Mood of the Nation
A study into the perceptions held by Australian consumers with respect to the size and value of Australia’s tourism industry
The “Mood of the Nation” research was initiated to provide a quantitative read on perceptions held by Australian consumers with respect to the size and value of Australia’s tourism industry, in addition to perceived benefits and consequences.

The aim of the research was to identify key issues that might negatively affect perceptions or that might alter on-the-ground experience for visitors.

A further aim is to compare the sentiment around tourism across different regions of the country – potentially introducing the need for further infrastructure or marketing investment to help grow or maintain growth to regions.
The online survey was conducted in September 2016 amongst n=1,000 Australians.

A nationally representative sample was chosen to make sure areas are represented in the data proportionally to current population.

<table>
<thead>
<tr>
<th>Region</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSW/ACT</td>
<td>333</td>
</tr>
<tr>
<td>VIC</td>
<td>252</td>
</tr>
<tr>
<td>QLD</td>
<td>201</td>
</tr>
<tr>
<td>WA</td>
<td>106</td>
</tr>
<tr>
<td>SA</td>
<td>76</td>
</tr>
<tr>
<td>TAS</td>
<td>23</td>
</tr>
<tr>
<td>NT</td>
<td>9</td>
</tr>
<tr>
<td>Industry</td>
<td>120</td>
</tr>
</tbody>
</table>
Perceptions of the value of Australian tourism

Insight: Three quarters of respondents underestimate the value of tourism as an export.

Q13. Australia’s exports contribute significantly to the overall services economy. Where do you think international tourism ranks as a services export in the Australian economy?

Base: All respondents (n=1000)
Q9. At current levels, how many international visitors do you think come to Australia each year?
Base: All respondents (n=1000)

Insight: Over 60% of Australians underestimate inbound tourism arrivals to Australia.
Perceptions of Australians employed in tourism

Insight: 37% overestimate the proportion of Australians employed in tourism.

Q9. How many Australian workers do you think are either directly or indirectly employed in the tourism industry?
Base: All respondents (n=1000)
Perceptions of international visitation to regional destinations

Insights: Half of respondents underestimate international visitation to regional destinations.

Q14: How many international visitors visit regional (i.e. not metropolitan) destinations when on holiday in Australia?
Base: All respondents (n=1000)
Perceptions of top inbound visitor markets to Australia

Insight: Respondents correctly identified the top three inbound markets for visitation.

Q10. Which of the following countries does Australia receive the most visitors from? Please select the top three.

Base: All respondents (n=1000)

- China: 82%
- UK: 48%
- New Zealand: 44%
- Japan: 36%
- USA: 27%
- India: 12%
- Hong Kong: 11%
- Indonesia: 7%
- Germany: 6%
- Singapore: 5%
- Other (NET): 21%

Actual Top 3: China, UK, New Zealand
Perceptions of top inbound spend markets to Australia

Insight: Excluding Japan, respondents correctly identified the top three inbound markets for expenditure.

Q11. Which of the following countries’ visitors spend the most money while visiting Australia? Please select the top three.

Base: All respondents (n=1000)

- China: 77%
- USA: 46%
- UK: 38%
- Other (NET): 29%

Corrected Top 3: China, Japan, USA

Actual Top 3: China, Japan, USA
Perceptions of Australia’s current intake of inbound visitors

Insight: Only 11% of Australians view the current intake as excessive.

Q16: Overall, from your perspective, do you think that Australia attracts too many, too few, or just the right amount of international visitors?

Base: All respondents (n=1000)
Perceptions of Australia’s predicted intake of 10m inbound visitors by 2020

Insight: Less than a quarter of consumers believe the forecast growth is excessive.

Q17: Some experts have predicted that in 2020, approximately 10 million international visitors will come to Australia. Given that nearly 8 million international visitors come to Australia now, do you think that this is too much growth, the right amount of growth, or not enough growth?
Base: All respondents (n=1000)
Perceptions of Australia’s capacity to manage inbound visitor growth

Insight: three quarters of consumers believe Australia is equipped to handle current visitor intake.

Q15: Which of the following statements best describes your overall perception?
Base: All respondents (n=1000)

- Total Australians 18+ (100%)
- Don't know (12%)
- Australia is equipped to handle current numbers (75%)
- Current number is putting too much pressure on Australia (13%)
Perceptions of **pros** and **cons** of tourism

Insight: Over half of Australians believe international tourism creates opportunities for business and economic growth. Less than a quarter perceive negative outcomes of tourism to Australia.

Q21: Below is a list of possible pros and cons a country could experience as a result of international tourism. From your perspective, to what extent do you agree or disagree with each of these statements? (7 point scale) International tourism to Australia ...

Base: All respondents (n=1000)
Perceptions of the importance of marketing Australia internationally

Insight: 83% of Australians are proud of the way Australia is promoted overseas.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia is a destination international visitors want to visit</td>
<td>94%</td>
</tr>
<tr>
<td>International tourism is good for Australia</td>
<td>94%</td>
</tr>
<tr>
<td>Tourism is important for Australia's future</td>
<td>93%</td>
</tr>
<tr>
<td>Tourism is vital to regionals areas of Australia</td>
<td>89%</td>
</tr>
<tr>
<td>Tourism is an industry I’d encourage Australians to work in</td>
<td>84%</td>
</tr>
<tr>
<td>I am proud of how Australia is promoted overseas</td>
<td>83%</td>
</tr>
<tr>
<td>Tourism is an industry I’d encourage my friends and family to work in</td>
<td>76%</td>
</tr>
<tr>
<td>I am concerned about tourism's impact on the environment</td>
<td>44%</td>
</tr>
</tbody>
</table>

Q21: Do you agree with the following statement?
Base: All respondents (n=1000)
Awareness of Australia’s current global tourism campaign

Insight: One quarter of respondents correctly identified Australia’s current global tourism campaign.

TA1: What is Australia’s current global campaign?
Base: All respondents (n=1000)
Attitudes towards Chris Hemsworth’s status as global tourism ambassador

Insight: Over 80% of Australians are supportive of Chris Hemsworth as Australia’s global tourism ambassador.

TAS: The current tourism ambassador for Australia is Chris Hemsworth. How would you rate Chris Hemsworth as being representative of Australia as a holiday destination?
Base: All respondents (n=1000)
Views on how Australia should be marketed internationally

Insight: Consumer perceptions of how Australia should be marketed internationally are largely aligned with Tourism Australia’s core pillars.

<table>
<thead>
<tr>
<th>Factor</th>
<th>First</th>
<th>Second</th>
<th>Third</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aquatic and coastal</td>
<td>19%</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>World class nature</td>
<td>21%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>Safety and security</td>
<td>16%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Local and different wildlife</td>
<td>6%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>Family friendly</td>
<td>6%</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Value for money</td>
<td>5%</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>Interesting attractions</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Good food and wine</td>
<td>3%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Native or indigenous experiences</td>
<td>3%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Friendly and open citizens</td>
<td>3%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Thank you