

Australian Tourism Industry Council and Tourism & Transport Forum Australia

Joint Submission to the Review of Regional Migration Settings 2024

ABOUT THE AUSTRALIAN TOURISM INDUSTRY COUNCIL



The Australian Tourism Industry Council (ATIC) is the national representative body of Australia's state and territory tourism industry councils (TIC) covering all states and territories. Together, ATIC members represent 10,000 tourism operators across the nation from Broome to Bruny Island and Port Lincoln to Port Douglas and the majority of which are small to medium sized enterprises. This is holistically reflective of the true make-up of our greater industry where tourism product and experiences are overwhelmingly delivered by small businesses.

ABOUT THE TOURISM & TRANSPORT FORUM AUSTRALIA



Tourism & Transport Forum Australia (TTF) is the peak industry group for the Australian tourism, transport and aviation sectors. A national, member-funded CEO forum TTF advocates the public policy interests of leading corporations and institutions in these sectors.



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Summary

The Australian Tourism Industry Council (ATIC) and the Tourism & Transport Forum (TTF) welcome the Review of Regional Migration Settings and the opportunity to reform the WHM Visa program.

The Working Holiday Maker (WHM) Visa is critical to Australian tourism and regional economies as it allows for long stay visitors travelling widely across Australia. The tourism spending of WHMs contributes more than \$3 Billion to the Australian economy, generating thousands of jobs, particularly in regional Australia. The longer the stay and spend of WHMs, the greater the regional employment created.

WHM Visa	Avg WHM Length of Stay	Total Tourism Filled Jobs (FTE)	Regional Tourism Filled Jobs (FTE)
1 st Visa	121 days (approximately 4 months)	8,802	2,905
2 nd Visa	469 days (approximately 1 year and 3 months.)	8,991	2,967
3 rd Visa	661 days (approximately 1 year and 10 months)	2,022	667

ATIC and TTF contend that the WHM Visa program should be primarily designed as a long stay tourist-holiday visa, rather than a work visa or quasi-permanent migration visa. To achieve this policy objective, ATIC and TTF support the following key design principles:

- Maintaining 2nd and 3rd visas for WHM visa holders who are undertaking longer holiday journeys travelling across Australia.
- Enabling WHM visa holders to work and holiday in tourism businesses in tourism regions to qualify for longer visas.
- Ensuring WHMs who qualify for longer 2nd and 3rd visas are travelling across Australia, rather than staying in one location and competing with Australians in the residential housing market.
- Focusing WHMs on temporary work to qualify for longer 2nd and 3rd visas, rather than competing for ongoing employment.
- Providing WHM visa holders with positive holiday work experiences to attract and retain long stay visitors and their expenditure in regional economies.
- Ensuring WHMs are not exploited in the workplace, by providing greater choice in specified regional work and addressing exploitation by individual employers.
- Investing in tourism marketing to attract genuine long stay tourists through the WHM program.



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WHMs in 2023

Tourism Research Australia has recently released International Visitor Survey (IVS) results for Y/E March 2024. This provides the most recent full-year data on international visitors post-COVID. The IVS estimated that in Y/E March 2024, WHMs stayed 47,650 visitor nights and spent \$3 Billion in Australiaⁱ. The IVS only includes visitors staying in Australia for less than 12 months and would not include WHMs on a 2nd or 3rd visa who have stayed more than a year at the time of departure. This means the IVS undervalues the stay, regional dispersal and expenditure of WHM visa holders. Nonetheless, the IVS provides good data on the travel patterns of WHMs in their first 12 months.

The IVS shows that WHMs stay more than eight times as long, spend more than twice as much, and travel to more States and regions than other international visitors to Australia. The disproportionate contribution of WHMs arises from their ability to earn an income so they can stay longer and keep travelling and spending across Australia.

WHMs Length of Stay and 2nd and 3rd Visa

Analysis of data provided by the Department of Home Affairsⁱⁱ shows the following estimated actual Length of Stay in Australia based on 1st, 2nd or 3rd visa granted.

WHM Visa	Avg WHM Length of Stay
1 st Visa	121 days (approximately 4 months)
2 nd Visa	469 days (approximately 1 year and 3 months.)
3 rd Visa	661 days (approximately 1 year and 10 months)

Table 1 - Average Length of Stay (LOS) by WHM Visa Extension

On average WHMs on the 2nd visa stay 469 days (approximately 1 year and 3 months). The significance of the 2nd year visa is not that WHMs can stay for up to two years. The significance is that it enables the WHM to plan and make full use of the 365 days available in their first visa to travel across Australia, before departing during the second year.

Similarly, the significance of the 3rd visa is not that the WHM can stay for up to three years. On average WHMs on the 3rd visa stay 661 days (approximately 1 year and 10 months.) The significance of the 3rd visa is that they can plan to travel for another 12 months after the 2nd visa expiry date. Consequently, 3rd visa WHMs stay on average more than 6 months longer than those on the 2nd visa. The 2nd and 3rd visas facilitate longer stay, but typically that stay is well short of the visa expiry date.

WHM Visa Length and Spending

International visitors spent approximately \$31 Billion in Australiaⁱⁱⁱ. This spending by international visitors is crucial export earnings for Australia and creates significant economic value, taxation revenue and jobs across Australia.

As international visitors, WHMs also make a major economic contribution. The contribution of WHMs is not their labour in specified agricultural work in regional areas, but their disproportionately high visitor



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spending in Australia, particularly in regional areas. The latest International Visitor Survey (IVS) Y/E March 2024 shows that while international visitors (not WHMs) spend an average of \$4,060 per trip, WHMs' average spend is more than double at \$9,570 per trip^{iv}.

WHMs' higher spend in Australia is due to their longer stay. Depending on the LOS facilitated by their visa extension, WHMs have the following estimated average spend in Australia^v:

WHM Visa	Avg WHM LOS	Avg Trip Spend per WHM
1 st Visa	121 days	\$7,538
2 nd Visa	469 days	\$29,218
3 rd Visa	661 days	\$41,180

Table 2 - Average Spend in Australia per WHM per Trip by WHM Visa Extension

WHMs on the 3rd visa make the highest economic contribution due to their longer stay, greater dispersal and higher spend. These long stay WHMs are the critical target market for Tourism Australia, State Tourism Organisations and regional destination tourism marketing organisations as they have the time to visit more regional areas.

Applying the latest data on the number of WHM visa holders as of 30 June 2024 provides the estimated spend in Australia of WHM on their 1st, 2nd and 3rd visa.

WHM Visa	Avg LOS	Avg Spend per WHM	No. of WHMs	Total Spend \$M
1 st Visa	121	\$7,538	179,643	\$1,354
2 nd Visa	469	\$29,219	47,338	\$1,383
3 rd Visa	661	\$41,180	7,561	\$311

Table 3 - Average Spend in Australia per Trip by WHM Visa Extension

WHM Visa Extension, Economic Contribution and Jobs Created

The significant tourism spending by WHMs across the Australian economy creates economic value, taxation revenue and jobs. Due to the high regional dispersal of WHMs, a significant proportion of the jobs created are estimated to be in regional economies.

Visa	Total Spend (\$M)	Total GDP (\$M)	Total Net Taxation (\$M)	Total Tourism Filled Jobs (FTE)	Regional Tourism Filled Jobs (FTE)
1 st Visa	\$1,354	\$1,058	\$110	8,802	2,905
2 nd Visa	\$1,383	\$1,081	\$112	8,991	2,967
3 rd Visa	\$311	\$243	\$25	2,022	667

Table 4 - Estimated Contribution to GDP, Net Taxation Revenue and Tourism Filled Jobs by WHM Visa Extension^{vi}



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Due to their length of stay and regional specified work, 2nd and 3rd visa WHMs disperse widely across multiple states. This mobility and stay by 2nd and 3rd visa WHMs contribute to the following estimated Gross State Product and tourism filled jobs across the States and Territories:

State	Avg Nights (,000)	Spend (\$M)	Total GDP (\$M)	Total Tourism Filled Jobs (FTE)	Regional Tourism Filled Jobs (FTE)
NSW	10,299	\$642	\$502	4,174	1,377
VIC	4,800	\$299	\$234	1,944	642
QLD	6,364	\$396	\$310	2,574	849
SA	913	\$57	\$45	371	122
WA	3,498	\$218	\$170	1,417	468
TAS	751	\$47	\$37	306	101
NT	381	\$24	\$19	156	51
ACT	193	\$12	\$9	78	26

Table 4 - Estimated Contribution of 2nd & 3rd Visa WHMs to GSP and Tourism Filled Jobs by State^{vii}

WHMs create significant economic value, taxation revenue and employment. WHMs on the 3rd visa make the highest contribution to regional economies and jobs per visitor, due to their longer stay. The total contribution by all 3rd WHMs is limited by the small proportion of 2nd visa holders who apply for a 3rd visa. Enhancing the proportion of WHMs that are granted the 3rd visa to extend their stay would have a significant positive impact on regional economies and jobs.

ATIC and TTF note the Australian Government “is not considering limiting the Working Holiday Maker visa to one year as this would significantly damage regional economies”^{viii}. The tourism industry supports this position and further contends that the WHM 2nd and 3rd visa extensions should also not be limited. Limiting the current maximum WHM visa of 3 years would limit the actual length of stay and also create significant damage to regional economies.

1. Recommendation

Retain both the 2nd and 3rd visas to the current maximum of three years and retain the significant economic contribution of longer stay WHMs, particularly in regional areas.

WHM Holiday Travel, Dispersal and Regional Work Requirements

Australia is a large and geographically varied nation in culture, environment, and seasons. To have a working holiday travelling across much of Australia including multiple states and seasons, east coast and west coast, urban and regional or northern Australia and southern States takes more than a long travel itinerary.

According to IVS 2023, less than 20% of WHMs arrive in Perth, Darwin, Adelaide or Cairns. Most working holiday makers (68%) arrive in Sydney and Melbourne and stay for less than 5 months, and 28% never leave the city of arrival^{ix}. It is primarily the WHMs on 2nd and 3rd visas travelling for at least 12 months that have the time and intention to journey from Sydney and Melbourne onto other States and account for the majority of WHM overnight stays.



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The regional work requirements for WHMs to qualify for 2nd and 3rd visas encourage WHMs to disperse beyond the city of arrival and visit a regional destination. These requirements ensure 2nd and 3rd year visas are well targeted to WHMs that are having a genuine holiday and are travelling and working across Australia to experience our culture and environment.

The 88-day regional work requirement in the first year, to qualify for the 2nd visa, is a key design feature to ensure that longer visas are provided for those who are undertaking holiday travel leaving the city of arrival to stay in a regional area.

The 179-day work requirement in the second year to qualify for the 3rd visa is designed to retain the WHMs in the same job in the same location for longer. While the WHM may work with multiple employers and multiple regions to qualify, in practice there is a tendency to stay in the one location with the one employer. This is because choice of employment in specified work is mainly limited to specified agricultural work and the seasons and regions in which that work is available.

This 179-day regional work during the 2nd visa could also be the same job, same location and same State as the previous 88-day regional specified during the first visa. ATIC and TTF contend that in practice, the current 179-day work requirement is counter to the objective of a longer holiday for WHM to experience more of Australia.

The 179-day requirement may also be so onerous as to dissuade WHMs from planning a longer holiday of more than 24 months, resulting in an earlier departure, shorter holiday and reduced expenditure in regional economies.

2. Recommendation

Retain the 88-day regional work requirement to qualify for a 2nd visa, to ensure the longer stay is granted to those travelling from the major cities to a regional destination. Reduce the 179-day regional work requirement for the 3rd visa to 88-days worked in a State different to the State worked in the first year and with a different employer. This would ensure the longer stay is granted to those travelling WHMs across States and from one region to another for genuine holiday purposes.

WHMs and Housing

WHMs who are travelling typically stay in hostels, caravan parks, camping grounds and other group and short-stay accommodation as part of their 'backpacking' experience. WHMs typically do not stay in the one destination long enough to be competing for long term housing such as six month plus residential tenancies.

The WHMs which may be competing for residential housing are those who stay in the one location (typically the city of arrival) for six months or longer. Due to the regional work requirements, WHMs on 2nd and 3rd visas are the most mobile and less likely to stay in one location seeking residential housing.



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3. Recommendation

Retain the 88-day regional work requirement for the 2nd year visa and establish an 88-day regional work requirement in another State to qualify for the 3rd year visa to ensure WHMs are travelling using short-stay accommodation rather than competing for residential housing.

UK WHM Visa and Quasi-Permanent Residence

Changes to WHM Visas for UK residents allow for 2nd and 3rd visas without undertaking specified work in regional Australia. This means UK WHMs can reside in the one location and undertake any employment for up to three years. Consequently, UK WHMs are now less likely to travel in Australia and more likely to compete with Australians for residential housing and ongoing employment.

The new UK arrangements have not been operating long enough to fully quantify the change in visitor travel patterns from working holiday travel to quasi-permanent residence. However, the Australian tourism sector has already noticed the loss of UK WHMs to tourism regions. This can be seen in the redirection of marketing efforts by tourism businesses and DMOs^x, away from the UK. Tourism marketers are now focused on attracting WHMs from countries such as France, rather than the UK, as those visitors are more likely to travel further and spend more across regional tourism destinations.

4. Recommendation

Revisit WHM arrangements for UK visitors where possible. Ensure regional travel is a key part of the design for all other WHM visas to ensure the program remains a holiday visa and not a quasi-permanent residential migration visa.

WHM and Seasonal Work

Tourism and agriculture in regional areas are highly seasonal. During peak periods, the local workforce in regional towns is insufficient to cover regional work. These regional economies and communities need mobile workers who can travel to the towns, stay in temporary accommodation, and fill these temporary seasonal work shortages. WHMs undertaking seasonal work, rather than regular work, make a positive economic and social contribution to these regional towns, without displacing local workers.

Regional tourism destinations are particularly seasonal ranging from winter in northern Australia and alpine areas to summer in coastal destinations, wildflower and whale watching seasons and peak periods such as tourism events, school holidays and long weekends.

During peak periods, Australians travel in large volumes from urban areas to regional destinations for a non-working holiday. This domestic tourism makes a major contribution to local economies and jobs but puts significant pressure on the limited local workforce to cover seasonal work ranging from a deckhand on a marine tour, to a room attendant in a holiday town.

WHMs are also attracted to these same regional destinations during their best seasons. WHMs play a critical role in tourism by not only visiting these destinations as holiday makers, but enabling these destinations to function in peak periods by working the seasonal jobs for which there is a local workforce shortage.



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In no small way, WHMs do the jobs needed to enable Australians to have a domestic holiday in peak periods, while enjoying the best seasonal tourism experiences in Australia. This is crucial to the sustainability of regional tourism destinations. It is the WHMs that travel further and stay longer that make this positive social and economic contribution to multiple regional destinations across multiple seasons.

Specified Work Requirement and Choice of Employer

The regional work requirement in regional Australia is effective in ensuring that 2nd and 3rd visas are targeted to WHMs travelling onwards across Australia on a genuine working holiday, rather than staying in a single location. The specified work focus on regional Australia also assists to target seasonal work, rather than ongoing employment, where regional areas need additional staff in peak periods.

The specified work requirement is also for work undertaken in a 'specified' industry. This requirement has been traditionally focused on work in the agriculture sector. While limiting specified work to jobs such as fruit picking may assist those industries meet seasonal shortages, they also limit the WHMs' choice of work, employer, region and season for visiting.

Expanding WHMs' choice of work would put the onus on employers to compete with better employment conditions and practices to attract WHMs in peak seasons. Greater choice of employer would empower WHMs to choose the best working holiday experience for themselves and avoid, or leave, work situations they do not want.

Tourism jobs are also more likely to be public facing and in holiday towns rather than remote agricultural regions. Together with the greater choice of employer, work and holiday region, this will design out risks of WHM exploitation.

From a tourism perspective, greater choice of work would encourage WHMs to stay longer and travel further, rather than leaving Australia because they do not want to work in industries such as horticulture. By staying longer and travelling further, these WHMs would contribute more to local economies and jobs. Greater choice of work would also provide a better working holiday experience and encourage future international visitors to consider Australia as a destination of choice for a working holiday.

Tourism and Hospitality as a Specified Industry

From June 2021, specified work was expanded to include tourism and hospitality in northern or remote and very remote Australia. Feedback from the tourism industry is that this expansion in WHM choice of employment has been successful, with many WHMs choosing to work in tourism in these remote areas. ATIC and TTF contend that the opportunity to work in tourism and hospitality has improved the working holiday experience and has attracted WHMs to these destinations in peak periods for seasonal work.

ATIC and TTF propose that tourism and hospitality in any region be included as specified work for the 2nd and 3rd visas. This would increase WHM choice of employer, seasonal work opportunities and their length of stay and economic contribution to regional economies.



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While expanding specified work to include tourism in all regional areas may reduce the immediate incentive to work in northern Australia, ATIC and TTF contend that this would be balanced by an increase in the number WHMs staying longer who have the time to visit northern Australia. WHMs will stay longer because they can choose to work in tourism in a tourism destination, rather than leaving Australia earlier because they do not wish to work in agriculture.

ATIC and TTF contend that WHMs will still be attracted to northern Australia because areas such as the Kimberley, the NT and Tropical North Queensland are compelling holiday destinations with good seasonal work opportunities for WHMs in the winter peak holiday period.

While it is proposed to expand the specified industries to include employment choices such as tourism, it is essential that regional work requirements remain. Without the requirement to move on to a regional location, the WHM could remain in a single location for more than 12 months, seeking ongoing work and residential accommodation. The regional work requirement ensures that the WHM 2nd and 3rd visas are targeted to working holiday makers travelling across Australia doing temporary seasonal work.

Similarly, ATIC and TTF do not support expanding specified work to all industries as this would encourage WHMs to seek ongoing employment rather than travel to regional destinations to do temporary work in peak seasons.

5. Recommendation

Expand the specified work to include work in tourism and hospitality in all regions to design out exploitation, enhance the holiday experience and attract longer stay WHMs and their economic contribution to regional economies.

Definition of Tourism for Specified Work

The current definition of tourism and hospitality for specified work for WHMs is reasonable but misses positive crucial tourism work opportunities. Businesses in regional destinations often specialise in providing services directly to tourists but may not be classified as tourism and hospitality work. For example, tourism attractions featuring pearls, opals and gold in Broome, Coober Pedy and Ballarat may be ANZIC classified as jewellery retailers but provide visitor experiences.

These businesses can be identified as genuine tourism businesses if they have achieved Quality Tourism Accreditation. More than 5,000 businesses have achieved Quality Tourism Accreditation across Australia. Accreditation also covers employment and human resource management standards as well as quality standards for service to visitors. Tourism Accreditation is recognised by DMOs, land management and regulatory agencies across multiple states e.g. for licenced tourism operations in national parks.

ATIC and TTF recommend that specified work to qualify for 2nd and 3rd visas include attractions and all Quality Tourism Accredited Business in regional areas.

6. Recommendation

Expand the specified work to include work “attractions and work with any Quality Tourism Accredited Businesses” to include all genuine tourism businesses and high standards of visitor servicing and employer practices.



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WHM and Destination Marketing

Destination marketing by Tourism Australia, State Tourism Organisations and other DMOs is critical to the proper use of the WHM program as a tourist/holiday visa. WHMs are high value visitors for regional destinations as they are mobile, disperse widely, stay longer and spend more. WHMs are therefore a key market for Tourism Australia's international destination marketing and DMOs State and regional destination marketing.

International travel, especially long trips such as backpacking, has considerable planning time for potential WHM visitors to Australia. Investment in international tourism marketing now targets visitors who will arrive in around 12 to 18 months' time.

Reforms to the WHM program, such as the recommendations in this submission, would make Australia and our regions a more attractive destination for backpackers on WHM visas. Greater investment in destination marketing for WHM is crucial to achieving enhanced regional economic outcomes from these reforms. The destination marketing will ensure the WHM program is promoted as a tourist-holiday program, not a work program and attract WHMs for holiday purposes.

ATIC and TTF recommend a substantial investment in destination marketing lead by Tourism Australia to accompany reforms to the WHM program. This destination marketing would:

- Showcase tourism holiday work experience that attract WHMs to Australia and onwards to regions.
- Promote greater choice of more appealing work for WHMs.
- Promote understanding of the good employment conditions, rights and respect WHMs are entitled to experience in Australia, especially to potential WHMs from NESB.
- Attract more WHMs from Europe and Asia to travel to the regions to make up for the loss of UK WHMs to quasi-permanent residence in major cities.
- Promote long journeys and itineraries travelling across Australian regions.

Greater investment in WHM destination marketing would be led by Tourism Australia, working with State Tourism Organisations, DMOs and DFAT. The objective of this marketing will be to target, attract and disperse genuine WHM tourists who stay longer and travel further.

Rather than increasing the number of WHMs per se, the marketing would focus on attracting the right mix of WHMs to increase stay and dispersal. Even without increasing WHMs, increasing the average length of stay by one month would generate an additional \$445 Million in the Australian economy, creating 2,890 FTE jobs of which 950 would be in regional Australia.

Investing \$5M p.a. in marketing to increase length of stay by one month to generate additional expenditure of \$445 p.a. would also generate additional net taxation revenue of \$36M p.a. (not including income tax paid by WHMs)^{xi}.



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7. Recommendation

Invest \$5M per year for 3 years in destination marketing lead by Tourism Australia to promote the reformed and improved WHM program and retain and grow the contribution of WHMs to regional economies. The marketing investment to focus on increasing length of stay to achieve \$445M per year additional expenditure, \$36M in net taxation revenue and 950 additional jobs in regional Australia.

WHMs and Overseas Migration Statistics

Redesigning the WHM program as a tourist-holiday visa, rather than a work visa, should ensure that WHMs are genuine tourists and not quasi-permanent migrants. Critically, the WHM program should be designed to focus on travel mobility and temporary regional work, rather than facilitating WHMs competing for residential housing and ongoing employment.

Should such reforms be implemented, WHMs on 2nd and 3rd visas should not be included in the count of overseas migration because it is not a migration program but a tourist program. We appreciate that WHMs from the UK are now quasi-permanent migrants and may be included in the count.

Counting long stay tourists as migrants is inappropriate because they do not behave as migrants and do not have the same policy objectives and issues as migration. Including WHMs as migrants is misleading to policy makers and the public.

The prime policy objective of WHMs is the same as all other tourist visas, being the significant export earnings and economic contribution they make, particularly to regional Australia.

8. Recommendation

Do not include WHMs on 2nd or 3rd visas in the count of overseas migration.

Demographic and Market Led Reforms to Visa Program

Traditionally WHMs have been predominantly a youth market of international visitors seeking a 'backpacker' or 'gap year' experience before joining the workforce, or in the early years of their career, in their country of residence.

New cohorts of potential high value international visitors have now emerged. These potential visitors are older than traditional 'backpackers' and are seeking long term travel either between careers or as digital nomad.

These are high value international visitors as they have higher income and savings, have less need to work while travelling in Australia, and will stay longer and spend more than other visitors. A range of reforms to the Visa program could attract these visitors.

9. Recommendation

Consider the following broader reforms to visitor and WHM visa program to attract high value long stay visitors:

- *Establish a consistent maximum age limit of 35 years across all countries to simplify the WHM visa program and attract older high value visitors not currently eligible from some countries.*



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- Allow a second WHM visa for visitors up to 45 years age, who travelled previously in Australia on a WHM visa when under the age of 35 and who have since spent four years outside Australia.
- Reform the Visitor visa Tourist Stream apply outside of Australia (subclass 600) to enable tourists to stay longer than 3 months (i.e. 6 months or 12 months) without work rights at the same zero cost and prompt processing as the eVisitor (subclass 651) visa, providing there is a visa condition to travel to multiple states and regional areas for a 6 month or 12 months approval.

List of Recommendations

1. Retain both the 2nd and 3rd visas to the current maximum of three years and retain the significant economic contribution of longer stay WHMs, particularly in regional areas.
2. Retain the 88-day regional work requirement to qualify for a 2nd visa, to ensure the longer stay is granted to those travelling from the major cities to a regional destination. Reduce the 179-day regional work requirement for the 3rd visa to 88-days worked in a State different to the State worked in the first year and with a different employer. This would ensure the longer stay is granted to those travelling WHMs across States and from one region to another for genuine holiday purposes.
3. Retain the 88-day regional work requirement for the 2nd year visa and establish an 88-day regional work requirement in another State to qualify for the 3rd year visa to ensure WHMs are travelling using short-stay accommodation rather than competing for residential housing.
4. Revisit WHM arrangements for UK visitors where possible. Ensure regional travel is a key part of the design for all other WHM visas to ensure the program remains a holiday visa and not a quasi-permanent residential migration visa.
5. Expand the specified work to include work in tourism and hospitality in all regions to design out exploitation, enhance the holiday experience and attract longer stay WHMs and their economic contribution to regional economies.
6. Expand the specified work to include work “attractions and work with any Quality Tourism Accredited Businesses” to include all genuine tourism businesses and high standards of visitor servicing and employer practices.
7. Invest \$5M per year for 3 years in destination marketing lead by Tourism Australia to promote the reformed and improved WHM program and retain and grow the contribution of WHMs to regional economies. The marketing investment to focus on increasing length of stay to achieve \$445M per year additional expenditure, \$36M in net taxation revenue and 950 additional jobs in regional Australia.
8. Do not include WHMs on 2nd or 3rd visas in the count of overseas migration.
9. Consider the following broader reforms to visitor and WHM visa program to attract high value long stay visitors:
 - Establish a consistent maximum age limit of 35 years across all countries to simplify the WHM visa program and attract older high value visitors not currently eligible from some countries.



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- Allow a second WHM visa for visitors up to 45 years age, who travelled previously in Australia on a WHM visa when under the age of 35 and who have since spent four years outside Australia.
- Reform the Visitor visa Tourist Stream apply outside of Australia (subclass 600) to enable tourists to stay longer than 3 months (i.e. 6 months or 12 months) without work rights at the same zero cost and prompt processing as the eVisitor (subclass 651) visa, providing there is a visa condition to travel to multiple states and regional areas for a 6 month or 12 months approval.

ⁱ Tourism Research Australia, International Visitor Survey, Year Ending March 2024.

ⁱⁱ Data provided on request by the Department of Home Affairs 1 August 2024. The data provided was for the 2022-23 period. The data provided counted average length of stay from when the visa was granted, not from arrival in Australia. Following consultation with Department of Home Affairs staff, the average length of stay was reduced by 90 days to reflect the average delay between grant of visa and arrival.

ⁱⁱⁱ Tourism Research Australia, International Visitor Survey, Year Ending March 2024.

^{iv} Tourism Research Australia, International Visitor Survey, Year Ending March 2024.

^v Trip expenditure estimated by average length of stay at an average spend of \$62.3 per day by WHMs as per the International Visitor Survey, Year Ending March 2024.

^{vi} Table 4 - The Total GDP, Net Taxation and Tourism Filled Jobs figures was estimated from the total spend per WHM visa extension shown in Table 3; using the ratio of total Australian tourism consumption by international visitors to direct Gross Domestic Product (GDP), Total Net Taxation, and Total Tourism Filled jobs in the latest Tourism Research Australia, State Tourism Satellite Accounts 2022-23.

The Total GDP and Tourism Filled Jobs includes both the direct and indirect impact of WHM exemptions and includes the multiplier effect. The Regional Tourism Filled jobs was estimated on a ratio of 33% being the proportion of nights WHMs spent in regional areas International Visitor Survey, Year Ending March 2024.

^{vii} Table 5 was estimated using the same methodology as Table 4 above. The national ratios and multiplier were used from the State Tourism Satellite Accounts 2022-23, rather than the State and Territory's. The breakdown by State was based on the proportion of nights WHMs spent in each State according to the International Visitor Survey, Year Ending March 2024.

^{viii} Australian Government, Supporting strong and sustainable regions: Review of Regional Migration Settings Discussion Paper, June 2024, page 12.

^{ix} Tourism Research Australia, International Visitor Survey, 2023.

^x Destination Marketing Organisations (DMOs) are government or industry bodies which promote their destination to visitors. DMOs include Visitor Centres, Local Tourism Associations, Regional Tourism Organisations and State Tourism Organisations.

^{xi} There are 234,542 current WHM visa holders as at 30 June 2024 according Department of Home Affairs. An additional month (30.5 days) per WHM at \$62.3 spend per day would generate more than \$445M in additional expenditure. Net taxation and employment from this spend were calculated using the methodology in Table 4 above.



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