B
+22% YoY

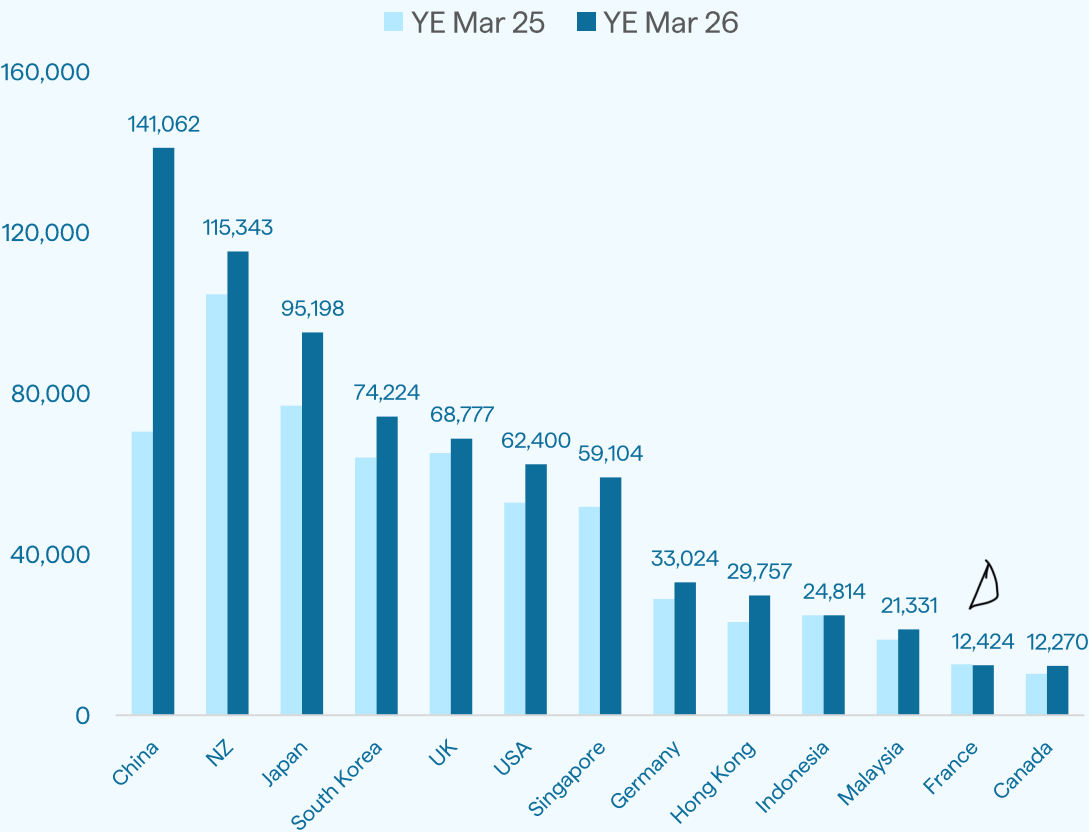
Total trip spend
(inclusive of airfares)

What markets are driving the arrivals?

Working Holiday Maker

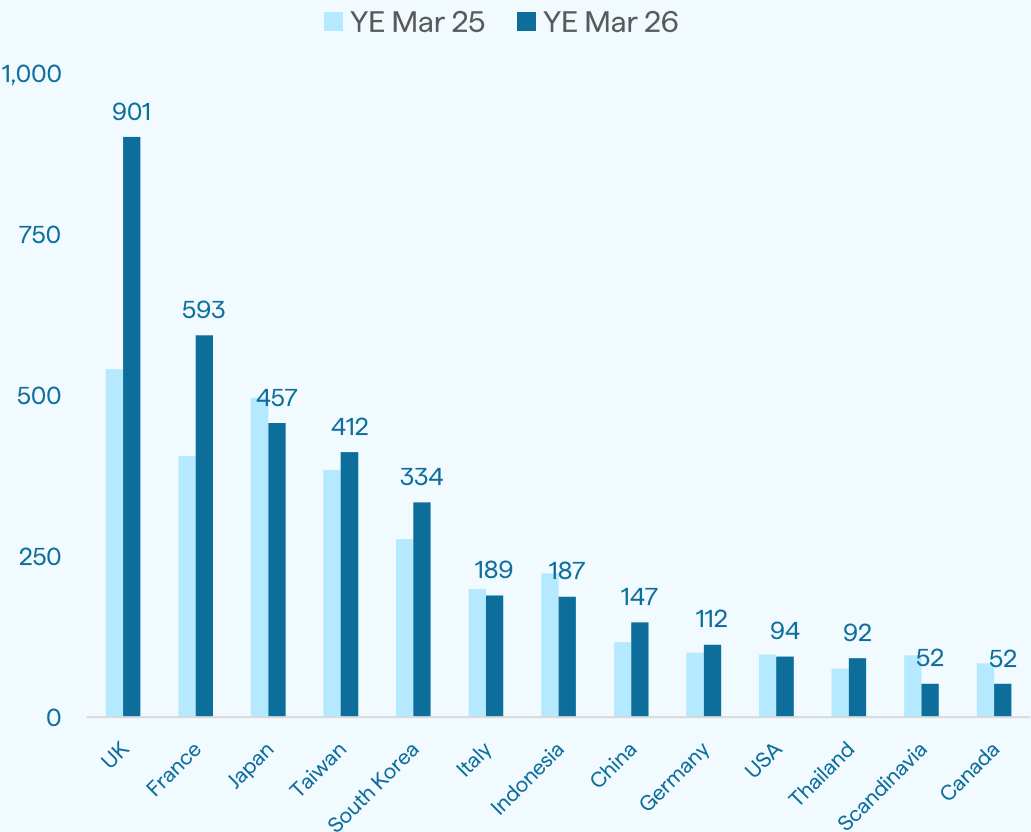


Youth holiday

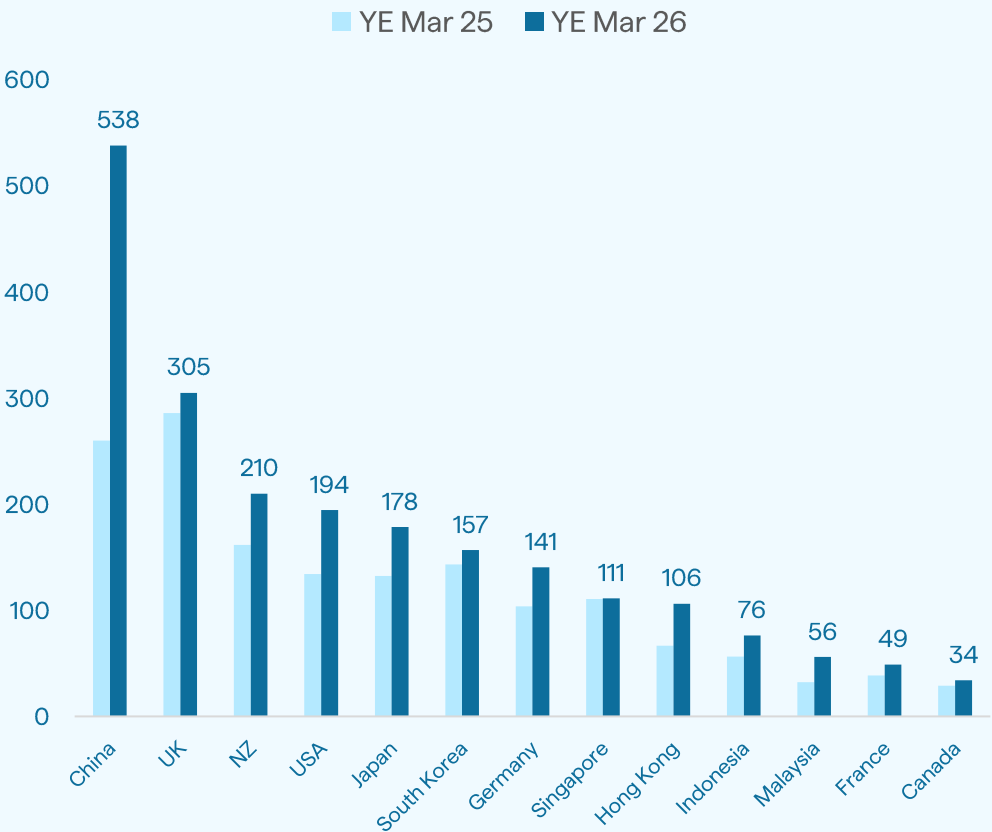


What markets are driving the spend?

WHM – Spend in Australia \$M

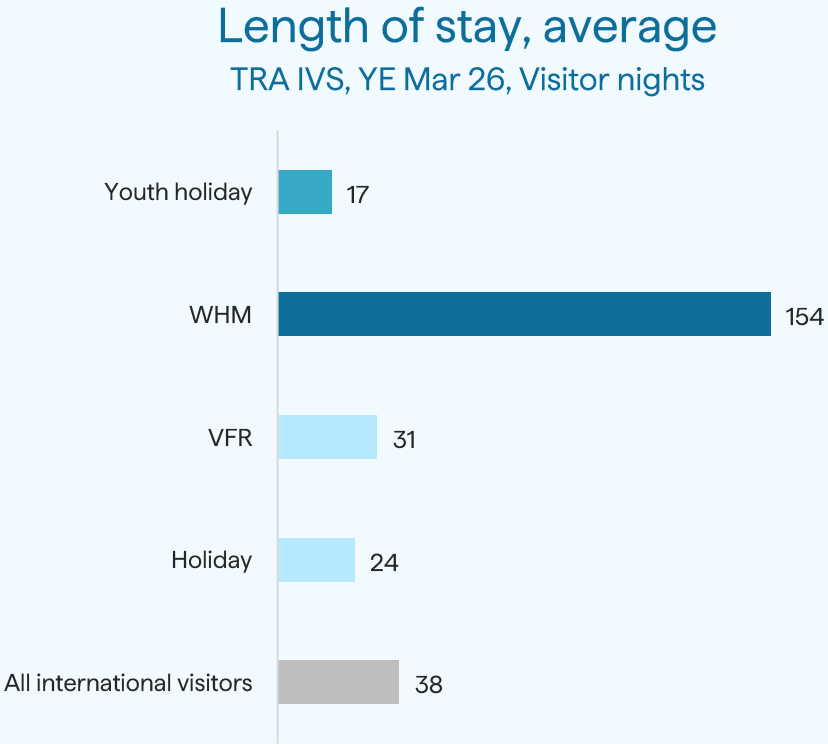
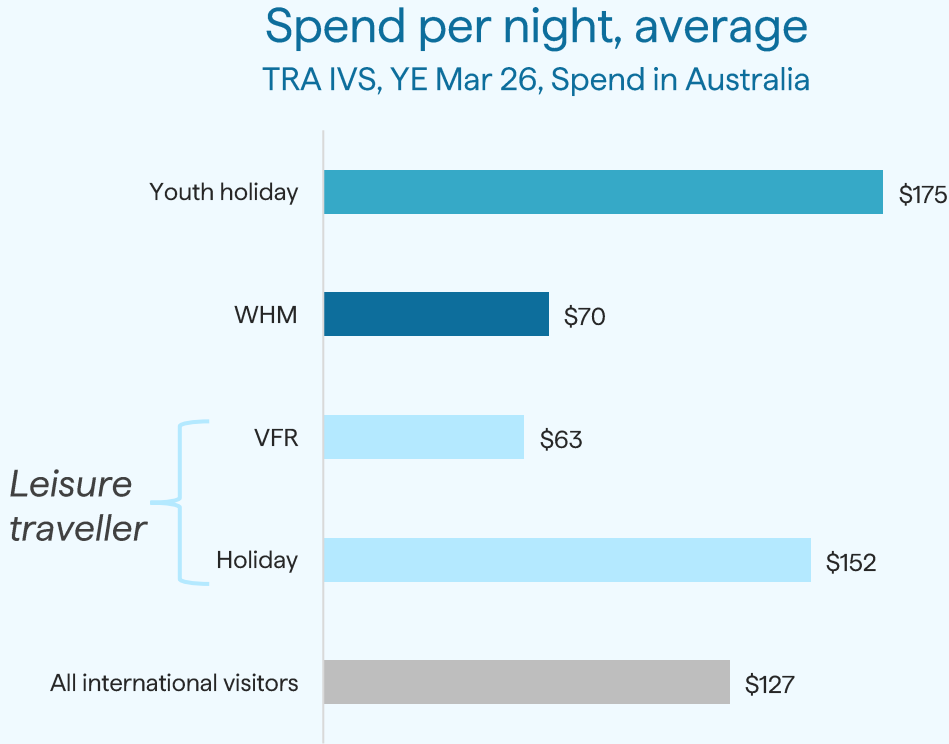


Youth holiday – Spend in Australia \$M



The importance of a dual youth approach

Youth travellers outspend leisure (on a per night basis), while WHM broaden the visitor economy through longer stays.

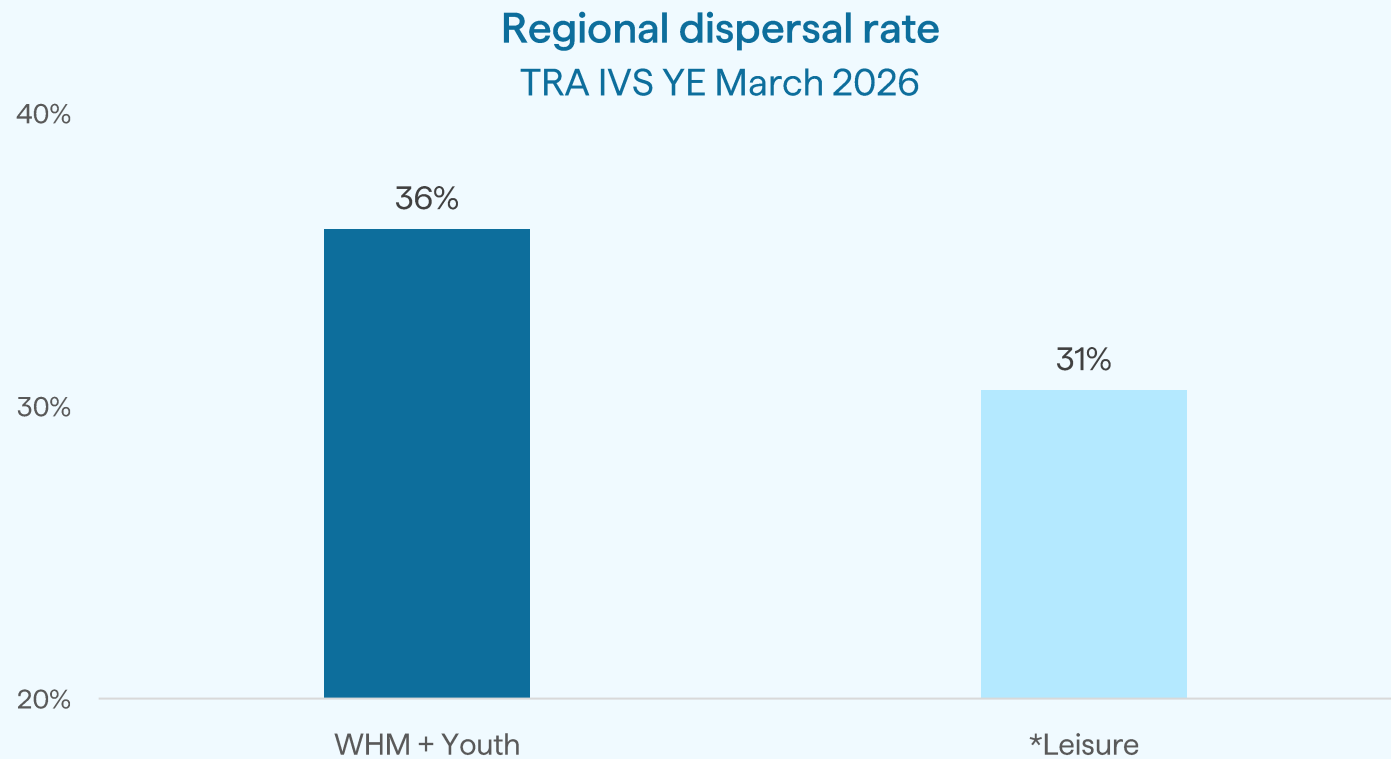


Beyond expenditure



1. Critical dispersing audience

The youth travel group disperses into regional Australia at a far higher rate than typical leisure visitor

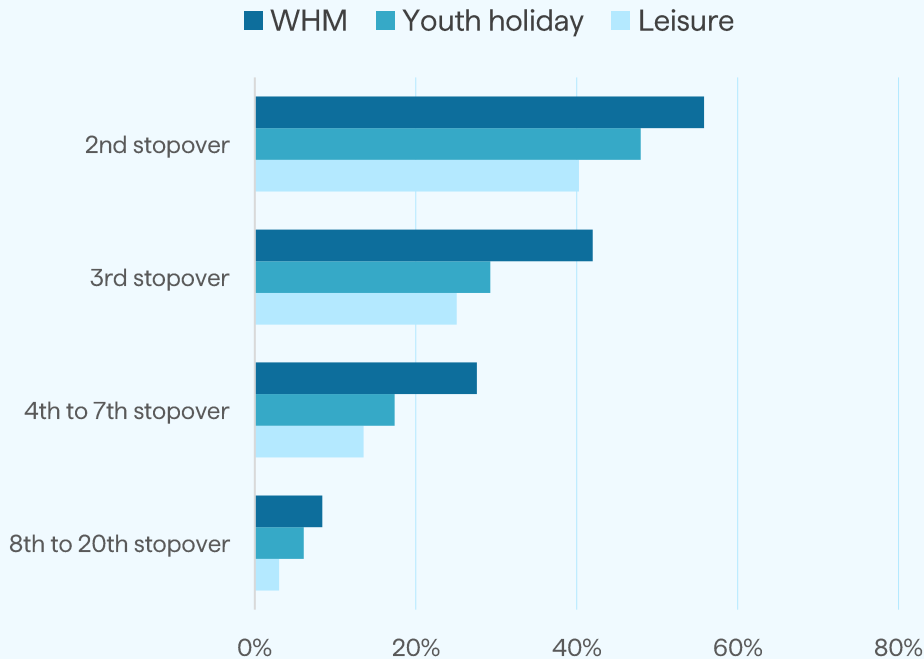


Dispersal is a night in a regional location. Regional is defined as NOT a capital city and the Gold Coast.

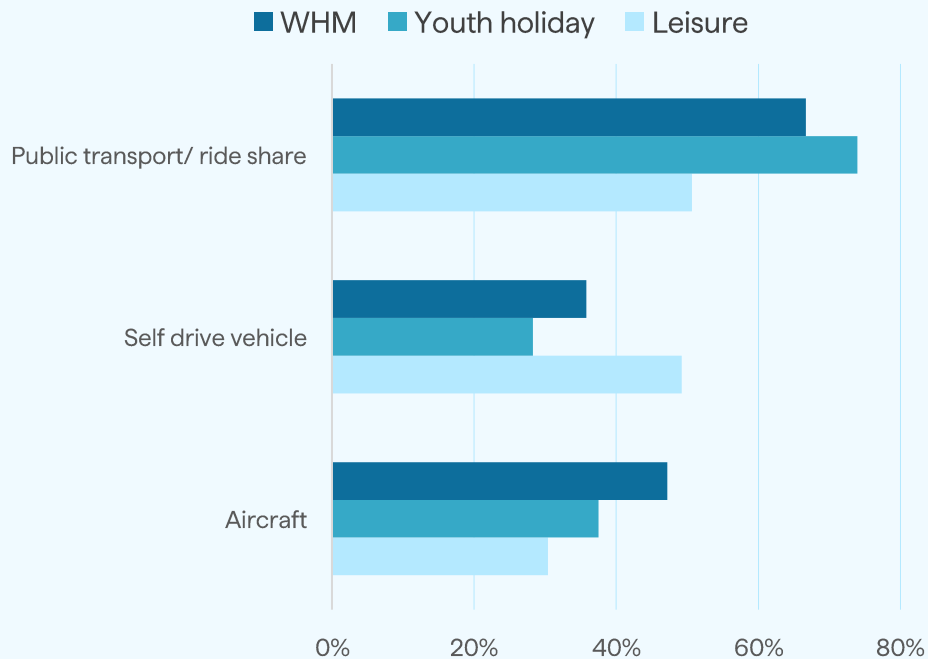
Seeing more of our country than most other visitors

Both WHM and youth leisure travellers have a greater volume of stopovers and use a greater volume of on the ground transport.

Number of stopovers

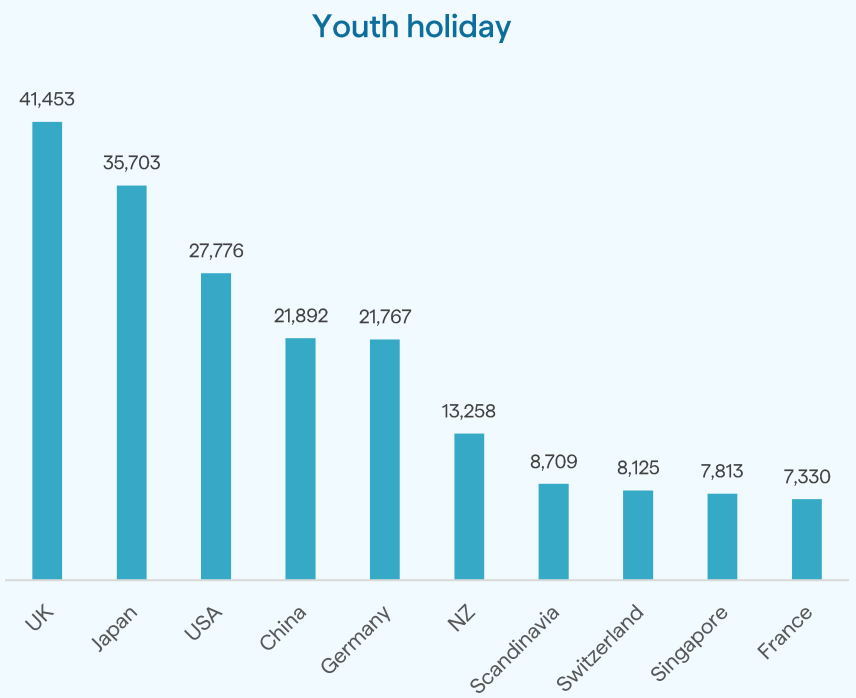
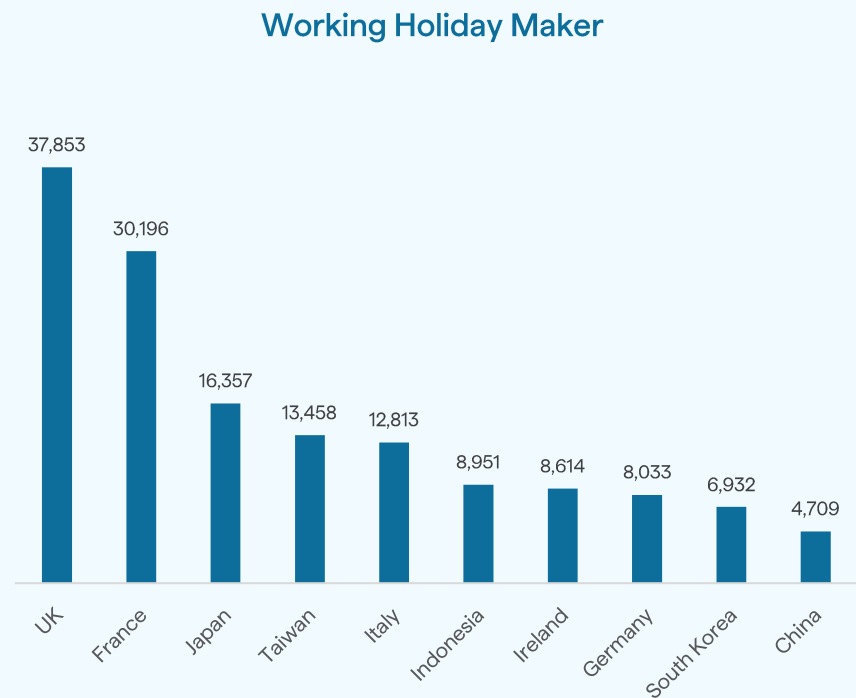


Modes of transport used



But it should be noted not all youth markets, are the same

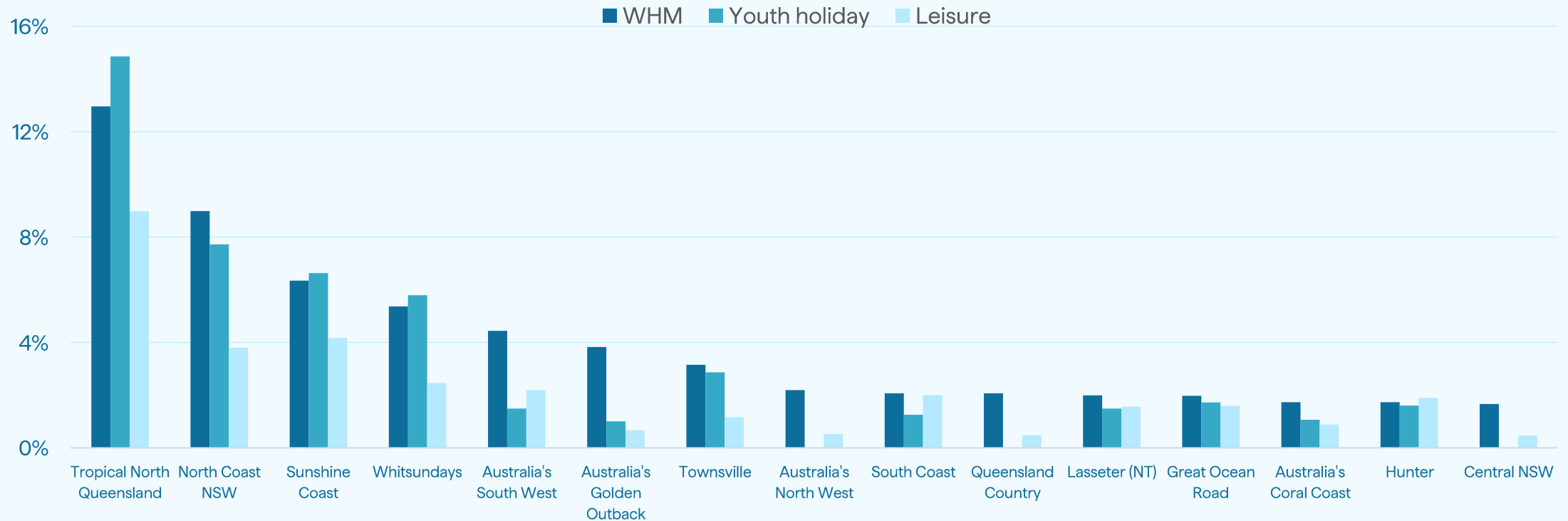
Regional dispersal ranked by volume
TRA IVS, YE March 2026



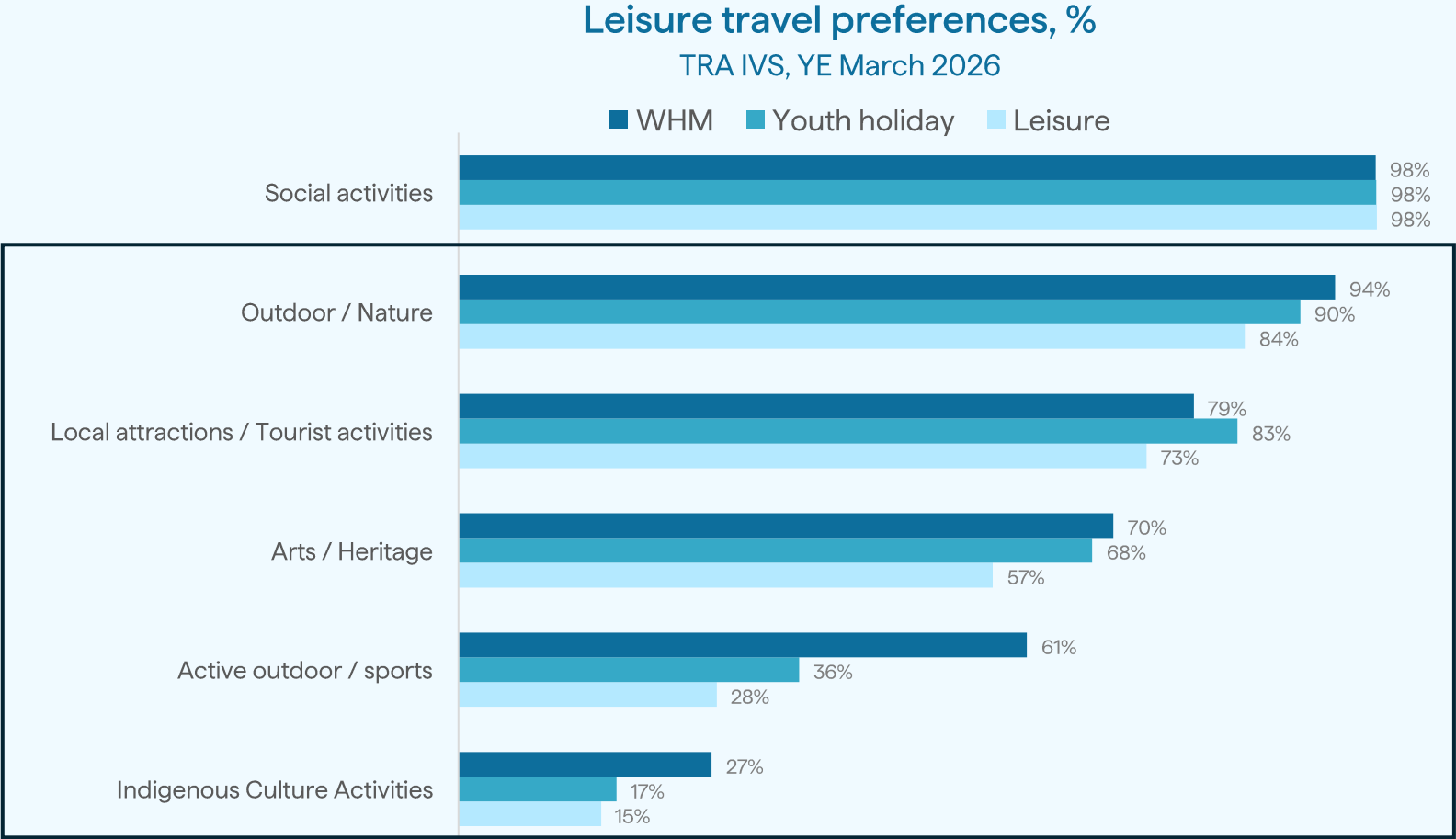
What's driving this dispersal? They have time on their side – same places greater volume

Regional destinations preferences by visitor segment, %

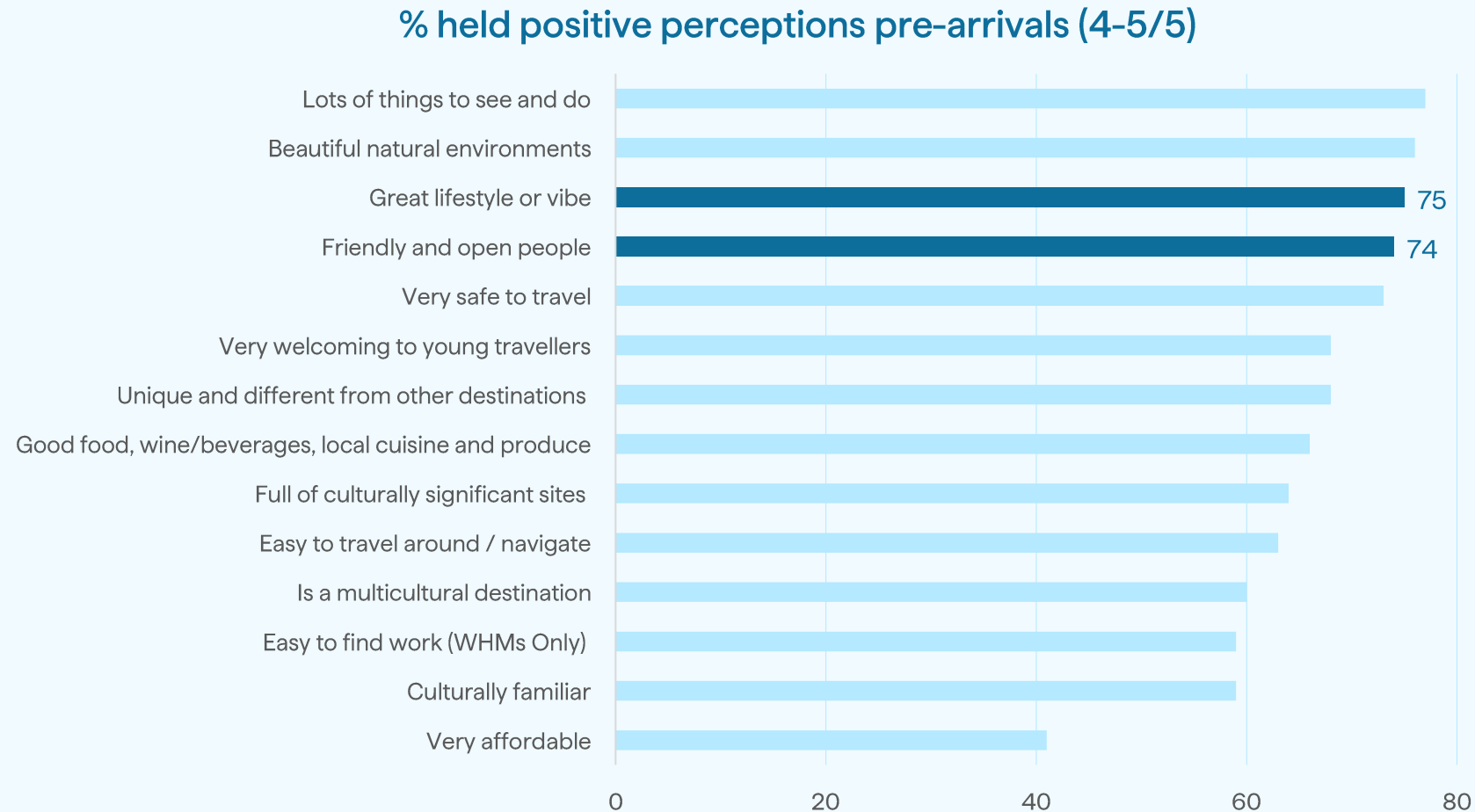
TRA IVS, Stopover dispersed regions, YE March 2026



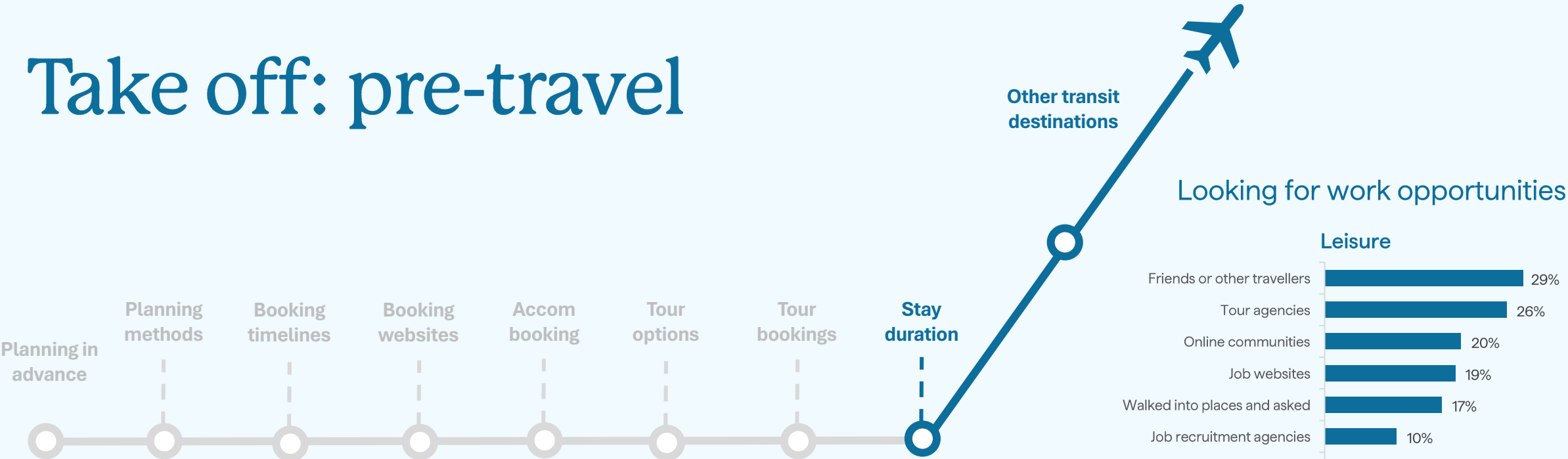
2. They are arguably more desirable: seeking to experience more of our land and peoples



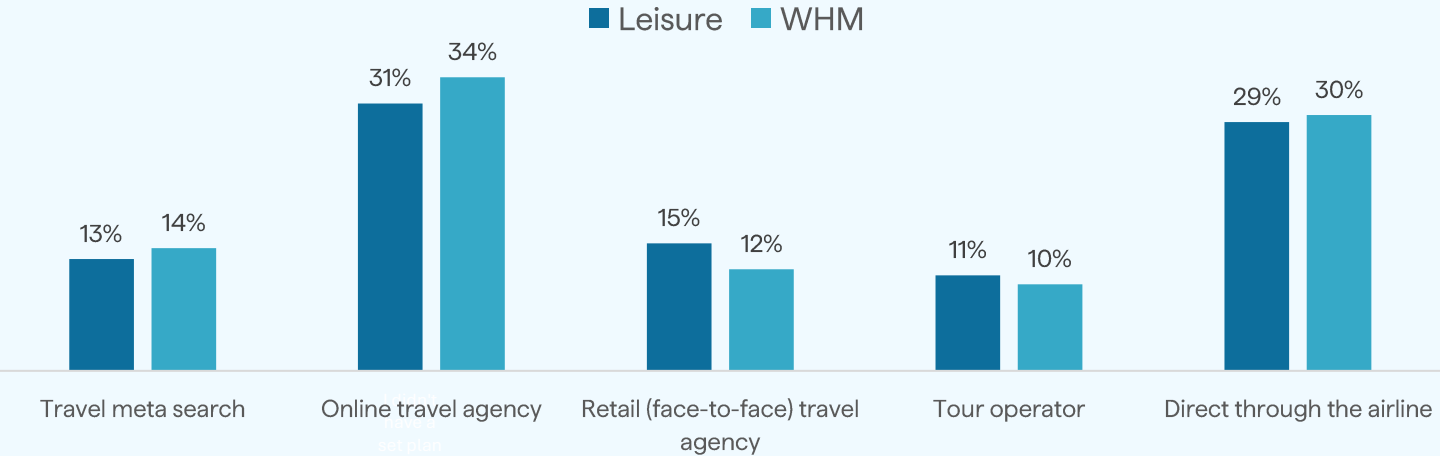
Choosing Australia due to our ‘vibe’, friendly people and lifestyle



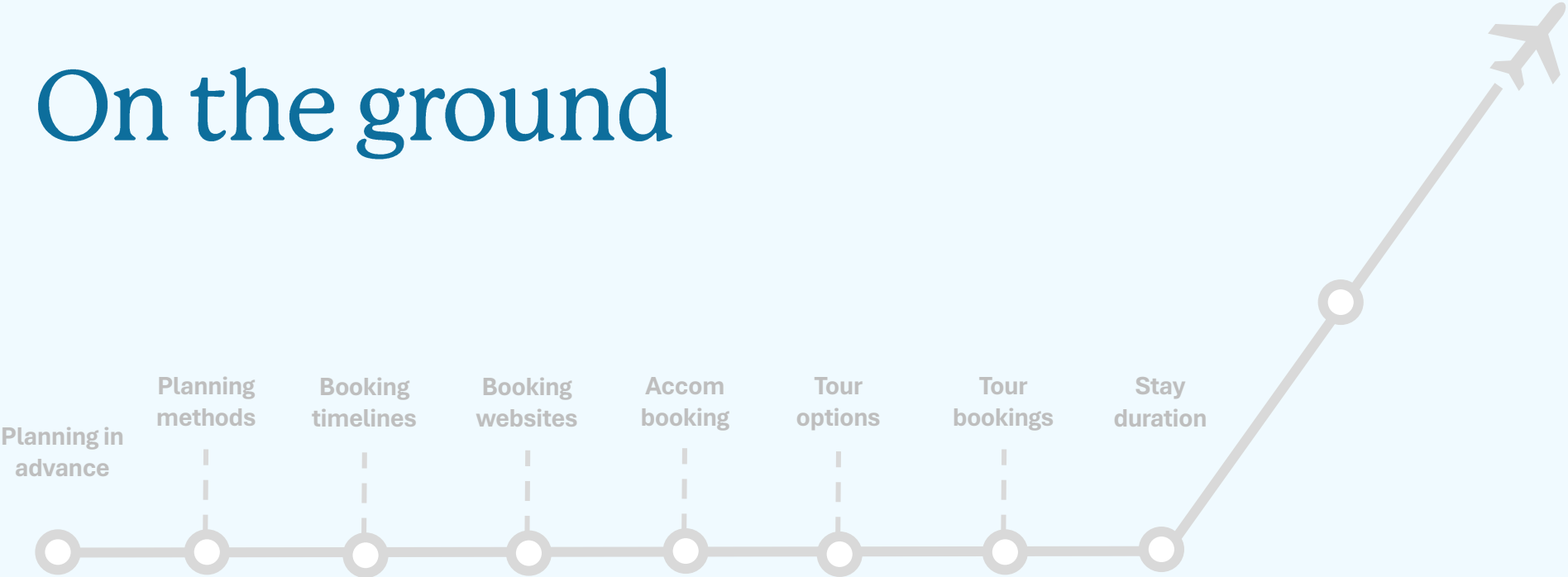
Take off: pre-travel



Booking flights



On the ground



Working holiday makers



Travelling during Australian summer, working during winters



Likely to prioritise working and book travel later in their visa



They often join other Korean travellers to share costs and feel safety in numbers



More likely to pre-book travel to big cities and tourist attractions

Youth leisure travellers



Likely to plan in meticulous detail, to limit wasted time



Searching for authentic experiences without straying too far



More likely to base themselves in big cities with big tourist attractions.



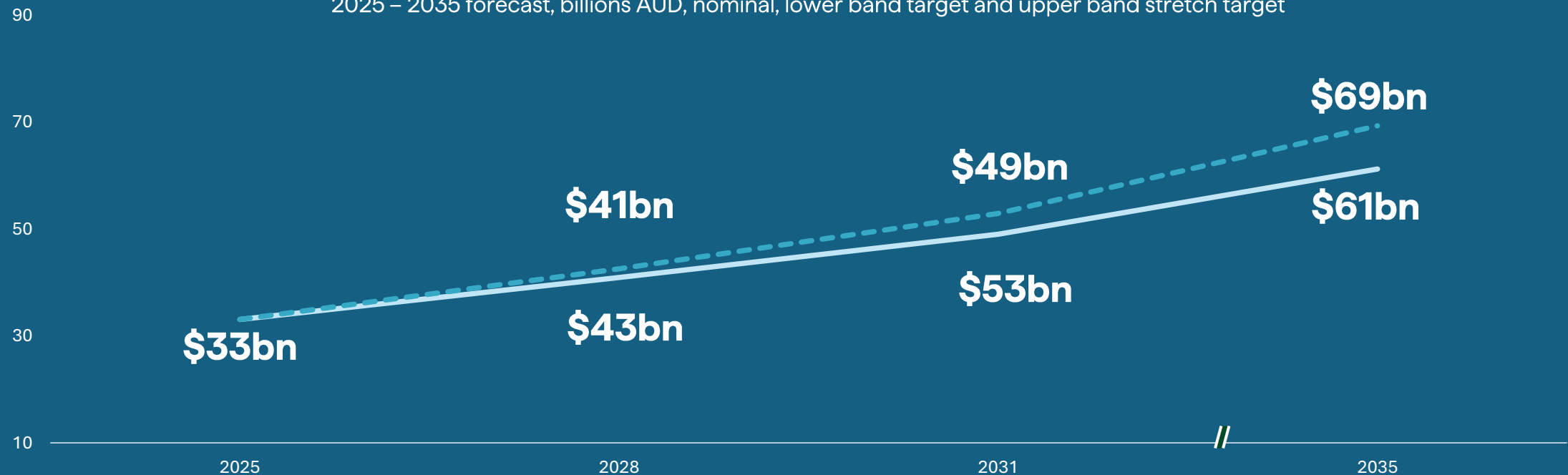
More likely to consider tour operators and travel agents due to a sense of security

Bring it altogether Tourism 2035

T35 aim is to map out the potential of the leisure Australia visitor economy to 2035.

Total trip expenditure Leisure (Holiday, VFR), WHM, and Business Events

2025 – 2035 forecast, billions AUD, nominal, lower band target and upper band stretch target



Note: Underlying L.E.K. modelling was based on Spend in Australia and carried out in detail for the top 30 markets only. Scaling has been applied to both derive Total Trip Spend (based on the FY2025 proportionality) and account for all markets (based on historical movement in the share of other markets) at the segment level of granularity. Modelling completed in late 2025. Source: L.E.K. Consulting Australia Pty Ltd, 'Modelling for Tourism Australia 2035 Strategy Project' Report], December 2025.

Youth and WHM travellers are reflected in our choice of grow and protect markets

Grow

Full funnel marketing including brand advertising with investment and targeting based on potential returns

China and Hong Kong

United States

Japan

India

South Korea

Protect

Full funnel marketing funded to protect share

United Kingdom

Germany

Activate

Earned channels, partnerships, and distribution engagement

Singapore

New Zealand

Canada

France

Malaysia

Indonesia

Vietnam

Italy

And in how we speak about our key high yielding audiences within those markets

HIGH-YIELDING TRAVELLERS

High-Yielding Leisure

Holiday and Visiting Friends and Relatives

Luxury

Per Person
Spend per night:
> \$1,200

Working Holiday Makers

Working Holiday Makers are high yield via length of stay and regional dispersal

Business Events

Purpose: Business Events incentive and association

As a part of T35 we've identified 10 key trends to respond to over the next three years.



**The Asian
Century Continues**



**High Yield
Competition**



**The Era of
Volatility**



**Rise in Travel
for Good**



**Capitalise on
Major Events**



**Breadth Drives
Choice**



**The Future
of Flight**



**Multiple Paths
to Purchase**



**Attention
Fragmentation**



**Natural
Desire**

Undertaking activity that stretches TA beyond our BAU activity.

**Create
Demand**

**Convert
Demand**

**Support
Industry**

3 of the 4 are connected to the youth and WHM sector

1. Win in marketing to humans and machines

Lean into digital distribution, the AI world and its role within the path to purchase.

2. Continue to showcase the breadth of our country

Continue to find new ways to show travellers there is more to Australia than our stereotypes (without forgetting them, they are our most powerful and asset we have!)

3. Capitalise on major events

Limited attention world. Australia in focus.

The way youth are thinking about travel

Personal mindset shifts

- **Travel is transformative**
personal development, self discovery and change
- **Social media steering decisions** peer validation and influencer content
- **Aspiration for authenticity**
rejecting curated Instagram experiences in favour of genuine cultural immersion and real connections
- **Smarter not harder** blending personal development with adventure, using travel not just for exploration, but as an opportunity to grow professionally

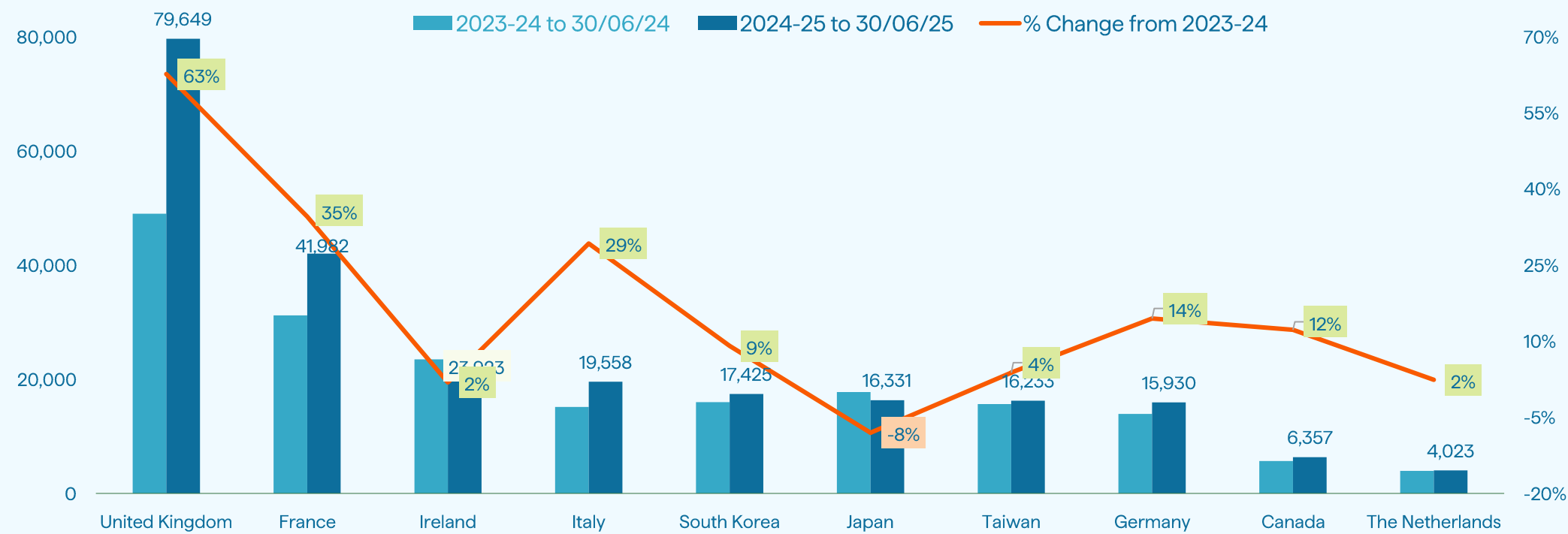
Macro forces at play

- **Competing destinations**
Canada, Japan, NZ
- **Global currency fluctuations and inflation**
- **Cost of living** shifting it from an aspirational lifestyle choice to a major life milestone

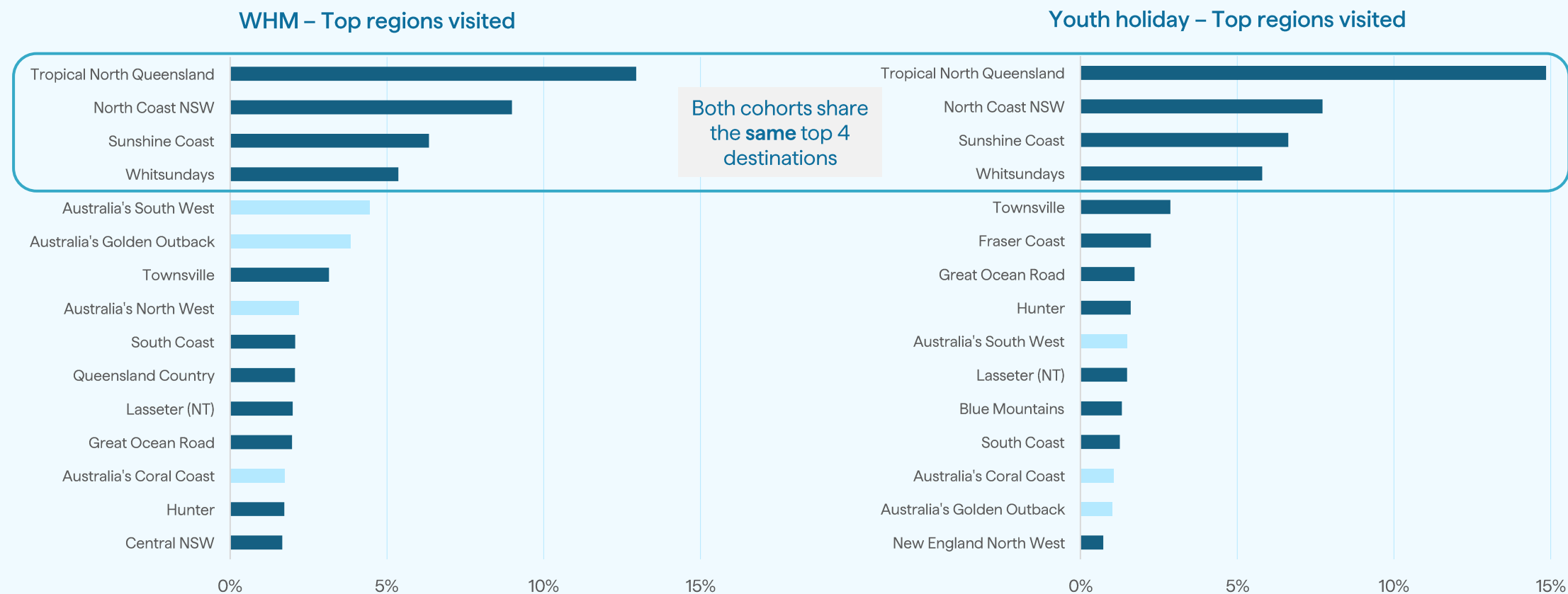
Working Holiday (417) visas lodged, up 25.3% vs. previous financial year

* END WITH THIS *

Total Working Holiday (subclass 417) visas granted in 2024-25 to 30/6/25 by citizenship country
Department of Home Affairs, Working Holiday Maker visa program report

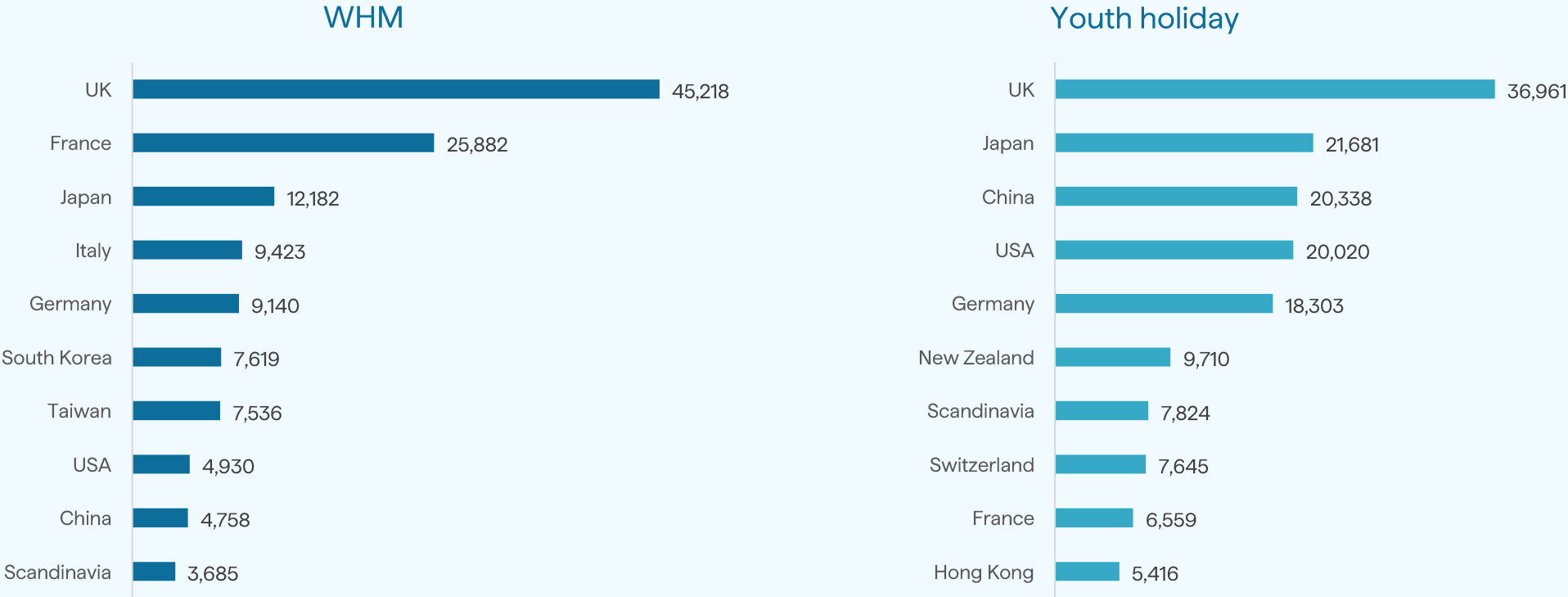


Due to regional work visa requirements, WHMs show a preference for Australia's remote and outback



Youth markets resonate with Australia's coastal culture

Active water sports participation
TRA IVS, YE March 2026



Importantly: more likely to engage with Indigenous parts of our visitor economy

Indigenous cultural activities, %
TRA IVS YE March 2026

