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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	estab	lish an office in North Americ	ca?	
Ho	w many offices do you currently	oper	rate in North America?	*	
WI	nere are your North American of	fices	located?		
			USA		
	New York		Chicago		Los Angeles
	San Francisco		Washington DC		Dallas
	Miami		Atlanta		Boston
	Other		Other		Other
					117 2
			Canada		11/1
	Vancouver		Toronto		Other
Но	w many employees do you have	in N	orth America?		
На	s your marketing budget increas	ed, d	ecreased, or stayed the same in	n the la	st three years?
			-		-
	Decreased		□ Stayed the same		□ Increased
	Decreased		Stayed the same		Increased
Wł	nat is your total budget in North	Ame	rica?		
	Under \$ 100,000		\$ 100,000 - \$ 249,000		\$250,000 - 499,000
	\$500,000 - 749,000		\$ 750,000 - \$ 999,999		\$1,000,000 - 1,999,999
	\$2,000,000 - 2,999,999		\$3,000,000 - 3,999,999		\$4,000,000 - 4,999,999
	\$5,000,000 or more				
Wł	nat is your marketing budget in I	Jorth	America?		
	Under \$ 100,000		\$ 100,000 - \$ 249,000		\$250,000 - 499,000
	\$500,000 - 749,000		\$ 750,000 - \$ 999,999		\$1,000,000 - 1,999,999
	\$2,000,000 - 2,999,999		\$3,000,000 - 3,999,999		\$4,000,000 - 4,999,999
	\$5,000,000 or more				

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

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.

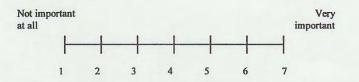
Your Marketing Activity

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		Ne	utral		1	Very mportant
Network TV		1	2	3	4	5	6	7
Local TV		1	2	3	4	5	6	7
Cable TV		1	2	3	4	5	6	7
Infomercials		1	2	3	4	5	6	7
Magazine Advertising -						12		
Consumer		1	2	3	4	5	6	7
Magazine Advertising Inserts		1	2	3	4	5	6	7
Newspaper Advertising		1	2	3	4	5	6	7
Newspaper Advertising Sections		1	2	3	4	5	6	7
Trade Advertising		1	2	3	4	5	6	7
Trade Ad Sections		1	2	3	4	5	6	7
Blast Faxes - Travel trade		1	2	3	4	5	6	7
Web Banner Advertising		1	2	3	4	5	6	7
Web Sponsorships		1	2	3	4	5	6	7
E-mail Marketing –Trade		1	2	3	4	5	6	7
E-mail Marketing – Consumers		1	2	3	4	5	6	7
Direct Mail		1	2	3	4	5	6	7

Do you produce marketing materials developed specifically for the US target market? \Box Yes / \Box No

Have you undertaken market research to improve and enhance your destination brand marketing during the last three years? \Box Yes / \Box 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?



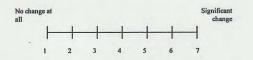
In what ways has it changed your marketing? Please mark the following if they apply:

- □ 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.

 Reducing Budgets
 Image: Constraint of the sector of th

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

5 6

7

2 3 4

1

Distributing promotional literature to travel trade intermediaries (e.g.			
travel agents, tour operators)	 -	3	
Distributing promotional literature to consumers		100	
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			1				
It is essential that an NTO places advertisements about its country in			11				
consumer travel magazines (eg Travel & Leisure, Conde Nast			11	10			1
Traveler).		1					1
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		1					
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	- 1 -



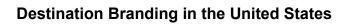
Value Migration Questions - Operators

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



Value Migration Questions - wholesalers

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

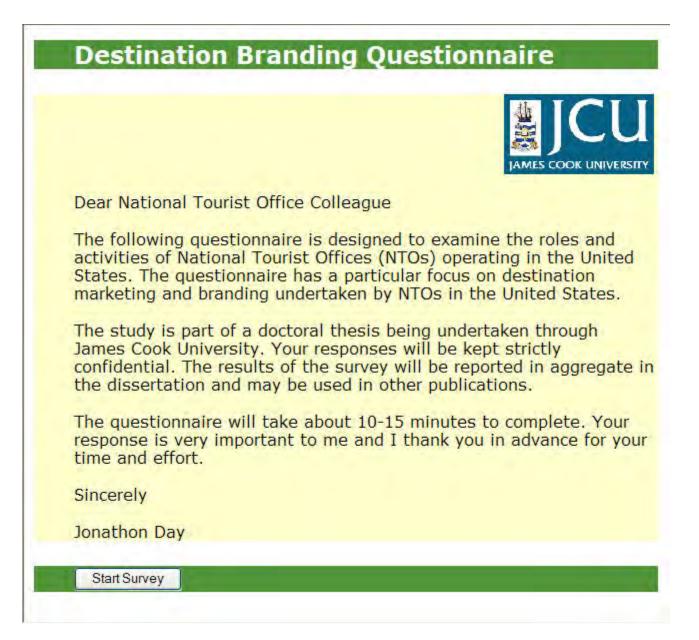




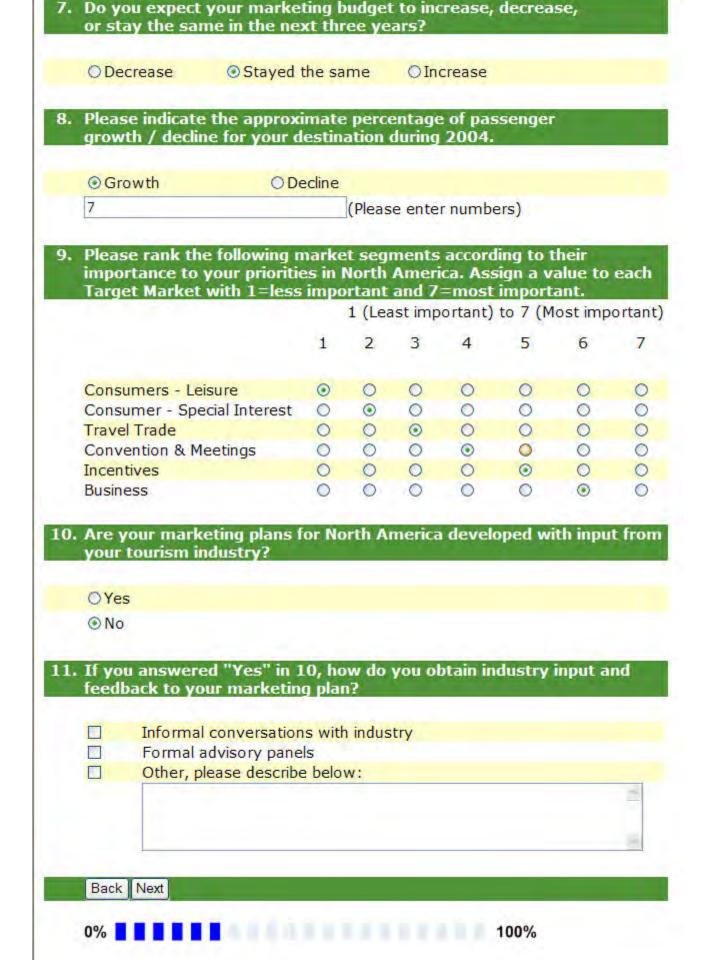
Other Notes

Appendix C

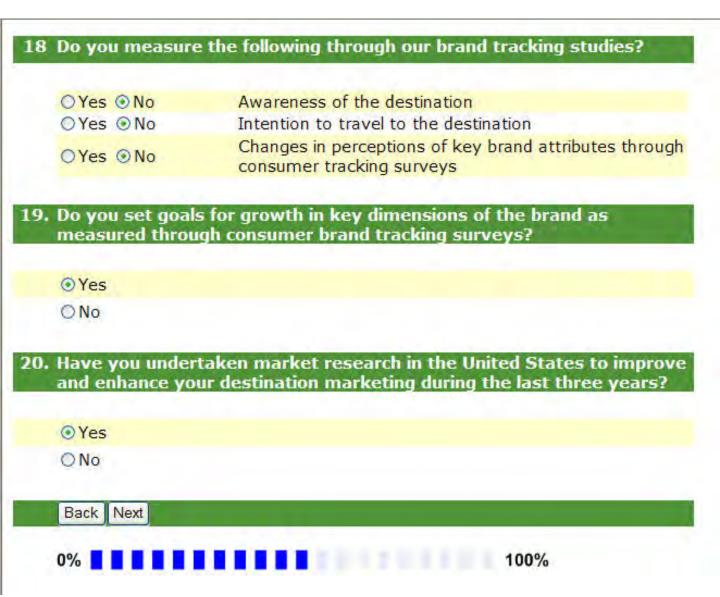
National Tourist Office Study 2005



5	(Please enter numbers)	
Where are your N	orth American offices locate	ed?
New York		
San Francisco	Chicago	✓ Los Angeles
Miami	Washington DC	Boston
Other:	Other:	Other:
Jourer.		
low many employ	yees do you have in North A	merica?
tow many employ	yees up you have in north P	
5	(Please enter numbers)	
	(Flease enter numbers)	
Vhat is your total	budget in North America?	
Vhat is your total	budget in North America?	
What is your total	budget in North America? (Please enter numbers)	
		ised, or stayed the same
	(Please enter numbers) ng budget increased, decrea	used, or stayed the same
las your marketi	(Please enter numbers) ng budget increased, decrea	nsed, or stayed the same
las your marketi	(Please enter numbers) ng budget increased, decrea	n <mark>sed, or stayed the same</mark> ⊙Increased
las your marketi n the last three y	(Please enter numbers) ng budget increased, decrea ears?	
las your marketin n the last three y O Decreased	(Please enter numbers) ng budget increased, decrea ears? © Stayed the same	⊙Increased
las your marketin n the last three y O Decreased	(Please enter numbers) ng budget increased, decrea ears?	⊙Increased
las your marketin n the last three y O Decreased What is your mark	(Please enter numbers) ng budget increased, decrea ears? © Stayed the same ceting budget in North Ame	⊙Increased
las your marketin n the last three y O Decreased What is your mark	(Please enter numbers) ng budget increased, decrea ears? © Stayed the same	⊙Increased
las your marketin n the last three y O Decreased What is your mark	(Please enter numbers) ng budget increased, decrea ears? © Stayed the same ceting budget in North Ame	⊙Increased



0	1-25% 25-50						
0	50-75						
0	75-10	0%					
				ur advertis rketing act		ve images an	d
⊙ Y	es						
ON	0						
				and/or cro tive markin		equirement fo es?	r ti
• A	lways						
0s	ometime	es, depen	ding on circ	umstances			
ON	0						
						ons efforts/bu cations goals	
						Please ent	
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			e overall s	success fro	om your m	arketing activ	viti
		cking rese					
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P							1
P	ther						
P							



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

	1	(Leas	st imp	ortan	t) to 7	(Mos	t impo	rtant)
	Not Applicable	1	2	3	4	5	6	7
To raise the profile of your country in the United States.	0	0	0	0	0	0	0	۲
For political reasons in your own country.	0	0	0	0	0	0	0	۲
Increase the efficiency and effectiveness of our NTO marketing efforts.	0	0	0	0	0	0	0	۲
Increase efficiency and effectiveness of marketing efforts of your tourism products.	0	0	0	0	0	0	0	۲
Increase efficiency and effectiveness of tourism intermediaries, like travel agents and travel wholesalers, to sell your tourism products.	0	0	0	0	0	0	0	0
To increase sales of product and services from your country including non-tourism products.	0	0	0	0	0	0	0	۲

Back Next

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

0%

100%

	elopment process: (Please select only one)
0	Core brand elements and strategy are developed centrally and the USA operation has no ability to interpret the brand execution for lo market.
0	Core brand elements and strategy are developed centrally and the USA operation has limited ability to interpret the brand execution for local market.
0	Core brand elements and strategy are developed centrally and the USA operation has great flexibility to interpret the brand execution local market.
0	The American operation develops brand strategy for the USA mark
\odot	We do not undertake brand development.
0	Other, please describe:
	ou produce marketing materials developed specially for the US
	ou produce marketing materials developed specially for the US et market?
targ	et market?
targ ⊙Ye	et market?
targ	et market?
© Ye ⊙ No	et market?
© Ye ⊙ No	et market?
© Ye ⊙ No	et market? s o ou produce web pages specially for the US target market?
targ ⊙Ye ⊙No Do y ⊙Ye	et market? s o ou produce web pages specially for the US target market? s
targ ⊙Ye ⊙No Do y	et market? s o ou produce web pages specially for the US target market? s
targ ⊙Ye ⊙No Do y ⊙Ye	et market?
©Ye ○No Do y ⊙Ye ○No Back	et market?

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.

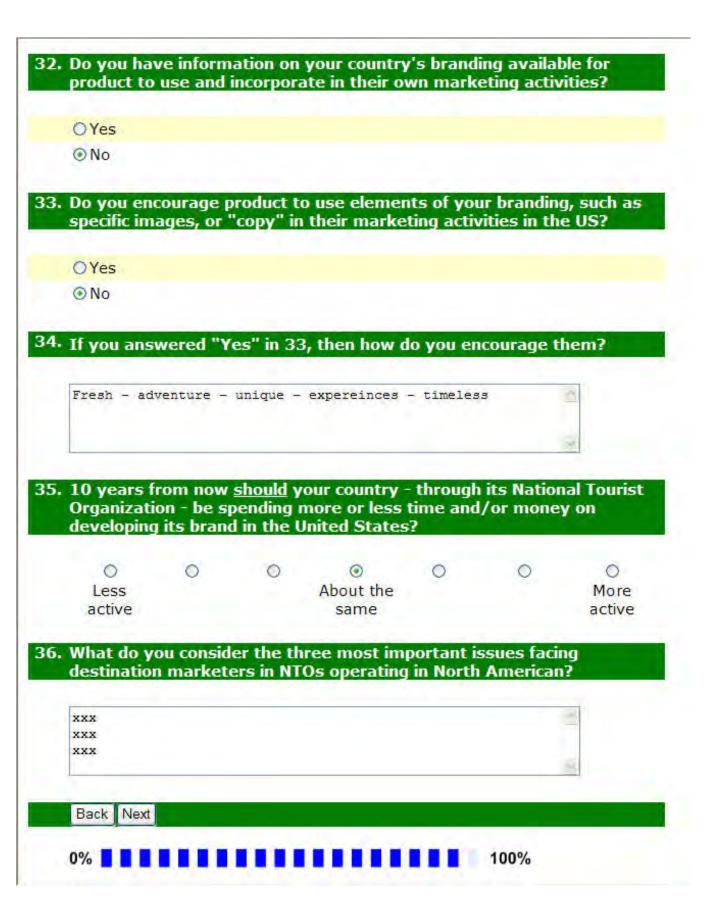
	1 (N	otat	all imp	oortan	t) to 7	7 (Very	/ impo	rtant)
	Not Applicable	1	2	3	4	5	6	7
Network TV	0	0	0	0	0	0	0	۲
Local TV	0	0	0	0	0	0	0	۲
Cable TV	0	0	0	0	0	0	0	۲
Infomercials	0	0	0	0	0	0	0	۲
Magazine Advertising - Consumer	0	0	0	0	0	0	0	۲
Magazine (consumer) Advertising Inserts	0	0	0	0	0	0	0	۲
Newspaper Advertising	0	0	0	0	0	0	0	۲
Trade Advertising	0	0	0	0	0	0	0	۲
Trade Ad Sections	0	0	0	0	0	0	0	۲
Blast Faxes - Travel Trade	0	0	0	0	0	0	0	۲
Web Banner Advertising	0	0	0	0	0	0	0	0
Other Web marketing	0	0	0	0	0	0	0	۲
E-mail Marketing - Trade	0	0	0	0	0	0	0	\odot
E-mail Marketing - Consumers	0	0	0	0	0	0	0	۲
Direct Mail	0	0	0	0	0	0	0	۲
Your own North American web site content	0	0	0	0	0	0	0	۲
Your brochures	0	0	0	0	0	0	0	0

Back Next

0%

O Not at import		0	۲	O Neutral	0	0	O Very importar
interm	ediari	ies - like	travel w	ation brand holesalers a ct in the US	nd trave	agents -	
O Not at import		0	0	O Neutral	0	0	€ Very importa
apply.							
	camp Increa Easier brand Ability been NTO I count NTO I	aigns. ased busi r introduc l marketii / to focus covered. Brand ma try.	iness as an ction of pro- ng. s on produ arketing m arketing all	direct result n indirect res oduct to the ct sales know akes it easie ows our tou	ult of cam US marke wing "dest r to conve	paigns. et because tination me ert "sales"	of NTO essage" ha to your

OMore		Not	a factor	10	OLess	
			narketing ef			
tourism pro		inge if th	ere was no l	TO cou	ntry brand	ing or
ONo						
If yes - how	N?					
30						-14
						-
Indicate vo	ur level	of agreet	nent with th	e followi	ng statem	ents
indicate yo		or agreet	mente with th	C TOILOWI	ng staten	iciită;
Travel pro	duct from	n my cou	ntry should	procont	a "uniform	" macca
			n when selli			
0	0	0	0	0	0	0
Strongly			Neutral			Strong
disagree			Heatrai			agree
Selle	rs of trav		destination		re of dest	ination
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Strongly	0	0		V	0	Strong
disagree			Neutral			agree
Sellers			estination an			stination
~	-	brand's k	cey design co	mponer	its.	~
Strongly	0	0	۲	0	0	Strong
disagree			Neutral			Strong agree
						ugree
albug, cc	travel to	my cou	ntry are awa	re of ou	r destinati	ion brand
	10000		key message		A REAL PROPERTY	and a contra
Sellers of		0	۲	0	0	0
Sellers of	0					Strong
Sellers of	0		Neutral			agree
Sellers of	0		Neutral			agree
Sellers of O Strongly disagree	0					
Sellers of O Strongly disagree	O travel to		itry are awa		goals of c	
Sellers of O Strongly disagree Sellers of			itry are awa ourism brand		goals of o	our nation
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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 ch	aller	nging	g) to	7 (M	lost c	hallen	ging)
	1	2	3	4	5	6	7
Reducing Budgets	0	0	0	0	0	0	۲
Increasing costs of marketing activities	0	0	0	0	0	0	۲
Maximizing benefits from new marketing techniques like the Internet	0	0	0	0	0	0	0
Providing proof of benefits in return for marketing expenditures	0	0	0	0	0	0	۲
Reaching target markets efficiently and effectively	0	0	0	0	0	0	۲
Destination Brand Marketing	0	0	0	0	0	0	۲
Collaborative marketing/cooperative marketing	0	0	0	0	0	0	۲
Other:	0	0	0	0	0	0	0

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

Back	Next		

Destination Branding Questionnaire

Please confirm your email below. This will remove your name form 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

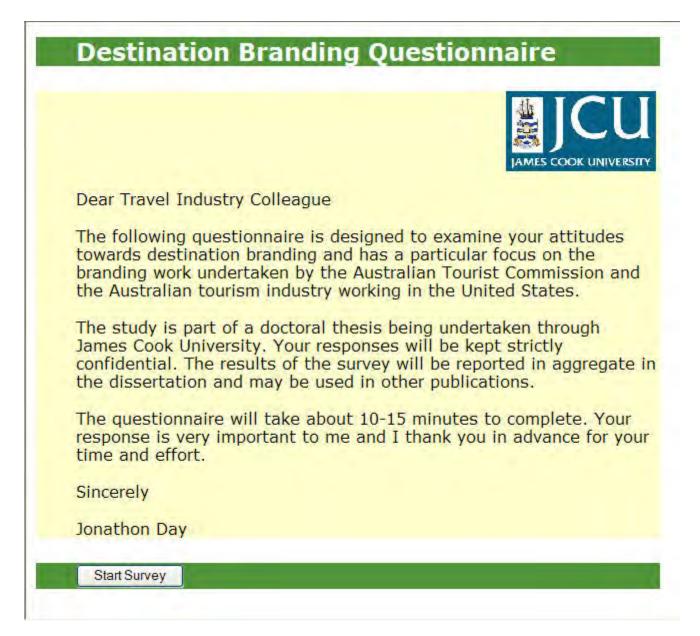
Appendix D

Content Analysis

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

Appendix E

Australian Tourism Marketers Study: Australian Product



What percentage of y	your total business came from international
visitors in 2003?	
Please select one	
Rank the following co	untries in order of importance with respect to
your international ma	arkets.
1 = The Highest Rankin	g; 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
What percentage of y States?	your <u>international</u> business comes from the Un
States	
Please select one 👻	
How many passenge	rs did you receive from the United States in
How many passenge 2003?	rs did you receive from the United States in
2003?	rs did you receive from the United States in
	rs did you receive from the United States in
2003? Please select one 💌	
2003? Please select one 💌	rs did you receive from the United States in vities do you undertake in the USA? Tick as ma
2003? Please select one 💌 What marketing activ	
2003? Please select one 💌 What marketing activ	
2003? Please selectone What marketing activas apply. Brochure support	
2003? Please select one What marketing activation as apply. Brochure support Sales incentives	vities do you undertake in the USA? Tick as ma
2003? Please select one What marketing activas apply. Brochure support Sales incentives Distribute general pu	vities do you undertake in the USA? Tick as ma
2003? Please select one What marketing activation Mhat marketing activation Brochure support Sales incentives Distribute general pu Produce and distribute	vities do you undertake in the USA? Tick as ma
2003? Please select one What marketing activates apply. Brochure support Sales incentives Distribute general pu Produce and distribu Advertising	vities do you undertake in the USA? Tick as ma
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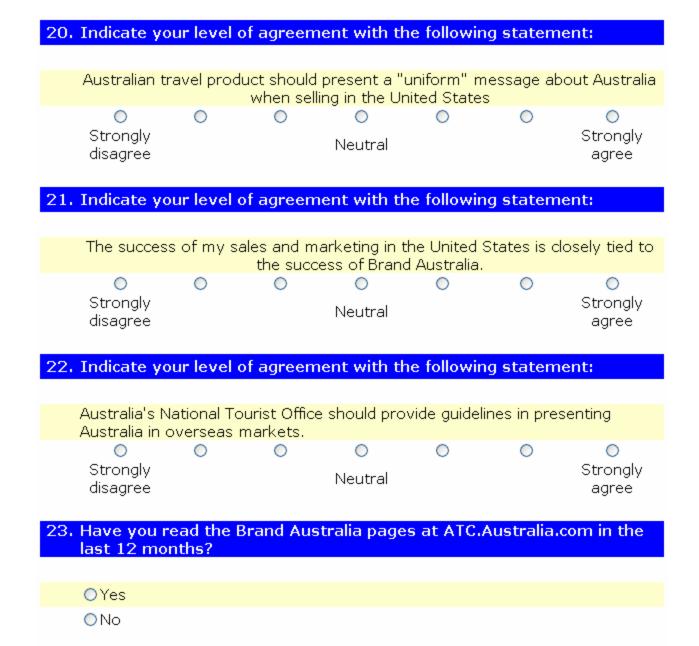
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Culture		1	2	3	4	
Culture Which includes:	School and education	0	0	0	0	
which includes.	Documentaries and nature	~	~	~	-	
	shows	0	0	0	0	
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Which includes:	Movies	0	0	0	0	
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	Music	õ	õ	Õ	Õ	
	Sporting events	0	0	Õ	0	
	TV commercials - Australian or Australian themed products	0	0	0	0	
	La companya da	-	-	-	-	
Which includes:	Friends	0	0	0	0	
	Family	0	0	0	0	
Word of mouth Which includes:	People who have traveled to Australia	0	0	0	0	
	Australians they have met	0	0	0	0	
Travel Media						
Which includes:	Travel guides	0	0	0	0	
	Newspaper - travel stories	0	0	0	0	
	Magazine - travel stories	0	0	0	0	
	TV Travel shows/guides	0	0	0	0	
Travel Advertisin	Online travel guides	0	0	0	0	
Which includes:	ATC major campaigns - TV	0	0	0	0	
Which melducs.	ATC major campaigns -		-	~	-	
	Newspaper	0	0	0	0	
	ATC major campaigns -	0	0	0	0	
	Magazine	1	100	10	-	
	Australia.com Australia - destination	0	0	0	0	
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	Qantas Australian travel	0	0	0	0	
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	Other airline travel	0	0	0	0	
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	Other travel advertising - wholesalers/hotel etc.	0	0	0	0	
	Travel product brochures	0	0	0	0	
Travel intermedi						
Which includes:	Travel agents - travel agents	0	0	0	0	
	Travel wholesalers -	0	0	0	0	
	reservations	-				
	Airline reservations	0	0	0	0	
	Online travel agencies	0	0	0	0	
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	shows	0	0	0	0	
	Current events and news	0	0	0	0	
Pop culture	stories					
Which includes:	Movies	0	0	0	0	
	Australian celebrities	0	0	0	0	
	Books - Fiction	0	0	0	0	
	Music	0	0	0	0	
	Sporting events	0	0	0	0	
	TV commercials - Australian or Australian themed products	0	0	0	0	
Word of mouth Which includes:	Friends	0	0	0	0	
	Family	0	0	0	0	
	People who have traveled to Australia		0	0	0	
	Australians they have met	0	0	0	0	
Travel Media						
Which includes:	Travel guides	0	0	0	0	
	Newspaper - travel stories	0	0	0	0	
	Magazine - travel stories	0	0	00	0	
	TV Travel shows/guides Online travel guides	0	0	0	00	
Travel Advertisin		U	U	0	0	
Which includes:	ATC major campaigns - TV	0	0	0	0	
	ATC major campaigns -	0	0	0	0	
	Newspaper	0	Q.	0	Q	
	ATC major campaigns - Magazine	0	0	0	0	
	Australia.com	0	0	0	0	
	Australia - destination					
	brochures	0	0	0	0	
	Qantas Australian travel advertising	0	0	0	0	
	Other airline travel	0	0	0	0	
	advertising Other travel advertising -					
	wholesalers/hotel etc.	0	0	0	0	
	Travel product brochures	0	0	0	0	
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Which includes:	Travel agents - travel agents	6 O	0	0	0	
	Travel wholesalers -	0	0	0	0	
	reservations Airline reservations	0	0	0	0	
	Online travel agencies	0	0	0	0	

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



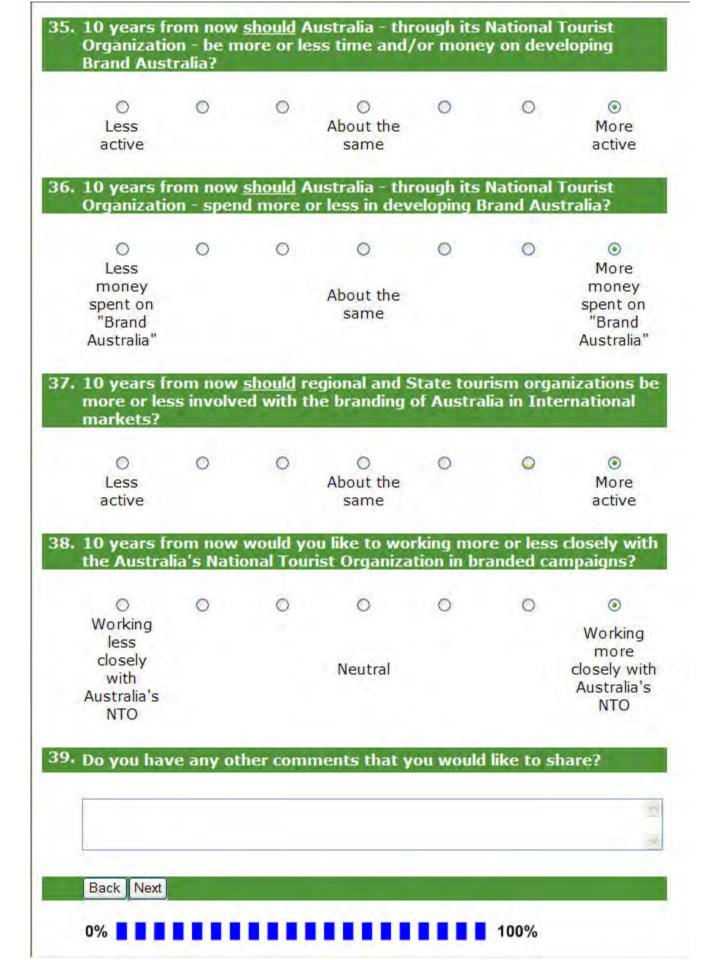
24. Indicate your level of agreement with the following statements:

O Strongly disagree	0	O	for Australian	O	0	O Strongly agree
Iam	aware of	the key o	design compo	onents of B	Brand Aust	tralia.
O Strongly disagree	0	0	O Neutral	0	0	O Strongly agree
1	I am awar	e of the k	ey copy poir	nts of Bran	d Australia	э.
O Strongly disagree	0	0	O Neutral	0	0	O Strongly agree
	Iam	aware of	the goals of	Brand Aus	tralia.	
O Strongly disagree	0	0	O Neutral	0	0	O Strongly agree
I am av	ware of th	e effective	eness of brar	nd activity	in the US	market.
O Strongly disagree Back Next	0	0	O Neutral	0	0	O Strongly agree
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	i spend more ign in the Unit	or less in the USA beca ted States?	ause ATC has a l	branding
OMore	9	○Not a factor	Less	
	nportant is AT orth America	C Brand Australia adv ?	ertising to your l	business
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I have seen out one and not been been and the set out have been and the last

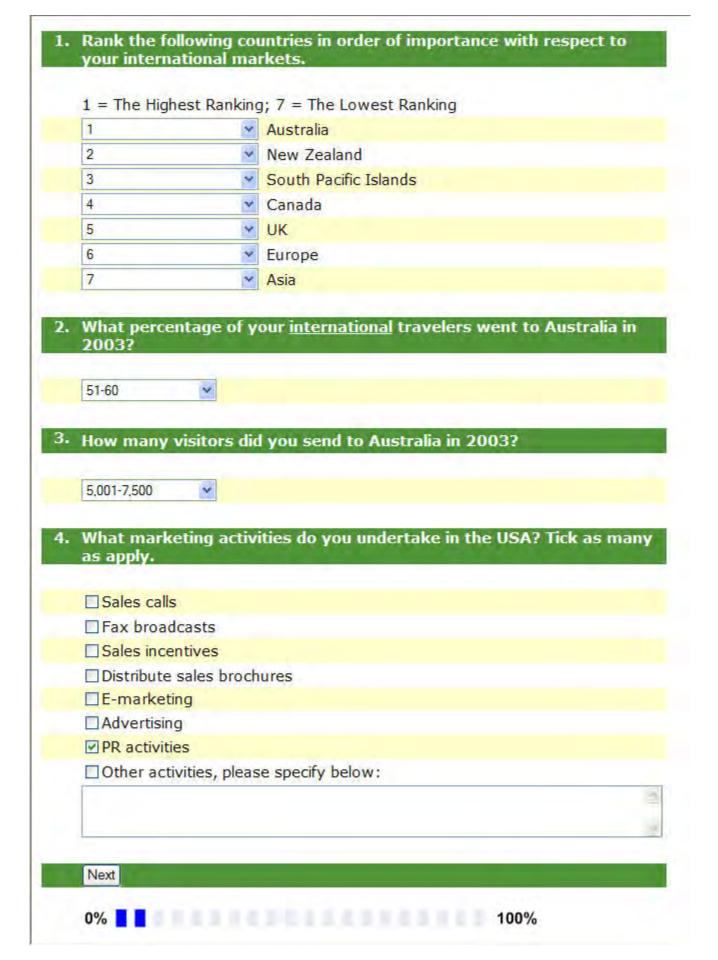
Your company/corporate brand messages	50	%
Individual property/attraction features and messages	30	%
Destination messages	20	%
Other		%
	Tot: 100	al must equal t)%
Would your marketing efforts change if there wa promotion?	s no	"Brand Austr
OYes		
⊙ No		
If yes, how?		
se consider the following questions regarding Des ralia 10 years from now: What position <u>should</u> Brand Australia be pursuing consumers 10 years from now?		Contraction and
ralia 10 years from now: What position <u>should</u> Brand Australia be pursuing		C. La Contrata
ralia 10 years from now: What position <u>should</u> Brand Australia be pursuing consumers 10 years from now?	j in t	he minds of
ralia 10 years from now: What position <u>should</u> Brand Australia be pursuing consumers 10 years from now? Expereinces What 5 words do you think <u>should</u> reflect Brand /	y in t	he minds of
ralia 10 years from now: What position <u>should</u> Brand Australia be pursuing consumers 10 years from now? Expereinces What 5 words do you think <u>should</u> reflect Brand A time?	y in th Austr	he minds of alia in ten ye
ralia 10 years from now: What position <u>should</u> Brand Australia be pursuing consumers 10 years from now? Expereinces What 5 words do you think <u>should</u> reflect Brand A time? Fresh - adventure - unique - expereinces - timeles How do you think Brand Australia will need to ev	y in the	he minds of alia in ten ye



Appendix F

Australian Tourism Marketer Study: Tourism Wholesalers



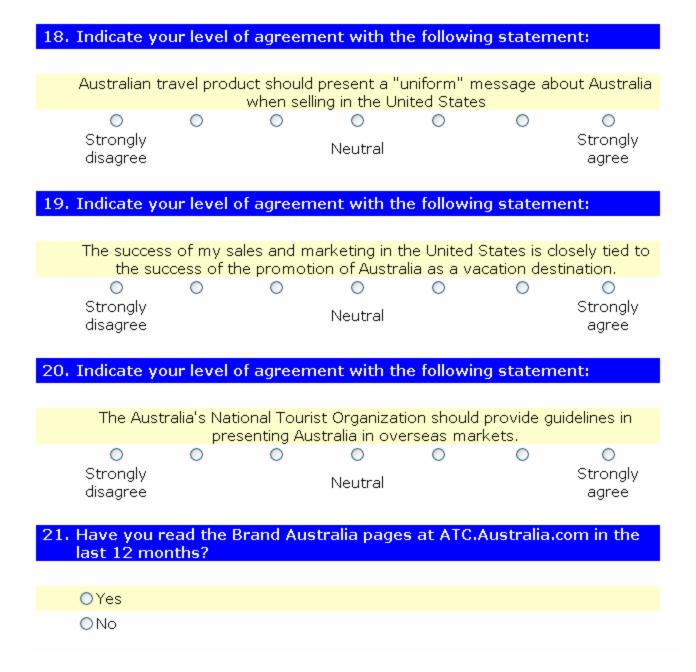


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	Books - Fiction	0	0	0	0	0
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which includes:	Friends Family	00	00	00	00	0
	People who have traveled to Australia	0	0	0	0	0
- I P	Australians they have met	0	0	0	0	(
Travel media Which includes:	Travel guides	0	0	0	0	0
which includes.	Newspaper - travel stories	0	0	õ	0	0
	Magazine - travel stories	0	0	0	0	0
	TV Travel shows/guides	0	0	0	0	(
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The fire of the second	ATC major campaigns -		~	-	~	
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	ATC major campaigns - Magazine	0	0	0	0	0
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	Australia - destination	0	0	0	0	0
	brochures Qantas Australian travel advertising	0	0	0	0	0
	Other airline travel advertising	0	0	0	0	0
	Other travel advertising - wholesalers/hotel etc.	0	0	0	0	0
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	Travel wholesalers -	0	0	0	0	(
	reservations Airline reservations	0	0	0	0	0
	Online travel agencies	0	0	0	0	0
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	TV commercials - Australian or Australian themed	0	0	0	0	0
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	Newspaper - travel stories	0	0	0	0	0
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	Other travel advertising - wholesalers/hotel etc.	0	0	0	0	0
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	Australian celebrities	0	0	0	0	0
	Books - Fiction	0	0	0	0	0
	Music	0	0	0	0	0
	Sporting events	0	0	0	0	0
	TV commercials - Australian or Australian themed products	0	0	0	0	0
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	Online travel agencies	0	0	0	0	0



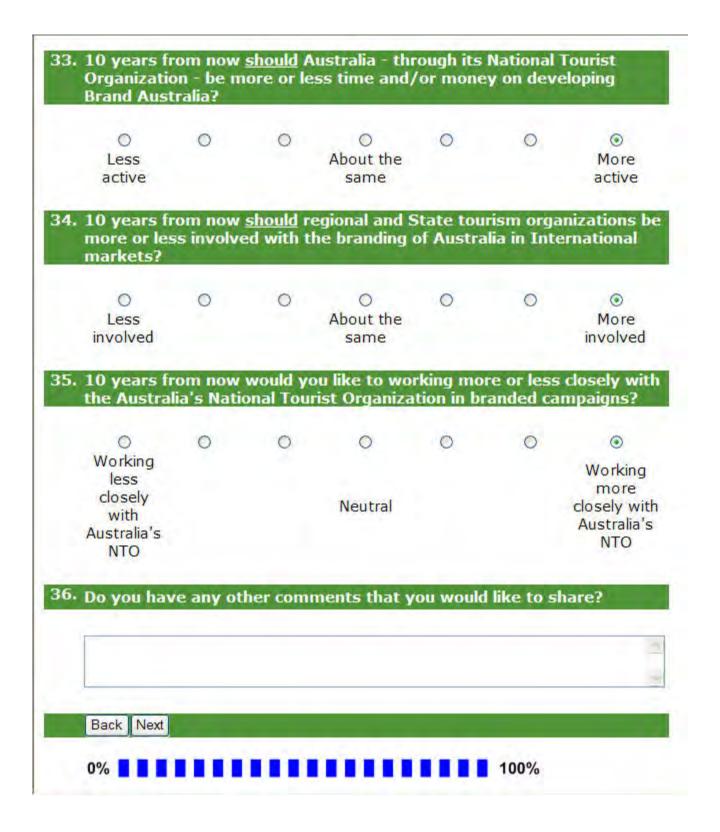
22 Indicate your level of agreement with the following state
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Your company/corporate brand messages	50	%
Individual property/attraction features and messages	30	%
Destination messages	20	%
Other		%
	Tota 100	al must equal 1 1%
Would your marketing efforts change if there wa promotion?	s no	"Brand Austr
OYes		
⊙ No		
If yes, how?		
se consider the following questions regarding Des ralia 10 years from now: What position <u>should</u> Brand Australia be pursuing consumers 10 years from now?		
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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?	