

‘Long Term Tourists or Short Term Migrants’

***The Impact of International Working Holiday Makers
(WHMs) on the Tourism Economy of Mildura in
Regional Victoria 2009-2010***

Phase Two Results: December 2010



Photo. A British WHM outside his hostel in Mildura & A sign placed outside a hostel in the Mildura region offering backpackers for hire 2010

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Executive Summary: Mildura WHM research (phase two 2010)

Young international travellers visiting Australia on Working Holiday Maker (WHM) visas have been identified as a strategically significant sub-segment of the wider international backpacker industry. A 2009 Department of Immigration and Citizenship study conducted by Tan *et al* (2009) estimated that each WHM spent \$13,218 in Australia over an average 8 month stay, with the total value of the segment estimated at \$1.8 billion. In addition, the study identified that every 100 WHMs arriving in Australia creates 6.3 full time jobs in the wider economy. Working Holiday Makers are also a fast growing segment of international visitors with the number of WHM visas granted by the Australian government increasing from 104,352 in 2004/5 to 175,739 in 2009/10, an increase of over 68% over a 5 year period.

In 2005 the Australian government made a significant modification to the WHM visa. Visa holders could now work for a single employer for 6 months (up from 3 months) and were free to apply for a second 12 month WHM visa extension if they completed 88 days registered work in regional Australia in specific occupations such as fruit picking, mining or pearling. The changes caused substantial impact on the traditional work/leisure patterns of the WHMs. Firstly, WHMs able to commit more time to working were now more attractive to local employers in diverse fields of work. Secondly, the distribution of WHMs altered significantly as they were now motivated to leave the cities and the traditional eastern coastal backpacker trail and into regional centres that offered work opportunities enabling them to qualify for the additional 12 month visa extension.

Limited research on WHM's in Australia, especially in a regional context, prompted Dr Jeff Jarvis and Dr Vicki Peel from the National Centre for Australian Studies at Monash University, to partner with Tourism Victoria in 2009 in order to analyse WHM behaviour as a result of policy changes. They conducted a face to face

qualitative survey with 171 WHMs in the Northern Victorian city of Mildura, a key citrus and grape producing district provides virtually year round work for WHMs. In February - March 2010 phase two of the qualitative research study was conducted with 214 Working Holiday Makers staying at hostels and caravan parks in Mildura, Red Cliffs and Robinvale in Northern Victoria.

The results of the 2010 study closely mirrored that of the 2009 study and confirmed that WHMs have a significant role to play in the tourism economy of Mildura. Each traveller was identified as spending over \$3960 in the town over an extended stay of 65 nights. The research also identified that WHM's tend to 'live like locals' in Mildura spending in supermarkets and entertainment venues and living in the 'working hostels' which are one of the major financial beneficiaries of the industry. The WHMs were found to consume limited local tourism product.

The WHMs who visited Mildura were primarily young Europeans with an average age of 23. British, Irish, French and Germans comprised over 68% of the sample in 2010. As was the case with the 2009 sample, few Asian WHMs were found to be staying at the official working hostels and were therefore under represented in relation to the significant overall number of WHM visas issued to Korean and Taiwanese travellers each year. The behaviour of such travellers is clearly a field that demands further research.

The study identified that WHMs are basically only in Mildura to work in order to fund their extended stay in Australia with the majority motivated to travel to regional Victoria to seek fruit picking and farm based work so they can qualify for the second visa. Despite their high yield, their interaction with the established tourism industry in Mildura is limited, as is their knowledge of tourism opportunities in the region. This finding was not unexpected given that the majority of the tourism economy in Mildura caters primarily for the needs of the domestic Australian market.

The main industry segment that has developed to service the WHMs has been the 'Working Hostel'. The working hostel is both similar and different to its coastal and urban cousin the 'backpacker hostel'. Both hostel types offer dormitory accommodation and provide a social environment, however working hostels generally demand accommodation to be paid for on a weekly basis and are based on the model of long stay residents. In Mildura, the research team identified that working hostels have been established in old nursing homes, private homes and old hotels and warehouses. Working Hostels also recognize that the primary motivation for their guests to stay is employment rather than leisure and offer work-based services such as a shuttle bus service to drop workers at individual farms. They therefore fulfill the role of an unofficial 'employment office', providing employment contacts to those who stay in their accommodation. Unlike their backpacker hostel cousins, limited leisure activities are promoted and only one property ran its own travellers' bar.

As the vast majority of WHMs are motivated to visit Mildura only for work (95% in 2010), there is a threat that fewer travellers will seek to visit the region and contribute to the local economy if work opportunities decline. The researchers identified that in 2010 increasing pressure was being placed on what were seen as 'WHM jobs' by the infiltration of contract labour into the region. These contractors approach farmers directly and provide labour to pick fruit, thus diminishing the pool of jobs available to WHMs and the attractiveness of Mildura as a destination. In addition to this, the appearance of illegal hostels in the region is also placing economic pressures on the existing registered Working Hostels.

The study identified that most WHMs enjoy their time in Mildura with the most enjoyable aspect identified as interacting with other WHMs. This was followed by the attraction of a generally sunny climate and the ability to earn good money working in the destination. WHM satisfaction with the destination can be interpreted from the fact that over 70% of those surveyed would recommend that their friends come to the city.

Two significant factors were identified as assisting in this positive word of mouth; firstly, the provision of more information on how to find jobs in the region and, secondly, the promotion of more leisure activities in the region suitable for WHMs to experience during their time off.

Overall the 2010 study confirmed the 2009 findings that WHMs are an economically significant, although largely misunderstood, segment of the tourism economy of Mildura. Potentially, the benefits they bring to the region can be enhanced if the industry can develop and price appropriate leisure product to suit their needs at the end of their period of work in the region. Conversations with individual WHMs in Mildura confirmed the attractiveness of 'outback and indigenous experiences' or "barbeques in the bush' for young Europeans.

In addition the study found that the administrative changes that were made to the visa in 2005 are a driving force enhancing the dispersion of WHMs throughout Australia and have significantly contributed to increased numbers of travellers visiting the region and boosting the regional economy of Mildura. Their dispersion is highlighted by the fact that over 50% of the sample in 2010 also planned to spend a night in the popular backpacker destinations of Sydney, Melbourne, Brisbane, Gold Coast, Cairns and Byron Bay.

From a national perspective, the study identified that the WHM visa is proving to be an important marketing aid in motivating international visitation. The survey found that around one third of the sample (36.1% in 2009 and 32.2% in 2010) felt strongly that Australia's WHM visa offer was a significant inducement to take an extended trip from home.

1.0 Research Summary 2010

1.1 Introduction to the study

In March 2009, a research team from Monash University led by Dr Jeff Jarvis and Dr Vicki Peel conducted a quantitative research study with 171 working holiday maker visa holders in the regional Victorian city of Mildura. The pilot research study was a jointly funded *Tourism Victoria* and *National Centre for Australian Studies (Monash University)* initiative that is part of an upcoming national Australian Research Council (ARC) – Linkage research grant application on the impact of WHMs on regional Australia for 2011 – 2013. This was the first ever study of WHMs undertaken in a regional Australian context and confirmed the substantial size of the associated tourism economy.

The project examined international WHMs, an important segment of the international visitor market to Australia, testing their potential to enhance the economic wellbeing of regional communities through analysis of the City of Mildura. The first of its kind to be conducted in a rural destination, the study traced the impact on regional destinations of significant changes to visa regulations in 2005. At that time, travellers were granted the option to extend the initial 12 month visa by a further 12 months. To qualify for the visa extension WHMs were required to spend at least 88 days working in regional Australia in specific fields such as fruit picking, pearling or mining amongst others. This policy change has seen WHMs seek out employment in regional Australia and has driven many to destinations such as Mildura, thus dispersing their economic impact away from capital city gateways and the major east coast backpacker route running between Melbourne and Cairns.

WHMs have been identified by the federal government as high yield visitors who provide significant benefits to Australia. A 2009 Department of Immigration and Citizenship study conducted by Tan *et al* (2009) estimated that each WHM spent \$13,218 in Australia over an average 8 month stay, with the total value of the

segment estimated at \$1.8 billion. In addition, the study identified that every 100 WHMs arriving in Australia creates 6.3 full time jobs in the wider economy.

There is a strong correlation between the WHM and the inbound backpacker in terms of aspects of visitor behaviour and general tourism industry perceptions. The national backpacking industry assumes that the majority of WHM visa holders will spend at least one night of their stay in hostel accommodation. This behaviour means they are classified as a 'backpacker' according to the definition used by Tourism Research Australia (TRA). This assumption is further supported by Tan *et al* (2009) who also noted that hostels were the most popular form of accommodation used by WHMs.

The initial 2009 study identified that WHMs are long staying and high spending visitors within the tourism economy of Mildura, with each visitor spending just under \$3200 in the city. However the research identified that the majority of WHM expenditure is not spent within the traditional tourism economy of Mildura which is primarily geared to the needs of domestic tourism. Instead the 2009 study identified that WHMs during their stay in Mildura tend to live 'like locals', spending their money on accommodation, food, and leisure activities within the city.

Following the publication of the 2009 study results through the Tourism Victoria web site, significant media attention was drawn to the issue of the large number of foreign workers in regional Australia, with Brendan King of ABC Radio National producing a radio program entitled 'Bitter Harvest' on the issues associated with the potential exploitation of the casual rural workforce (King, 2010).

After negotiations with Tourism Victoria, it was decided that the study would be repeated in 2010, with funding jointly sourced from Tourism Victoria and Monash University. In February - March 2010 the study was replicated as phase two of the project. Using a qualitative judgemental sampling methodology, the survey population of 214 WHMs were interviewed face-to-face in hostels in Mildura. The research was conducted during March 2009 and February - March 2010 within

accommodation establishments within the region. The key findings from the research study are discussed in the following section. To determine any changes in market behaviour in short term, the latest data from phase two of the project is shown in the context of data gathered in 2009 during phase one.

1.2 Phase two research overview (2010)

1.2.1: Industry Development in Mildura

Results from phase two of the study found that, in terms of industry development in the regional context of Mildura, the most notable beneficiaries of the growth in WHM visitation are the individual 'working hostels'. These enterprises have adapted the business model followed by traditional leisure focused backpacker hostels to cater for long staying WHMs. Rapid supply of properties to meet backpacker demand was also observed in Mildura. Overall the development of the backpacker industry in Australia has been characterised by the transformation of properties designed for other purposes to be adapted to the backpacker market. In Mildura, the research team discovered examples of private homes and flats, nursing homes, pubs and motels converted into hostels to house WHMs in official 'working hostels'.

Typically, 'working hostels' have acted as ad hoc labour brokers providing a conduit between agricultural producers who require short-term labour and the work seeking WHMs. An ad hoc informal supply and demand system has emerged which bypasses the Harvest Line labour information service provided by MADEC in which WHMs have access to a range of jobs brokered by their accommodation provider. Hostels may also run a transport commuter service to ferry the WHMs from their jobs around Mildura. The fundamental role of accommodation providers as labour brokers in the WHM economy of Mildura means that hostel beds are rarely available to the holidaying WHM requiring a 2 or 3 day stay as most are sold on a weekly basis with the labouring WHM in mind.

Overall phase two of the study has re-confirmed the value of this segment to the tourism economy of Mildura, with average expenditure per WHM visitor estimated

to be over \$3900. WHMs are clearly, high spending, long staying visitors who are motivated to visit the destination almost exclusively to seek employment.

At the time of the second study, little specific tourism product had developed to cater for the market. This is despite clear opportunities to meet the needs of a market with interests in adventure tourism and indigenous tourism within an outback context. Informal discussions conducted with WHMs identified that, while they did not specifically come to Mildura for tourism purposes, they would be attracted to leisure activities if these were presented to them.

1.2.2 Market conditions 2009 vs 2010

During the 12 months between the conduct of phase one and two of the study (March 2009 – March 2010), the researchers observed both national and local market conditions with direct impacts on the WHM tourism economy in Mildura. Most notable was the increasing pressure on the WHM/Backpacker industry in Mildura, particularly the hostel network serving the market. This pressure has been found to originate from four sources; firstly the increase in the number of contractors flooding the market with cheap labour; secondly, the rise of illegal hostels in a variety of forms seeking to capitalise on the in-flow of WHMs to the region; thirdly, negative media reporting of the WHM experience in Mildura (O'Brien, 2010) and fourthly, a 6% decline in WHM arrivals nationally.

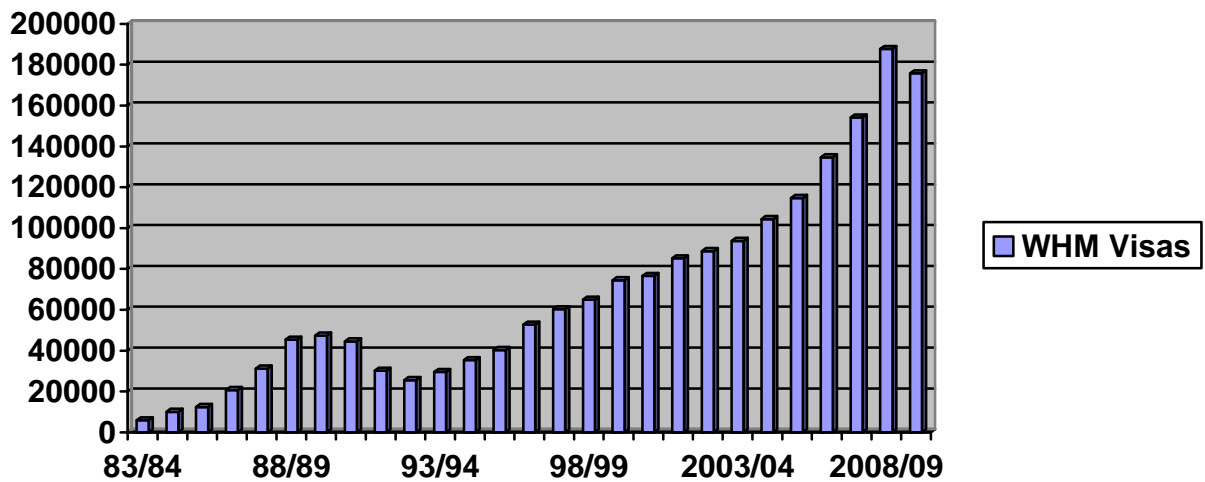
Phase one identified that backpackers sought Mildura chiefly as a work destination. This has encouraged the informal 'job search' activities of hostels which have linked WHMs and farmers in the region. However, interviews with hostel managers conducted during phase two of the study identified that the pool of backpacker jobs available through the hostel network was shrinking as labour contractors approached many farms directly. These contractors would source their employees from outside the backpacker/WHM market and informal advice suggested that such workers were paid significantly less than WHMs for the same work. In effect, the pool of available 'backpacker jobs' in and around Mildura appeared to have decreased in 2010 as increasing numbers of contractors entered the labour

provision market. The loss of these jobs to the hostel network has severely impacted the business model on which much of Mildura’s hostel industry is dependent.

In addition, in contrast to the growth in the number of WHM visas that had been issued in previous years, 2009/10 saw a decline of 6.4% or just over 12,000, with the key markets of Ireland and the UK down 35% and 7.8% respectively. On the positive side, the French market increased by 11.7% or some 1900 visas (Figure 1 & Table 1). Notable growth can also be observed out of the smaller markets (under 10,500 visitors) such as Taiwan (+10%) Hong Kong (+37%), Italy (+18%), Norway (+27%) and Estonia (+11%) (Table 1).

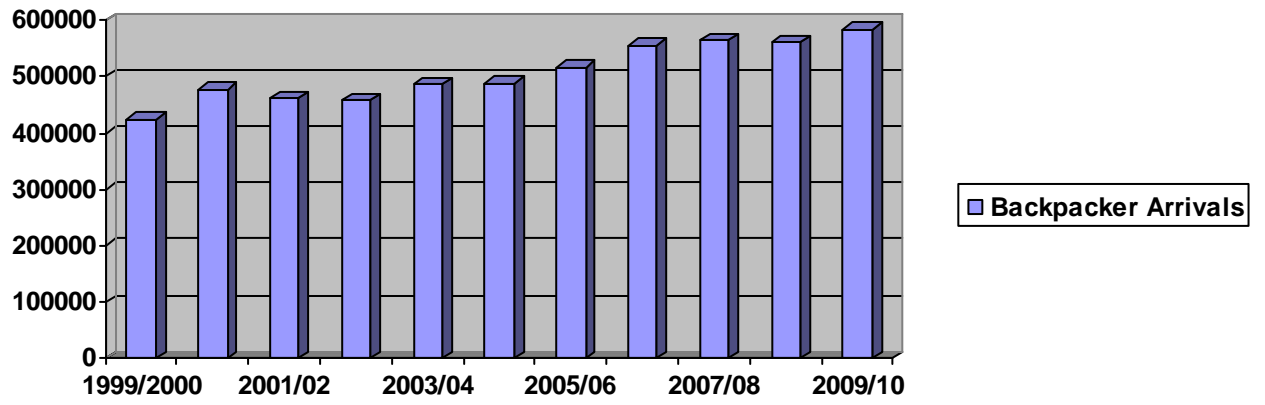
Over 2008/9 – 2009/10 backpacker numbers to Australia showed a small increase to over 583,000, with WHMs accounting for approximately 30% of the market in 2009/10 (see Figure 2).

Figure 1: WHM Visas issued 1983/84 – 2009/10



(Source: Department of Immigration and Citizenship)

Figure 2: Backpacker Arrivals 1999/2000 – 2009/10



(Source: Tourism Research Australia: Superweb)

Table 1. Australian WHM visas issued 2007/2008 - 2009/2010*(Source: Department of Immigration and Citizenship, 2008, 2009, 2010)*

	Country	2007/08	2008/09	2009/10
1	United Kingdom	34,147	40,182	37,056
2	Korea	32,629	39,506	34,870
3	Germany	17,450	20,319	20,880
4	Ireland	17,119	22,786	14,833
5	France	11,013	16,250	18,172
6	Japan	10,605	9,324	8,089
7	Canada	8,089	8,737	8,217
8	Taiwan	6,132	9,240	10,188
9	Sweden	3,912	4,398	4,210
10	Holland	3,591	3,988	4,034
11	Italy	3,567	4,632	5,481
12	Hong Kong (SAR China)	1,533	2,715	3,713
13	Denmark	1,142	1,220	1,294
14	Belgium	977	1,223	1,298
15	Finland	928	1,060	997
16	Norway	694	727	925
17	Estonia	520	1,248	1,387
18	Malta	93	97	67
19	Cyprus	5	25	15
	Other	35	19	13
TOTAL		154,181	187,696	175,739

2.0 Key Research findings 2010

2.1 The Impact of WHMs on Mildura

- Mildura is clearly identified as a 'work' destination by the market with 97% (2009) and 95% (2010) of the sample visiting the town only to secure employment.
- On average the WHM visa holders in the sample were long stay visitors, planning to reside in Mildura in 2009 for 56 nights and in 2010 for 65 nights. The additional 9 nights stay in 2010 may be explained by the fact that given the impact on the global financial crisis on Australia, many backpackers were keen to stay longer in a job if they secured one.
- WHMs are estimated to make a significant contribution to the domestic economy of Mildura, spending in 2009 on average \$57.31 per night and \$60.95 in 2010. With an average stay of just under 8 weeks, each WHM in Mildura is estimated to be worth over \$3192 to the region in 2009. This value increases to \$3962 in 2010 for a stay of 65 nights.
- The majority of WHM expenditure in 2010 was spent within the local economy on accommodation (33.5%), food and drinks from supermarkets (16.1%), food and drinks from local cafes/restaurants (11.7%) and transport and petrol (13.3%).
- Expenditure on tours or activities is notably slight at 3.4%. Anecdotal observational evidence suggested that few if any 'backpacker style' leisure products were promoted to the segment within the hostel environment both in 2009 and 2010.
- The continued paucity of WHM travel to outlying regions is exhibited in the high percentage that stay only in Mildura (91.7% in 2009 and 88.8% in 2010)

with just 8.3% (2009) and 11.2% (2010) taking either a day or overnight trip beyond the city.

- Word of mouth via friends was the most important source of information on Mildura with 49.7% (2009) and 53.8% (2010) rating it as an important source. Interestingly 'the hostel' is increasingly taking on a more important role in providing information (23.7% in 2009, and 23.8% in 2010).

2.2 Who are the WHMs in Mildura?

- The sample of workers interviewed was primarily young with an average age in 2009 of 22.7 years. 76% were under 25 years of age. In 2010 the average age was slightly higher at 23.4, with 77.1 under 25. (*The average for all WHM visas issued being 69.5% under 25 years of age*)¹ The sample was also dominated by Europeans, with the UK, Germany, Ireland and France accounting for 76% of the total in 2009 and 68.6% in 2010. There was a notable decline in Irish and British WHMs in the region correlating with the general fall-off in visa entries from these source markets.
- Respondents' education level reflected a tendency to travel at the end of a completed course of education (secondary or tertiary) 60.1% in 2009 and 57.2% in 2010. However, over one third of the population (36.3% in 2009 and 37.6% in 2010) were 'career breakers' with a significant number having quit their job and a smaller proportion having taken leave without pay in order to travel.
- The desire to travel before taking on a career and other adult responsibilities was a strong motivation for the sample population of WHMs to leave home and go travelling (73.4% in 2009 and 63.1% in 2010). Significantly, 37.8% of the sample were motivated to take a WHM visa in response to the economic downturn at home, compared to only 18.3% in 2009.

¹ Department of Immigration. WHMs Issuance by Age, 2005/2006. Unpublished data.

2.3 Attitudes to work and the WHM visa

- Over one third (36.1% in 2009 and 32.2% in 2010) felt strongly that Australia's WHM visa offer was a significant inducement to take an extended trip from home.
- The opportunity to extend their WHM visa by an additional year through working in regional Australia appears to be a strong motivation amongst the sample with 66% intending to do so in 2009 and 2010. In addition, a further 15% of those surveyed had already applied for a second WHM visa in 2009 and 11% in 2010. Thus, in 2009 a total of 81% of the WHMs in the sample had either already applied for a second visa or expressed a desire to do so (77.1% in 2010). This finding indicates that the lure of a second visa continues to encourage backpackers to seek work in Mildura and regional destinations stimulating significant visitor dispersion.
- Almost three quarters of the survey felt strongly that the WHM provided a good way to *'experience more of the country'* than if they had arrived as a tourist (73.4% in 2009 and 80.4% in 2010). The WHM visa also *'enabled a closer experience of the Australian lifestyle'* (69.2% in 2009 and 76.6% in 2010).
- There was continued strong support for the statement that this form of travel was beneficial to personal development (71.6% in 2009 and 72.5% in 2010) and that it permitted maximum traveling freedom (71% in 2009 and 72% in 2010).
- The *'social contacts'* afforded by WHM travel was identified as important as over three quarters of the survey believed it was *'a good way to meet other travellers'* (75.7% in 2009 and 81.7% in 2010). Almost two thirds (62.8% in 2009 and 64% in 2010) were also strongly motivated by the *'good party atmosphere'* provided by travelling in this form.

- Overall, a mix of information sources were used to find work. *'The hostel'* proved to be the most popular with 57.1% of the sample in 2009 and 60.1% in 2010. In addition, 46.4% of respondents in 2009 and 48.6% in 2010 directly approached employers for work. Users of the Australian Government's 'Harvest jobs' website to source work comprised 44% (2009) and 40.7% (2010) of the survey.
- A number of WHMs complained that there was not enough work available for them in the Mildura region causing them to have to wait for jobs to come up. This was viewed as unnecessary added expenditure in living costs experienced in a destination which is perceived as not having any real tourism attraction for the market.
- Concerns were raised equally in 2009 and 2010 about some hostel operators providing faulty information to WHMs regarding the availability of work in a bid to attract them to their accommodation.
- During their time in Australia WHMs are clearly adaptable employees with many undertaking not just manual labour/fruit picking jobs, but also 'bar/retail/café' work and general 'sales' work. In considering their interest in future jobs, 64% (2009) and 56% (2010) of WHMs were interested in further fruit picking, while 48% (2009) and 52% (2010) were interested in bar or retail work respectively.
- Career based professional work was undertaken by just 4.8% of the WHMs surveyed in 2009 and 5.1% in 2010. However it is significant that around one fifth of WHMs expressed interest in undertaking this kind of work in future (26% in 2009 and 19% in 2010).
- Almost one third of the sample of WHMs (31.4%) would consider applying for permanent residency in Australia as a result of their experience in 2009. This figure increased to 38.4% in 2010.

2.4 Travel Patterns in Australia

- The researchers identified that WHMs segment destinations in Australia into three sub categories according to their primary motivation to visit; (a) work, (b) work/leisure or (c) pure leisure. WHM behaviour in the destination, and therefore their direct impact, is an area worthy of future research.
- WHMs follow traditional backpacker routes around Australia with the East Coast states of Victoria, NSW and Queensland dominating their intended visitation patterns.
- The average expected length of stay of the WHMs sample is significantly higher than the average stay for all backpackers at 365 nights in 2009 and 331 nights in 2010 compared to around 73 nights for all backpackers in Australia in 2009. (It should be noted that the strong interest in applying for the additional 'WHM extension' year in Australia increases the average).
- There is an indication that WHMs stimulate additional visitation to Australia through VFR. Almost half (47% in 2009 and 35.5% in 2010) claimed that they had been visited by friends or relatives whilst on their WHM visa during their stay.

3.0 Mildura Working Holiday Makers Result Tables 2009-2010

3.1 Demographics

3.1.1 Respondent's Nationality

Nationality	Mildura 2009 * N = 171	Mildura 2010* N = 214
<i>United Kingdom</i>	28.0	23.8
<i>Germany</i>	19.0	17.3
<i>Ireland</i>	16.7	12.1
<i>France</i>	11.9	15.4
<i>Italy</i>	4.8	4.2
<i>Sweden</i>	4.2	5.6
<i>Canada</i>	4.2	4.2
<i>South Korea</i>	2.4	2.3
<i>Belgium</i>	2.4	0.9
<i>Netherlands</i>	1.2	0.0
<i>Hong Kong (China)</i>	1.2	0.0
<i>Estonia</i>	1.2	3.7
<i>USA* (Work & Travel Visa)</i>	1.2	1.4
<i>Others</i>	1.8 (<i>Japan, Taiwan, Norway</i>)	9.1 Denmark, Finland, Thailand, Japan, Taiwan

3.1.2 Age of respondents

Age Category	Mildura 2009	Mildura 2010
<i>18-19</i>	10.6	8.4
<i>20-21</i>	24.8	24.7
<i>22-23</i>	27.9	21.5
<i>24-25</i>	21.3	22.4
<i>26-27</i>	8.9	10.3
<i>28+</i>	6.6	12.6
Average Age	22.7	23.4
<i>Those 26+</i>	15.5	22.9

3.1.3 Gender

Gender	Mildura 2009	Mildura 2010
<i>Male</i>	62.7	59.3
<i>Female</i>	37.3	40.7

3.1.4 Education Level

Highest level attained	Mildura 2009	Mildura 2010
<i>High School (Incomplete)</i>	2.4	6.1
<i>High School (Complete)</i>	43.8	35.0
<i>Trade Diploma</i>	10.1	15.9
<i>University Degree (Incomplete)</i>	7.7	9.8
<i>University Degree (Complete)</i>	33.0	28.0
<i>Post Graduate</i>	3.0	5.2
<i>Total</i>	100%	100%

3.1.5 Most recent occupation

Occupation	Mildura 2009	Mildura 2010
<i>Student (High school)</i>	17.8	22.4
<i>Student (University)</i>	16.6	16.8
<i>Tradesperson</i>	11.8	15.4
<i>Professional</i>	16.6	15.4
<i>Labourer</i>	5.9	9.8
<i>Office Employee</i>	20.1	18.7
<i>Other</i>	11.2	1.4

3.1.6 How they took the time off to travel

Traveller Category	Mildura a 2009	Mildura 2010
<i>High School Gapper</i>	29.1	29.1
<i>University Gapper</i>	31.0	28.1
<i>Career Breaker (Quit job/ leave without pay)</i>	36.3	37.6
<i>Unemployed</i>	3.6	5.2

3.2 Travel Characteristics

3.2.1 Number of previous visits to Australia

Number of Visits	Mildura 2009	Mildura 2010
<i>None (First time visitor)</i>	88.2	80.8
<i>Once</i>	8.9	14.0
<i>Twice or more</i>	2.9	5.2

3.2.2 Length of stay in Australia

The expected time the Mildura based WHMs will spend in Australia was on average 365 nights in 2009 and 331 nights in 2010.

3.2.3 Major stopover destinations prior to Australia (*% spent at least a night in*)

Country	Mildura 2009	Mildura 2010
<i>None (Flew directly to Aust)</i>	35.5	41.6
<i>Thailand</i>	11.8	15.4
<i>Singapore</i>	9.5	6.1
<i>Hong Kong/China</i>	5.9	6.5
<i>New Zealand</i>	5.3	5.1
<i>USA</i>	5.3	3.3
<i>Indonesia</i>	4.1	2.3
Others	22.6 (<i>inc Malaysia, Fiji, South Korea, Dubai, India, Japan, Vietnam</i>)	19.7 (<i>inc Fiji, Japan, South Korea, Vietnam, Malaysia, India, Dubai</i>)

3.2.4 Point of arrival in Australia

City	Mildura 2009	Mildura 2010
<i>Sydney</i>	64.3	47.7
<i>Melbourne</i>	16.1	28.0
<i>Brisbane</i>	10.1	9.3
<i>Perth</i>	4.8	10.7
<i>Cairns</i>	3.0	2.3

<i>Adelaide</i>	1.2	0.0
<i>Darwin</i>	0.6	1.4

3.2.5 Anticipated travel destinations while in Australia (spend at least one night) Estimated percentage of their total trip they will spend in each state (average)

**NB: For Mildura, Victoria = 100% as the survey was completed there*

<i>State</i>	Mildura 2009	Mildura 2010
<i>VIC</i>	100%	100%
<i>NSW</i>	97.0	83.6
<i>QLD</i>	90.4	80.4
<i>SA</i>	69.9	56.1
<i>WA</i>	64.8	50.9
<i>NT</i>	64.0	46.7
<i>TAS</i>	41.8	36.9
<i>ACT</i>	36.4	29.9

3.2.6 Forms of Transport used in Australia (to travel between destinations)

Transport type	Mildura 2009	Mildura 2010
<i>Private car/van (purchased)</i>	32.1	23.4
<i>Private car/van (friends)</i>	26.8	14.5
<i>Rental Car</i>	22.0	17.8
<i>Backpacker Campervan (Rented)</i>	16.7	22.9
<i>Bus/Coach</i>	75.0	71.5
<i>Air</i>	67.3	58.9
<i>Regional Train</i>	38.7	34.1
<i>Backpacker Tour bus</i>	16.7	11.7
<i>Boat/Ferry</i>	16.7	11.7

3.2.7 Types of accommodation used in Australia

Accommodation Type	Mildura 2009	Mildura 2010
<i>Backpackers Hostel*</i>	99.4*	99.1
<i>Camping/Tent</i>	39.3	31.8
<i>Rented House/Apartment</i>	35.1	36.0
<i>Caravan Park</i>	29.8	28.5
<i>Motel/Hotel 1-3 star</i>	16.7	16.8
<i>Hotel/Resort 4-5 star</i>	6.0	7.0
<i>Friends/Family house/apartment</i>	32.1	27.6
<i>Campervan</i>	16.7	20.1
<i>Accommodation provided by employer</i>	16.1	9.8
* Surveys were completed in mainly backpacker accommodation		

3.3 Travel Characteristics in Mildura

3.3.1 Length of stay in Mildura

	Mildura (2009)	Mildura (2010)
Length of Stay	55.7	65.0

3.3.2 Why did they decide to come to Mildura?

Motivation to visit Mildura	Mildura 2009	Mildura 2010
<i>To look for Work</i>	97.0	94.9
<i>For leisure</i>	3.0	0.9
<i>VFR</i>	0.0	4.2

3.3.3 Current employment situation in Mildura.

Currently working?	Mildura 2009	Mildura 2010
<i>Yes</i>	81.1	79.0
<i>No (looking for work)</i>	14.8	14.5
<i>No (Not looking for work)</i>	4.1	6.5

3.3.4 Information sources used to find out about Mildura (% useful/highly useful)

Information Source	Mildura 2009	Mildura 2010
<i>a) 'Word of mouth' advice from friends/fellow travellers.</i>	49.7	53.8
<i>b) Travel guidebook(s).</i>	18.9	21.5
<i>c) Tourist office information (outside of Mildura)</i>	9.5	14.9
<i>d) Information sourced at a hostel</i>	23.7	23.8
<i>e) Information from the net site: www.backpackvictoria.com. OR visitvictoria.com or visitmelbourne.com</i>	11.8	10.7
<i>f) Information sourced from friends via social networking sites (eg: Facebook, MySpace)</i>	15.4	20.6
<i>g) Information from the tourist information centre in Mildura</i>	13.0	16.3
<i>h) Information from the Mildura Tourism website</i>	Not asked	12.1
<i>i) Information from the Australian Harvest Line website</i>	Not asked	38.8

3.3.5 Activities participated in (and participation intention) during their Mildura stay

Activity	Mildura a 2009	Mildura 2010
<i>Visited a pub</i>	72.0	75.7
<i>Went to a nightclub</i>	58.9	64.5
<i>Swam in the Murray river</i>	59.5	51.9
<i>Went swimming at the Mildura pool</i>	48.8	39.3
<i>Visited at a restaurant</i>	52.4	49.5
<i>Went to the movies</i>	36.3	42.5
<i>Visited a winery</i>	26.8	24.8
<i>Visited Perry Sand Hills (NSW)</i>	6.0	4.2
<i>Visited Broken Hill</i>	6.0	4.2
<i>Rented a Houseboat</i>	3.6	4.2
<i>Visited Mungo National Park</i>	7.7	10.7
<i>Went water Skiing on the Murray</i>	5.4	11.2

3.3.6 Travel patterns during their stay in Mildura

Have you travelled outside of Mildura during your stay?	Mildura a 2009	Mildura 2010
<i>No (Stayed in Mildura)</i>	91.7	88.8
<i>Day trip outside of Mildura</i>	5.3	4.2
<i>Overnight trip** Mainly to Melbourne</i>	3.0	7.0

3.3.7 Expenditure pattern in Mildura 2010

<i>Expenditure</i> (Average amount spent 'yesterday' (\$A))	<i>Mildura 2010</i>
a) Accommodation: <i>(Basic charge you paid for bed/room only)</i>	20.46
b) Entertainment: <i>(eg: admission charges, performances, movies,</i>	7.52

<i>nightclub entrance)</i>	
c) Tours and activities	2.09
d) Food & Drink purchased from restaurants, cafes (and bars/nightclubs)	7.15
e) Food & Drink purchased from supermarkets/ grocery stores <i>(Includes take away Alcohol</i>	9.80
f) Shopping: <i>(Souvenirs, clothes, other consumer goods, internet and phone charges)</i>	5.80
g) Transport & Petrol	8.13
TOTAL	60.95

3.3.8 Estimated spend in Mildura

<i>EXPENDITURE</i>	<i>Average Length of stay</i>	<i>Average spend per day</i>	<i>Estimated spend (per WHM)</i>
<i>Mildura 2009</i>	<i>55.7 Nights</i>	<i>\$57.31</i>	<i>\$3192</i>
<i>Mildura 2010</i>	<i>65 Nights</i>	<i>\$60.95</i>	<i>\$3962</i>

3.4 Working in Australia

3.4.1 What type of work have you done in Australia so far?

Type of work	Mildura 2009% (undertaken so far in Australia)	Mildura 2010 % (undertaken so far in Australia)
1. Manual labour, eg: Fruit picking, farm work , cleaning, painting, packing	94.6*	93.0
2. Administrative and clerical work. Eg Secretary, data entry	11.3	6.5
3. Career based semi professional work. Eg: Market research, book keeping	4.2	1.9
4. Bar/retail/café work. Eg: In pubs, restaurants, hotels	23.2	19.2
5: Sales/promotions Eg. Sales assistant in a shop, promotions at events	14.3	10.7
6. Professional work linked to my existing career.	4.8	5.1
7. studying at a University/ College	Not asked 2009	0.5
8. Undertaking an English course at a language school	Not asked 2009	2.3
9. 'WOOFING'	Not asked 2009	7.0
10. Other		2.8
* Note as Mildura is a fruit picking destination, this result is high		

3.4.2 What type of work are you interested in, in the future?

Type of work (interested in doing in the future)	Mildura 2009%	Mildura 2010 %
1. Manual labour, eg: Fruit picking, farm work , cleaning, painting, packing	63.7	55.6
2. Administrative and clerical work. Eg Secretary, data entry	17.9	16.4
3. Career based semi professional work. Eg: Market research, book keeping	10.1	12.6
4. Bar/retail/café work. Eg: In pubs, restaurants, hotels	47.6	51.4
5: Sales/promotions Eg. Sales assistant in a shop, promotions at events	20.8	17.4
6. Professional work linked to my existing career.	26.2	19.2
7. studying at a University/ College	Not asked	15
8. Undertaking an English course at a language school	Not asked	7.5
9. 'WOOFING'	Not asked	24.3
10. Other	Not asked	1.4
* Note as Mildura is a fruit picking destination, this result is high		

3.4.3 How WHMs searched for work

Search Method	Mildura 2009	Mildura 2010
1. Via registering with an employment agent. Eg. GN jobs	32.7	25.7
2. Via a general internet site eg: Seek.com	33.9	44.4

3. <i>Face to face with employers (walk in)</i>	46.4	48.6
4. <i>Via speaking with other WHMs in Australia</i>	34.5	27.6
5. <i>Via local friends</i>	31.0	32.2
6. <i>Via a hostel</i>	57.1	60.1
7. <i>Called a Harvest hotline number</i>	35.7	30.4
8. <i>Australian Government Harvest job site</i>	44.0	40.7
9. <i>Via social networking site group</i>	Not asked 2009	7.9
10. <i>Via an internet search engine</i>	Not asked 2009	18.7

3.4.4 Attitude to working in Australia. Percentage (Agreed or strongly agreed)

Attitude comment	Mildura 2009	Mildura 2010
a) <i>It is a good way to experience parts of the country I wouldn't normally see as a tourist.</i>	70.4	79.0
b) <i>I found it easy to SEARCH for a job in Australia</i>	34.9	35.9
c) <i>I found it easy to FIND a job in Australia.</i>	25.5	21.9
d) <i>Australia is well set up to cater for WHM visa holders.</i>	32.6	31.3
e) <i>I believe the pay I get as a WHM in Australia is adequate for the work I do.</i>	27.2	24.7

f) <i>I would advise my friends from home to come on a WHM visa to Australia</i>	72.7	63.6
g) <i>I would consider applying for permanent residency in Australia in the future</i>	31.4	38.4
h) <i>Right now there are too many backpackers looking for work</i>	Not asked 2009	
i) <i>I would consider undertaking a period of further study in Australia after my WHM visa</i>	Not asked 2009	34.6
j) <i>I would be interested in migrating to Australia in the future</i>	Not asked 2009	24.1
k) <i>I would be interested in developing business links between my country and Australia in the future</i>	Not asked 2009	37.0

3.4.5 What future links would you like to establish with Australia?

FUTURE LINKS	Mildura 2009	Mildura 2010
l) <i>I would consider applying for permanent residency in Australia in the future</i>	31.4	38.4
m) <i>I would consider undertaking a period of further study in Australia after my WHM visa</i>	Not asked 2009	34.6
n) <i>I would be interested in migrating to Australia in the future</i>	Not asked 2009	24.1

<i>o) I would be interested in developing business links between my country and Australia in the future</i>	Not asked 2009	37.0
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3.4.6 Interest in applying for a second WHM visa

Interest in a second WHM visa	Mildura a 2009	Mildura 2010
<i>Yes I would like to</i>	65.7	65.9
<i>Yes, I already have</i>	15.4	11.2
<i>No</i>	18.9	21.0
<i>Total who have already or intend to apply for a second WHM visa</i>	81.1%	77.1 %

3.4.7 Will friends and relatives visit?

Mildura 2009	Yes – 47.0%	No – 53.0%
Mildura 2010	Yes – 35.5%	No – 64.5%

3.5 Motivation & Information Sources

3.5.1 Motivation to leave home and go travelling. (Percentage Agreed or strongly agreed)

Motivation Statement	Mildura 2009	Mildura 2010
<i>a) In my country travelling for an extended time is regarded as a positive thing to do for young people (aged 18 – 31)</i>	53.2	50.9
<i>b) As I have travelled a lot previously, spending an extended time away from home was not a concern to me.</i>	39.1	33.6
<i>c) Within my group of friends, travelling for an</i>	31.4	33.2

<i>extended time away from home is regarded as a common thing to do.</i>		
<i>d) I wanted to go travelling before taking on the responsibilities associated with adult life.</i>	73.4	63.1
<i>e) I was able to negotiate leave from my current job to go travelling, so I have the opportunity to return to that job when I return home.</i>	39.2	19.6
<i>f) I was influenced by the promotion of WHM visas by the travel industry in my home country. Eg: STA Travel, Kilroy Travel</i>	12.4	22
<i>g) If Australia did not offer WHM visas I would not have taken an extended trip away from home.</i>	36.1	32.2

3.5.2 Information sources used to apply for a WHM visa to Australia.

(Percentage (Agreed or strongly agreed))

Information Source	Mildura 2009	Mildura 2010
<i>(a)Information gained from the Tourism Australia internet site on working holidays in Australia. www.work.australia.com</i>	12.5	27.5
<i>b) Information gained from internet blogs I read written by ravelers on working holidays in Australia</i>	29.0	31.3
<i>c) 'Word of mouth' advice from friends/other ravelers who have been on a working holiday in Australia.</i>	59.2	57.9
<i>d) Travel stories I have read about working holidays in Australia, in newspapers, magazines</i>	33.7	31.8
<i>i) Brochures/information I saw at a travel agent on working holidays in Australia</i>	18.4	19.6
<i>j) Information I gained from social networking sites (eg: Facebook)</i>	19.0	19.1

<i>k) Advice from Australian friends that I have met.</i>	<i>31.4</i>	<i>27.5</i>
<i>l) Information I gained from reading a guidebook on Australia</i>	<i>22.5</i>	<i>21.9</i>
<i>m) Information I gained from an Australian government website (e.g: Department of Immigration)</i>	<i>Not asked</i>	<i>24.3</i>
<i>n) Information I obtained from my university campus (e.g: Student expo)</i>	<i>Not asked</i>	<i>7.9</i>

3.5.3 Motivation to come to Australia as a WHM. Percentage (Agreed or strongly agreed)

<i>Motivation to come to Australia as a WHM</i>	<i>Mildura 2009</i>	<i>Mildura 2010</i>
<i>(a) It is a form of travel that lets me experience more of the country than just being a tourist.</i>	<i>73.4</i>	<i>80.4</i>
<i>(b) It is a cost effective (cheap) way to work, travel and see the country</i>	<i>69.8</i>	<i>59.3</i>
<i>(C) It is a good way to meet lots of other travellers</i>	<i>75.7</i>	<i>81.7</i>
<i>(D) It is a good way to experience the Australian way of life.</i>	<i>69.2</i>	<i>76.6</i>
<i>(E) I wanted to travel to avoid the economic situation at home</i>	<i>18.3</i>	<i>37.8</i>
<i>(F) Working in Australia will be beneficial to my resume (CV) and future career</i>	<i>37.3</i>	<i>43.0</i>
<i>(G) It's a good party atmosphere traveling this way.</i>	<i>62.8</i>	<i>64.0</i>
<i>(H) It's a good way to take an extended break from my career/life at home</i>	<i>69.8</i>	<i>67.8</i>
<i>(I) I wanted to improve my English language</i>	<i>67.7</i>	<i>69</i>

<i>skills (Not Applicable if English was their native language)</i>		
<i>(J) I wanted to travel and Australia was a country where I had the opportunity to work to earn money while I traveled so I could afford to leave home.</i>	50.8	62.1

3.5.4 Attitude to traveling in Australia as a WHM Percentage (Agreed or strongly agreed)

<i>Attitude to Travelling</i>	<i>Mildura 2009</i>	<i>Mildura 2010</i>
<i>a) It's a form of travel that permits maximum freedom and flexibility in my plans.</i>	71.0	72.0
<i>b) It is a good way to meet and interact with local Australian people</i>	52.1	51.4
<i>c) It is a good way to meet lots of other 'like minded' people.</i>	69.8	72.0
<i>d) I feel that a Working Holiday in Australia is beneficial for my overall personal development.</i>	71.6	72.5

3.5.6 Use of Information Technology. % used while a WHM

Information Technology	Mildura 2009	Mildura 2010
<i>Updating trip photos on social networking sites. eg. Facebook</i>	84.5	79.0
<i>Emailing friends on a regular basis</i>	74.4	67.3
<i>Communicating with friends on instant</i>	57.1	49.5

<i>messaging. Eg. MSN</i>		
<i>Writing a blog about my trip</i>	18.5	21.5
<i>Calling friends at home on V.O.I.P (eg: Skype)</i>	38.7	39.7
<i>Emailing photos of my trip to friends at home</i>	41.7	42.1
<i>Joined a social networking site group on Australia</i>	6.0	6.1
<i>Calling friends via a normal phone</i>	53.6	45.3
<i>Using 'calling cards' or vouchers to call home</i>	48.8	28.5
<i>Sending a SMS to friends at home</i>	NA	61.2
<i>Contributed to on-line forums (e.g: Lonely Planet, Trip Advisor)</i>	Not asked	3.3
<i>Reviewed a hostel online</i>	Not asked	12.1
<i>Accessed the internet via I-Phone or Mobile phone</i>	Not asked	11.7
<i>Posted a travel video on the web (e.g: you-tube)</i>	Not asked	5.6
<i>Sent or received e-mails or picture messages via mobile phone</i>	Not asked	17.3
<i>Read the newspaper online from home at least once a week</i>	Not asked	23.4

3.5.7 Where did you hear about the option for a second 12 month WHM visa in Australia?

Information source	Mildura 2010
I read about it in the media at home	17.8
Via the Australian Government website	31.8
From friends who had been to Australia	48.1
From my guidebook	7.5

From my travel agent	7.9
From an internet research engine	8.4
Via promotional material I saw at home	3.7

3.5.8 Which information sources have you been using to plan your trip after arriving in Australia?

Information source	Mildura 2010
Advice from other travelers	75.5
Guidebook	50.5
Backpacker travel agency/ centre	29.4
Internet search engine	57.5
Visitor information centre	27.1
Free backpacker magazine	25.7
Tourism Australia website	13.6
Tourism Victoria/ Backpacker Victoria website	6.1
Other Government tourism website	7.5
Social networking website	11.2
Hostel review internet site	7.0

3.5.9 What desire do you have to leave the country and visit one of the following destinations for a short break and then return to Australia?

Destination	Mildura 2010
a) New Zealand	65.5
b) Fiji (Pacific Islands)	44.8
c) Bali (Indonesia)	45.4
d) Malaysia	24.8
e) Thailand	51.8
f) Vanuatu (Pacific Islands)	16.4

3.5.10 Which of the following destinations have you spent a night during your stay in Australia?

Destination	Mildura 2010
1. Melbourne	86.4
2. Sydney	81.8
3. Brisbane	63.1
4. Gold Coast	55.1
5. Sunshine Coast	41.1
6. Fraser Islands/ Hervey Bay	42.5
7. Airley B./ Whithsundays	31.8
8. Townsville	27.6
9. Cairns	53.7
10. Port Douglas	16.8
11. Cape Tribulation	19.2
12. Darwin	31.8
13. Broome	18.2
14. Exmouth	8.3
15. Margaret River	14.5
16. Perth	34.6
17. Adelaide	47.2
18. Cooper Pedy	9.8
19. Alice Springs	35.5
20. Great Ocean Road	32.5
21. Newcastle	18.7
22. Byron Bay	56.1
23. Bundaberg	18.2
24. Hobart	16.8
25. Yarra Valley	7.9
26. Grampians	8.4
27. Wilson Promontory	1.4
28. Canberra	23.8

29. Kangaroo Island	18.2
30. Kununurra	7.5
31. Phillip Island	13.6

3.5.11 What have you enjoyed most about your stay in Mildura?

1. I can earn good money here	34.6
2. Socializing with other backpackers	71.5
3. The weather	38.8
4. The environment in the hostel	29.4
5. Swimming in the river	23.5
6. Travelling around the region	7.5

3.5.12 How could your stay in Mildura be improved?

1. Provide more information on finding jobs here	54.2
2. Have more things for backpackers to do in their time off	52.8
3. Improve the quality of backpacker accommodation	37.9
4. Locals should have a better attitude to backpackers	19.6
5. Employers should have a better attitude to backpackers	48.1

3.5.13 Would you recommend friends to come to Mildura? (2010)

Yes – 70.1 %

No – 29.9 %

3.5.14 What could be improved for Working Holiday Makers in Australia?

Improvement statement	Mildura 2010
a) The WHM visa works well as it is, don't change it	44.4
b) Provide more assistance for WHMs to find work	66.3
c) Reduce the number of days you have to spend working in regional Australia to qualify for a second visa to 60	61.7

d) Increase the upper age limit of the WHM visa to 35	57.0
e) Hand out fewer visas	33.2
f) Provide more information on how backpackers can find work	56.0
g) Improve the quality of “working hostel” accommodation	61.7
h) Increase the number of accommodation options for backpackers/ WHMs in regional working destinations	46.7
i) Make it possible to qualify for a second visa by working in jobs other than farm/ construction work (e.g: Retail/ café/ bar)	67.3
j) Automatically provide all WHMs with 2 year visa	52.8
k) Enable travelers who have completed one WHM visa to be able to return home and after at least 2 years out of Australia apply for a second visa	58.9
l) Make it possible to qualify for a second visa by undertaking volunteer work	69.1
m) Relax the eligibility rules for WHM visa in terms of allowing time spent in employment in metropolitan locations to count but only on value of 50% of the time spent in regional locations	43.0

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