

Recommendations to grow the Australian Working Holiday Maker scheme

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Executive Summary

The Working Holiday Maker (WHM) programmes purpose is to foster closer ties and cultural exchange between Australia and partner countries and has been in existence since 1975. It provides for reciprocal travel arrangements and is the largest scheme of its type in the world.

In a world that has experienced increasing terrorism activity, mass migration pressures and economic uncertainty, these types of cultural exchange programs are essential to gain more understanding of cultures, to encourage cultural interaction and for young travellers to gain an appreciation of how others live in order to avoid future conflict and tension.

The Federal Government announced in its 2015/16 Federal Budget that it intends to introduce new taxation arrangements for working holiday makers (the so-called "backpacker tax") to be implemented from 1 July 2016. The proposed tax removes the tax-free threshold for working holiday makers which is currently set at \$18,200 and installs a marginal rate of 32.5% from the very first dollar earned in Australia. The Government expects this to generate over \$540m in revenue over the next 3 years. This is on top of the existing hefty WHM visa fee of \$440 that young travellers must pay to receive a visa.

This paper provides a summary of the state of the youth industry and the positive impacts that youth travellers provide to the Australian economy in terms of taxation revenues and employment particularly in regional areas where attracting labour has become a major issue. A range of recommendations are included that the tourism industry believe are necessary to help offset a further predicted decline in WHM arrivals in coming years.

This paper draws the conclusion that the severe increase in visa application fees from 2013-2015 has had a negative impact on WHM arrivals and that this situation will dramatically worsen should the proposed tax arrangements be implemented particularly at the higher marginal tax rate.

Inbound arrivals to Australia have grown in recent years and increased 8.2% in 2015 fuelled by growth out of China in particular and improvements in growth from traditional long haul markets like the UK and USA. We have seen stable and historically low airfares, increases in capacity and access from key markets, and improving economic conditions in key source markets post the Global Financial Crisis. Yet despite the positive market conditions the number of youth travellers granted a WHM visa has decreased by some 12% from June 2013 to June 2015. A further decline of 6% for first year 417 visa grants and a decline of 13.9% for second year 417 visa grants for the 6 months to end December 2015 has been reported in the latest update provided to industry by the Department of Immigration and Border Protection. This includes declines in the all of the six largest WHM source markets being in order UK, Germany, France Korea, Taiwan and Italy. This is a particularly concerning trend which must be addressed with more flexible policy settings and in particular a review and reduction of the current WHM visa fee.

If we experience a further decline of WHM arrivals by say 5%, this would mean a loss of 11,340 arrivals, with a resulting loss of \$5.6m in direct tax loss (with no WHM visa application fee & Passenger Movement Charge – PMC collected), let alone the average spend contribution of \$15,000 per WHM not being realised, resulting in over \$170m not being spent in Australia.

If we saw a decline of 10% in WHM arrivals, the Government will not see \$11.2m (WHM visa application fee and PMC), let alone the \$340m not being spent in Australia by working holiday makers – far in excess of the uncertain revenue which may be raised by introducing the tax.

The recommendations to offset any change to the marginal tax rate that the author of this paper suggests are as follows.

Recommendations:

- 1. Lower the proposed marginal rate of tax on declarable earnings up to A\$80,000 from 32.5% to 15% or 13%, to coincide with other overseas worker rates;**
- 2. Reduce the current visa application fee to a more competitive level comparable with New Zealand and Canada.**
- 3. Raising the age threshold for working holiday maker visas to 35 or higher (from the current 30);**
- 4. Raising the current caps applying to source nations in aggregate by 20,000;**
- 5. Capturing compulsory employer superannuation payments not utilised by WHM when they leave the country as an industry marketing fund to market the WHM program;**
- 6. Allowing tourism as an eligible regional occupation for a second year visa (as announced for Northern Australia);**
- 7. Continue to expand the WHM programme to more countries and at a faster rate where feasible;**
- 8. Allow multiple visa applications by individuals (so they could reapply whilst still 'in country' on an existing WHM visas or in an older age bracket);**
- 9. Promote the WHM more extensively in existing participating countries;**
- 10. Better promote and encourage second year visa options;**
- 11. Tourism Australia to conduct a new global youth campaign from July 2016;**
- 12. Funding to be provided to conduct an in-depth study into Working Holiday Makers travelling in Australia building on the National Institute of Labour Studies research report published in 2009.**
- 13. A commitment to modelling for any future proposed change which incorporates formal industry consultation.**

Background to proposed tax changes

The Federal Government announced in its 2015/16 Federal Budget that it intends to introduce new taxation arrangements for working holiday makers (the so-called “backpacker tax”) to be implemented from 1 July 2016. The proposed tax removes the tax-free threshold for working holiday makers which is currently set at \$18,200 and installs a marginal rate of 32.5% from the very first dollar earned in Australia. The Government expects this to generate over \$540m in revenue over the next 3 years (2016-17 \$100m, 2017-18 \$220m, 2018-19 \$220m).

The purpose of this paper is to consolidate information available regarding the positive impact that WHM have on the Australian economy and to outline the benefits of continuing to foster the development of the WHM scheme. The programme includes Working Holiday (visa subclass 417) and Work and Holiday (subclass 462). The key differences are that the Work and Holiday has caps on the number of visas granted and some additional eligibility requirements. The programme is reciprocal in nature.

All applicants must be 18-30 in age when applying, hold a passport from an eligible country and meet health and financial requirements. In addition, Work and Holiday applicants must have functional English, have completed at least 2 years of undergraduate study at university and have a letter of home government support.

The Tourism and Hospitality industry supports over 1 million jobs in Australia and generates almost \$100 billion in economic activity. It has been described as one of five super-sectors of the future with the potential to be the rising star of the Australian economy as the mining and manufacturing industries continue to wane. Another of the so-called super sectors is International Education with which youth tourism is closely linked and both sectors work well together to support and grow tourism and education.

The Tourism, Hospitality and Agriculture industries are united in their opposition to this new proposed tax.

Australia has always been an attractive destination for visitors however being a long haul market it is traditionally an expensive destination to visit. On top of increased visa costs and the existence of a costly passenger movement charge, we are becoming less and less affordable. The new “backpacker tax” could be the straw that breaks the camel’s back. We will have surely reached the tipping point where other destinations with more affordable and more flexible visa policy settings start to win the market share battle.

A decline of 6% for first year 417 visa grants and a decline of 13.9% for second year 417 visa grants for the 6 months to end December 2015 has been reported in the latest update provided by the Department of Immigration and Border Protection. This includes declines in the all of the six largest WHM source markets being in order UK, Germany, France Korea, Taiwan and Italy.

Tourism industry lobby groups have objected to the proposed tax measure in their response to the 2015/16 Federal Budget and have recommended the Federal Government reverse this measure in their 2016/17 pre-budget submissions. The value of WHM and their contribution to the local economy cannot be underestimated. They stay much longer and spend well in excess of what the average leisure tourist spends in Australia. A 2009 Department of Immigration and Citizenship study conducted by Tan et al focusing specifically on the WHM market estimated that each WHM program visitor spent \$13,218 in Australia over an average 8-month stay. Based on today’s WHV arrivals that represents \$2.99 billion! The Tan study also identified that for every 100 WHM program visitors arriving in Australia, 6.3 full time equivalent additional jobs are created in the wider economy. With current visitor numbers under the WHM program this equates to 11,700 FTE jobs in Australia.ⁱ (Tan, 2009)

In addition, working holiday makers are a greatly needed resource for agriculture and regional tourism operators that face labour and skills shortages (current estimates of over 38,000 positions available and which will increase to 120,000 positions by 2020).

Farming and agricultural lobby groups have expressed concern at the impact of the proposed changes due to the immediate impact on available labour and due to the expectant loss of visitor expenditure that will occur. This will impact the regional economies that benefit from youth travellers spending time in and travelling through those regions.

National Farmers Federation President, Brent Finlay, welcomed the Government’s initiative to bring key stakeholders together, but expressed concern at the requirement from Government for any solution be ‘revenue neutral’. “Since the announcement of this tax we have heard from primary producers across the country who say it will reduce agricultural productivity and stifle spending in rural and regional towns,” Mr Finlay said. “These concerns, together with the extremely positive forecast for agricultural sector growth and its ability to robustly contribute to the Australian economy, must be considered in any modelling about the likely revenue effect of the tax”.

The industry has called for reforms of this visa type for many years dating back to the Australian Tourism Export Council (ATEC) papers dated 2011 and 2012. ATEC called for reforms to have employment in tourism and hospitality be included in regional Australia as part of the 12-month extension for the WHM second visa and increasing the age for eligibility to 35, and removing restrictive caps. Further detail can be found below in this paper.

A number of industry groups sent out a national survey to members with the responses representing the views of employers only. While 57% of respondents advised that they were employing the same number of WHM as previously, 43% advised that they had seen a decline. The main reason for the decline was the difficulty in attracting WHM’s because of our lack of competitiveness with respect to employment terms and conditions.

Whilst there have been some positive changes to the scheme in recent times such as from late 2016, 462 visa holders who have worked 88 days in Northern Australia will be eligible for a second 12 month visa, there is much to be done to keep the scheme attractive to young travellers from around the world.

Research analysis:

The table below outlines the current tax rate, the proposed Government rate, and a set of industry options compared to those of our major competitors.

The preferred industry position is Option 3 which will provide the least deterrence to potential WHM’s.

Table 1: Taxation rates paid by Working Holiday Makers

Income (AUD)	AUS currently	AUS GOV proposed 32.5%	AUS INDUSTRY Option 1 19%	AUS INDUSTRY Option 2 15%	AUS INDUSTRY Option 3 13%	NZ 10.5%	CAN 15%	UK 20%
7,000	ZERO	2,275	1,330	1,050	910	735	1,050	1,400
14,000	ZERO	4,550	2,660	2,100	1,820	1,470	2,100	2,800
21,000	ZERO	6,825	3,990	3,150	2,730	2,695	3,150	4,200

Source: Tourism Industry Roundtable

For the six months ending December 2015, 116,750 Working Holiday Maker visas were granted representing a 3.3% decrease compared to the same period in 2014-15.

There was a 6% reduction in first Working Holiday grants and a 13.9% reduction in second Working Holiday grants. Work and Holiday however increased by 80% off a much smaller base and impacted by the recent announcement that allows Chinese to access this visa.

The table below shows the recent declines in WHM visa grants.

Table 2: Total visas granted in recent years to WHM

	June 2011	June 2012	June 2013	June 2014	June 2015
Visas granted	192,922	222,992	258,248	239,592	226,812
Increase / decline	-	+15%	+15.8%	-7%	-5.3%

The proposed tax is in addition to almost \$100m the Government receives from WHM visa issuance, which has doubled in the past five years, whilst visa grants have fallen by 12% over the 2013-2015 period. The Government has introduced a series of increases to WHM visas costs over the past decade from \$180 in 2005 to \$440 in 2015/16. This represents an increase of 144% over the past decade.

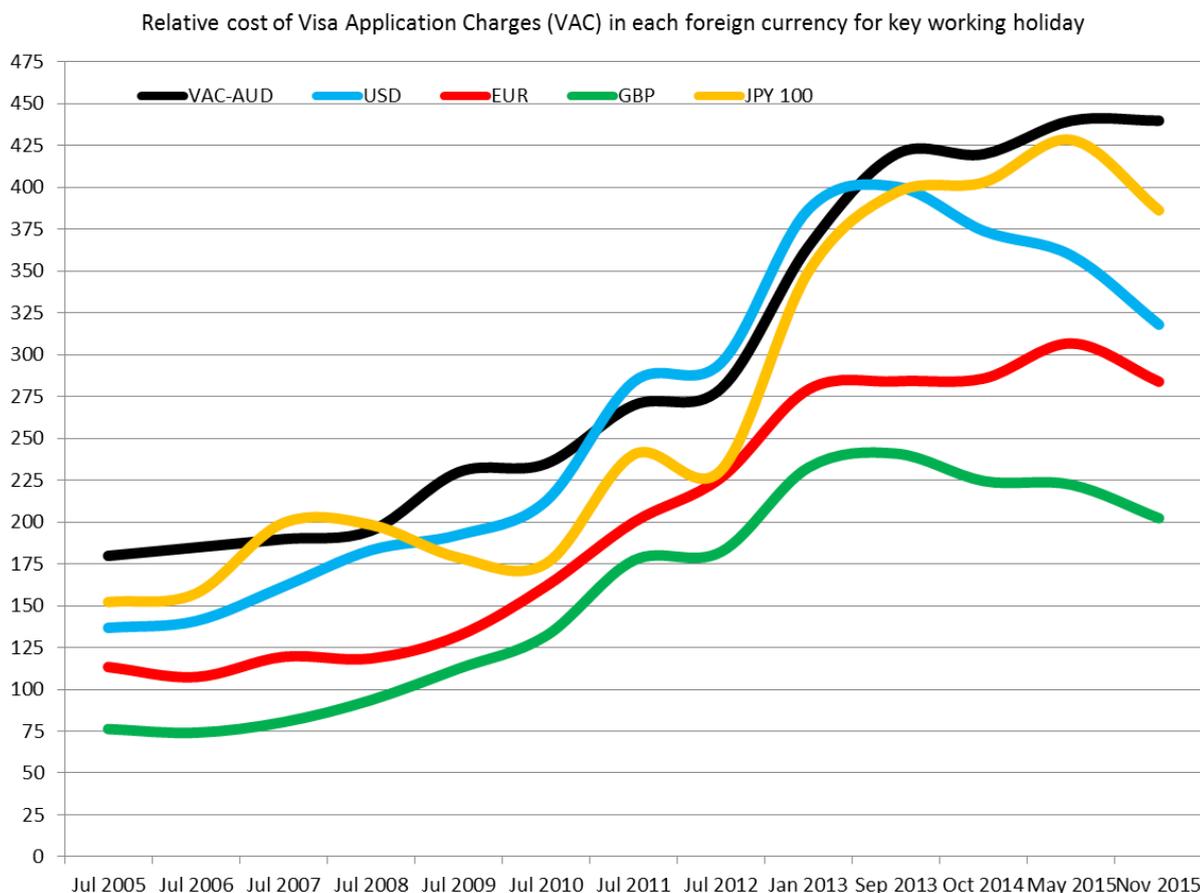
Table 3: WHM visa cost increases over recent years

Year	Fee	Increase	Percentage Increase
2005	\$180	-	-
2006	\$185	\$5	2.7%
2007	\$190	\$5	2.7%
2008	\$195	\$5	2.6%
2009	\$230	\$35	17.9%
2010	\$235	\$5	2.2%
2011	\$270	\$35	14.8%
2012	\$280	\$10	3.7%
2013	\$365	\$85	30%
2014	\$420	\$55	15%
2015	\$440	\$20	4.7%
		Total increase	144%

Source: ATEC

The table below shows the relative cost of the visa in foreign currencies over the past 10 years.

Table 4: Relative cost of the visa in foreign currencies



Source: YHA

There is continuous feedback from in market regarding what is perceived to be the inflated price of the Australian working holiday visa. The visa fee increased twice in 2013 and at a time when the Australian dollar was trading high making Australia less attractive to potential WHM’s. The visa fee being an up-front levy and an additional hurdle increases the cost of coming to Australia as a WHM on top of the fact that we are a long haul destination for many potential travellers in key markets which makes Australia an expensive destination.

There is no other explanation for the steady decline in visas issued since 2013 other than the increasingly high visa fee. The notion that if you offer it and they will come has proven to be wrong. This is simply because the visa fee is paid by young people in source countries saving by working second jobs which are typically low paid. To get a foot on the opportunity ladder of the working holiday visa is not easy and as with any other product the price elasticity of demand needs to be understood. Previously there had been a cautious and correct incremental approach to the fee which ended with what in hindsight have been the reckless increases of 2013.

A further point as has been noted is that the working holiday visa is not primarily a jobs scheme. However, the high visa fee has emphasised the need to work to be able to recover the up-front investment that would have otherwise been spent on the holiday component of the visa.

The table below shows the cost differential between Australia and NZ and Canada as two key competing working holiday destinations. There is a distinct cost differential which those in market advise has an impact on selecting which destination a WHM will apply to travel to.

Table 5: Cost comparison of WHM visa with major competitors in AUD

	Cost	In AUD	% increase compared to Australian WHM visa fee
Australia	AUD\$440	\$440	n/a
New Zealand	NZD\$208	\$187	+135%
Canada	CAD\$250	\$252	+75%

The New Zealand Working Holiday scheme has many similar conditions to the Australian Working Holiday programme. Key differences being that the NZ scheme is open to 42 different nationalities compared to Australia with only 19 for 417 visa subclass and 15 countries for the 462 subclass with 4 agreements pending approval.

The NZ and Canadian schemes allow some nationalities to enter until they turn 35 years compared to Australia being only 30. The NZ and Canadian schemes also allow hospitality work whilst the Australian scheme only allows hospitality work in Northern Australia – a recent announcement. The Canadian scheme also allows second entry for some nationalities under the International Experience Canada program and the NZ scheme allows for an extension after providing evidence of 3 months work in horticulture or viticulture.

The table below demonstrates these key differences.

Table 6: Key differences between working holiday schemes

Scheme	Australia	NZ	Canada
Number of countries	19 (417 visa) 15 (462) + 4 not yet in effect	42	32
Age restrictions	30	35 (for some countries)	35
Allows hospitality work	No (except Northern Australia)	Yes	Yes
Allows second entry	Yes after 88 days work in regional area in limited industries	Yes allows an extension for up to 11 months after 3 months work in a horticulture or viticulture	Yes but must apply after the original visa has expired and not in the country

The WHM pays a fee to apply for a WHM visa (\$440), they pay the passenger movement charge (PMC) currently set at \$55, which was initially described as a charge to partially offset the cost to government of the provision of passenger facilitation at airports, principally customs, immigration and quarantine functions. There is a huge \$800 - \$900m over collection from the PMC that goes directly to Treasury coffers which is borne by travellers. In addition, potential travellers must provide evidence of sufficient funds available prior to travel with a certified copy of a bank statement showing the traveller has access to AUD\$5,000.

Table 7: WHM tax and fee contribution to Australian economy

	WHM Visa fee	PMC	Average spend	Total
1 WHM	\$440	\$55	\$15,000	\$15,495
100,000 WHM	\$44,000,000	\$5,500,000	\$1,500,000,000	\$1,549,500,000
226,812 WHM in 2015	\$99,797,280	\$12,474,660	\$3,402,180,000	\$ 3,514,451,940

If we experience a further decline of WHM arrivals by say 5%, this would mean a loss of 11,340 arrivals, with a resulting loss of \$5.6m in direct tax loss (with no WHM fee & PMC collected), let alone the average spend contribution of \$15,000 per WHM lost, resulting in over \$170m not being spent in Australia.

If we saw a decline of 10%, the Government will not see \$11.2m in taxes, let alone the \$340m not being spent in Australia.

If we see a decline of 20%, which is not unrealistic, the Government will not realise \$22.4 m in direct taxes, and \$680m in WHM earnings not being spent in this country. There is already a problem with people being paid cash in hand and the high tax will drive more of this behaviour with its associated problems of underpayment, non-payment of Super and no workers compensation insurance cover.

These are significant numbers in comparison to what the new tax is purported to generate.

ATEC paper

ATEC developed a position paper in February 2012 focused on the importance of the Working Holiday Visa to Australia. This paper was developed off the back of an initial paper developed in 2011.

The WHM program attracts international visitors and is a key motivator in young people's decision to come to Australia. These visitors boost the prosperity of the tourism sector and the Australian economy in three key ways:

- By increasing expenditure and output for key tourism sectors given the high spend of international tourists overall and the higher spend of backpacker visitors (60% higher than the average international visitor).
- Working holiday makers have an extended stay averaging 8 months and spend \$15,000 each.
- They provide a significant boost to employment and economic prosperity in regional Australia as both a key source of labour supply and driving spending in regional communities.

ATEC recommended a range of changes to the policy settings of the WHM visa as per below:

1. Employment for 88 days in 'tourism and hospitality' in regional Australia be included as part of the 12 month extension program for the Second WHV 417;
2. The costs and financial requirements of applying for WHM program visas be held constant or reduced;
3. The qualifying age range be increased from 18–30 up to 35 years in line with other countries;
4. Multiple visa applications be permitted, one between 18–25 years of age and a second one from 26–30/35 years;
5. Better engagement with the tourism industry as the Government looks to expand the WHM program to new source countries.

ATEC's economic modelling to quantify the impact of these recommendations highlights significant gains are available to tourism industries, regional economies, and the wider Australian economy. Annual gains in GDP are conservatively estimated at \$85 million or up to \$700 million over 10 years, which allows for a gradual increase in participation as eligibility criteria are refined.

Specifically, ATEC modelling has shown that by expanding the second year visa qualification to include work in regional tourism businesses, tourism can conservatively contribute an additional \$225 million to the Australian economy, over the next 10 years.

Increasing the age range for the visa from 18-30, to 18-35 would enable Australia to capture a greater market share and help us to remain competitive with other countries such as Canada, which has already made policy adjustments in recognition of the potential of this expanded market.

The modelling has also shown that, by further expanding the program to allow multiple visa applications within the relevant age range, tourism has the potential to contribute a further \$275 million to the nation's GDP over 10 years, and more than \$2 billion in tourism spending.

The modelling also shows that expanding the program to a further four source countries would deliver a further \$76 million to \$195 million in GDP over the same period, depending on most likely uptake rates.

The WHM program has an important impact on attracting labour to regional areas, which helps to address the significant labour shortages that these areas experience. Most jobs for WHM program workers are in the accommodation and tourism sector, and 31% of these are located in regional Australia.

However, the WHM program is more than just a source of labour supply for regional Australia. It also drives spending in key sectors of regional economies given the important role of tourism industries to the economic life of regional Australia.

As well as injecting new money and creating new wealth in Australia, the WHM program brings other benefits to Australia including:

- Providing a key motivation in stimulating travel to Australia
- Providing substantial economic benefits to the regional economies where they work
- Are long staying and high yielding visitors
- Disperse widely throughout Australia, spreading economic benefits
- Provide short-term skilled and semi-skilled labour which meets the labour shortages of industries such as tourism

Strong evidence suggests WHMs do not displace local Australian workers. Most WHMs are employed in lower skilled positions and frequently in casual harvest work and are often willing to move to regional and remote areas where Australian workers are in increasingly short supply.

Flinders University - National Institute Labour Studies 2009 study

There is a need to conduct an updated wide ranging survey to understand the state of the industry and its critical contribution to the tourism and hospitality and agriculture sectors.

Previously organisations like the Sustainable Tourism Cooperative Research Centre (STCRC) - which no longer exists, were previously funded by tourism industry organisations and conducted research studies into industry related issues. There is a definite need to conduct a detailed study broadening the scope of the original study into this sector.

The NILS 2009 study found that WHMs come from a variety of work backgrounds and generally do different types of jobs in Australia compared to their employment at home. They are geographically mobile, willing to work in a variety of low skilled/low paid jobs, including in the regions, that are not connected to their longer term career aspirations or home employment. Those who were more keen to work were better educated, more proficient in English and stayed longer than those who gave other reasons for coming under the WHM visa.

The study found that the WHM program is successful in meeting many of its objectives. WHMs are generally content with the program and feel that they learn quite a lot about Australia. They contribute more to total expenditure than they do to earnings, and thus on balance make a small net contribution to increasing the demand for Australian workers. In this sense, the WHM is more a tourism export program than a labour supply program. But WHMs do supply labour, and employers who use the program generally welcome it and feel that the quality of worker they get is high, relative to what is available from the local labour market given the pay and conditions on offer. The supply of WHM labour is of particular value to employers in the regions, especially agricultural enterprises who employ them to pick produce and to supply general farm labour.

The potential negatives

The imposition of the tax will encourage informal work and tax avoidance and illegal rates of pay. We have seen some evidence of this already in the agricultural sector and in the tourism industry and these businesses have faced government action regarding labour hire exploitation.

Numbers to Australia will reduce as youth travellers seek out destinations with lower tax rates, applications fees and departure taxes such as Canada and NZ. This will reduce the number of WHM paying for a visa, paying the passenger movement charge and reduce expenditure particularly in regional Australia which is so reliant on WHM.

Regional communities will suffer as less travellers disperse throughout Australia. The agriculture industry will struggle to attract staff and crops will potentially not be harvested and revenue generated in these regions by businesses will plummet impacting the local regional economy.

Communications strategy

The tourism industry together with Tourism Australia and the Department of Immigration and Border Protection should prepare a communications strategy in advance of the announcement or confirmation of changes to the marginal tax rate.

The strategy should:

- Define a set of key agreed talking points;
- Determine who are the “go to” industry commentators on the subject;
- Decide the best time to go public with any commentary;
- Hold a joint media conference to gain as much publicity as possible;
- Issue a media release outlining the industry position;
- Publish the industry paper on various industry websites.

Proposal for Global Tourism Australia campaign

Tourism Australia (TA) has not undertaken a global youth market campaign since 2012/13.

According to TA, the Youth market categorised as 15-29 year olds represents around 25% of all arrivals to Australia and 44% of all spend. These figures are skewed by the education sector which dramatically increases arrivals numbers, length of stay and spend. To the year ending December 2015 youth arrivals were 1.86 million (+8%) and spend was \$16 billion (+19%).

TA currently have a range of individual market campaigns running in key markets with a youth element. The focus in Europe is on a Pan-European Youth Campaign running from March-June 2016. The concept of an inspirational bucket list and trip planner tool promoting Australia’s key youth experiences. The positioning is Australia as the ultimate destination to work and travel, highlighting the variety of work opportunities.

TA’s current global campaign now focuses on aquatic and coastal experiences and food and wine. Whilst boasting some impressive social media statistics (Facebook – 6.8m+ followers, Instagram 2.1m followers, Twitter 311k followers, YouTube 6m+ views of ad (27k subscribers, 11m video views), Weibo, WeChat, LinkedIn etc.) more is needed to create awareness of the Australian offer and convert desire and intention to visit to actual travel.

Some anecdotal feedback suggests the proposed taxation changes have received negative media coverage internationally however this will be ramped up once any changes are announced by the Government.

A global youth campaign from Tourism Australia would help offset some of the damage that the tax changes would undoubtedly bring and help grow the number of youth travellers seeking a working holiday experience in Australia.

Report Recommendations:

1. Lower the proposed marginal rate of tax on declarable earnings up to A\$80,000 from 32.5% to 15% or 13%, to coincide with other overseas worker rates. The industry believes this to be a fair scenario as opposed to the proposed rate of 32.5c per dollar earned.
2. Reduce the current visa application fee to a more competitive level comparable with New Zealand and Canada. Surely the rapid increases over recent years have had a detrimental impact on WHM arrivals after a period of solid growth which is now turning into year on year declines in take up of the WHM visa.
3. Raising the age threshold for working holiday maker visas to 35 or higher (from the current age of 30). This will surely encourage more WHM travellers coming to Australia.
4. Raising the current caps applying to source nations in aggregate by 20,000. Some of the current caps are set at 100 or 200 positions which is extremely low.
5. Capturing compulsory employer superannuation payments as an industry levy, as many WHM's are not aware that they have super funds put aside for them and many leave without accessing the funds. These funds could be put to use by supporting the industry to attract more WHM's. A marketing fund could be developed to assist promote WHM visas.
6. Allowing tourism as an eligible regional occupation for a second year visa (as announced for Northern Australia). This expansion would surely attract more WHM's who would then potentially stay on for a second year as well.
7. Continue to expand the WHM programme to more countries. More opportunities to promote the WHM program in other markets and attract more travellers.
8. Allow multiple visa applications by individuals (so they could reapply whilst still 'in country' on an existing WHM visas or in an older age bracket). This would potentially allow a traveller to come back and work in another industry and travel to destinations they did not visit on their first visit.
9. Promote the WHM more extensively in existing participating countries, a more targeted program focused on promoting the cultural exchange benefits and travel benefits as well as the Australian lifestyle.
10. Better promote and encourage second year visa options. The current take up rate is quite low and the current arrangements and limitations act as a deterrent to young travellers.
11. Tourism Australia to conduct a new global youth campaign from July 2016. It has been a number of years since Tourism Australia ran a global youth campaign and whilst ad hoc activity has occurred in some markets, a global campaign with a reasonable spend would surely increase the focus on Australia as an attractive destination for WHM's.
12. Funding to be provided to conduct an in-depth study into Working Holiday Makers travelling in Australia, building on the initial National Institute of Labour Studies study in 2009 and broadening the scope to include detail that the tourism industry would want to analyse.

13. A commitment to modelling for any future proposed changes which incorporates formal industry consultation. Industry would like the opportunity to be consulted and contribute to any modelling of potential impacts that changes to the scheme might have going forward.

References

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