



MOOD OF THE NATION REPORT

Australians recognise the importance and benefits of the tourism industry; however, they consistently underestimate the industry's size and value. The Mood of the Nation study identifies opportunities for the Australian tourism industry to improve in the telling of our story. Specifically, getting better at sharing our successes with those passionate Australians who have such pride in their country and are such willing advocates. Educating the public regarding the overall value of tourism to Australia's economy is imperative to ensuring a successful and sustainable future for Australian tourism.

RESEARCH FINDINGS

- > Three-quarters of respondents underestimate the value of tourism as an export.
- > Over 60% of Australians underestimate inbound tourism arrivals to Australia. However, respondents correctly identified the top three inbound markets for visitation.
- > Half of respondents underestimate international visitation to regional destinations.
- > 80% of Australians feel the current international visitor intake is either just right, or not enough.
- > Over half of Australians believe international tourism creates opportunities for business and economic growth. Less than one-quarter perceive negative outcomes of tourism to Australia.
- > 94% of Australians believe that international tourism is good for the country.
- > 83% of Australians are proud of the way Australia is promoted overseas.
- > One-quarter correctly identified Australia's current global tourism campaign.
- > Over 80% of Australians are supportive of Chris Hemsworth as Australia's global tourism ambassador.
- > Consumer perceptions of how Australia should be marketed internationally are largely aligned with Tourism Australia's core pillars.

BACKGROUND

Tourism is currently Australia's number one service export; generating jobs, investment and growth in communities throughout Australia. The industry has achieved supercharged growth in the last five years, surpassing eight million visitors in 2016, whom contributed \$38 billion to the Australian economy. While visitor numbers continue to grow, the past two decades have seen a dramatic shift in the international visitor mix to Australia, with emerging markets such as China and India comprising a far larger proportion of visitation.

Tourism Australia partnered with TNS to investigate and understand perceptions held by Australian consumers with respect to the

size, value and positive and negative impacts of Australia's tourism industry. The overall aim of the research was to identify key issues that may negatively affect perceptions or that might alter on-the-ground experience for visitors. Over 1000 Australian residents, aged 18 years and over were surveyed online in September 2016 regarding:

- > Knowledge of the industry
- > Knowledge of inbound markets
- > Sentiment around inbound tourism and its impact on the country, environment and infrastructure
- > Awareness and opinion of Tourism Australia's marketing efforts.



For more information, visit www.tourism.australia.com.