

Appendices

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Appendix A

National Tourist Office
Study 2001-2002



JAMES COOK UNIVERSITY

Townsville campus

Townsville QLD 4811 AUSTRALIA

Telephone: (07) 4781 4111 web: www.jcu.edu.au

October 23, 2001

Dear Martin,

Greetings!

Destination marketing by National Tourist Offices (NTOs) in North America has never been more challenging. Even before the terrible events of September 11 the tourism industry was going through major changes while marketing in the region was becoming more and more cost prohibitive. Now destinations must not only come to terms with vastly different marketplace while struggling to attract American consumers

I am a doctoral student in the School of Business, Tourism Program at James Cook University in Australia. I am also a destination-marketing practitioner - I am the Regional Director - the Americas for Tourism Queensland. As part of my studies I am conducting a study of the key issues affecting NTOs in North America.

Please rest assured that this study is for strictly academic purposes and that your responses will only be reported in aggregate. **Your responses are confidential - under no circumstances will your responses be attributed to you or your company.** This study is an integral part of my dissertation research and **your participation is important to my study.** Thank you in anticipation for your support.

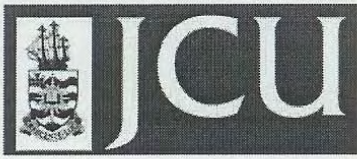
In appreciation for your participation, I would be happy to **provide a complimentary report of the study results** to your firm. I believe that with your support, it will provide valuable insights into destination marketing in North America.

Please complete the enclosed questionnaire and return in the envelope provided. Or fax it directly to me at (310) 697-0208.

Thank you in anticipation.

Kind Regards,

Jonathon Day
Ph.D. Student
Business - Tourism



Questionnaire Prepared by:
Jonathon Day
Doctoral Student – Tourism
James Cook University

National Tourist Office Marketing Activities Study Americas

The following questionnaire is designed to identify the key issues facing National
Tourism Organizations in the United States.
Thank you for your participation.

Please return Questionnaires to:

Jonathon Day
NTO Study
1026 Triunfo Canyon Rd
Westlake Village, CA 91361

Or Fax to 310 6970208

Your Organization

In what year did your organization establish an office in North America? _____

How many offices do you currently operate in North America? _____

Where are your North American offices located?

USA

- | | | |
|--|--|--------------------------------------|
| <input type="checkbox"/> New York | <input type="checkbox"/> Chicago | <input type="checkbox"/> Los Angeles |
| <input type="checkbox"/> San Francisco | <input type="checkbox"/> Washington DC | <input type="checkbox"/> Dallas |
| <input type="checkbox"/> Miami | <input type="checkbox"/> Atlanta | <input type="checkbox"/> Boston |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> Other _____ | <input type="checkbox"/> Other _____ |

Canada

- | | | |
|------------------------------------|----------------------------------|--------------------------------------|
| <input type="checkbox"/> Vancouver | <input type="checkbox"/> Toronto | <input type="checkbox"/> Other _____ |
|------------------------------------|----------------------------------|--------------------------------------|

How many employees do you have in North America? _____

Has your marketing budget increased, decreased, or stayed the same in the last three years?

- | | | |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Decreased | Stayed the same | Increased |

What is your total budget in North America?

<input type="checkbox"/> Under \$ 100,000	<input type="checkbox"/> \$ 100,000 - \$ 249,000	<input type="checkbox"/> \$250,000 - 499,000
<input type="checkbox"/> \$500,000 - 749,000	<input type="checkbox"/> \$ 750,000 - \$ 999,999	<input type="checkbox"/> \$1,000,000 - 1,999,999
<input type="checkbox"/> \$2,000,000 - 2,999,999	<input type="checkbox"/> \$3,000,000 - 3,999,999	<input type="checkbox"/> \$4,000,000 - 4,999,999
<input type="checkbox"/> \$5,000,000 or more		

What is your marketing budget in North America?

<input type="checkbox"/> Under \$ 100,000	<input type="checkbox"/> \$ 100,000 - \$ 249,000	<input type="checkbox"/> \$250,000 - 499,000
<input type="checkbox"/> \$500,000 - 749,000	<input type="checkbox"/> \$ 750,000 - \$ 999,999	<input type="checkbox"/> \$1,000,000 - 1,999,999
<input type="checkbox"/> \$2,000,000 - 2,999,999	<input type="checkbox"/> \$3,000,000 - 3,999,999	<input type="checkbox"/> \$4,000,000 - 4,999,999
<input type="checkbox"/> \$5,000,000 or more		

Do you expect your marketing budget to increase, decrease, or stay the same in the next three years?

- | | | |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Decrease | Stay the same | Increase |

Your Market

Please rate the following Target Markets according to their importance to your priorities in North America. Assign a value to each Target Market with 1=Least important and 7=most important.

Consumers – Leisure	1	2	3	4	5	6	7
Consumer – Special Interest	1	2	3	4	5	6	7
Travel Trade	1	2	3	4	5	6	7
Convention & Meetings	1	2	3	4	5	6	7
Incentive	1	2	3	4	5	6	7
Business	1	2	3	4	5	6	7

Please indicate the approximate percentage of passenger growth / decline for your destination during 2000.

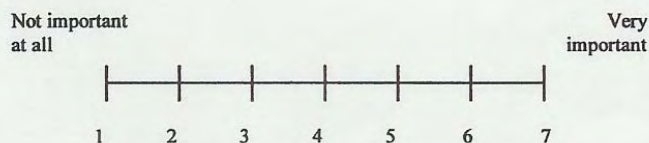
Your Marketing Activity

Please place a tick next to the statement that best describes your marketing focus.

- Destination Promotion only.** Advertising that promotes the destination but does not include a tourism product – either a package or airfare.
- Primarily Destination Promotion.** Advertising that highlights the destination’s images and attributes but includes some product/price information.
- Primarily Product/Price.** Advertising that focuses on promoting travel products to you destination but does not include a heavy focus on images of the destination itself.
- Combination of Some Product/Price Advertising and some destination promotion.** Advertising that includes images of the destination

Destination “Brand” Marketing

How important is “branding” of your destination as a goal of your marketing activities.



What are the key tools you use to support the development of your branding activity?

Please indicate which of the following marketing activities your organization undertakes by placing a tick in the corresponding box. Also please rank each of the following marketing media in terms of their importance to your **brand/image** building?

	Tick if you use	Not at all important	Neutral					Very Important
		1	2	3	4	5	6	7
Network TV	<input type="checkbox"/>	1	2	3	4	5	6	7
Local TV	<input type="checkbox"/>	1	2	3	4	5	6	7
Cable TV	<input type="checkbox"/>	1	2	3	4	5	6	7
Infomercials	<input type="checkbox"/>	1	2	3	4	5	6	7
Magazine Advertising - Consumer	<input type="checkbox"/>	1	2	3	4	5	6	7
Magazine Advertising Inserts	<input type="checkbox"/>	1	2	3	4	5	6	7
Newspaper Advertising	<input type="checkbox"/>	1	2	3	4	5	6	7
Newspaper Advertising Sections	<input type="checkbox"/>	1	2	3	4	5	6	7
Trade Advertising	<input type="checkbox"/>	1	2	3	4	5	6	7
Trade Ad Sections	<input type="checkbox"/>	1	2	3	4	5	6	7
Blast Faxes – Travel trade	<input type="checkbox"/>	1	2	3	4	5	6	7
Web Banner Advertising	<input type="checkbox"/>	1	2	3	4	5	6	7
Web Sponsorships	<input type="checkbox"/>	1	2	3	4	5	6	7
E-mail Marketing –Trade	<input type="checkbox"/>	1	2	3	4	5	6	7
E-mail Marketing – Consumers	<input type="checkbox"/>	1	2	3	4	5	6	7
Direct Mail	<input type="checkbox"/>	1	2	3	4	5	6	7

Do you produce marketing materials developed specifically for the US target market?

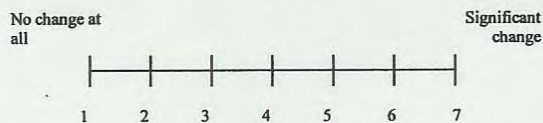
Yes / No

Have you undertaken market research to improve and enhance your destination brand marketing during the last three years? Yes / No

Do you track target market perceptions of your destination? Yes / No

Internet Marketing

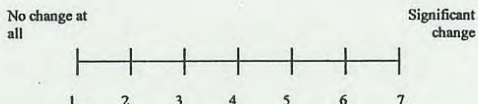
How significantly has the impact of the Internet changed your marketing activities over the last three years?



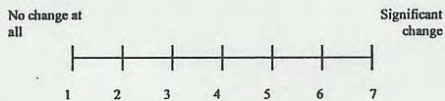
In what ways has it changed your marketing? Please mark the following if they apply:

- Reallocation of funds to internet marketing.
- Development of website for North American market
- Development of web-based Newsletter
- Development of email Newsletter
- Other _____

How significantly do you expect your marketing operations will change over the next three years as a result of the Internet?



How significantly do you expect the marketing operations of your key partners will change over the next three years as a result of the Internet?



Collaborative marketing / Co-operative Marketing

Are your marketing plans developed with industry? Yes / No

If so, how do you obtain the feedback/input?

- Informal conversations with industry
- Formal advisory panels
- Other _____

What percentage of your marketing is undertaken with co-operative partners (hotels, tour operators etc)

- 1-25%
- 25-50%
- 50-75%
- 75-100%

Destination marketing today

What do you consider to be the most important issues regarding the operation of North American NTOs?

What are the “hottest” topics in destination marketing? Assign a value to each topic with **1=Not at all important** and **7=very important**. Place a tick in the corresponding box for each topic.

1	2	3	4	5	6	7
---	---	---	---	---	---	---

Destination Brand Marketing							
Internet Marketing							
Collaborative Marketing / Co-operative Marketing							
Market Segmentation							
Other _____							
Other _____							

What are the greatest challenges to you as a marketer? Assign a value to each challenge with **1=least challenging** and **7= most challenging**. Place a tick in the corresponding box for each challenge.

1	2	3	4	5	6	7
---	---	---	---	---	---	---

Reducing Budgets							
Increasing costs of marketing activities							
Maximizing benefits from new marketing techniques like the internet							
Providing proof of benefits in return for marketing expenditures							
Reaching target markets efficiently and effectively							
Other _____							
Other _____							

What do you consider the most important marketing activities among North American NTOs? Assign a value to each activity with **1=not at all important** and **7=very important**. Place a tick in the corresponding box for each activity.

1	2	3	4	5	6	7
---	---	---	---	---	---	---

Distributing promotional literature to travel trade intermediaries (e.g. travel agents, tour operators)							
Distributing promotional literature to consumers							
Organizing educational/training seminars/workshops for the travel trade							
Developing new packages with the travel trade							
Arranging familiarization trips for travel writers							
Advertising in consumer travel magazines/newspapers							
Arranging familiarization trips for travel trade intermediaries							
Making sales calls on travel trade intermediaries							
Maintaining a computerized database of enquiries							
Exhibiting at travel trade shows							
Exhibiting at consumer travel shows							
Making sales calls on consumers (e.g. groups)							
Providing up to date information on a website							

Please indicate your level of agreement with each of the following statement by placing a tick in the most appropriate box. 1= totally disagree, 7=totally agree.

1	2	3	4	5	6	7
---	---	---	---	---	---	---

Joint ventures or cooperation with other travel related business (hotels, wholesalers, airlines, travel agencies, etc) in the USA and Canada increase the effectiveness of your country's promotional efforts							
Fast responses to consumer and travel trade enquiries are essential for an NTO to increase tourist arrivals.							
Database marketing is an essential step in effective NTO promotions in North America							
It is essential that an NTO places advertisements about its country in consumer travel magazines (eg Travel & Leisure, Conde Nast Traveler).							
Employees should have training in marketing or sales in order to work in an NTO office.							
Employees should have formal education in tourism to qualify for positions with NTOs (eg university degree, travel-related certification).							
In North America, it is more effective for an NTO to work closely with travel trade intermediaries rather than concentrating on consumer advertising.							
Joint ventures or cooperation with non-travel businesses (eg manufacturers) in the USA and Canada increase the effectiveness of your country's promotional efforts.							
It is essential that an NTO places advertisements about its country in North American travel trade magazines /newspapers (e.g. Travel Weekly).							
It is important for NTO employees to have prior work experience in tourism before joining an NTO.							

Thank you!

Appendix B

National Tourist Office
Opinion Leaders Survey



Operational Questions

Name of NTO _____

Name of respondent _____

Staff size _____

Budget size _____

Branding – Importance of Activity/ management process

Do you consider your destination a brand?	
How do destinations behave like brands? How are they different? What impact does this have on your branding activity?	
Do you have specific goals for the brand	
Is the brand a core part of your strategic planning process	
How do you measure the success of your campaigns? Do you measure brand equity growth long term as well as short term ROI.	
Who is the key manager of the brand	
Who is involved in the brand development and how?	

Date of interview _____

respondent _____

Value Migration Questions - Operators

<p>What benefits do product in your destination receive from your branding activity</p>	
<p>How do your products benefit? Indirectly, directly. Do they value the benefits</p>	
<p>What is the value of destination branding activity to products in your destination</p>	
<p>Do you encourage products to utilize brand elements in their marketing activity – if so what / how</p>	
<p>Do you “incentivize” products to use your brand imaging</p>	
<p>Does your destination gain benefit from brand efforts of your products ? Specific product?</p>	
<p>Do your stakeholders spend more of marketing the destination because of your campaigns – or less ?</p>	

Date of interview
respondent

Value Migration Questions - wholesalers

<p>What benefits do wholesalers of your destination receive from your branding activity</p>	
<p>How do operators benefit from your brand activity? Directly, indirectly Do they value the benefits?</p>	
<p>What is the value of destination branding activity to products in your destination</p>	
<p>Do you encourage products to utilize brand elements in their marketing activity – if so what / how</p>	
<p>Do you “incentivize” products to use your brand imaging</p>	
<p>Does your destination benefit from the brand efforts of your products? Specific wholesalers?</p>	
<p>Do your stakeholders spend more of marketing the destination because of your campaigns – or less ?</p>	

Date of interview
respondent

Appendix C

National Tourist Office
Study 2005

Destination Branding Questionnaire



Dear National Tourist Office Colleague

The following questionnaire is designed to examine the roles and activities of National Tourist Offices (NTOs) operating in the United States. The questionnaire has a particular focus on destination marketing and branding undertaken by NTOs in the United States.

The study is part of a doctoral thesis being undertaken through James Cook University. Your responses will be kept strictly confidential. The results of the survey will be reported in aggregate in the dissertation and may be used in other publications.

The questionnaire will take about 10-15 minutes to complete. Your response is very important to me and I thank you in advance for your time and effort.

Sincerely

Jonathon Day

[Start Survey](#)

1. How many offices do you currently operate in North America?

5 (Please enter numbers)

2. Where are your North American offices located?

- | | | |
|---|---|---|
| <input checked="" type="checkbox"/> New York | <input checked="" type="checkbox"/> Chicago | <input checked="" type="checkbox"/> Los Angeles |
| <input checked="" type="checkbox"/> San Francisco | <input checked="" type="checkbox"/> Washington DC | <input type="checkbox"/> Dallas |
| <input type="checkbox"/> Miami | <input type="checkbox"/> Atlanta | <input type="checkbox"/> Boston |
| <input type="checkbox"/> Other: | <input type="checkbox"/> Other: | <input type="checkbox"/> Other: |
- | | | |
|--|--|--|
| | | |
|--|--|--|

3. How many employees do you have in North America?

5 (Please enter numbers)

4. What is your total budget in North America?

1 (Please enter numbers)

5. Has your marketing budget increased, decreased, or stayed the same in the last three years?

- Decreased Stayed the same Increased

6. What is your marketing budget in North America?

2 (Please enter numbers)

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7. Do you expect your marketing budget to increase, decrease, or stay the same in the next three years?

- Decrease Stayed the same Increase

8. Please indicate the approximate percentage of passenger growth / decline for your destination during 2004.

- Growth Decline

(Please enter numbers)

9. Please rank the following market segments according to their importance to your priorities in North America. Assign a value to each Target Market with 1=less important and 7=most important.

1 (Least important) to 7 (Most important)

	1	2	3	4	5	6	7
Consumers - Leisure	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Consumer - Special Interest	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Travel Trade	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Convention & Meetings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Incentives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

10. Are your marketing plans for North America developed with input from your tourism industry?

- Yes
 No

11. If you answered "Yes" in 10, how do you obtain industry input and feedback to your marketing plan?

- Informal conversations with industry
 Formal advisory panels
 Other, please describe below:

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- 1-25%
- 25-50%
- 50-75%
- 75-100%

13. Do you maintain control of your advertising creative images and messages in co-operative marketing activities?

- Yes
- No

14. Is using your brand elements and/or creative a requirement for travel trade participation in cooperative marketing activities?

- Always
- Sometimes, depending on circumstances
- No

15. What percentage of your marketing communications efforts/budgets are allocated to the following marketing communications goals?

	Please enter numbers only
Raising awareness of the destination	50
Building greater understanding of aspects of the destination	30
Generating leads for conversion by private sector partners	20
Other	0

16. How important is "branding" of your destination as a goal of your marketing activities?

- | | | | | | | |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|----------------------------------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Not at all important | | | | | | Very important |

17. How do you measure overall success from your marketing activities? Check each that is applicable:

- Brand tracking research
- Response to marketing campaigns - number of leads generated
- Conversion studies of campaigns to determine passengers generated
- Co-operative partner reporting on leads and/or conversions
- PR - Equivalent Advertising value of Press exposure
- PR - Impressions
- Other

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18 Do you measure the following through our brand tracking studies?

- Yes No Awareness of the destination
- Yes No Intention to travel to the destination
- Yes No Changes in perceptions of key brand attributes through consumer tracking surveys

19. Do you set goals for growth in key dimensions of the brand as measured through consumer brand tracking surveys?

- Yes
- No

20. Have you undertaken market research in the United States to improve and enhance your destination marketing during the last three years?

- Yes
- No

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21. Please rate the importance of the following reasons for undertaking the Destination Branding based on your experience of branding in the United States.

1 (Least important) to 7 (Most important)

Not Applicable 1 2 3 4 5 6 7

To raise the profile of your country in the United States.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
For political reasons in your own country.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Increase the efficiency and effectiveness of our NTO marketing efforts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Increase efficiency and effectiveness of marketing efforts of your tourism products.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Increase efficiency and effectiveness of tourism intermediaries, like travel agents and travel wholesalers, to sell your tourism products.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To increase sales of product and services from your country including non-tourism products.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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Thanks! You've passed the halfway mark in this questionnaire.

0%  100%

22. Please choose the following statement that best describes your brand development process: (Please select only one)

- Core brand elements and strategy are developed centrally and the USA operation has no ability to interpret the brand execution for local market.
- Core brand elements and strategy are developed centrally and the USA operation has limited ability to interpret the brand execution for local market.
- Core brand elements and strategy are developed centrally and the USA operation has great flexibility to interpret the brand execution for local market.
- The American operation develops brand strategy for the USA market.
- We do not undertake brand development.
- Other, please describe:

23. Do you produce marketing materials developed specially for the US target market?

- Yes
- No

24. Do you produce web pages specially for the US target market?

- Yes
- No

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25. Please rate each of the following marketing media in terms of their importance to your brand/image building? Please mark "not applicable" if you do not use the media.

1 (Not at all important) to 7 (Very important)

	Not Applicable	1	2	3	4	5	6	7
Network TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Local TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Cable TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Infomercials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Magazine Advertising - Consumer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Magazine (consumer) Advertising Inserts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Newspaper Advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Trade Advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Trade Ad Sections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Blast Faxes - Travel Trade	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Web Banner Advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other Web marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
E-mail Marketing - Trade	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
E-mail Marketing - Consumers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Direct Mail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Your own North American web site content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Your brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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0%



100%

26. How important is your destination brand marketing for the tourism product from your country that target the US market?

- Not at all important Neutral Very important

27. How important is your destination brand marketing for the tourism intermediaries - like travel wholesalers and travel agents - who sell your country's tourism product in the US market?

- Not at all important Neutral Very important

28. In your opinion - what benefits does the branding of your country create for products selling to the American market? Tick as many as apply.

- Increased business as a direct result of participation in NTO sponsored campaigns.
- Increased business as an indirect result of campaigns.
- Easier introduction of product to the US market because of NTO brand marketing.
- Ability to focus on product sales knowing "destination message" has been covered.
- NTO Brand marketing makes it easier to convert "sales" to your country.
- NTO Brand marketing allows our tourism operators to charge a "price" premium.
- Other, please describe below:

[Back](#) [Next](#)

0%  100%

less on marketing in the USA because your country has a branding campaign in the United States?

More

Not a factor

Less

30. In your opinion - would the marketing efforts of your country's tourism product change if there was no NTO country branding or promotion?

Yes

No

If yes - how?

31. Indicate your level of agreement with the following statements:

Travel product from my country should present a "uniform" message about our destination when selling in the United States

Strongly disagree Neutral Strongly agree

Sellers of travel to my destination are aware of destination undertaken by the NTO.

Strongly disagree Neutral Strongly agree

Sellers of travel to my destination are aware of our destination brand's key design components.

Strongly disagree Neutral Strongly agree

Sellers of travel to my country are aware of our destination brand's key messages.

Strongly disagree Neutral Strongly agree

Sellers of travel to my country are aware of the goals of our national tourism branding.

Strongly disagree Neutral Strongly agree

[Back](#) [Next](#)

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32. Do you have information on your country's branding available for product to use and incorporate in their own marketing activities?

Yes

No

33. Do you encourage product to use elements of your branding, such as specific images, or "copy" in their marketing activities in the US?

Yes

No

34. If you answered "Yes" in 33, then how do you encourage them?

Fresh - adventure - unique - expeirences - timeless

35. 10 years from now should your country - through its National Tourist Organization - be spending more or less time and/or money on developing its brand in the United States?

Less active

About the same

More active

36. What do you consider the three most important issues facing destination marketers in NTOs operating in North American?

xxx
xxx
xxx

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0%  100%

37. What are the greatest challenges to you as a marketer? Assign a value to each challenge with 1=least challenging and 7=most challenging. Select the corresponding box for each challenge.

1 (Least challenging) to 7 (Most challenging)

	1	2	3	4	5	6	7
Reducing Budgets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Increasing costs of marketing activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Maximizing benefits from new marketing techniques like the Internet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Providing proof of benefits in return for marketing expenditures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Reaching target markets efficiently and effectively	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Destination Brand Marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Collaborative marketing/cooperative marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other: <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

38. Do you have any other comments that you would like to share?

[Back](#) [Next](#)

0%  100%

Destination Branding Questionnaire

Please confirm your email below. This will remove your name from the list and ensure that you are not asked to fill in this questionnaire again. Please be assured that your responses will be kept strictly confidential.

Submit

Appendix D

Content Analysis

THE CONTENTS OF THIS APPENDIX HAVE BEEN REMOVED DUE TO
COPYRIGHT RESTRICTIONS

Appendix E

Australian Tourism
Marketers Study:
Australian Product

Destination Branding Questionnaire



Dear Travel Industry Colleague

The following questionnaire is designed to examine your attitudes towards destination branding and has a particular focus on the branding work undertaken by the Australian Tourist Commission and the Australian tourism industry working in the United States.

The study is part of a doctoral thesis being undertaken through James Cook University. Your responses will be kept strictly confidential. The results of the survey will be reported in aggregate in the dissertation and may be used in other publications.

The questionnaire will take about 10-15 minutes to complete. Your response is very important to me and I thank you in advance for your time and effort.

Sincerely

Jonathon Day

[Start Survey](#)

Please select one ▼

2. What percentage of your total business came from international visitors in 2003?

Please select one ▼

3. Rank the following countries in order of importance with respect to your international markets.

1 = The Highest Ranking; 8 = The Lowest Ranking

Please select the ranking ▼ New Zealand

Please select the ranking ▼ Japan

Please select the ranking ▼ United States

Please select the ranking ▼ UK

Please select the ranking ▼ Europe

Please select the ranking ▼ China

Please select the ranking ▼ Northern Asia

Please select the ranking ▼ Southeast Asia

4. What percentage of your international business comes from the United States?

Please select one ▼

5. How many passengers did you receive from the United States in 2003?

Please select one ▼

6. What marketing activities do you undertake in the USA? Tick as many as apply.



Brochure support

Sales incentives

Distribute general purpose brochures

Produce and distribute brochures specifically for US market

Advertising

PR activities

E-marketing with Australia.com

Other activities, please specify below:

Next

0% ■■■

100%

Please select one

8. When developing marketing activities for the USA market how important are various messages:

Your company/corporate brand messages

Not important Neutral Very important

Individual property/attraction features and messages

Not important Neutral Very important

Destination messages

Not important Neutral Very important

9. Indicate how much space and/or time you dedicate to the conveying the following types of messages:

Your company/corporate brand messages	<input type="text"/>	%
Individual property/attraction features and messages	<input type="text"/>	%
Destination messages	<input type="text"/>	%
Other	<input type="text"/>	%

Total must equal to 100%

10. When marketing your product how important are the following types of messages:

Identifying your product with Australia or aspects of Australia.

Not important Neutral Very important

Identifying your product with the state of Australia in which it is located.

Not important Neutral Very important

Identifying your product with the city or local region in which it is located.

Not important Neutral Very important

11. Indicate your level of agreement with the following statement:

Being associated with Australia assists my marketing efforts in the United States.

Strongly disagree Neutral Strongly agree

12. Indicate your level of agreement with the following statement:

It is important to emphasize the "Australian-ness" of my product to consumers in the United States.

Strongly disagree Neutral Strongly agree

13. How do you communicate your "Australian-ness"?



15. Indicate how important the following factors are in generating awareness of Australia as a vacation destination in America.

1 (Not at all important) to 5 (Very important)

		1	2	3	4	5
Culture						
Which includes:	School and education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Documentaries and nature shows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Current events and news stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pop culture						
Which includes:	Movies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australian celebrities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Books - Fiction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Music	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Sporting events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	TV commercials - Australian or Australian themed products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Word of mouth					
Which includes:	Friends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	People who have traveled to Australia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australians they have met	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel Media						
Which includes:	Travel guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Newspaper - travel stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Magazine - travel stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	TV Travel shows/guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Online travel guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel Advertising						
Which includes:	ATC major campaigns - TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	ATC major campaigns - Newspaper	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	ATC major campaigns - Magazine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australia.com	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australia - destination brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Qantas Australian travel advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Other airline travel advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Other travel advertising - wholesalers/hotel etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Travel product brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel intermediaries						
Which includes:	Travel agents - travel agents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Travel wholesalers - reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Airline reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Online travel agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>



17. Indicate how important the following factors are in generating desire to travel to Australia for Americans.

1 (Not at all important) to 5 (Very important)

		1	2	3	4	5
Culture						
Which includes:	School and education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Documentaries and nature shows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Current events and news stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pop culture						
Which includes:	Movies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australian celebrities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Books - Fiction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Music	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Sporting events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	TV commercials - Australian or Australian themed products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Word of mouth						
Which includes:	Friends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	People who have traveled to Australia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australians they have met	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel Media						
Which includes:	Travel guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Newspaper - travel stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Magazine - travel stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	TV Travel shows/guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Online travel guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel Advertising						
Which includes:	ATC major campaigns - TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	ATC major campaigns - Newspaper	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	ATC major campaigns - Magazine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australia.com	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australia - destination brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Qantas Australian travel advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Other airline travel advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Other travel advertising - wholesalers/hotel etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Travel product brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel intermediaries						
Which includes:	Travel agents - travel agents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Travel wholesalers - reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Airline reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Online travel agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

19. Indicate how important you think the following factors to actually get Americans to travel to Australia.

1 (Not at all important) to 5 (Very important)

		1	2	3	4	5
Culture						
Which includes:	School and education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Documentaries and nature shows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Current events and news stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pop culture						
Which includes:	Movies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australian celebrities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Books - Fiction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Music	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Sporting events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	TV commercials - Australian or Australian themed products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Word of mouth						
Which includes:	Friends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	People who have traveled to Australia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australians they have met	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel Media						
Which includes:	Travel guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Newspaper - travel stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Magazine - travel stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	TV Travel shows/guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Online travel guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel Advertising						
Which includes:	ATC major campaigns - TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	ATC major campaigns - Newspaper	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	ATC major campaigns - Magazine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australia.com	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australia - destination brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Qantas Australian travel advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Other airline travel advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Other travel advertising - wholesalers/hotel etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Travel product brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel intermediaries						
Which includes:	Travel agents - travel agents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Travel wholesalers - reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Airline reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Online travel agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

20. Indicate your level of agreement with the following statement:

Australian travel product should present a "uniform" message about Australia when selling in the United States

Strongly disagree Neutral Strongly agree

21. Indicate your level of agreement with the following statement:

The success of my sales and marketing in the United States is closely tied to the success of Brand Australia.

Strongly disagree Neutral Strongly agree

22. Indicate your level of agreement with the following statement:

Australia's National Tourist Office should provide guidelines in presenting Australia in overseas markets.

Strongly disagree Neutral Strongly agree

23. Have you read the Brand Australia pages at ATC.Australia.com in the last 12 months?

- Yes
 No

24. Indicate your level of agreement with the following statements:

I am aware that the Australian Tourist Commission has developed a branding strategy for Australian Tourism.

Strongly disagree Neutral Strongly agree

I am aware of the key design components of Brand Australia.

Strongly disagree Neutral Strongly agree

I am aware of the key copy points of Brand Australia.

Strongly disagree Neutral Strongly agree

I am aware of the goals of Brand Australia.

Strongly disagree Neutral Strongly agree

I am aware of the effectiveness of brand activity in the US market.

Strongly disagree Neutral Strongly agree

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(e.g. Images from ATC, suggested copy style, other items provided by the ATC)

Yes

No

26. Do you spend more or less in the USA because ATC has a branding campaign in the United States?

More

Not a factor

Less

27. How important is ATC Brand Australia advertising to your business from North America?

Not at all important

Very important

28. In your opinion - what benefits does "Brand Australia" create for products selling to the American market? Tick as many as apply.

- Increased business as a direct result of participation in ATC sponsored campaigns.
- Increased business as an indirect result of campaigns.
- Easier introduction of product to the US market because of brand Australia marketing.
- Ability to focus on product sales knowing "destination message" has been covered.
- Brand Australia marketing makes it easier to convert "sales" to Australia.
- Brand Australia allows Australian tourism product to charge a "price" premium.
- Other, please describe below:

29. How much more money would you need to extra spend to achieve your current results if there was no "Brand Australia" marketing in the US?

US\$ (Please enter digit numbers, no decimals or commas)

[Back](#) [Next](#)

You are almost finished. Only two pages to go...

30. If there were no marketing of Australia by the National Tourist Office indicate how much space and/or time you would dedicate to the conveying the following types of messages:

Your company/corporate brand messages	50	%
Individual property/attraction features and messages	30	%
Destination messages	20	%
Other		%

Total must equal to 100%

31. Would your marketing efforts change if there was no "Brand Australia" promotion?

Yes

No

If yes, how?

Please consider the following questions regarding Destination Branding in Australia 10 years from now:

32. What position should Brand Australia be pursuing in the minds of consumers 10 years from now?

Experiences

33. What 5 words do you think should reflect Brand Australia in ten years time?

Fresh - adventure - unique - experiences - timeless

34. How do you think Brand Australia will need to evolve over the next 10 years to remain competitive?

Fresh - adventure - unique - experiences - timeless

Back Next

0%  100%

35. 10 years from now should Australia - through its National Tourist Organization - be more or less time and/or money on developing Brand Australia?

Less active About the same More active

36. 10 years from now should Australia - through its National Tourist Organization - spend more or less in developing Brand Australia?

Less money spent on "Brand Australia" About the same More money spent on "Brand Australia"

37. 10 years from now should regional and State tourism organizations be more or less involved with the branding of Australia in International markets?

Less active About the same More active

38. 10 years from now would you like to working more or less closely with the Australia's National Tourist Organization in branded campaigns?

Working less closely with Australia's NTO Neutral Working more closely with Australia's NTO

39. Do you have any other comments that you would like to share?

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0%  100%

Appendix F

Australian Tourism
Marketer Study:
Tourism Wholesalers

Destination Branding Questionnaire



Dear Travel Industry Colleague

The following questionnaire is designed to examine your attitudes towards destination branding and has a particular focus on the branding work undertaken by the Australian Tourist Commission and the Australian tourism industry working in the United States.

The study is part of a doctoral thesis being undertaken through James Cook University. Your responses will be kept strictly confidential. The results of the survey will be reported in aggregate in the dissertation and may be used in other publications.

The questionnaire will take about 10-15 minutes to complete. Your response is very important to me and I thank you in advance for your time and effort.

Sincerely

Jonathon Day

[Start Survey](#)

1. Rank the following countries in order of importance with respect to your international markets.

1 = The Highest Ranking; 7 = The Lowest Ranking

- | | | |
|---|---|-----------------------|
| 1 | ▼ | Australia |
| 2 | ▼ | New Zealand |
| 3 | ▼ | South Pacific Islands |
| 4 | ▼ | Canada |
| 5 | ▼ | UK |
| 6 | ▼ | Europe |
| 7 | ▼ | Asia |

2. What percentage of your international travelers went to Australia in 2003?

51-60 ▼

3. How many visitors did you send to Australia in 2003?

5,001-7,500 ▼

4. What marketing activities do you undertake in the USA? Tick as many as apply.

- Sales calls
- Fax broadcasts
- Sales incentives
- Distribute sales brochures
- E-marketing
- Advertising
- PR activities
- Other activities, please specify below:

Next

0%  100%

6. When developing marketing activities for the USA market how important are various messages:

Your company/corporate brand messages

Not important Neutral Very important

Individual property/attraction features and messages

Not important Neutral Very important

Destination messages

Not important Neutral Very important

7. Indicate how much space and/or time you dedicate to the conveying the following types of messages:

Your company/corporate brand messages	<input type="text" value="20"/>	%
Individual property/attraction features and messages	<input type="text" value="30"/>	%
Destination messages	<input type="text" value="50"/>	%
Other	<input type="text" value="0"/>	%
Total must equal to 100%		

8. When marketing your product how important are the following types of messages:

Identifying your product with Australia or aspects of Australia.

Not important Neutral Very important

Identifying your product with the state of Australia in which it is located.

Not important Neutral Very important

Identifying your product with the city or local region in which it is located.

Not important Neutral Very important

9. Indicate your level of agreement with the following statement:

Being associated with Australia assists my marketing efforts in the United States.

Strongly disagree Neutral Strongly agree

10. Indicate your level of agreement with the following statement:

Being associated with Australia assists my marketing efforts in the United States.

Strongly disagree Neutral Strongly agree

11. How do you communicate your "Australian-ness"?

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○ ○ ○ ○ ○ ○ ○ ○ ○ ○
 Not at all aware Very aware

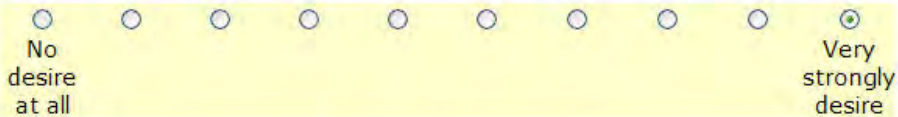
13. Indicate how important the following factors are in generating awareness of Australia as a vacation destination in America.

1 (Not at all important) to 5 (Very important)

		1	2	3	4	5
Culture						
Which includes:	School and education	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Documentaries and nature shows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Current events and news stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pop culture						
Which includes:	Movies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australian celebrities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Books - Fiction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Music	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Sporting events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	TV commercials - Australian or Australian themed products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Word of mouth					
Which includes:	Friends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	People who have traveled to Australia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australians they have met	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel media						
Which includes:	Travel guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Newspaper - travel stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Magazine - travel stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	TV Travel shows/guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Online travel guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel advertising						
Which includes:	ATC major campaigns - TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	ATC major campaigns - Newspaper	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	ATC major campaigns - Magazine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australia.com	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australia - destination brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Qantas Australian travel advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Other airline travel advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Other travel advertising - wholesalers/hotel etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Travel product brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Travel intermediaries					
Which includes:	Travel agents - travel agents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Travel wholesalers - reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Airline reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Online travel agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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15. Indicate how important the following factors are in generating desire to travel to Australia for Americans.

1 (Not at all important) to 5 (Very important)

		1	2	3	4	5
Culture						
Which includes:	School and education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Documentaries and nature shows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Current events and news stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pop culture						
Which includes:	Movies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australian celebrities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Books - Fiction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Music	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Sporting events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	TV commercials - Australian or Australian themed products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Word of mouth					
Which includes:	Friends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	People who have traveled to Australia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australians they have met	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel media						
Which includes:	Travel guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Newspaper - travel stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Magazine - travel stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	TV Travel shows/guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Online travel guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel advertising						
Which includes:	ATC major campaigns - TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	ATC major campaigns - Newspaper	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	ATC major campaigns - Magazine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australia.com	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australia - destination brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Qantas Australian travel advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Other airline travel advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Other travel advertising - wholesalers/hotel etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Travel product brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel intermediaries						
Which includes:	Travel agents - travel agents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Travel wholesalers - reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Airline reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Online travel agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

○ ○ ○ ○ ○ ○ ○ ○ ○ ○ Very well
Not at all well

17. Indicate how important you think the following factors to actually get Americans to travel to Australia.

1 (Not at all important) to 5 (Very important)

		1	2	3	4	5
Culture						
Which includes:	School and education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Documentaries and nature shows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Current events and news stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pop culture						
Which includes:	Movies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australian celebrities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Books - Fiction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Music	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Sporting events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	TV commercials - Australian or Australian themed products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Word of mouth						
Which includes:	Friends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	People who have traveled to Australia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australians they have met	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel media						
Which includes:	Travel guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Newspaper - travel stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Magazine - travel stories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	TV Travel shows/guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Online travel guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel advertising						
Which includes:	ATC major campaigns - TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	ATC major campaigns - Newspaper	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	ATC major campaigns - Magazine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australia.com	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Australia - destination brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Qantas Australian travel advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Other airline travel advertising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Other travel advertising - wholesalers/hotel etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Travel product brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Travel intermediaries						
Which includes:	Travel agents - travel agents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Travel wholesalers - reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Airline reservations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Online travel agencies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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Thanks! You've passed the halfway mark in this questionnaire.



18. Indicate your level of agreement with the following statement:

Australian travel product should present a "uniform" message about Australia when selling in the United States

Strongly disagree Neutral Strongly agree

19. Indicate your level of agreement with the following statement:

The success of my sales and marketing in the United States is closely tied to the success of the promotion of Australia as a vacation destination.

Strongly disagree Neutral Strongly agree

20. Indicate your level of agreement with the following statement:

The Australia's National Tourist Organization should provide guidelines in presenting Australia in overseas markets.

Strongly disagree Neutral Strongly agree

21. Have you read the Brand Australia pages at ATC.Australia.com in the last 12 months?

- Yes
 No

22 Indicate your level of agreement with the following statements:

I am aware that the Australian Tourist Commission has developed a branding strategy for Australian Tourism.

Strongly disagree Neutral Strongly agree

I am aware of the key design components of Brand Australia.

Strongly disagree Neutral Strongly agree

I am aware of the key copy points of Brand Australia.

Strongly disagree Neutral Strongly agree

I am aware of the goals of Brand Australia.

Strongly disagree Neutral Strongly agree

I am aware of the effectiveness of brand activity in the US market.

Strongly disagree Neutral Strongly agree

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Australia elements? (e.g. Images from ATC, suggested copy style, other items provided by the ATC)

- Yes
 No

24. Do you spend more or less in the USA because ATC has a branding campaign in the United States?

- More Not a factor Less

25. How important is ATC Brand Australia advertising to your business from North America?

- Not at all important Very important

26. In your opinion - what benefits does "Brand Australia" create for products selling to the American market? Tick as many as apply.

- Increased business as a direct result of participation in ATC sponsored campaigns.
- Increased business as an indirect result of campaigns.
- Easier introduction of product to the US market because of brand Australia marketing.
- Ability to focus on product sales knowing "destination message" has been covered.
- Brand Australia marketing makes it easier to convert "sales" to Australia.
- Brand Australia allows Australian tourism product to charge a "price" premium.
- Other, please describe below:

27. How much more money would you need to extra spend to achieve your current results if there was no "Brand Australia" marketing in the US?

US\$ (Please enter digit numbers, no decimals or commas)

You are almost finished. Only two pages to go...

28. If there were no marketing of Australia by the National Tourist Office indicate how much space and/or time you would dedicate to the conveying the following types of messages:

Your company/corporate brand messages	<input type="text" value="50"/>	%
Individual property/attraction features and messages	<input type="text" value="30"/>	%
Destination messages	<input type="text" value="20"/>	%
Other	<input type="text"/>	%

Total must equal to 100%

29 Would your marketing efforts change if there was no "Brand Australia" promotion?

- Yes
- No

If yes, how?

Please consider the following questions regarding Destination Branding in Australia 10 years from now:

30. What position should Brand Australia be pursuing in the minds of consumers 10 years from now?

31. What 5 words do you think should reflect Brand Australia in ten years time?

32. How do you think Brand Australia will need to evolve over the next 10 years to remain competitive?

33. 10 years from now should Australia - through its National Tourist Organization - be more or less time and/or money on developing Brand Australia?

Less active About the same More active

34. 10 years from now should regional and State tourism organizations be more or less involved with the branding of Australia in International markets?

Less involved About the same More involved

35. 10 years from now would you like to working more or less closely with the Australia's National Tourist Organization in branded campaigns?

Working less closely with Australia's NTO Neutral Working more closely with Australia's NTO

36. Do you have any other comments that you would like to share?

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Appendix G

Australian State Tourist Office
Opinion Leaders Survey

State Tourist Office Questions

This questionnaire focuses on the destination marketing and branding undertaken by Australia organizations in the United States between 1996 and 2004.

Name	
Title	
Organization	
Do you consider you were you involved in the brand development process? If so, how.....	
Do you agree with ATCs definitions of Australia's key brand elements over the last 10 year?	
Does the brand advertising effectively represent your state and its destinations.	
How would you do it differently???	
Do you believe that the ATC has correctly defined Australia's target market?	
What benefits does your state gain from Brand Australia?	
What concerns do you have, if	

any regarding Brand Australia?	
What benefits does your product get from Brand Australia?	
What benefits do the wholesalers and other sellers of travel receive from Brand Australia?	
Is brand development for your state an important goal for you and your organization in North America	
Are you undertaking branding activities separate from Brand Australia ? If so – how different/ how similar.	
Do wholesalers play an active role in your marketing in North America. Do you actively develop your “brand” with them ?	
Do product play an active role in your marketing in North America. Do you actively develop your “brand” with them? If so – how?	