



# SPECIAL SUBJECT REVIEW

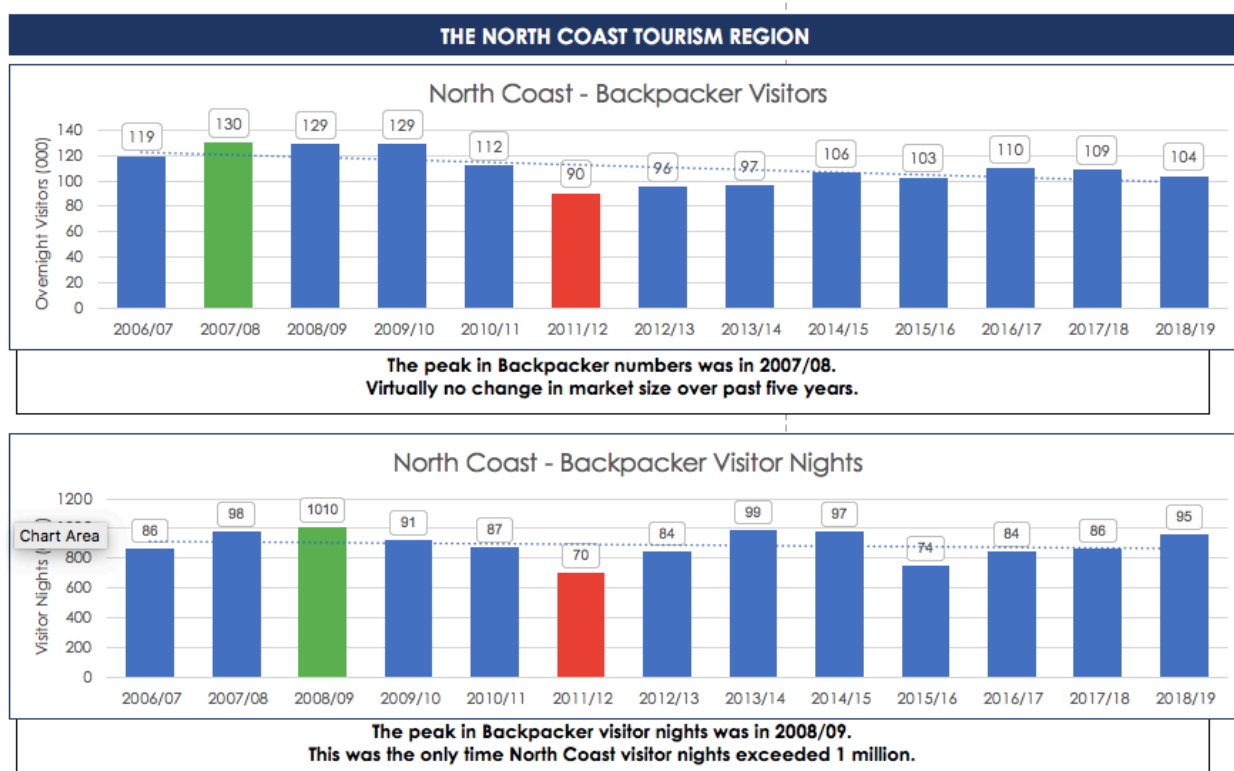
## The International Backpacker Market

Key results for YE December 2019

### DEFINING BACKPACKERS

In this Special Subject Review, Backpackers those who spend at least 10% of their trip nights in Backpacker/Hostel accommodation and stay at least 14 nights in Australia. This definition can be consistently applied in the International Visitor Survey (IVS) over several years.

### MARKET PROFILE ~ NORTH COAST REGION



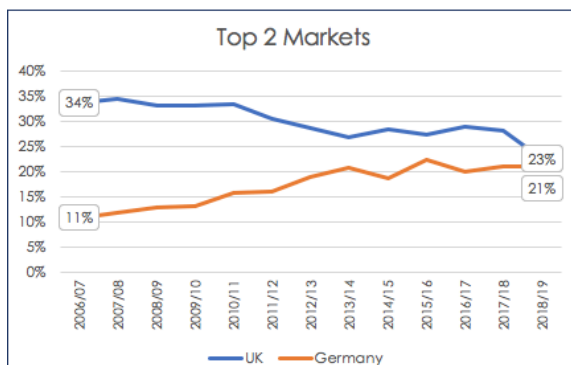
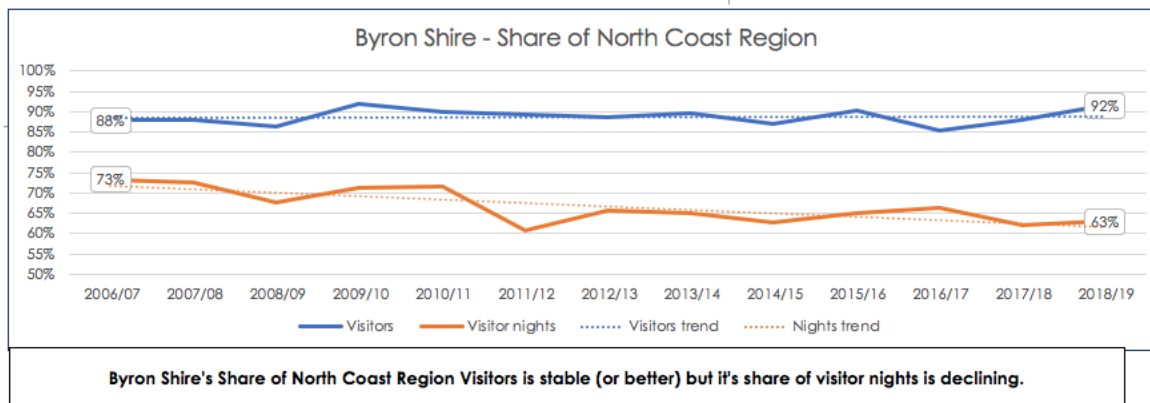
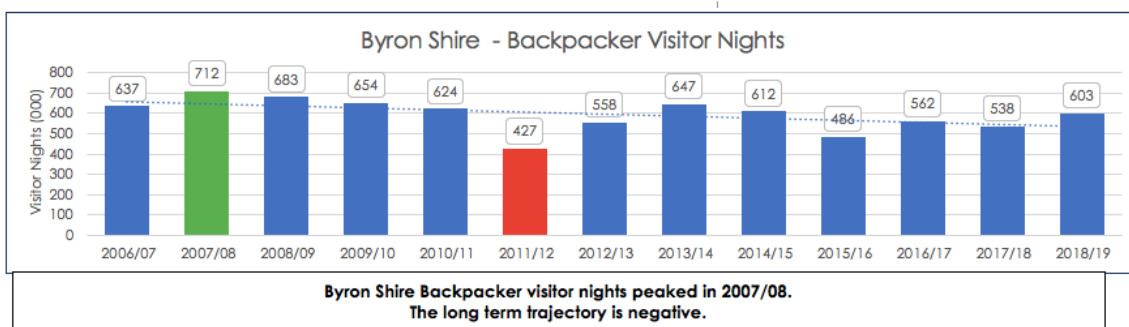
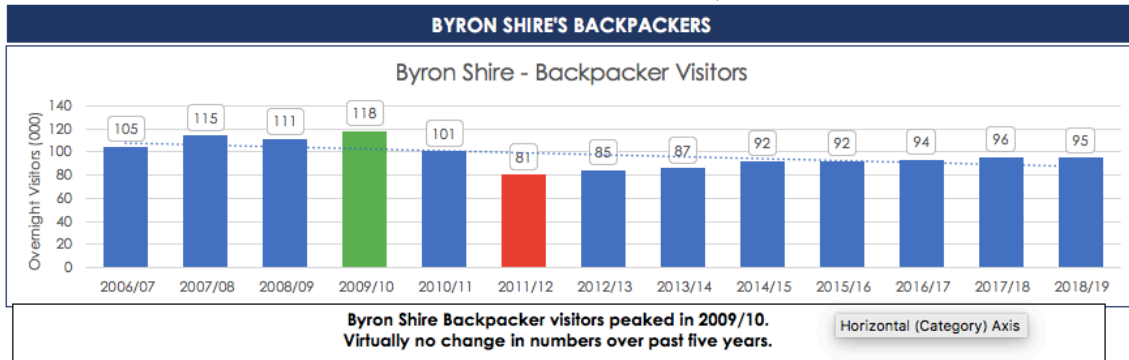
Source: Tourism Research Australia; International Visitor Survey (unpublished data accessed under licence by Peter Valerio)

This report was commissioned by Destination Byron on behalf of its members to support their approach to a 'sustainable & responsible' visitor economy in the Byron Shire

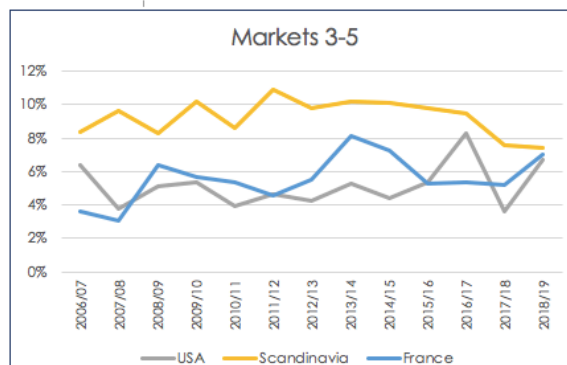
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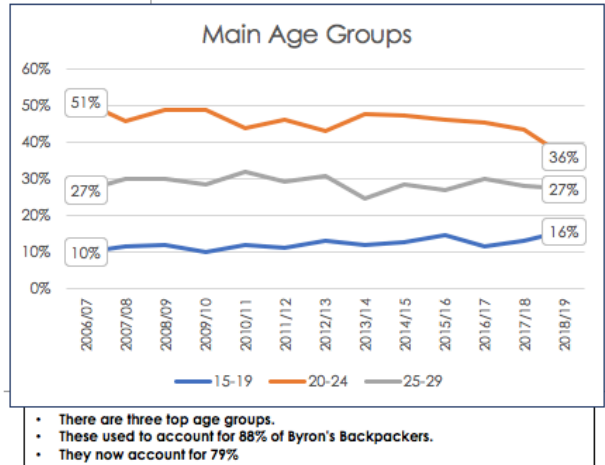
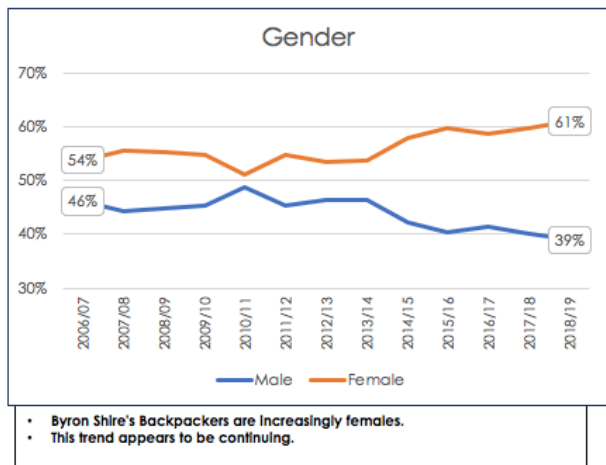
## MARKET PROFILE ~ BYRON SHIRE



- The UK and Germany have been the top two markets over the long term accounting for over 40% of all Backpackers.
- The significance of these two markets has, however, changed considerably.
- Germany will likely become No.1 market within a year.



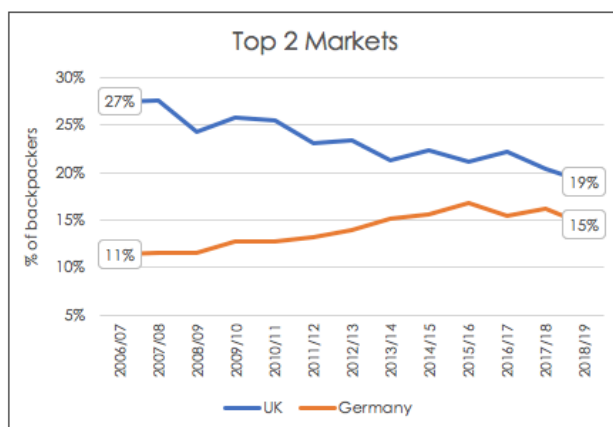
- The next most significant markets account for around 20% of Byron Shire Backpackers. These account for around 20% of visitors.
- The top five markets account for around two-thirds of the total.



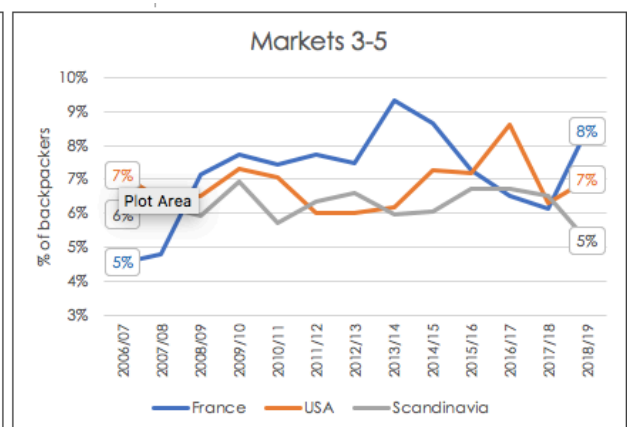
## MARKET PROFILE ~ AUSTRALIA

The top 10 markets in 2018/19 accounted for over 70% of the backpacker market.

The UK and Germany have held first and second position (respectively) for several years.



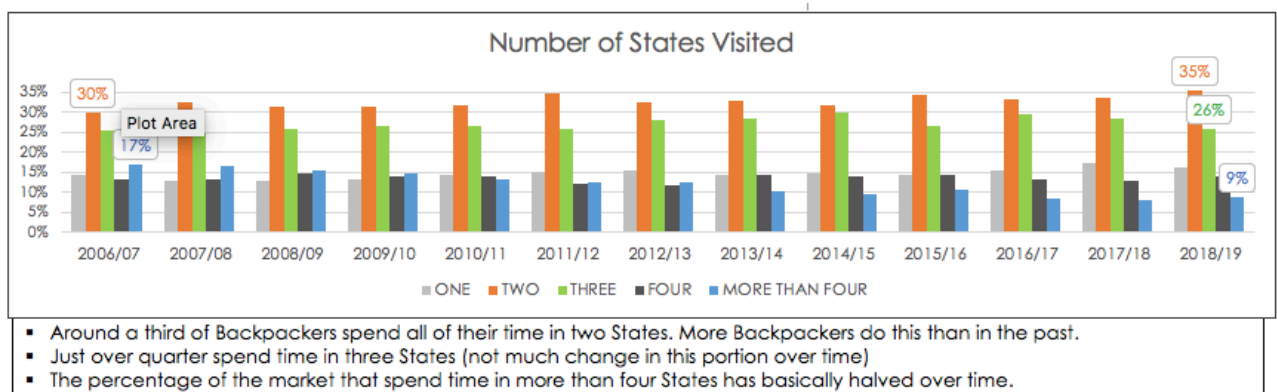
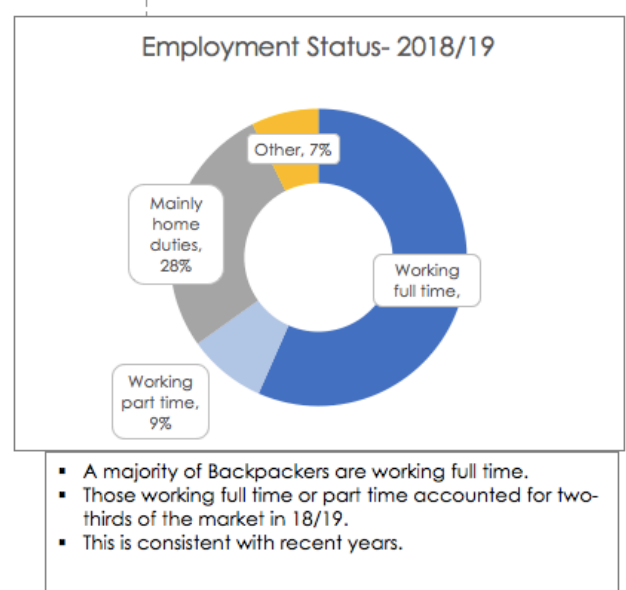
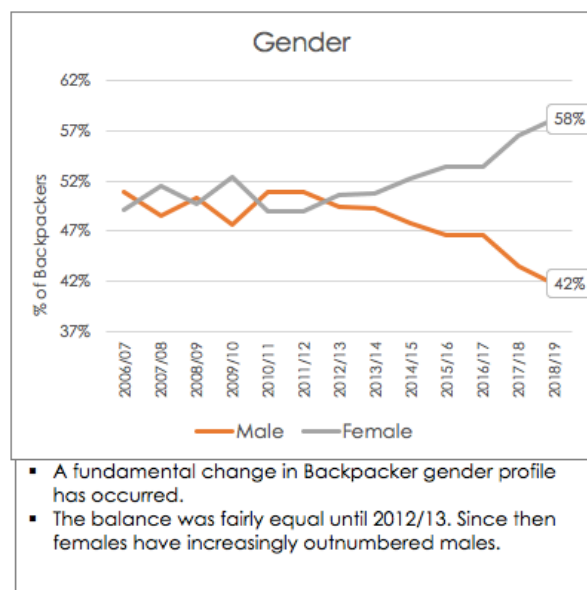
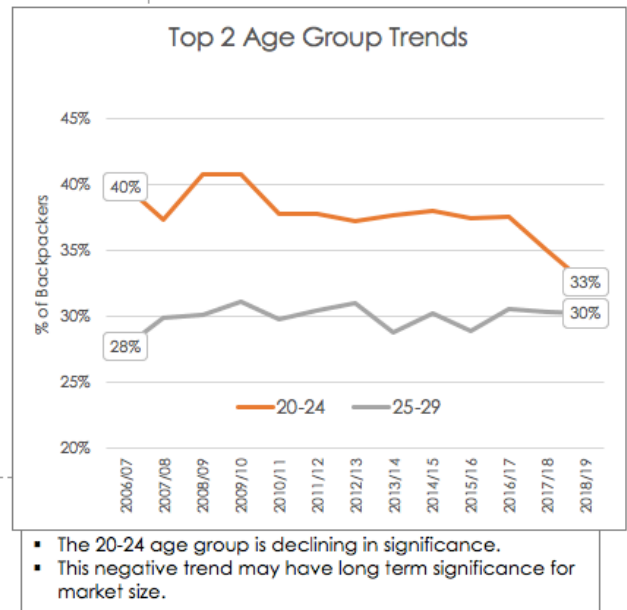
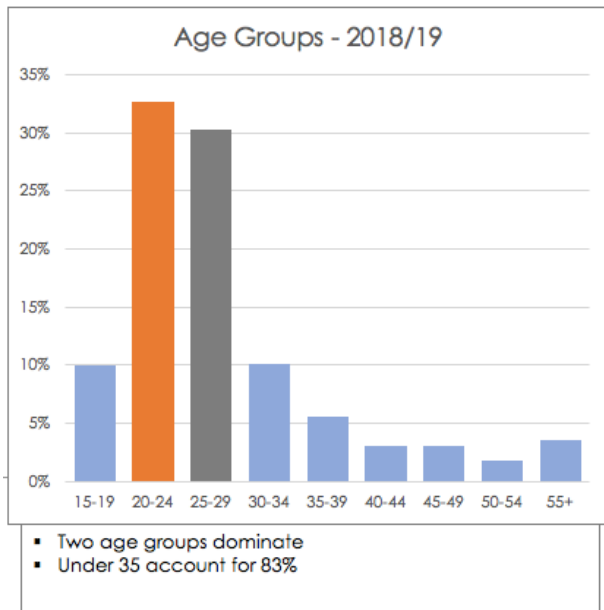
- On average the top two markets account for 38% of backpackers.
- Significance of UK backpackers is steadily declining
- German market grew but has now 'stalled'

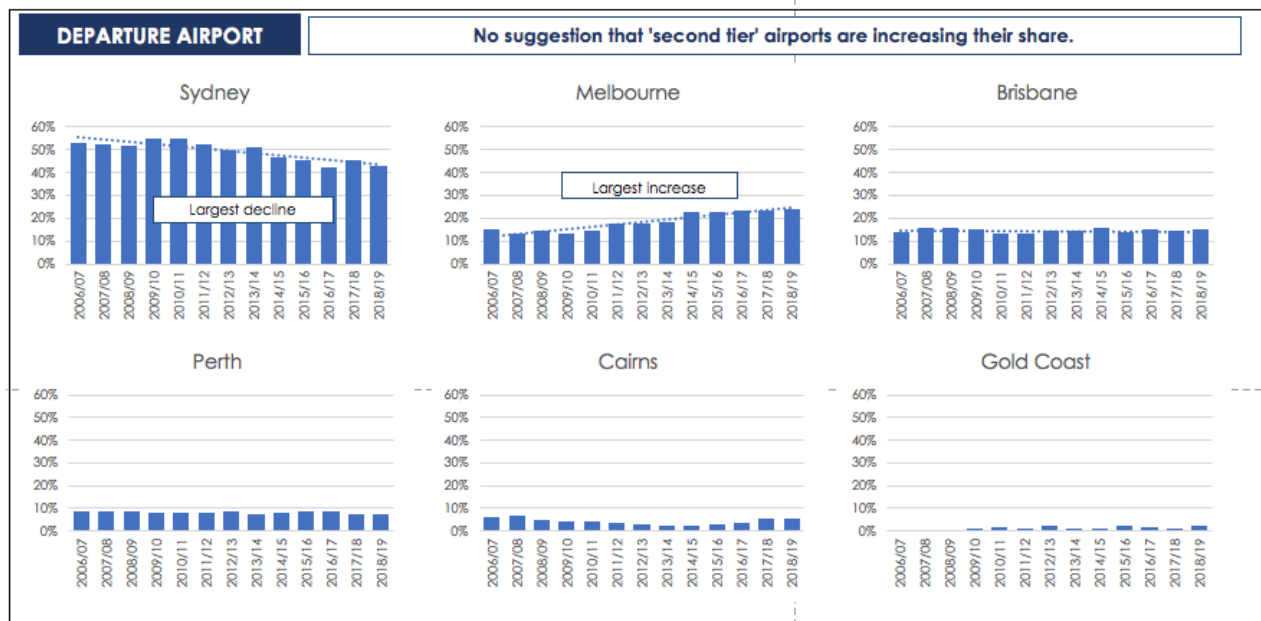
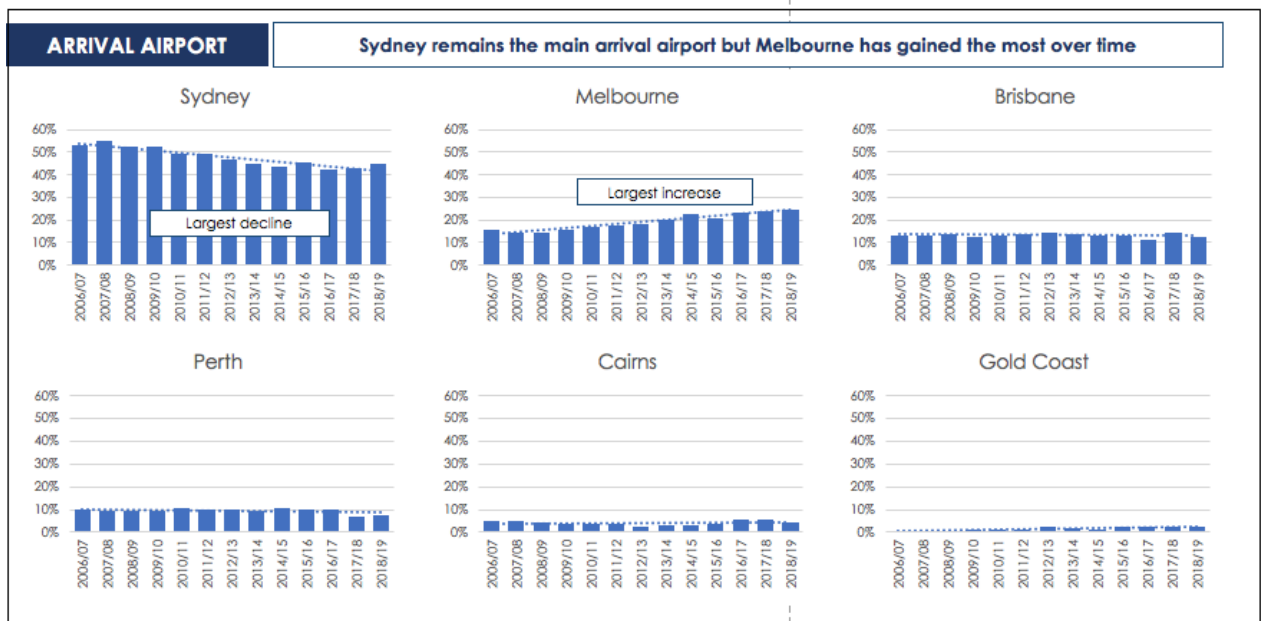
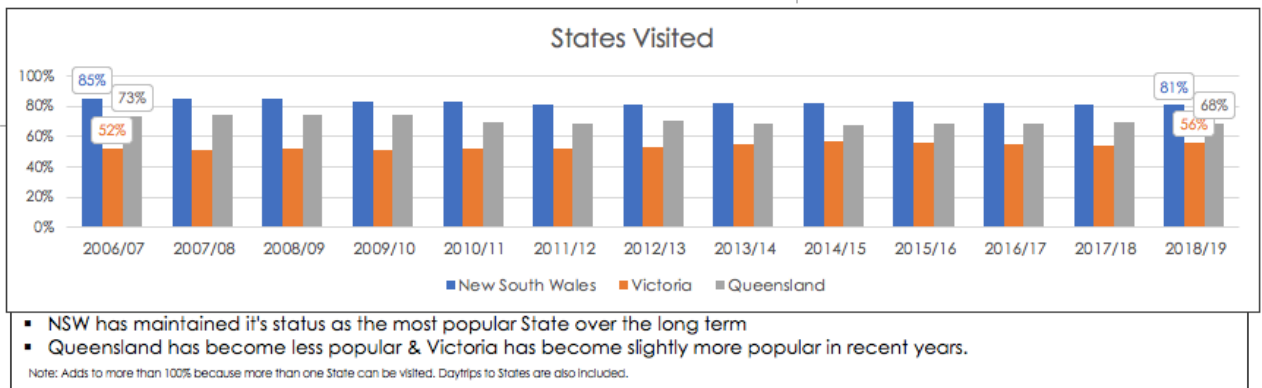


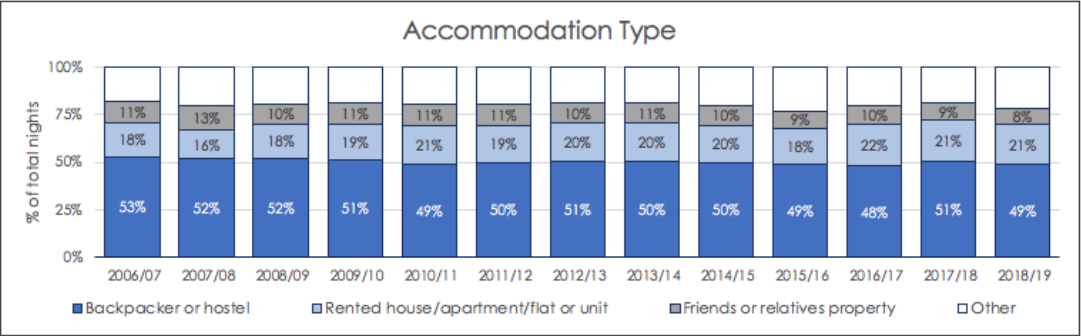
- The most notable change is the modest increase in the significance of France.
- On average, these three countries account for 20% of backpackers.

### Markets 6-10 with 18/19 percentage contribution:

Canada (4.6%), Switzerland (3.6%), Netherlands (3.2%), China (3.2%) and Japan (2.8%).

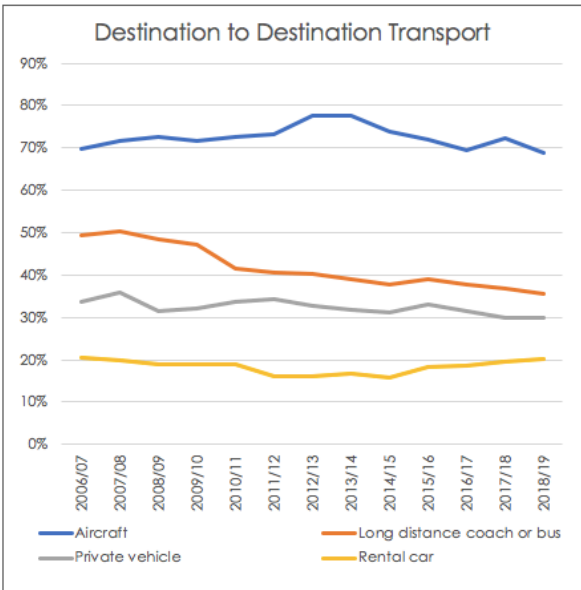






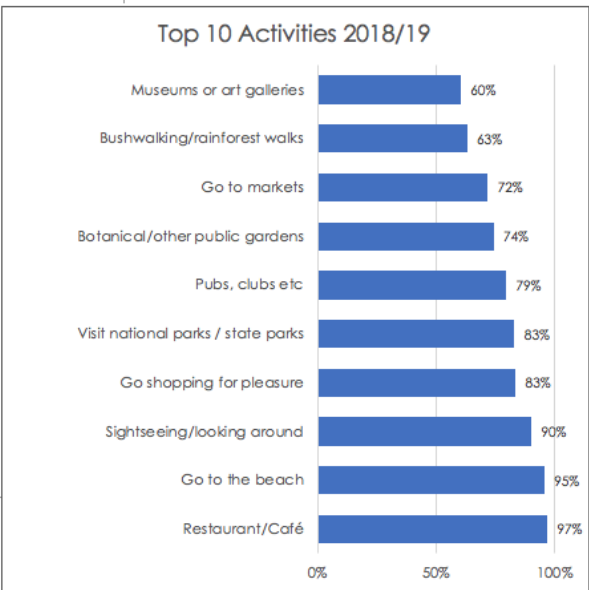
Accommodation type has remained relatively stable over time.

1. Backpacker or hostel style: Average 50%
2. Rented house/apartment/flat/unit: Average 19%
3. Property of friends/relatives: Average 10%



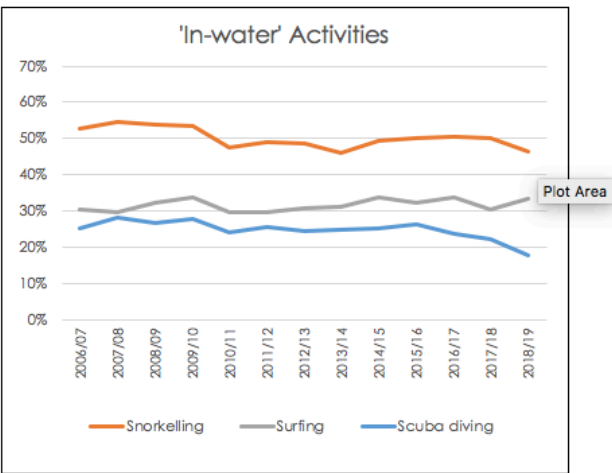
Transport between destinations in Australia has remained fairly stable with the exception of the reduction in the significance of long distance coach/bus.

Note: Adds to more than 100% as more than one type can be used.

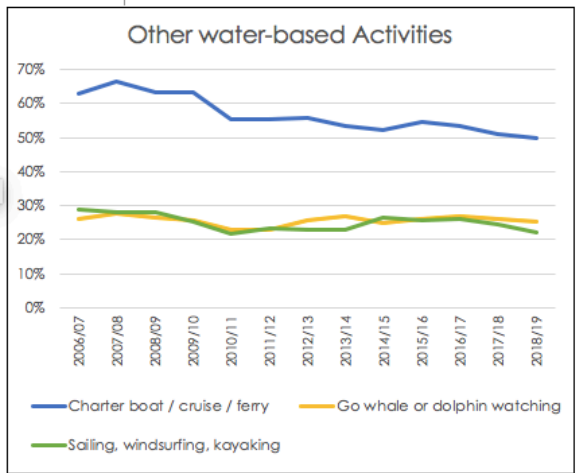


The top 10 activities in 2018/19 include a mix of passive and active.

Note: Adds to more than 100% as more than one type can be used.



Snorkelling & Scuba declining



Charter boat/cruise/ferry declining

## MARKET SIZE & CHANGE OVER TIME ~ AUSTRALIA

- The Backpacker market is slowly declining
- The year 2018/19 represented the lowest in terms of Backpacker visitors and visitor nights to date
- Overall spend in Australia is relatively stable (not considering inflation)
- Spend per night has risen slightly in recent years.

