

SOUTH PACIFIC Backpacker Market

STUDY REPORT 2014



South Pacific Tourism
ORGANISATION



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Pacific Regional Tourism Capacity Building Programme

SOUTH PACIFIC NICHE MARKET REPORT



BACKPACKING TOURISM

March 2014

South Pacific Tourism
ORGANISATION

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EXECUTIVE SUMMARY

Where do backpackers come from?

LARGEST backpacking and gap year markets to Australia: **UK, Germany**

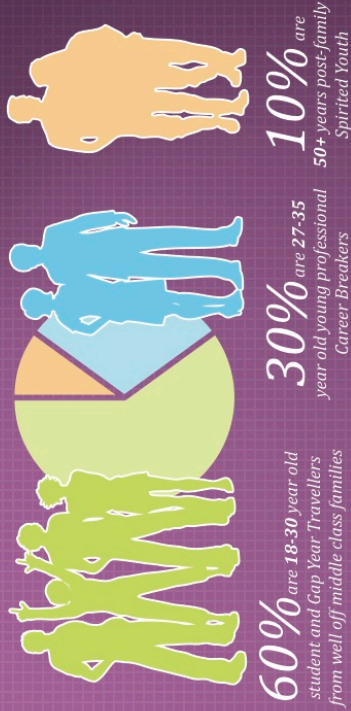


- Growth markets**
- Italy
 - China
 - Ireland
 - South Korea

What does backpacking involve?

- 1st Top South Pacific Destination: **Fiji**
- Average length of backpacker trip: **7-10 days**
- Average Cost: **Around AU \$2,000 (US\$ 1,900)**
- Preferred Accommodation: **Budget, locally owned, good value, flexible booking system**
- Preferred Local Transport and Activities: **Flexible passes for boat, buses**

Who goes backpacking?



Why is backpacking in the South Pacific special?

- Tropical paradise, great beaches
- Unusual destination
- Relaxing holiday destination after the working hard in Australia!
- Good backpacker scene (Fiji)
- Ease of access from Australia and New Zealand to Fiji and Samoa
- Other side of the world: for European backpackers in Australia - once in a lifetime opportunity to visit
- The warmth and friendliness of the people
- Cultural experience

EXECUTIVE SUMMARY

How do backpackers research their holidays?

- Internet research, Google searches
- Social media networks eg. Facebook, YouTube, TripAdvisor, Pinterest, Twitter
- Word of mouth recommendations from friends, peer group reviews
- Trade representatives eg. retail travel agents, gap year organisations

How do backpackers book their holidays?

- Direct with airlines and accommodation online
- Specialist backpacker agencies in Australia and New Zealand

Competing Destinations

- Australia** has appeal for its Working Holiday Visa
- Bali** is cheap and easily accessible
- Thailand** is cheaper and en route to and from Europe
- South America** is opening up as a cheap backpacker destination

Marketing to backpackers

- Sell the Experience, not just the beach
- Differentiate between South Pacific islands
- Tell the story of the place, the people, the lifestyle
- Destination marketing in source markets should include potential backpackers, eg. through school gap year fairs
- Engage visitors with social media, encourage reviews and feedback
- Produce webpages, guidebooks, and promotional materials in Asian languages.

Constraints

- Limited accessibility beyond Fiji, Vanuatu and Cook Islands
- Cost of air fares and local accommodation
- Lack of consumer and trade knowledge of the South Pacific beyond Fiji
- Lack understanding of the travel trade by local suppliers

Opportunities

- Develop a regional transport pass
- Be price competitive
- Provide easily accessible local information
- Co-ordinate product development regionally to encourage differentiation
- Support volunteering projects
- Train local suppliers to effectively promote themselves overseas

ACKNOWLEDGEMENTS

The authors would like to thank the numerous tour operators and travel businesses across Europe, North American, Japan, Australia and New Zealand who gave us their time and advice to assist us with this study and to enable us to understand their markets.

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ABBREVIATIONS

PNG	Papua New Guinea
RTO	Regional Tourism Organisations
RTW	Round the World
WHV	Working Holiday Visa



1. INTRODUCTION

Study Context

This study is one of a series of three market studies into major niche tourism markets: cultural heritage and historic tourism, backpacker and dive market segments.

Objectives

These market studies have been designed and carried out to provide practical and actionable market intelligence and guidance to South Pacific tourism operators wishing to penetrate these niche markets.

Methodology

The research for this study has involved extensive desk research and primary research with 80 tour operators and tourism businesses in Europe (UK, Germany, France, Italy, Sweden), North America (USA and Canada), Japan, Australia and New Zealand. A mixture of face-to-face and telephone interviews were conducted together with an online survey.

Study Limitations

The nature of backpacking as an independent segment of the tourism market means that there is little official data available. The research that has been done has focused on the school leaver gap-year market and on youth travel, including educational tourism, which are the more structured parts of the segment.

Definition of Backpacker Tourism

Backpacking is a form of low-cost, independent international travel. It includes the use of a backpack or other luggage that is easily carried for long distances or long periods of time; the use of public transport; inexpensive lodging such as youth hostels; a longer duration to the trip when compared with conventional vacations; and an interest in meeting the locals as well as seeing the sights. It is typically associated with young adults, who generally have fewer obligations and thus more time to travel. They also have less money to spend on hotels or private vehicles. It may include wilderness adventures or be limited to travel within settled areas.

Closely associated with 'backpacker tourism' is 'gap-year travel' where school leavers, university students, graduates and post-graduates or people taking a break from their career stay in a country for extended periods, often working on voluntary environmental and community projects.

Of importance in backpacking is a sense of authenticity. Backpacking is perceived as being more than a holiday, but a means of education. Backpackers want to experience the "real" destination rather than the packaged version often associated with mass tourism.

2. TOURISM TO THE SOUTH PACIFIC

What's In This Section?

- *This section provides an overview of tourism in the South Pacific in 2012. The same data is provided in each of the three niche market reports: backpacking, cultural heritage tourism and diving, to provide a context for each niche market.*

2.1 Tourism Performance in 2012

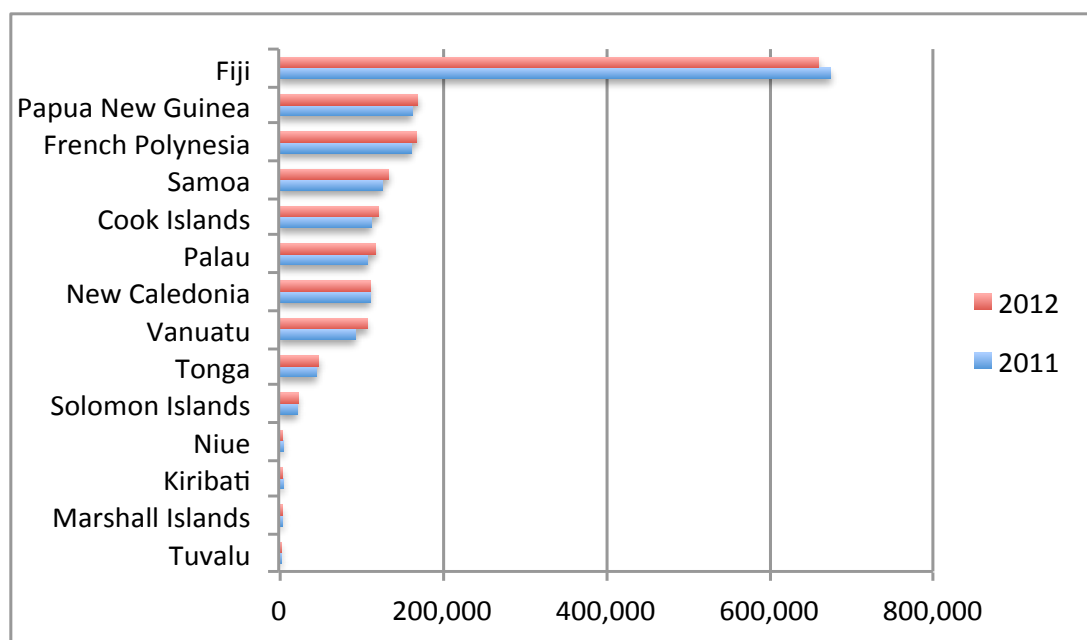
In 2012 the total number of international visitors to the South Pacific countries increased by 2.5%, compared to 2011. The five countries receiving the highest number of international arrivals, for all purposes, during 2012 were Fiji, Papua New Guinea, French Polynesia, Samoa and the Cook Islands.

Fiji continues to attract the largest number of visitors (660,600) although it saw a 2% drop during 2012. The disruption of international flights caused by cyclones Evans and Freda in December contributed to this decline. Other countries that saw a fall in arrivals were Niue (-17%) and Tuvalu (-15%).

The countries that experienced the largest percentage growth during 2012 were Vanuatu (15%), Palau (9%), Cook Islands (8%), Tonga (7%) and Samoa (5%).

In the first quarter of 2013, compared to the same period in 2012, visitor numbers to Fiji continued drop (5%). Samoa also saw a noticeable decline (10%) during the quarter, while Kiribati (39%), the Marshall Islands (23%) and Niue (21%) experienced the largest percentage increases in visitors.

Figure 1: International Arrivals to Pacific ACP and SPTO Countries



Source: SPTO

Figure 2: International Visitor Arrivals to Pacific ACP and SPTO member countries Quarter 1, 2012 and Quarter 1, 2013

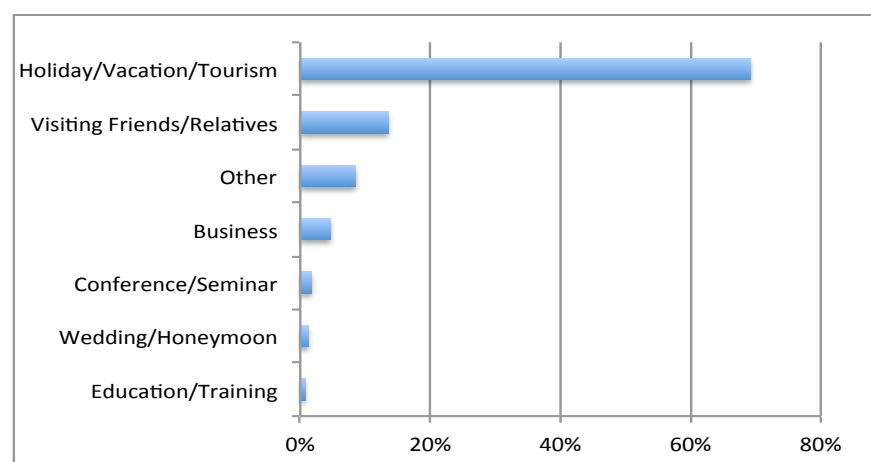
Country	2012 Q1	2013 Q1	Difference	% change 2012 to 2013
Fiji	136,421	129,591	-6,830	-5.0%
French Polynesia	34,836	36,248	1,412	4.0%
Palau	31,647	31,828	181	0.6%
Papua New Guinea	25,238	25,341	103	-0.4%
New Caledonia	25,732	24,289	-1,443	-5.6%
Samoa	25,935	23,297	-2,638	-10.2%
Cook Islands	20,567	20,618	51	0.3%
Vanuatu	19,798	19,520	-278	-1.4%
Tonga	7,913	8,050	137	1.7%
Solomon Islands	4,651	4,541	-110	-2.4%
Kiribati	1,202	1,655	453	38.5%
Marshall Islands	945	1,166	221	23.4%
Niue	660	798	138	20.9%
Tuvalu	238	247	9	3.8%
Total	335,783	327,189	-8,594	-2.6%

Source: SPTO, *Tourist Arrivals to Pacific ACP & SPTO Member Countries, Quarter 1, 2013*

2.2 Tourist Purpose of Visit

Holidays are the reason why 69% of visitors travel to the SPTO member countries, however this varies from country to country.

Figure 3: Purpose of Visit to SPTO member countries in 2012



Source: SPTO

Leisure travel accounts for more than 70% of visitors to the Cook Islands, Fiji, French Polynesia, Micronesia, Palau and Vanuatu.

In New Caledonia and Niue leisure is also the main motivation for visitors travelling to these countries, with around half of visitors coming on holiday.

Samoa attracts as many people visiting their family and friends as those who visit on for a holiday.

In Papua New Guinea, business and employment are the main reasons for visiting the country, with only around 20% of visitors travelling to the country for a holiday.

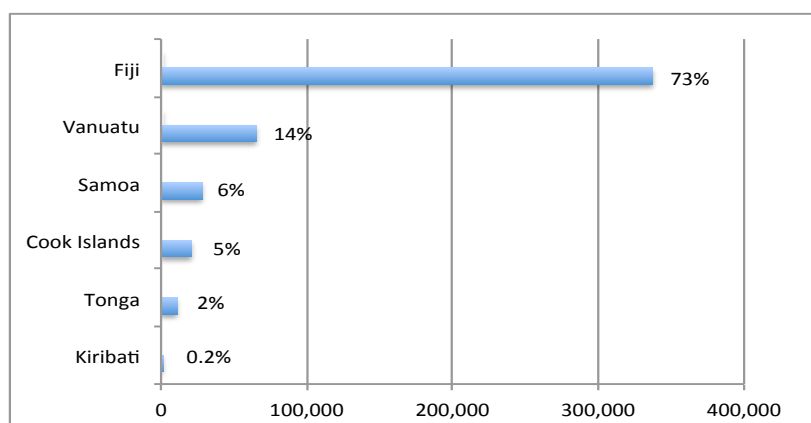
2.3 Source Tourism Markets and Arrivals to South Pacific Countries

The visitor arrivals by source market during 2012 are summarised in the charts below, highlighting the main South Pacific destinations for each source market included in this study.

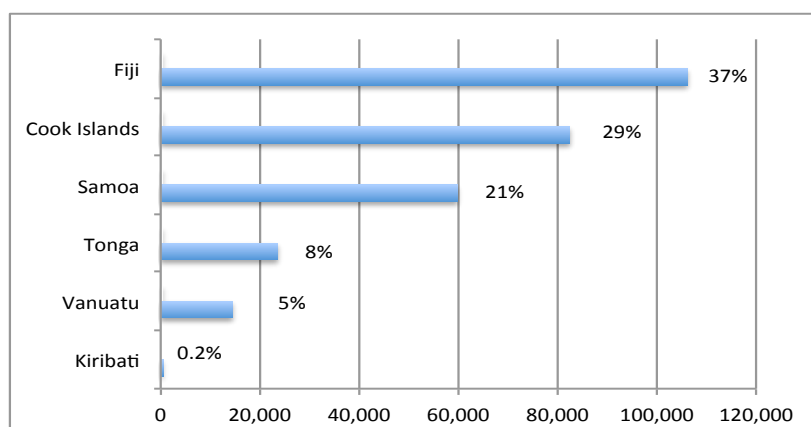
The breakdown of arrivals for the largest South Pacific leisure markets – the Cook Islands, Fiji, Kiribati, Samoa, Tonga and Vanuatu – are also illustrated below.

Arrivals from Key Source Markets

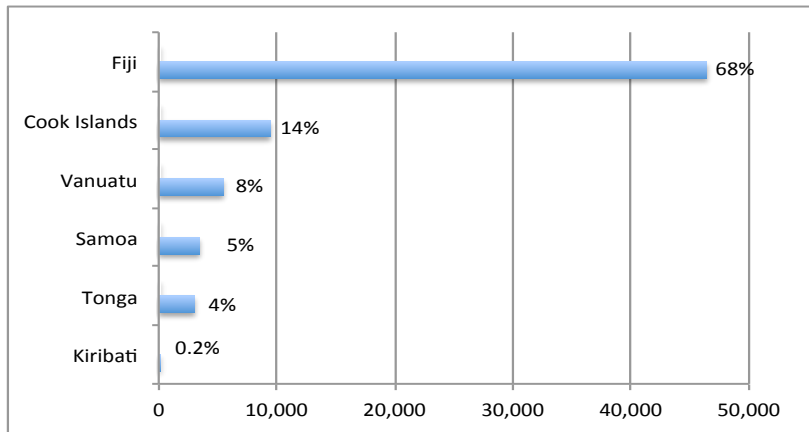
Arrivals from Australia



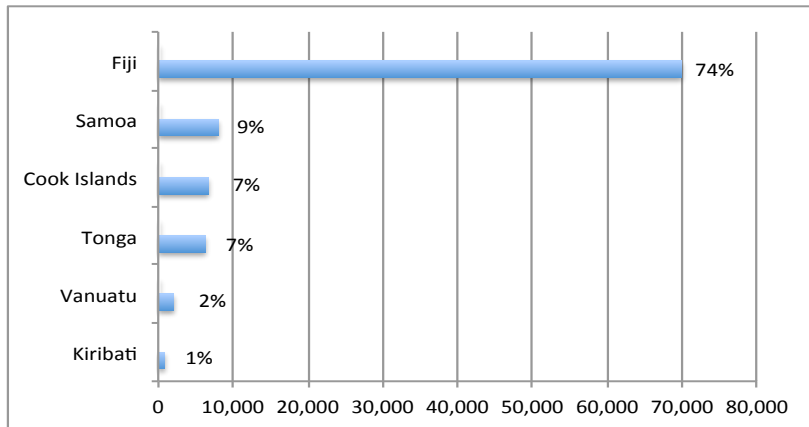
Arrivals from New Zealand



Arrivals from Europe

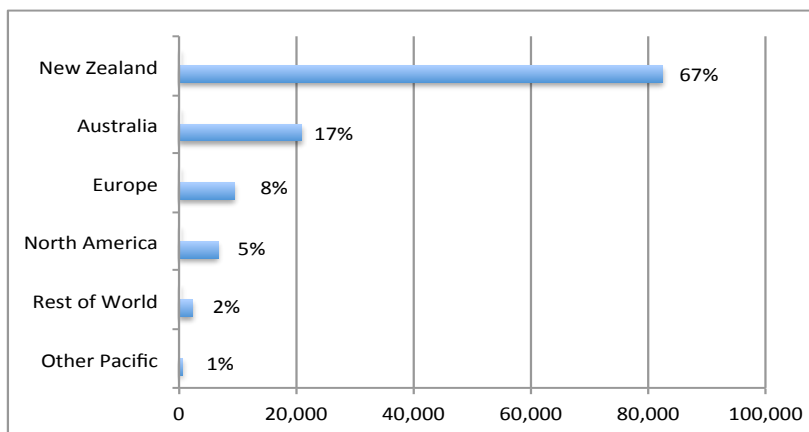


Arrivals from North America

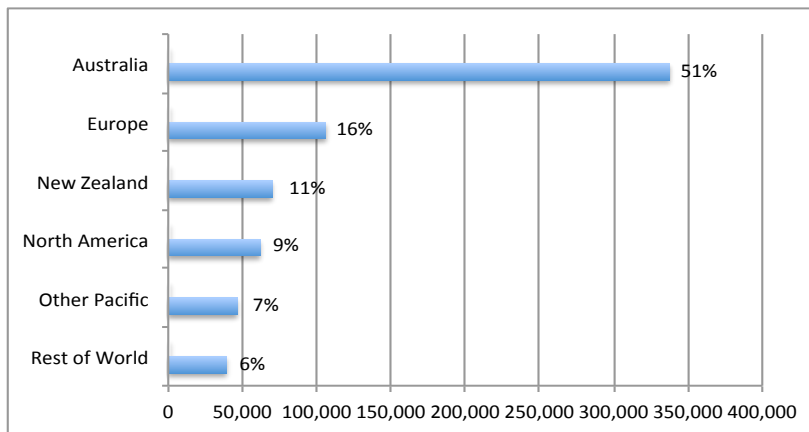


Arrivals to South Pacific Countries

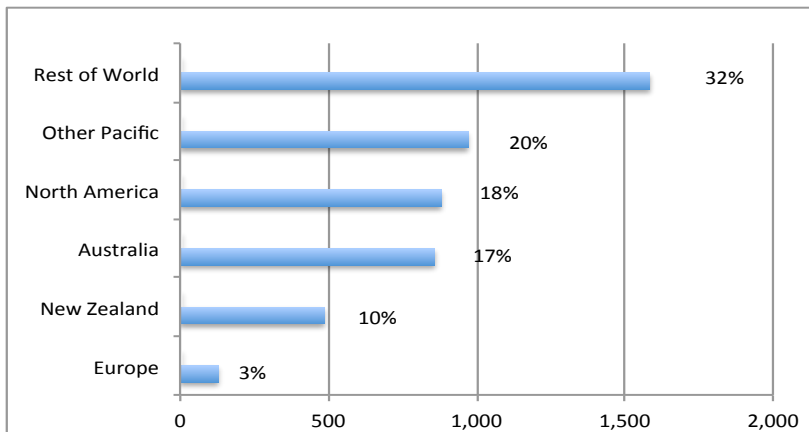
Cook Islands



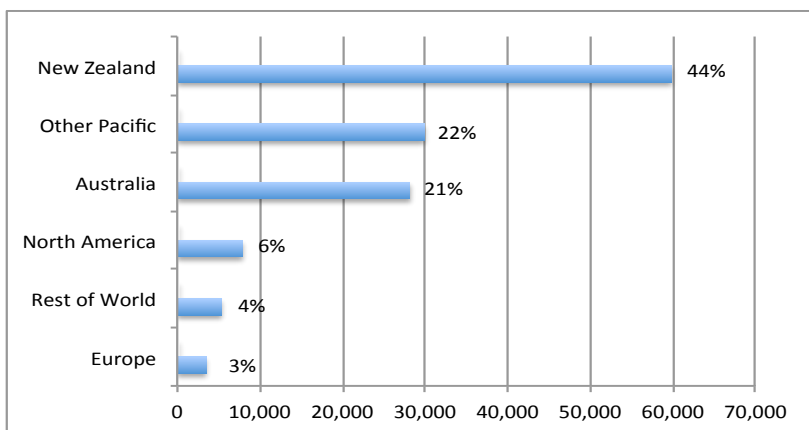
Fiji



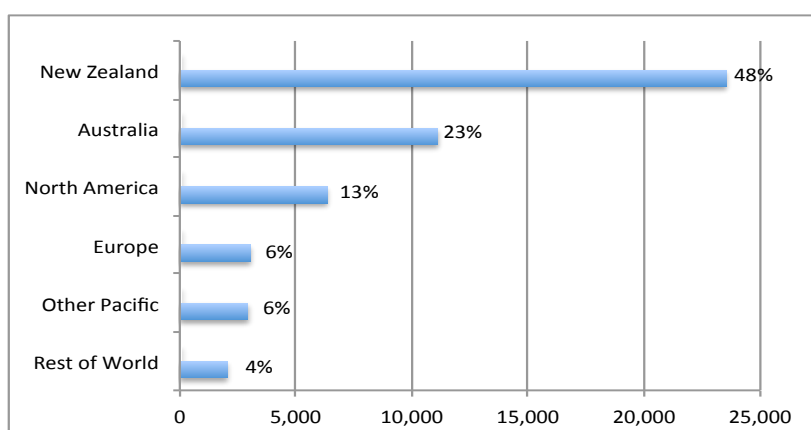
Kiribati



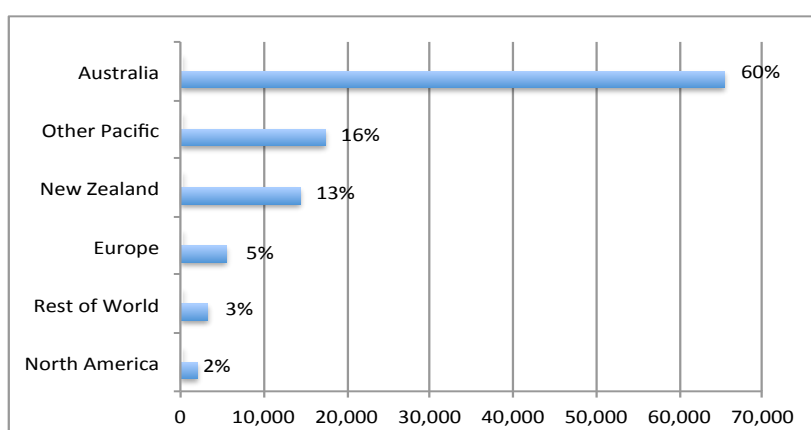
Samoa



Tonga



Vanuatu



2.4 Summary

- Holidaymakers account for 69% of all visits to the South Pacific, followed by visiting friends and relatives (14%).
- Fiji is the leading destination for international arrivals, particularly from North America (74%) and Australia (73%), followed by Europe (68%).
- After Fiji, tourists from New Zealand and Europe are most inclined to visit the Cook Islands (29% and 14% respectively) while Australians travel to Vanuatu (14%) and North Americans visit Samoa (9%).
- New Zealand tourists dominate the arrivals figures to the Cook Islands (67%), Tonga (48%) and Samoa (44%).
- Australians tend to travel to Vanuatu (60%), Fiji (51%) and Tonga (23%).
- As a destination that is more challenging to reach, Kiribati typically attracts visitors from the rest of the world (32%); just 27% are from Australia and New Zealand and 20% from the rest of the Pacific.

3. WHERE DO BACKPACKERS COME FROM?

What's In This Section?

- *How big is the backpacking market and how much is it worth?*
- *Which international markets do backpackers and gap year travellers come from?*

3.1 How Big is the Global Market?

In 2011 youth travel accounted for 196 million tourism arrivals worldwide, and its global economic value is predicted to rise from US\$173 billion in 2011 to US\$320 billion per annum by 2020.¹

Youth travel incorporates travel by 15 to 29 year olds for all purposes including visiting friends and relatives, undertaking working holidays and education. Young people travelling for these reasons may also spend some time backpacking, which in countries such as New Zealand accounts for around 7% of total arrivals and a higher proportion of expenditure.

The economic value of backpacking is mostly derived from the length of stay in a destination. Although backpackers have relatively low expenditure per day, the long duration of their trip means that the total spend is usually well above average for the destinations they visit. These visitors also tend to stay in locally run accommodation, buy locally produced goods and undertake activities with local service providers. Therefore a greater percentage of their spend tends to remain in the country they visit.

As with most niche segments, it is difficult to measure the volume and value of backpacking.

There is no specific data for the number of backpackers visiting the SPTO member countries. However, due to the popularity of Australia and New Zealand as backpacking and gap year destinations and their proximity to the South Pacific countries, it is relevant to look at the Australian and New Zealand markets in some detail to get an impression of the potential backpacker market to the South Pacific. The market is examined in Section 4.

3.2 Europe

3.2.1 UK: The Largest Gap Year Market

In the UK gap year travellers drive the backpacker market. The concept of taking a gap year between school and university originated in the UK, where the gap year market is the most developed globally.

Approximately 80,000 British school leavers (aged 18 years) defer entry to university by one year so that they can take a gap year, which usually includes a period of travel that extends over several months. It may also include a period of volunteering abroad.

Due to the economic recession in Europe since 2009 and the increase in UK university fees in 2012, the market has dropped by about 20% over the past 3 years from around 100,000.

¹ What Next? Gap Year Travel in Australasia, Mintel, May 2013

The average cost of booking a gap year volunteering project abroad is around £1,000 (US\$1,600) per month excluding travel costs. Approximately half of this is spent in the country of travel.

Travel arrangements are made independently of the volunteering project and for a project in the South Pacific, would usually involve a RTW ticket, costing approximately £1,500. (US\$2,400).

The value of the UK gap year market for travel booked through a company that is a member of the Year Out Group is estimated to be in excess of £200 million (US\$ 320m) per annum. It is estimated that 'gappers' who organise their activities independently spend an additional £100 million (US\$160m) or more. The total size of the market can therefore be estimated to be in excess of £300 million (US\$480m) per annum.

The Year Out Group

The Year Out Group, established in 2003, aims to regulate companies who organise travel to volunteering projects abroad for the gap year market.

Nearly half of the UK 'gappers' (38,000) organise some of their gap year travelling activities through a member of the Year Out Group, which includes the larger gap year organisations such as Blue Ventures, Frontier, GapFORCE, Raleigh International and Projects Abroad.

In 2009 approximately 100,000 school leavers deferred their place at university and 47,000 of them booked their travels with a company that is a member of the Year Out Group.



3.2.2 Continental Europe

German Speaking Markets

Germany is the largest continental European market, with the strongest economy and has a long-standing culture of young people travelling abroad for extended periods.

Until 2007 military service was compulsory for 18-year-old men who could choose between undertaking military service or partaking in a social service, either within Germany or abroad with Government-funded volunteer projects. This has developed a culture of travelling abroad to volunteer from both young men and women.

The German education system is relatively flexible and favours students that travel and volunteer before, during or after their studies or who undertake internships during their studies.

In addition to Germany, the German-speaking market includes Austria and Switzerland. Many German tour operators have offices or representatives in these countries. The Swiss market is a small but important market. The Swiss are high income earners and are less concerned by the cost of travelling to, and partaking in, volunteering projects in more expensive destinations such as the South Pacific.

France

In France the education system is less flexible and there is an expectation that students will go straight to university from school and begin their careers after university. Taking a year off before university is not encouraged. Consequently French backpackers tend to be slightly older as some young professionals feel they have missed out on the experience gained from travelling and take a 'career break'. Due to the constraints of employment, this is likely to be for 1-2 months rather than the 6-12 month periods taken by British and German students.

Scandinavia

In Scandinavia (Denmark, Norway, Sweden) and the Netherlands there is a gap year culture similar to the UK market.

Italy

In 2013 the Italian backpacking market to Australia appears to be growing, with Australian backpacking companies are reporting large increases in the number of bookings by Italians.

3.3 North America

USA

Backpacking is a growing market in North America, although it has traditionally been less prevalent than it is in European countries.

The trend towards taking a gap year is becoming increasingly acceptable at universities in the United States and is referred to using a variety of terminology: a year out, year off, deferred year, bridging year, working holiday, time off or time out.

In 2011 it is estimated that 1.2% of all students applying for university in the US took a gap year.

However the gap year market is approximately 10 years behind the UK in its development and it is the UK Gap Year companies that are currently the main players in the North American market.

Canada

In Canada a gap year is more established, however a year out will usually be taken after graduation rather than between school and university.

The main Australian travel agents that specialise in backpackers report that their North American clients are more likely to be Canadian than American.

3.4 Australasia

Research in Australia² showed that number of students taking a gap year has increased by 14% from 10% in 2000 to 24% in 2010.

Australia and New Zealand are considered (by the UK Gap Year industry) to be the next growth market for gap year travel.

3.5 Asia

Japan

Whilst relatively small in comparison to the total number of outbound Japanese travellers and the number of backpackers from Europe, North America, Australia, and New Zealand, the Japanese backpacker market is growing. This has been encouraged by the Japanese Department of Education, which has started to encourage students to take a gap year.

Backpackers in contemporary Japanese society began with the 'poor travellers' and was popular mainly among young people in the 1960s. As many poor travellers carried large backpacks on their backs, they were known in Japanese as *kanizoku* (literally, "crab tribe") due to their appearance from behind and shuffling-like movements.

Backpacking is a relatively new phenomenon in Japan and, while attracting a growing number of young Japanese tourists, has yet to be researched in depth and there are no statistics showing the number of Japanese backpackers by country.

However for the year ending September 2012, there were 132,450 Japanese travellers aged between 15-29 visiting Australia³ with working holidays becoming more popular with younger Japanese.

Japanese backpackers aged 18-30 and on working holiday visas, like those from Europe, may book their travel to the South Pacific once they are in Australia or New Zealand, rather than from their country of residence.

² Longitudinal Surveys of Australian Youth, 2012

³ Australian Bureau of Statistics

South Korea

More than a third (34%) of South Korean visitors to Australia are aged between 15-29 years and they are mostly travelling for leisure or are studying in Australia.

These young travellers usually stay for more than four months and, due to the length of time they spend in the Australia, they spend more in total than other age groups.

Young South Koreans are eligible for a working holiday visa and South Korea is one of Tourism Australia's target markets for young travellers.

There is growth in special interest travel and an increasing percentage of young independent South Korean travellers are booking tourism products after they arrive in Australia. Therefore, as with long-stay young travellers from other countries, there is the potential to inspire them to visit the South Pacific countries during their stay in Australia.

China

There is no data on the emerging Chinese backpacking market. However the Chinese inbound markets to Australia and New Zealand are growing fast both for leisure and for education. In 2012 Chinese youth arrivals overtook the UK, and they mostly visited Australia for education whereas the UK youth travellers go for a holiday or a working holiday.

Chinese and other Asian visitors who are studying in these countries are looking for destinations to visit during their vacations. City destinations are currently more popular rather than beach orientated leisure holidays.

However these visitors are also in search of new and exciting experiences. It will be important to track the growth of this market and identify the activities and experiences that the South Pacific islands could develop to appeal to them.

3.6 Summary

Global youth travel market:

- 196 million arrivals worth US\$173 billion

Largest backpacking and gap year markets to Australia:

- UK and Germany

Important smaller markets:

- France, Ireland, Scandinavia, Switzerland,
- USA, Japan

Growth markets:

- Italy
- China, South Korea, Taiwan

4. YOUTH TRAVEL TO AUSTRALIA & NEW ZEALAND

What's In This Section?

- *What's significant about the youth markets in Australia and New Zealand?*
- *What do backpackers do when they get there?*

4.1 Why are the Australian and New Zealand Markets Important?

For the SPTO member countries, the backpacking market to Australia and New Zealand is very relevant.

The vast majority of backpackers, regardless of their country of residence, will travel to the South Pacific in conjunction with a trip to Australia or New Zealand and will book their travel to the South Pacific, usually Fiji, when they are in Australasia, rather than pre-book it in their home country.

Many of these backpackers are in Australia or New Zealand on Working Holiday Visas. These visas allow them to work in the country for up to a year, and for some nationalities stay for two years in Australia.

4.2 Backpackers to Australia

The backpacking market to Australia is substantial, with 1.5 million youth travellers visiting Australia each year⁴.

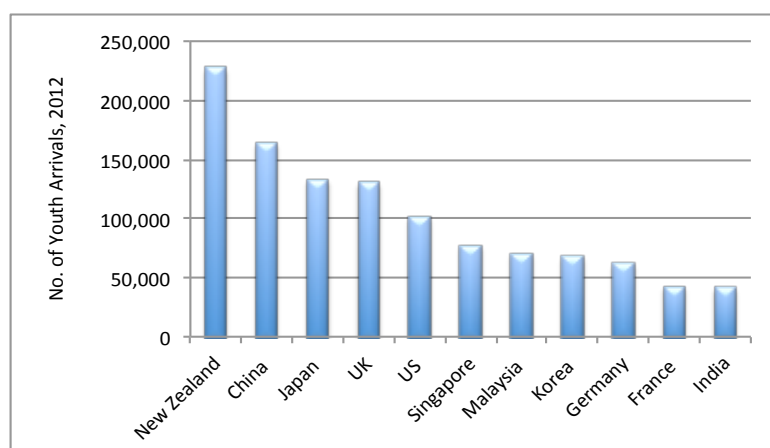
Historically the UK has been the main source market for inbound backpackers to Australia and in 2005 accounted for more than a quarter of backpackers (26%). European backpackers (excluding Germany) made up another quarter (24%) and the US and Germany each generated 9% of the market⁵.

However by 2012, Asia's share of the visitor market had grown considerably and the biggest youth markets (aged 15-29) after New Zealand were China and Japan followed by the UK and the USA.

⁴ Australian Tourism Export Council

⁵ Source: International Visitor Survey, year end June 2005

Figure 4: Origin of Youth Travel Arrivals to Australia from Key Markets, Year ending September 2012



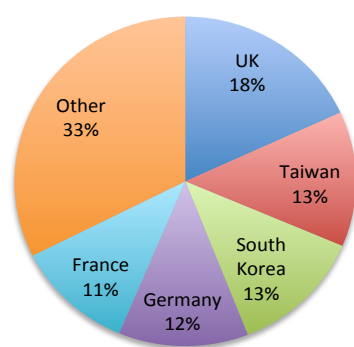
Source: Australian Bureau of Statistics

Nearly half (44%) of these young people come to Australia on holiday while another 18% come to study and 16% visit their families or friends.

4.3 Working Holidays

The UK is traditionally the largest supplier of working holidaymakers to Australia. During the second half of 2012, the UK still generated the largest proportion of the market however it was followed by Taiwan (which grew by 105% on the previous year), South Korea, Germany and France.

Figure 5: Proportion of Working Holidaymakers in Australia from July- Dec 2012



There are over a million young people visiting Australia each year who have time to travel and have the potential to include a trip to a South Pacific country as part of their stay.

The value these travellers bring to the country is considerable. In 2012 young travellers who stayed up to three weeks spent an average of AU\$2,700 (US\$2,500). However those that stayed for more than six months spent nearly eight times as much at AU\$21,400 (US\$2,200).

4.4 Youth Travel to New Zealand

In New Zealand, the youth market accounts for 24% of their total visitor arrivals, and the backpacker segment is thought to be around 7% of total arrivals with a higher proportion of expenditure.

The countries that generate the most backpackers to New Zealand are the UK and Europe. The North American market is also important but to a lesser extent and these backpackers tend to

stay for shorter periods of time, around two to three months. The American backpackers tend to be 'young adventurers' and spend more than other nationalities.

New Zealand, like Australia, is seeing a growth in adventurous young Asian travellers, who have often visited Europe and American already and are coming to New Zealand for their second or third overseas trip.

4.5 Asian and Chinese Students in Australia

Asian and Chinese students studying in Australia are a growing market. During university vacations they are looking for 7-10 holidays and may be interested in visiting South Pacific. However they tend not to be confident swimmers therefore beach and diving holidays are not interesting to them and they need to be offered something else to do. There is the opportunity to provide more flexible cultural tours or soft adventure activities to appeal to this market.

4.6 Summary

- Asian youth arrivals are growing fast.
- The UK, Germany, other European countries remain the biggest backpacking markets to Australia and New Zealand and therefore the largest potential backpacking markets for the South Pacific.



5. WHAT DOES BACKPACKING INVOLVE?

What's In This Section?

- *Where do backpackers go?*
- *How do they get to South Pacific*
- *What do they do?*
- *How long do they stay?*
- *What type of accommodation and local transport do they use?*

Where Do Backpackers Go in the South Pacific?

Fiji is the top backpacking destination on the South Pacific:

- It is easy to access from Australia and New Zealand
- RTW tickets offer stop-overs in Fiji
- It has built up a good reputation for backpackers
- It offers suitable accommodation
- Travel agents are more knowledgeable about Fiji than other South Pacific countries and sell flexible accommodation passes and tours
- It has enough community projects to enable gap year organisations to offer volunteering

The Gap Year Trip: Where Do Backpackers Visit in the South Pacific?

A typical pattern of travel for a European gap year backpacker is to be in Australia for an extended period on a working holiday visa. From Australia they will travel to New Zealand for 6 to 8 weeks and then to Fiji for one to two weeks.

Backpackers arrive in Fiji in roughly equal numbers from both Australia and New Zealand.

A few backpackers also travel to Vanuatu, Samoa and from New Zealand to the Cook Islands. These backpackers are probably slightly older i.e. in their mid-twenties, and are more experienced travellers than those on their pre-university gap year travels, and ready to be more adventurous.

5.2 How Do Backpackers Get To The South Pacific?

Backpackers from Europe and North America to the South Pacific fall into two categories:

i) RTW Ticket Holders: Travellers who purchase RTW tickets with a stopover in Fiji will usually pre-plan at least part of their stay in Fiji from the UK to fit in with their on-going travel schedule. This accounts for a relatively small number of backpackers to Fiji.

ii) Travellers to Australia: Australia is the most popular destination for UK backpackers and gap year travellers. This largely due to the availability of Working Holiday Visas which enable

young people up to the age of 30 to stay and work for a year, with the option to extend their stay for a second year if they undertake three months of rural employment.

These travellers may be intending to visit the South Pacific but are more likely to wait until they arrive in Australia or New Zealand to book their visit due to the availability of cheaper and more flexible international flights than can be booked from the UK.

Round the World Tickets (RTW)

Buying an RTW ticket can be cheaper than purchasing separate tickets linking each destination. Normally, RTW tickets allow visits to up to 16 different places with a minimum of three stops. Most airlines are now part of global alliances, so choosing a ticket with an airline that has multiple partners means travel can be with any of them.

The biggest airline partnership is Star Alliance (www.staralliance.com), which has 28 airlines covering almost a thousand destinations in 162 countries. In 2013 they offered four different versions of RTW ticket, depending on the number of miles travelled, starting at 26,000 miles and going up to 39,000.

Oneworld (www.oneworld.com), with 11 member airlines, is the next biggest network, offering a selection of RTW tickets with varying amounts of miles.

A number of individual airlines, including Virgin Atlantic, Air New Zealand, KLM and Singapore Airlines, offer RTW tickets too. But their tickets are only valid for their own planes.

Until recently these RTW tickets offered a free stopover in Fiji. Historically this opportunity to visit Fiji at no additional cost has driven the backpacker market to Nadi.

However in the past couple of years changes in airline alliances and the growth of Australia's budget airlines has ended this type of ticketing. Consequently the RTW backpacker market to Fiji has declined and the main market is now arriving via Australia and New Zealand.

5.3 Where do Backpackers Stay and How do They Get Around?

Accommodation Preferences: Good value, Flexible Booking, Local

Accommodation is not a priority for backpackers, who prefer to spend their money on activities. However within the budget category they still want value for money and may not always choose the cheapest accommodation, particularly the 'young professionals' or 'grey nomads'.

The accommodation most backpackers choose in the South Pacific is simple dormitory accommodation or twin/double rooms in small, mostly family run, resorts. They will expect it to be clean and safe, with kitchen and laundry facilities and Internet access.

Backpackers may be travelling alone or in small groups and are keen to meet other travellers. Therefore free offers, such as a 'free drink at the bar on arrival night' is appealing both for the value and also as an opportunity to meet other new arrivals at the bar.

Backpackers make plans at short notice, so accommodation that offers flexible booking arrangements is popular. Nomads, who run hostel accommodation across Australia, and have affiliate accommodation in other countries, offer a flexible accommodation pass in Fiji:

Mad Nights	Flexible Accommodation Pass
Price	AU\$181
Duration	7 nights
Type of Accommodation	Hostels at Nadi, Coral Coast, Pacific Harbour, Mamanuca and Yasawa Islands

The Mad Nights pass is paid for in advance and the specific accommodation is reserved 48 hours in advance.



Local Transport - Flexible Passes

Backpackers will use local transport more than any other visitor segment. However they need good sources of information about how to get around.

The lack of easily available information about local air, bus and boat services means that pre-booked tours are popular with backpackers who are short of time and only planning to go to Fiji for a week or two.

The market leaders for pre-booked backpacking local transport tours to Fiji are FeeJee Experience and Awesome Adventures.

The appeal of these packages is that they are flexible and allow backpackers to tour Fiji (FeeJee Experience) and the outer islands (Awesome Adventures) at their own pace, stopping off at different locations for as long as they want to.

They also offer a variety of cultural, nature and soft-adventure activities, some of which are included in the cost of the accommodation; others are subject to additional charges.

The Tables below illustrate the range of transport, and activities that are offered by FeeJee Experience, whose main focus is a tour of mainland Viti Levu and Awesome Adventures, who tour the outer Yasawa islands.

FeeJee Experience

FeeJee Experience	Flexible Travel Pass to tour Viti Levu and outer islands Accommodation Inclusive Passes: flexible travel pass with inclusive accommodation and some meals
<i>Cost</i>	From AU\$268 for 4-day transport only To: AU\$2,000 for 14 days/13 nights twin/double room
<i>Duration</i>	From 4 days
<i>Types of activities: cultural, nature, soft adventure</i>	Visits to: villages, schools, orphanages, cava ceremony, rainforest treks, bilibili rafting, sandboarding, sea kayaking, waterfall swimming, diving
<i>Add Ons</i>	Arrival, departure nights in Nadi Diving for 5-7 nights – AU\$613

Awesome Adventures

Awesome Adventures	Bula Pass: island hopping boat pass for Yasawa and Mamanuca Islands Bula Combo Pass: Boat pass and includes accommodation
<i>Cost</i>	From: AU\$575 for 5 days/4 nights dormitory accommodation To: AU\$2,750 for 21 days/20 nights double/twin room
<i>Duration</i>	Pass from 5 – 21 days
<i>Types of activities available: cultural, nature, soft adventure</i>	Visits to: villages, schools, cooking lessons, traditional crafts and weaving, Fijian dancing and singing, spear throwing, hand-line fishing trips, rainforest treks, surfing, snorkelling safaris, kayaking, parasailing, diving
<i>Add Ons</i>	Arrival, departure nights in Nadi Volunteering, from 1 to 26 weeks

5.4 Summary

The key characteristics of backpacker travelling involve:

- Freedom and flexibility
- Authentic local experiences
- Meeting like minded people
- Opportunities for self development

Top destination:

- Fiji

Average length of backpacker trip:

- 7-10 days

Average cost:

- Around AU\$2,000 (US\$1,900)

Preferred accommodation:

- Good value
- Local
- Flexible booking system

Preferred local transport and activities:

- Flexible passes

6. WHO GOES BACKPACKING?

What's In This Section?

- *Consumer profiles: Age, social background, behaviour*

6.1 Types of Backpackers

Students and Gap Year Travellers

Backpacking trips were traditionally undertaken either in a gap year between school and university, or between the university and the commencement of work. However the average age of backpackers has gradually increased over time, and it is not uncommon to include travellers in their late 20s or 30s on an extended career break.

The majority of backpackers, around 60% of the global market, are students and young people aged between 18 and 30 who are travelling for extended periods or on working holidays.

Gap year and student backpackers may travel alone but also meet or make friends while they are travelling and will then travel together as a group.

Young Professionals - Career Breakers

A growing market for extended travel is the young professional market. This age group are usually between 27 and 35 years old and are taking their annual holiday leave of four or five weeks at one time or are taking a time between changing jobs to travel. They account for around 30% of the backpacker market.

Backpackers who take their annual leave all at one time tend to be European travellers who get longer annual breaks than Americans.

Young Professionals have more money to spend and may stay in more comfortable accommodation than the gap year and student backpackers.

These backpackers may be travelling alone or as a couple, groups of friends travelling together are less common in this age group than amongst student backpackers.

Post Family: Baby Boomers, Spirited Youth, Grey Nomads, Flashpackers

Another growing market are the post-family backpackers, usually aged from 50 years upwards and are no longer tied by looking after their children. They are the smallest category of backpackers, accounting for around 10% of the market, but are higher spenders.

Various terminologies are used to refer to these travellers including Baby Boomers, the Spirited Youth, Grey Nomads and Flashpackers. These titles refer to the fact that this age group were born during the post-war baby boom years in Europe and North America from 1945 to 1965. They may have travelled extensively as students and still enjoy the backpacking spirit of adventure but can afford to travel more comfortably than younger backpackers. In some cases they are also the parents of gap year backpackers who take the opportunity to visit their children in more exotic locations or in Australasia.

6.2 Backpackers from Europe

Backpacking

Typical backpackers to Fiji are on working holiday visas and are spending a year in Australia before travelling to New Zealand for 6 to 8 weeks and then travelling on to Fiji.

The European backpackers travelling to Fiji from Australia are more likely to be 24-25 years old than 18-19 year olds. They feel they have been working hard in Australia and want some relaxation. They are more discerning about how they spend their money and may be looking for an additional experience and relaxing break before they return home.

Top three markets are from UK, Germany and France, followed by Irish, Swedish and Swiss. The UK and Irish have a wish list of what they want to see in Australia and are not very flexible whereas the German, Dutch, French and Italians want to experience more.

Who takes a Gap Year?

In the UK school leavers, aged 18, take a gap year before they go on to study at university. The aim of a gap year is to give these young adults broader life experiences than they would get from going directly to school and university.

A gap year may involve travelling to less well-known destinations and partaking in community projects. The considerable cost of organising this type of travel experience through a gap year company means that it is primarily children from well off middle class families that spend their gap year travelling in this way. The Year Out Group focuses its marketing activity, to recruit gap year volunteers, on the fee-paying schools.

Although these school leavers themselves will not be high income earners, the parents of families using the fee-paying schools are mostly well educated, well travelled and have professional occupations, with earnings well above the national average. They are prepared to support their children to have what they consider to be valuable 'life experiences'.

There is also a growing market in Internship 'experiences', where students in their third year (or fourth year for medical students) gain relevant work experience abroad.

Pre-Organised Gap Year's Appeal to Women

Gap year organisations in the UK are receiving more enquiries and bookings from 18-21 year old women than from men, as they tend to prefer a more structured trip that is organised in advance and offers a greater degree of safety than travelling independently.

6.3 North America

School and Gap Year Travellers

The market for school travel in America has grown substantially in past 15 years, with a growth of interest in other cultures in the school curriculum and amongst students. This broader global interest has also stimulated the gap year travel market.

School and post-school age travellers tend to come from middle and upper middle class families who are prepared to support them and help them to challenge themselves before going to university.

They usually come from progressive, wealthy families, go to private schools and live in New York, New Jersey, Connecticut, Boston, Washington DC, Los Angeles, San Francisco or Chicago.

The 18-20 year old market is growing in the US together with backpacking after university and before starting a career.

However gap year travellers are still more likely to come from Canada, where the gap year concept is well understood, than from the US where there is still pressure to go straight to university from school.

Post-family Backpackers

In America, as in Europe, there has also been a growth in backpacking amongst the 50+ year olds, who are travelling in more comfort than student travellers.

Volunteers

Travellers who volunteer in destinations such as Fiji or Vanuatu are usually in their twenties or older, rather than school leavers, and have travelled independently before. They are therefore better prepared for the basic conditions and isolated locations, than the younger backpackers.

6.4 Australasia

The South Pacific is not a destination that has mass appeal to backpackers from Australia and New Zealand. They tend to perceive it as a family beach holiday destination and the focus of their backpacking travels is to Europe, Asia or South America.

6.5 Asia

Japan

Japanese backpackers fall into three groups: student backpackers, employed backpackers, unemployed backpackers. They are all aged between 20-30 years and mostly live in the Tokyo metropolitan area.

Unemployed backpackers travel for the longest, followed by employed and then student backpackers, who are least likely to be knowledgeable about their destination.

Japanese backpackers place a high value on learning English and are more interested in meeting people and enjoying the environment than participating in the more hedonistic activities that are usually associated with Western backpackers.

However, there is also another type of Japanese backpacker, called '*Sotokomori*'. Soto means 'outside' in Japanese, and *sotokomori* stay for a long time in foreign countries where the cost of living is much lower than Japan. They tend to be people who cannot adjust to society and find it difficult to find work. Just over half (55%) of *sotokomori* are in their 20s or 30s, however around a third are middle aged and in their 50s and 60s. The majority (97%) are men.

So there are two completely different types of backpacker markets from Japan; one is the student, employed and unemployed backpacker; the other is the *sotokomori*. Each has a different motive for travelling. For the employed, unemployed and students acquiring

knowledge and new experiences is important whereas the *sotokomori*, who are only a very small proportion of Japanese backpackers, want to escape Japan's social structure and do not have any desire to learn from their destination.

South Korea and China

South Koreans are in Australia on working holiday visa. They work hard on the farms and prefer to visit Australian cities and send their money home rather than travel to the South Pacific Islands for relaxation.

Younger Chinese visitors are primarily in Australia to study. They do not take relaxing holidays in the same way as the Europeans, preferring to visit cities, or undertake extreme sports.

6.6 Summary

Who Goes Backpacking?

From Europe (mostly UK and Germany):

- 60% are 18-30 year old student and Gap Year Travellers from well off middle class families
- 30% are 27-35 year old young professional Career Breakers
- 10% are 50+ years post-family Spirited Youth

From North America:

- Small but growing number of Gap Year travellers
- Canadians are more likely to be backpacking than Americans

From Asia:

- Growing numbers of young Chinese, Korean and Japanese are in Australia to work and study. During their holidays they are looking for educational experiences and are unlikely to travel to South Pacific islands to relax.

7. WHAT'S SPECIAL ABOUT BACKPACKING IN THE SOUTH PACIFIC?

What's In This Section?

- *What are the motivations for backpacking or volunteering?*

7.1 Why do people go backpacking in the South Pacific?

Backpacker Perceptions

- Tropical paradise
- Great beaches
- Unusual destination
- The warmth and friendliness of the people
- Relaxing holiday destination after working hard in Australia
- Good backpacker scene (Fiji)
- Cultural experience
- Ease of access from Australia and New Zealand to Fiji and Samoa
- Other side of the world: for European backpackers in Australia - once in a lifetime opportunity to visit

Volunteering

- The appeal of a destination (Fiji) that no one else goes to - very few gap year volunteering and community projects are available
- Happy genuine warmth and friendliness of the people
- Good community service partners in exotic, pristine environment
- Completely different culture and infrastructure to Canada or North America
- Vision of paradise island; a special place to try teaching
- A desire to do something completely different
- Exotic ocean destination with marine activities: diving, surfing, snorkelling, beach, marine biology, conservation



8. RESEARCHING AND BOOKING BACKPACKING TRIPS

What's In This Section?

- *How do backpackers research, plan and book their travels?*

8.1 European and North American Backpackers

Internet Research

Backpackers are independent travellers. They may book elements of their trip using retail agents, or gap year organisations, but they are heavy users of the Internet and will research, plan and book the majority of their travel online.

Word of Mouth

Word-of-mouth recommendations are always the most powerful form of marketing and this is particularly true for the backpacker market where travellers will look to their friends for suggestions of where to visit, places to stay and things to do.

Social Media

These young travellers are heavy users of the social media and will share their experiences with their peer group, influencing potential travellers in their choice of destination.

Booking Agents

For backpackers the planning their trip and the researching of their potential destinations is a key part of the whole travel experience.

However in the South Pacific where up to date information on local travel or activities is not always readily available, backpackers, especially the younger gap year travellers, feel more secure booking their trips using specialist-backpacking agencies in Australia and New Zealand. Examples include Backpackers World Travel, Peter Pans, Mad Travel Shop, STA Travel and Student Flights.

Gap Year Market

On average UK students only look at 1.8 brochures before they chose a gap year project. They are mostly guided by word-of-mouth recommendations from friends or relations who know of other students who have done similar projects. It is therefore very important that each student has a good experience, and that the parents feel it has some 'life value', so they recommend it to their friends.

8.2 Australasia

In the mainstream Australian market Fiji is a destination that sells flights jointly with accommodation. A very small number of people turn up without having booked accommodation but most Australians only stay for a short period of time (maybe 8 days) so they want to have their accommodation arranged in advance.

The relatively small number of Australians who do go backpacking in Fiji and other South Pacific countries are more familiar with the region than the European and American backpackers and are more likely to book direct with local providers.

8.3 Asian Backpackers

Japan

Not many Japanese tour operators specialise in promoting backpacker tourism to the South Pacific; most South Pacific tours focus on specialised areas such as diving or honeymoons. In addition, most travel agencies sell the South Pacific as package tours at competitive prices.

Therefore, it can be presumed that Japanese backpackers purchase package tours from the major travel agencies or purchase their air ticket and accommodation independently through online agencies or at travel agencies.

South Korea

The preferred sources of information when planning and booking holidays to Australia are:

- General Internet searches (73%)
- Government tourist websites (42%)
- Talking to friends and relatives (41%)
- Guide books (41%)
- Travel agents (38%)

Generally South Korean prefer information to be presented in Korean; however younger travellers are comfortable using English language websites for research and bookings.

Word of mouth and online peer reviews are becoming increasingly influential in South Korea.

8.4 Summary

<p>Research</p> <ul style="list-style-type: none">• Internet research, Google searches• Social media networks e.g. Facebook, YouTube, Pinterest, Twitter• Work of mouth recommendations from friends, peer group review sites• Trade representatives e.g. retail travel agents or gap year organisations <p>Booking</p> <ul style="list-style-type: none">• Direct with airlines and accommodation online• Specialist backpacker agencies in Australia and New Zealand
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9. COMPETING DESTINATIONS

What's In This Section?

- *Competitor destinations to the South Pacific*
- *Visitor trends*

9.1 Global Competition

Since 2000 there has been increased global competition in the South Pacific to attract backpackers. Some of the reasons for this are:

- Infrastructure in Asia has improved significantly
- South America has seen the emergence of the backpacker business model
- Hostels have expanded across Europe.

In the past couple of years there has also been a growing interest in the concept of extended travel during a gap year in countries such as China, France, America, Australia and India. The UK based website Gapyear.com has identified a change in the nationality of the people visiting their website.

"In 2010 and 2011, the UK accounted for 62% of our overall traffic. The globalisation of the gap year over the last two years has meant that the UK now only accounts for 43% of traffic. Compared to two years ago, we receive 258% more traffic from China, 148% more traffic from France, 80% more traffic from the US, 68% more traffic from India, 32% more traffic from Australia, 32% more traffic from Germany and 25% more traffic from Canada." Macca Sherifi, Travel Editor Gapyear.com

9.2 Regional Competition – Australia and New Zealand

Australia is a major competing destination for backpackers. One of its strongest attractions is the availability of the Working Holiday Visa that allows travellers from the following countries to work and earn money during their travels: Argentina, Bangladesh, Belgium, Canada, Chile, the Republic of Cyprus, Denmark, Estonia, Finland, France, Germany, Hong Kong SAR, Indonesia, the Republic of Ireland, Italy, Japan, the Republic of Korea, Malta, Malaysia, the Netherlands, Norway, Sweden, Taiwan, Thailand Turkey and the USA and United Kingdom.

Australia's popularity is partially determined by its exchange rate and the recent strength of the Australian dollar compared to a weaker sterling has contributed to a decline in backpacker numbers from the UK. Australia has become too expensive just to travel around; most people are now on working holidays and then take a 'holiday from their holiday'.

Australia is a destination that is on the 'to do' list for many North Americans, not just backpackers, and Tourism Australia is proactive in attracting them; see the Case Study below.

As well as being competitor destinations, the popularity of Australia and New Zealand to backpackers is important to the South Pacific, as many backpackers planning to visit the South Pacific will do it while they are in Australia or New Zealand.

CASE STUDY

In September 2013, Air New Zealand and Tourism Australia announced a million dollar partnership to encourage North American's to tick Australia off their list, with their "Fill A Plane" campaign. They offered special low fares to six Australian destinations: Sydney, Melbourne, Brisbane, Cairns, Adelaide and Coolangatta on the Gold Coast from four North American gateways: Los Angeles, San Francisco, Honolulu and Vancouver, and connections via Star Alliance partner airlines from numerous other US and Canadian ports.

Fill-A-Plane

Get "a trip to Australia" off your Life List and onto your 2014 calendar. When 322 Go Mighty members make the pledge to travel to Australia next year, Air New Zealand will release a special discount, just for our community members.

<http://gomighty.com/goaustralia/>

The growing importance of social media in influencing visitors' choice of destination, particularly amongst younger travellers in North America, is also an important element of this promotional partnership. Air New Zealand and Tourism Australia have also partnered with Go Mighty, an influential blogger community, to showcase the 'must-do' experiences on offer in Australia. Ten influential bloggers will travel to Australia and join with Australian bloggers and personalities, to experience a diverse range of Australian experiences.

This partnership highlights the key elements needed to drive traffic to a destination: convenient and good value airfares, along with access and raising consumer awareness of a destination using social media.

9.3 Australasia

Europe

Backpackers from Australia and New Zealand who have extended periods of time to travel are most likely to head to Europe for their 'gap year' experience.

*"We send a very large amount of customers to Australia and not everyone has the budget to include the South Pacific. Very few people would travel to the South Pacific without visiting Australia as they travel all the way from the Nordic. Our customers mostly travel on special youth/students tickets with multiple stops and **the secret to selling more of South Pacific is to make it a convenient add on to Australia/New Zealand trips.**"*

Swedish Tour Operator

South East Asia

For backpackers with less time and/or budget, Bali and Thailand are very popular destinations. They are easy to access and considerably cheaper than the South Pacific.

South America

Latin America is growing in popularity as it is cheaper to travel around and there has been growth in the number of hostels offering backpacker friendly accommodation.

New Zealand - Travel with Purpose

Tourism New Zealand predicts a growth in travel with a purpose for the youth segment. Travellers from the main markets are increasingly concerned about entering or re-entering the workforce after travelling. They are therefore interested in participating in some sort of purposeful activity, whether it is volunteering, learning a language or new skill that enhances their curriculum vitae (CV).

In Christchurch, New Zealand, for example, the city has a huge rebuilding plan to recover from the severe earthquakes in 2011 and a lot of workers are needed. They are looking at how travellers on working holidays can participate in the very important development programme.

The South Pacific countries could consider what types of activities youth travellers could participate in and facilitate the organisation and communications with voluntary organisations.

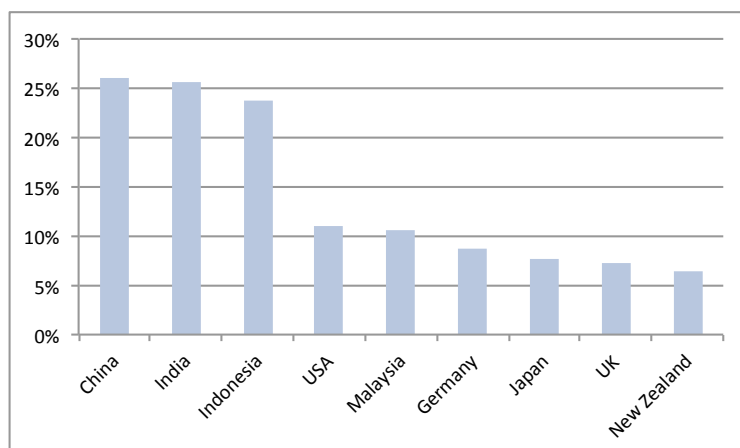
9.4 Asia

Australia is becoming an increasingly popular destination for Asian travellers. Over the next three years the largest growing markets for leisure travellers to Australia are expected to be China, India and Indonesia.

China is expected to overtake the UK as the second largest inbound leisure market, after New Zealand, during 2013-14. Similar growth is also expected from the Chinese youth market.

As Australia is a key source of international youth travellers for the South Pacific, it will be important to follow these trends and in future strategies take into account the needs of a more diverse range of travellers that need to be understood and communicated with.

Figure 6: Growth of Leisure Arrivals to Australia from 2012-13 to 2015-16



Source: Australian Tourism Forecasting Committee

9.5 Summary

- Australia – has appeal for its Working Holiday Visa
- Bali – is cheap and easily accessible
- Thailand – is cheaper and en route to and from Europe
- South America – is opening up as a cheap backpacker destination

10. WHAT STOPS MORE PEOPLE BACKPACKING IN THE SOUTH PACIFIC?

What's In This Section?

- *Why don't more backpackers travel to the South Pacific or venture beyond Fiji?*
- *Why doesn't the trade sell more backpacker tours?*

10.1 Accessibility

Accessibility is the main factor that determines where visitors travel to i.e. how easy it is to book flights, how long it takes to travel to a destination and how much it costs.

International Flights Drive the Market

In the South Pacific member countries there are regular (more than 5 per week)⁶ direct international flights on the following routes to:

- Fiji from Sydney, Brisbane, Melbourne, Auckland, Los Angeles
- Cook Islands from Auckland
- Vanuatu from Sydney, Brisbane, Auckland
- Samoa from Brisbane, Auckland
- Papua New Guinea from Brisbane, Cairns and Singapore
- Timor Leste from Darwin

There are also regular flights to French Polynesia (Tahiti) from Los Angeles and New Caledonia from Sydney, Brisbane and Auckland. The map overleaf illustrates the direct international flight routes that were available in October 2013. It highlights which South Pacific destinations have no direct international flight connection.

The ease of booking seats is also an important factor and while there is good capacity to Fiji, Cook Islands and Vanuatu, the flights to Samoa have limited seat capacity and are heavily booked by people visiting their friends and relatives.

Business travellers are the main users of flights to Papua New Guinea and Timor Leste.

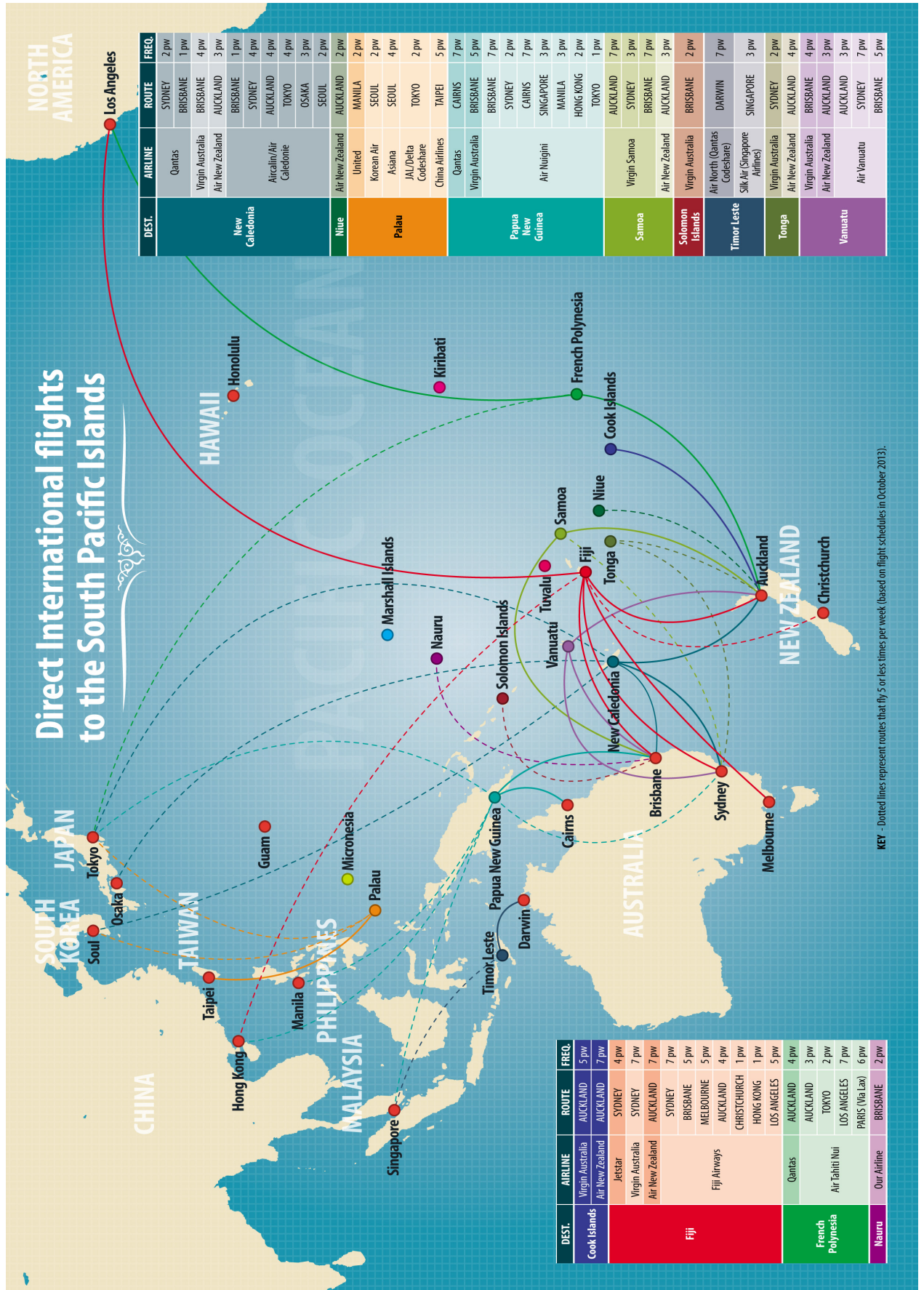
Outer Islands Are Too Inaccessible

The limited number of international flights to Micronesia, Kiribati, Marshall Islands, Nauru, Niue, Palau, Solomon Islands, Tonga and Tuvalu makes them expensive and time consuming to reach. They are therefore of limited appeal to the majority of backpackers who are on tight budgets and have mostly allocated limited time to visit the South Pacific during their trip to Australia and New Zealand.

Limited Knowledge of Regional Flight Schedules

Information about regional flight schedules and air passes within the South Pacific is not widely available or understood by general wholesalers in the main source markets of Europe, North America and Australia and there are often concerns about reliability that mean agents will avoid bookings on these airlines in favour of easier routes.

⁶ Based on airline schedules in October 2013



KEY - Dotted lines represent routes that fly 5 or less times per week (based on flight schedules in October 2013).

Time Constraints

The time it takes to reach the South Pacific islands from Europe and North America, combined with the cost, is another reason why backpackers combine a trip to the South Pacific with travelling in Australia and New Zealand to get maximum value from their international ticket and travelling time.

10.2 Cost

Travel and Living Costs

Backpackers are on tight budgets. They are looking for good value destinations, both to travel to and once they arrive.

For backpackers who are on RTW tickets and can stop off in Fiji for no additional cost, it remains a cheap destination to travel to.

However for the majority of backpackers who are purchasing their South Pacific travel from Australia and New Zealand, the cost of flights is considerable, despite the growth of budget airlines.

European backpackers are used to the budget airline prices available in Europe and a return flight from Sydney to Fiji costing from AU\$600 (US\$560) will probably be perceived as expensive, on top of their existing travel expenses in Australia and/or New Zealand.

To travel around the South Pacific and visit more than one destination involves purchasing regional air passes with a local airline and will be beyond the budget of most backpackers. Backpackers also choose destinations where accommodation, food and activities are good value. Compared to Asia, Fiji and the South Pacific destinations are considered to be relatively expensive.

Currency Exchange Rates

Exchange rates impact on the attraction of destinations for international visitors.

The strength of Australian dollar over the past decade has made it an increasingly expensive destination for backpackers. and this has impacted on the number of people visiting Australia from Europe and North America and therefore the number of backpackers that might continue their travels to the South Pacific.

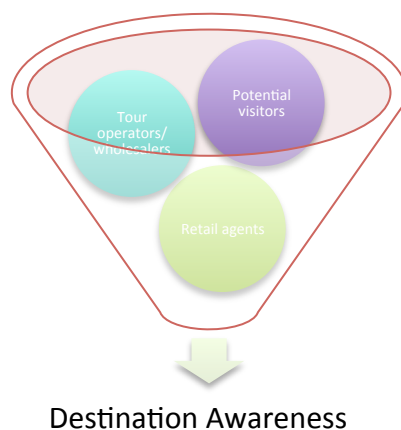
The Competitive Environment

The South Pacific countries have strong competition from South East Asia, which has many more flights, is cheaper to travel to, travel around and offers a wide variety of good value accommodation, food and activities.

10.3 Knowledge About the South Pacific

To attract more visitors there needs to be understanding of a destination amongst:

- Potential visitors – so they choose the destination and create a demand
- Tour operators and wholesalers – so they create trips to sell
- Retail agents – so they are confident to sell the destination



Lack of Destination Awareness Amongst Potential Gap Year Backpackers

If European and North American backpackers are going to put the South Pacific on their wish list of places to visit, they need to have an awareness and desire to visit before they plan their trips to Australia and New Zealand, so they can schedule their trip and budget accordingly.

There is currently a lack of awareness of the South Pacific amongst 16-18 year olds who are planning their gap year travel after they leave school. They may have heard of Fiji and consider it a tropical paradise but are unlikely to have any greater knowledge of Fiji or any other South Pacific country. Therefore the South Pacific countries, with the possible exception of Fiji, are not destinations that are on a typical backpackers wish list.

Perceptions of Security

The South Pacific is generally considered a safe and secure destination to travel to. However security concerns such as local coups, or the recent brutal attack on an Australian tourist group in PNG will put off future visitors.

Travel advisor warnings from foreign governments will also reduce the appeal of a destination and make travel insurance difficult to obtain.

Lack of Local Knowledge

Independent travellers need sufficient information about their destination to feel comfortable travelling to a country without pre-booking accommodation and activities.

Up to date information about local transport is an important element of planning a trip. The lack of easily accessible local air, boat and bus travel in the South Pacific is one of the elements that prevent backpackers travelling to the South Pacific islands without pre-booking tours.

Lack of Product Knowledge by Travel Sales Agents

Retail sales agents in Australia are reasonably knowledgeable about Fiji and most offer FeeJee Experience and Awesome Adventures to backpackers who enquire about travelling to Fiji. Their knowledge of other destinations within the South Pacific is generally very limited.

10.4 Local Suppliers' Understanding of the Tourism Industry

Lack of Local Supplier Knowledge

The Australian and New Zealand wholesalers and retail agents who specialise in selling South Pacific travel consider that there is a general lack of understanding amongst the smaller local suppliers in the South Pacific about how the travel industry operates.

This is restricting the ability of local suppliers to market and sell their products effectively through the trade. Consequently these local businesses will need to rely on promoting themselves direct to potential visitors using the Internet.

Lack of Online Booking Facilities

Tours designed for backpackers need to be properly packaged so travel agents can sell them easily. Agents won't spend time building an itinerary for a customer if they can't book it easily. FeeJee Experience and Awesome Adventures are market leaders and good models for how local transport, accommodation and activities can be effectively packaged for the backpacker market.

Upselling

Retail agents find it is difficult to upsell activities for trips to Fiji. This is mostly because activities are not made easily available online for agents to sell using industry sites such as www.websitetravel.com.

The limited scope for upselling could also be because backpackers want to relax after hectic trip around Australia and New Zealand and perceive Fiji as a relaxing beach destination and are not aware of what else the destination has to offer.

10.5 Summary

- Limited accessibility beyond Fiji, Vanuatu and Cook Islands
- Cost of air fares and local accommodation
- Lack of consumer and trade knowledge of the South Pacific beyond Fiji
- Lack of local supplier understanding of the travel trade

11. HOW CAN THE BACKPACKER PRODUCT BE IMPROVED?

What's In This Section?

- *Recommendations for improving the backpacker product to meet visitor needs*
- *Benefit of and suggestions for developing volunteering*

11.1 Access – Create a Regional Transport Pass

Work with airlines to understand the issues they have around capacity and air routes.

Sell countries together on a flexible pass for air travel and accommodation. People want to discover it for themselves but need the security of knowing they can get around, find somewhere to stay and have an idea of what it will cost them.

11.2 Cost – Be Competitive

To be able to price themselves competitively, local suppliers need to have a good understanding of competitor destination pricing.

Local suppliers need to understand how the travel industry is structured and the industry commission rates for wholesalers and retailers so they are competitive and provide an attractive product for the trade to sell.

11.3 Provide Local Knowledge

To encourage backpackers and independent travellers to venture beyond the main resorts, information on local air, boat and bus transport, local activities and small accommodation providers should be easily accessible.

This could be provided on the SPTO website as well as on individual countries' tourism websites.

11.4 Training – Understand the Travel Industry

There are many suitable products available in Fiji and on other islands that would appeal to backpackers.

Many international backpackers visiting Fiji pre-book their activities before they arrive, so there is limited scope to sell them additional accommodation and activities once they arrive.

Consequently there is a need to train local suppliers how they can sell their products to backpackers through agents in Australia and New Zealand so they can be booked before they arrive in their destination.

For example, small local businesses need to have sufficient knowledge to register with online portals such as www.websitetravel.com where they can gain international promotional support and agents can easily pre-book.

“We need more flexible tours around different countries, like FeeJee Experience and Awesome Adventures. There is nothing else that captures the youth market.” Australian Backpacker Agent

11.5 Regional Co-ordination

The view amongst some industry specialists is that an over-arching regional body needs to co-ordinate product development across the different South Pacific countries. Products need to be differentiated between countries and training provided on the products that are best suited to different markets.

Case studies of other destinations, for example Costa Rica or other Central American countries with similar landscapes to the South Pacific countries could be undertaken to what types of products are offered.

11.5 Volunteering Projects

Benefits of Facilitating Volunteer Tourism

- A good relationship with a community project could bring in an additional 500 people per year.
- Developing a bond with the local people can encourage future connections with the country and future travel to the country.
- Generates positive word-of-mouth feedback to friends and relatives.
- Increases probability of tourists returning to the country on holiday or to visit the community project they were involved with.
- The tourist spend goes directly to the country and often those that need it most rather than to multinational hotel chains or large one-off developments such as golf courses.
- The tourists that participate in volunteer programmes are more likely to be interested and concerned with the local communities and environmental protection than the average tourist.

Developing Gap Year/Volunteering Destinations

- Provide help to gap year companies to set up meaningful community programmes.
- The Ministry of Tourism could provide a ‘fixer’ to provide contacts for gap year companies who are looking for destinations and projects.
- Offer a ‘critical mass’ of community projects providing sufficient volume of volunteers to be placed to enable a gap year or volunteering company to invest in developing new programmes.
- Provide clarity over visa requirements and reduce barriers to entry. Facilitate visas for staff on projects, without making excessive charges for working visas.
- Communicate changes to entry requirements – make gap year companies aware of any changes.
- Set up a locally-based volunteering agency to represent good local projects to co-ordinate volunteers from European, Australian and North American markets

11.6 Summary

- Develop a regional transport pass
- Be price competitive
- Provide easily accessible local information
- Train local suppliers to effectively promote themselves overseas
- Co-ordinate product development regionally to encourage differentiation
- Support volunteering projects



BUSINESS TIPS FOR BACKPACKER BUSINESSES

Business Tips

- Familiarise yourself with backpacker characteristics, their travel patterns and their wants and needs.
- Understand the growth markets and define your target markets, and incorporate these markets into your promotions.
- Don't limit yourself to the 'backpacker' stereotypes.
- Constantly strive to improve the quality of your business through relevant training.
- Consolidate the South Pacific's image as a safe, friendly, adventurous destination through your product and service.
- Work with other tourism operators including transport services operating in your area. Consider creating an overall package that will enhance the attractions of your area and reduce your promotion costs.
- Remember the importance of word of mouth amongst backpackers and ensure that you are mentioned positively.
- Promote your product thoughtfully and economically using the most appropriate methods for your product and target markets.
- Consider creating giveaway souvenir material that will promote your product widely e.g. t-shirts (an extremely popular backpacker souvenir), caps, postcards.
- Access the Internet to inform potential backpackers (local and international) of your product's unique selling points.

Regular Market Research

Understand the movement patterns of backpackers into your area - where they come from, how they are travelling, where they are staying, what they want to do during their stay, where they are going, etc.

Cooperative Marketing and Package Development

An idyllic location is not really enough. All attractions and activities of real interest in the surrounding area must be identified, experienced first-hand by operators, and then promoted as a package.

Business can be improved by working closely with other local tourism operators and/or government bodies to develop a complete tourist package highlighting the selection of local accommodation, attractions or activities and prices.

Package prices should be set at an acceptable level and maintained for at least a 12-month period. International bookings should be charged the same price, or possibly at a cheaper rate using this discount as a pre-travel booking incentive.

Cooperative marketing ventures not only enhance the tourist experience, but provide economies of scale in terms of marketing and promotion costs for all operators involved. For example, backpacker operators working cooperatively with other tourism outlets can cost-effectively coordinate familiarisation tours for specialist student/campus travel agents and participate in travel shows promoting backpacker-specific products.

12. MARKETING RECOMMENDATIONS

12.1 What's In This Section

- *Marketing Recommendations*
- *Key pointers for successful marketing of the backpacking travels*

12.2 Sell the Experience

Backpackers are travelling to have amazing, new, life-changing experiences. They want to go home with stories to tell, to feel they are the first to have had these experiences amongst their social group.

While a tropical beach holiday appeals, it is the potential to partake in adventurous activities combined with mixing with local people and exploring local day-to-day life that will make a destination stand out.

Inspire backpackers to visit by focusing on selling the unique experiences that each of the South Pacific Islands and their individual businesses has to offer.

Backpackers want to meet local people and share their daily life. Local businesses can share their own story on their website. One tropical beach can look much like another but the people that live there and the lives they lead are all different. Telling your personal story can engage potential visitors and enthuse them to visit. The experience they then have when they visit will give them stories of their own stories and experiences to tell to their friends and family after their visit.

12.3 Differentiate Between South Pacific Countries

Move away from selling islands, beaches, palm trees and tropical paradise. Create an identify for individual islands, show what else there is to do and experience: from the natural environment – the rainforest, the volcanoes, the birdlife, the marine world; to the people – the fishermen, the children, the local minister; to the activities on offer - the surfing, diving, snorkelling, a river canoe trip, swimming with the jellyfish or humpback whales...

Example from a Samoan Beach Hut Resort, selling more than the beach...

If you get tired of snorkelling and looking at fishes in crystal clear water, we will show you how to weave a coconut leaf basket or how to open a coconut. We will also show you how to paddle an outrigger canoe, do Samoan herbal medicine, cooking and much more.

This resort is not only about accommodation, it is about giving yourself time to slow down and get used to living the island way. Enjoy watching the stars sitting on the beach at night or stroll along to find your private cove for the day. A short walk will take you into Saanapu village where you will be part of the daily village life. The Saanapu village has one of the most beautiful mangrove areas in Samoa, which you will be able to see from the nature walk or by renting one of the village canoes.

“Make other destinations apart from Fiji more accessible and promote what is different about them. Everyone has heard of Fiji but there’s a desire to go somewhere new and most European backpackers have never heard of the Cook Islands, Samoa, Vanuatu or Tonga. Sell their difference. Tell the consumer, tell the agents and tour operators.”

Australian Backpacker Agent

12.4 Pre-Visit Promotion

Destination promotional activities in source markets should include activities that target potential backpackers before they leave on their travels, for example in conjunction with gap year fairs, so the South Pacific is on the wish list of places to visit.

12.5 Promote Through the Trade

Promote the South Pacific islands in conjunction with flight sales agent brands that specialise in selling flights and trips to backpackers, for example STA Travel and Flight Centre. These agents are well placed to sell destinations to travellers who are planning their trips to Australia and New Zealand. Provide maps to travel agents - basic but essential!

12.6 Encourage Visitors to Use Social Media

Backpacker and gap year travellers tend to be under 30 and are avid users of digital technology. They post photos and comments about their travels on Facebook and other social networks. This form of word-of-mouth marketing and personal recommendation is exactly the type of digital endorsement that destinations are seeking.

As gapyear travellers often come from relatively well off families and travel to unusual destinations, they can be formative in establishing a destination as an aspirational choice of holiday for other members of their family and social group.

Destinations that start as backpacker destinations e.g. Tanzania and Vietnam have subsequently seen growth into higher spending sectors as the local product and accommodation became more developed and awareness from personal recommendations increased their desirability.

12.7 Understand Asian Backpackers

The Internet is the primary source of information for Japanese and Korean backpackers; however, they also place considerable reliance on guidebooks, especially if they are published in Japanese and help backpackers to overcome the language barrier.

A good marketing plan to promote backpacking tourism to South Pacific regions should focus on using Japanese translated guidebooks and internet sites. Providing information in Japanese on tourist board and business websites would help to make Japanese backpackers feel that they are welcome.

12.8 Summary

- Sell the Experience, not just the beach
- Differentiate between South Pacific islands
- Tell the story of the place, the people, the lifestyle
- Destination marketing in source markets should include potential backpackers, e.g. through school gap year fairs
- Engage visitors with social media, encourage reviews and feedback
- Produce webpages, guidebooks, and promotional materials in relevant languages.



13. PROMOTIONAL CHANNELS

What's In This Section?

- *Key methods of distribution - internet, direct sales, etc*
- *Specialised media for marketing and promotion*
- *Traditional and Electronic; through which consumers can be reached for promotional purposes.*

13.1 Global

Tech Savvy Backpackers

The 18-35 year age group is the most technologically sophisticated section of society and members are avid users of social media and they continue to use this means of communication on their travels.

Backpackers are likely to carry at least a smartphone, tablet or laptop computer with them on their travels, or to visit Internet cafes. Retail travel agents who specialise in backpacker travel usually offer Internet facilities in their shops.

There are plenty of ways for these young travellers to keep in touch with their family and the extensive network of friends they communicate with online. They have digital cameras on their phones and share their photos regularly with their social networks on their Facebook page or other social networks such as TripAdvisor, Pinterest, YouTube, Flickr, Instagram, Twitter or on travel blogs.

The instant distribution of reviews, images and comment about a destination is the type of promotion destinations and tourism businesses work hard to create. Ensuring backpackers have a very positive experience and encouraging them to review these experiences and share their photos on travel websites and their social media networks creates highly valuable word-of-mouth marketing.

www.pinterest.com/gapyear.com

www.tripadvisor.co.uk (gap year forum)

www.twitter.com/GapYearTweets (Gap Year Directory)

www.youtube.com/channel/HCgGhIApnDaSM

World Youth Student & Education (WYSE) Travel Confederation

Amsterdam based global not-for-profit membership organisation that promotes youth and student educational travel, holds an annual Travel Conference (WYSTC). In 2012 it was held in San Diego and in Sydney in September 2013. It is an important venue for gap year organisations to meet potential community projects for volunteering. The 2014 conference will be held in Dublin, Ireland between 23-26 September. www.wysetc.org

13.2 Europe

United Kingdom

There is a wide range of organisations that support the gap year market in the UK, guiding young people in the direction of suitable operators, destinations and volunteering projects.

The Year Out Group is an association of leading year organisations to promote the concept and benefits of well-structured year out programmes, promote good practice and help young people to select suitable and worthwhile projects. www.yearoutgroup.org

Gapyear.com is a community for backpackers and gap year travellers, offering trip advice, travel inspiration, jobs and volunteering ideas. www.gapyear.com/boards

The Student Room is the largest student community in the world with more than 1.2 million members and provides advice for students in a wide range of topics, including gap years and travel.

www.thestudentroom.co.uk/wiki/Gap_Years_and_Travel

Newspapers

The travel sections of the weekend newspapers in the UK publish annual supplements dedicated to year-out/gap-year travel. Broadsheet newspapers have dedicated gap-year travel sections on their websites:

Guardian www.guardian.co.uk/travel/gap-year-travel

Telegraph www.telegraph.co.uk/travel/hubs/gapyear

Independent www.independent.co.uk/student/gap-year

American publication the *Huffington Post* UK online paper regularly features relevant articles discussing gap year travel.

www.huffingtonpost.co.uk/tag/student-travel

Travel Magazines

Leading travel magazine Wanderlust provides advice for several different type of trip including volunteering, career breaks and 'Big Trips'. www.wanderlust.co.uk

Lonely Planet Traveller is only available in print; an award-winning travel magazine covering worldwide destinations and travel type. www.lonelyplanet.com/magazine

Online TNT Magazine's travel section includes a segment entitled 'Big trip' aimed at those planning their backpacking trip.

www.tntmagazine.com/travel

Australia and New Zealand magazine includes travel articles and advice.

www.australiamagazine.co.uk

Consumer Shows

Year Out Expo

To be held on 13-16 February 2014 as part of the *The Telegraph Outdoor Adventure & Travel Show* which is hosted in association with the *National Geographic Traveller*. It features seminars and talks on planning a year out, as well as the opportunity for potential volunteers and backpackers to meet travel, volunteer and work-placement organisers.

www.telegraphoutdoorshow.co.uk

TNT Travel Show

Free two-day travel show held in March at the Business Design Centre in Islington, London and again in September for one day. Aimed at the 18s-39s, the show features seminars related to gap years, student and youth travel and volunteering internationally. Exhibitors include overland travel operators, travel agents, flight and accommodation providers and tourist boards. Dates for 2014 have yet to be confirmed.

www.september-2013.tnttravelshow.com/home

The Telegraph Adventure Travel Show

To be held at Olympia between 25 to 26 January 2014, this annual travel show features a gap year travel section with exhibitors covering volunteering programmes, culture and community programmes and destination advice. Aimed at anyone thinking about taking an extended trip: 'whether retired, in the sixth form, getting ready to leave university or thinking about taking a sabbatical from work'.

www.adventureshow.co.uk

Futurewise Career & Gap Year Fairs

A student education programme organised by the Year Out Group that travels to independent schools in England to give students an opportunity to meet experts from member organisations for advice on gap-year plans.

www.yearoutgroup.org

Gapforce Open Day

Leading tour operator Gapforce holds an annual open day to promote its programmes; 2 November 2013 in London.

www.gapforce.org

Guide Books

Lonely Planet South Pacific Guide (2012)

Lonely Planet Fiji (2012)

Lonely Planet Vanuatu & New Caledonia (2012)

Lonely Planet Tahiti & French Polynesia (2012)

Lonely Planet Papua New Guinea & Solomon Islands (2012)

Lonely Planet Raratonga, Samoa & Tonga (2012)

Websites and Social Media Networks

The backpacking market are key users of social media websites and are increasingly likely to use travel forums to make decisions about gap year choices, destinations to visit, or volunteer projects to apply for. As a result, there are a number of useful websites targeting the gap year traveller; general travel forums are also key distribution channels.

www.gapyear.com

www.gapadvice.com

www.thegaptravelguide.com (also published as a guide book)

www.fco.gov.uk/gap-year-foreign-travel-advice

Lonely Planet's long-established Thorn Tree Travel Form provides travellers the opportunity to exchange travel information, advice, hints and tips. One of its forum 'branches' is Gap Year & Round the World Travel.

www.lonelyplanet.com/thorntree/forum.jspa?forumID=58

Other general travel social networking websites which attract the backpacking market are:

www.tripit.com

www.dopplr.com

www.gogobot.com

You Tube features a huge number of professional and amateur online videos covering a wide range of travel experiences and information. Further channels can be created to complement those already in existence - Fiji Travel Network; Samoa Tourism Authority; Vanuatu Islands VTO. The Australia and New Zealand You Tube channels provide good examples of channels targeted at youth travellers.

www.youtube.com/user/Australia www.youtube.com/user/PureNewZealand

13.4 North America

Since 2010 there have gradually been a growing number of gap-year articles in the US mainstream media including the *Wall Street Journal*, the *New York Times*, the *Washington Post* and *The Huffington Post's* travel section, *Huffpost Travel*. In 2013 the television channel *MTV* scheduled a documentary series on gap years.

www.online.wsj.com/public/page/news-travel-vacation.html

www.nytimes.com/pages/travel/index.html

www.washingtonpost.com/lifestyle/travel

www.huffingtonpost.com/travel

American Gap Association (AGA)

An accreditation and standards-setting organisation to advance the field of gap years by pioneering research on its benefits as well as serving as an information and advocacy hub for university admissions staff and educational counsellors.

www.americangap.org

US Gap Year Fairs

A national circuit of gap year events, hosted in schools, that brings together gap year organisations and experts, pupils, parents and high-school college counsellors. In the past five years it has expanded from 5 to 30 events across the USA, reflecting the growth of interest in gap year travel in the USA.

www.usagapyearfairs.org

13.5 Australasia

Website Travel is Australia, New Zealand and Fiji's largest online wholesale travel network for the backpacker, student and adventure market. It promotes 9,000 suppliers through 500 agents and provides travel guides, maps and websites to support the independent travel. Offers information about backpacker, hostel and budget hotels and activities in Fiji, Cook Islands, Samoa, Tonga and Vanuatu and also in New Caledonia and Norfolk Island.

www.websitetravel.com

Jasons Travel Media is the leading creator and distributor of travel information in New Zealand, Australia and the South Pacific. It has an extensive range of travel publications, multiple digital channels and a wide distribution network for its 62 annual publications to more than 2,100 locations. It is most prominent in New Zealand, consistently rated as one of the top 10 travel websites in NZ and top 20 in Australia.

www.jasons.co.nz

www.jasons.com.au

The Word is one of Australia's leading publishers and distributor of accommodation, tour activities and travel information to international youth, 'young at heart' and adventure markets. It is particularly known for its 'Cheap or Free' feature.

www.thewordaustralia.com.au

Aussie Backpacker, an online magazine specifically aimed at the Australian backpacking market.

www.aussiebackpacker.com.au

Backpacker Trade News is a discussion of everything under the hospitality umbrella.

www.backpackertradeneeds.com.au

Consumer and Trade Shows

Adventure & Backpacker Industry Conference

Backpacker week also features the industry events, the International Travel Exchange, the Adventure and Backpacker Industry Conference and The Golden Backpack Awards. Similar events are also hosted in the UK.

www.abic-australia.com

TNT Travel Show

Hosted during 'Backpacker Week' in November, the consumer-facing Travel Show is TNT's new initiative for 2013, with a major focus on backpackers and independent travellers.

The Holiday & Travel Show – Brisbane, Sydney, Melbourne

Australia's leading free travel expo to be held in three major cities in February and March 2014.

www.travelxpo.com.au

Adventure Travel Expo – Auckland, Brisbane, Sydney, Melbourne

Free adventure travel expos held annually in February and March.

www.myadventureexpo.com

Backpacker Hostel Listings

Hostel Bookers www.hostelbookers.com

Hostel World www.hostelworld.com

YHA www.yha.com.au ; www.yha.com.nz

Backpackers Board www.backpackersboard.co.nz

BBH New Zealand www.bbh.co.nz

Jobseeker Websites aimed at Working Holidaymakers

The Career Break Site www.thecareerbreaksite.com

Working Down Under www.workingdownunder.co.uk

Travellers at Work www.taw.com.au

OzForce www.ozforce.org

Get Me Down Under www.getmedownunder.com

International Exchange Programmes www.worknewzealand.org.nz

Targeting Backpackers in Australia

Popular Destinations

Promotional campaigns targeted at backpackers in Australia could focus on the most popular destinations for gap-year backpackers: Sydney, Byron Bay, Fraser Island, Whitsunday Islands, Cairns/Great Barrier Reef, Uluru (Ayer's Rock) and Daintree Forest.

Sporting Events

Sporting events are popular with backpacker and youth travellers, including regular cricket and rugby tournaments, the Melbourne Cup horse race and the Australian Open tennis tournament in Melbourne. International events can also attract the families of backpackers who combine seeing their children with attending big sporting events such as the British Lions rugby tour, the Ashes cricket tour and, in February 2015, the four-yearly Cricket World Cup which will be jointly hosted by Australia and New Zealand.

13.6 Asia

Guide Books

Chikyu no arukikata www.diamond.co.jp/arukikata

Kojin ryoko www.mapple.co.jp/mapple/publ

Lonely Planet www.lonelyplanet.com

Social Networks

Trip Advisor www.tripadvisor.jp

For Travel www.4travel.jp

Tabisuke www.tabisuke.arukikata.co.jp

Backpacker Promotion Sites

Japan Backpackers www.backpackers-link.com/2012/12/post-8.html

Samurai Backpacker Project www.samuraibp.com

14. OUTBOUND OPERATORS

What's In This Section?

- *Travel organisations providing services in the backpacking and student market*

14.1 Global

Flight Centre www.flightcentre.com

Provider of cheap flights and Round the World tickets. Offices in Australia, New Zealand, Canada, United States, South Africa, United Kingdom, Hong Kong, United Arab Emirates, Singapore, China, India.

GVI www.gvi.co.uk

Leading global volunteer organisation operating more than 150 humanitarian and conversation projects in some of the remotest parts of the world.

Projects Abroad www.projects-abroad.net

With offices throughout Europe including France, Germany, Italy, Sweden and the UK, Projects Abroad is a leading global organiser of volunteer placements worldwide for young people. Specialist areas include teaching, care conservation, medical, journalism, business and law, and destinations include Fiji and Samoa.

STA Travel www.statravel.com

Global company with international offices in the US, UK, Germany, Sweden and France. Aimed at the youth and backpacker market, STA provides cheap flights and accommodation and volunteer trips.

14.2 Europe

France

Nomade-Aventure www.nomade-aventure.com

Offers trips aimed at young adventurers and backpackers at competitive prices; tours to PNG and New Caledonia.

Germany

Praktikawelten www.praktikawelten.de

Provides volunteering, work and travel and internship opportunities for young people throughout the world.

Travel Works www.travelworks.de

Company specialises in working and volunteering overseas, including one marine conservation project in Fiji.

Sweden

Allresor www.allresor.se

Adventure tour operator offering a range of volunteer holidays to Africa.

Blueberry Worldwide www.blueberrysprak.nu

Agency representing language schools, universities and colleges worldwide offering volunteer and paid work internationally.

Kilroy Travel www.travels.kilroy.se

Specialises in products and services tailor-made for the youth and student market, helping them to explore life through travel and education. Areas include backpacking, working and volunteering abroad, and adventure.

United Kingdom

Frontier www.frontier.ac.uk

A non-profit conservation and development ngo which operates more than 300 projects in 57 countries. Volunteers can volunteer and travel for between 1 and 30 weeks which suit a variety of budgets and time constraints.

Gapyear.com www.gapyear.com

Social network and travel advice website created by backpackers, for backpackers, to offer advice on travelling, volunteering and working abroad.

gapFORCE www.gapforce.org

Provides opportunities in the fields of conservation, expeditions and medicine for volunteering, adventure and internships to enhance education.

Lattitude Global Volunteering www.lattitude.org.uk

International youth development charity specialising in sending young people (17-25) on long-term voluntary placements.

World Youth Adventures www.worldyouthadventures.com

WYA has specialised in overseas school group adventures for 20 years. One adventure includes the Kokoda Track in PNG.

14.3 North America

Adventure Life www.adventure-life.com

Adventure travel company with a wide portfolio of international destinations, including cruises to the South Pacific.

Air Treks www.airtreks.com

Provider of affordable, customised and efficient international air tickets through advanced technologies for complex multi-stop journeys.

Bootsnall www.bootsnall.com

One-stop travel resource for the independent traveller providing information and advice, access to the independent traveller community via message boards, and travel booking facilities.

Cadip Canada www.cadip.org

Canadian volunteering organisation offering opportunities throughout the world promoting peace, cooperation, tolerance and understanding in multi-cultural, multi-ethnic and international locations.

Carpe Diem Education www.carpediemeducation.com

Portfolio includes three-month and year-long gap year and study abroad programmes focused on community, cultural immersion, service learning and adventure.

Cross Cultural Solutions www.crossculturalsolutions.org

Non-profit organisation providing volunteer services to communities overseas throughout the world.

Go Abroad www.goabroad.com

A leading international education and experiential travel resource for those wanting to volunteer, undertake a internship or teach abroad.

Habitat for Humanity www.habitat.org

Operates home-building projects internationally, rehabilitating, repairing and new builds. Destinations include Fiji and Timor-Leste.

ISVolunteers (ISV) www.isvolunteers.org

Adventure and volunteer travel across the globe.

Lattitude Global Volunteering www.lattitudecanada.org

International youth development charity offering volunteering and gap year placements for the under 25s.

Rustic Pathways www.rusticpathways.com

Provides travel and service programmes for students and families in a wide range of international destinations. Aims to enrich the lives of students and benefits the areas in which it works, building cultural bridges to enable greater global understanding and cooperation.

United Planet www.unitedplanet.org

Provides volunteer and intership placements around the world.

WorldTeach www.worldteach.org

Partners with governments and other organisations to provide volunteer teachers to meet local needs and promote responsible global citizenship.

14.4 Australasia

Backpackers World Travel www.backpackersworld.com.au

Specialises in student and backpacker travel across Australia and New Zealand, Fiji and Asia, including Voluntourism.

House of Travel www.hot.co.nz

One of New Zealand's largest chain of high street and online travel agents offering flights, accommodation and tours to worldwide destinations.

Mad Travel Shop www.madtravelshop.com

One of Australia and New Zealand's largest travel networks, specialising in discount backpacker tours and packaged tour deals. Owns 'Nomads', the largest independent chain of hostels in Australia, New Zealand, Thailand and Fiji.

Peter Pans Adventure Travel www.peterpans.com.au

Backpacker and student travel specialists and providers of deals on adventure travel, hostels and tour packages for Australia, New Zealand and Fiji.

Unleashed Travel www.unleashedtravel.com.au

Specialists in overseas school leaver experiences out of Australia. They take thousands of school leavers away internationally to Fiji, Vanuatu or Bali.

World Expeditions www.worldexpeditions.co.nz

Specialist tour operator focused on responsible travel and community products.

14.5 Asia

JTB www.jtb.co.jp

JTB provides domestic and international tours and as part of their portfolio, it sells South Pacific package tours including Fiji, Tahiti and New Caledonia.

Nippon Travel Agency www.nta.co.jp

Operator offers a range of international tours including a South Pacific package tour in New Caledonia.

HIS www.his-j.com

Tour operator which offers tours to Fiji, Tahiti and New Caledonia.

Club Tourism International Inc www.club-t.com

International tour provider with several South Pacific destinations within its portfolio.

Kinki Nippon Tourist Inc www.knt.co.jp

Kinki Nippon Tourist provides international tours and destinations include Fiji, Tahiti, New Caledonia and Papua New Guinea.

Hankyu Travel www.hankyu-travel.com

International tour operator which provides a number of South Pacific tours including Fiji, Tahiti and New Caledonia.

JALPAK www.jal.co.jp

JALPAK offer international tours and as part of their portfolio, South Pacific destinations include Tahiti and New Caledonia.

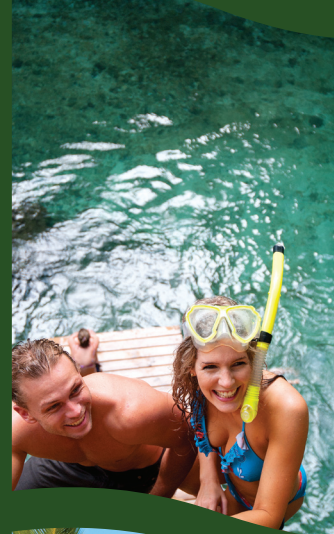
Meitetsu World Travel Inc www.mwt.co.jp

Meitetsu provides domestic and international tours all around the world, including South Pacific tours in Fiji, Tahiti, New Caledonia, Papua New Guinea and Easter Island.

South Pacific Tour www.sptjpn.com

South Pacific Tours specialises in the South Pacific and sell hotels, optional tours, transportation services and domestic airline and boat services.

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South Pacific Tourism ORGANISATION



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