Roy Morgan
International

www.roymorgan.com

Connecting The World Through International Single Source

Tourism Futures Conference

Queensland Government
Townsville, Australia
August 6, 2004

By
Michele Levine, Chief Executive
Wendy McInnes, Group Account Manager Tourism & Travel
Denise Ulbrick, Account Service Director Tourism & Travel
Roy Morgan Research Pty Ltd
411 Collins Street, Melbourne

More Americans watch Australian Rules Football than do Australians.

Almost seven and a half million Americans (7,496,000) watch Australian Rules Football at least occasionally on television. This means Australian Rules Football is viewed by more Americans than Australians (7,004,000)[1]. More Democrats than Republicans watch Australian rules, and yes, they are more likely to drink Fosters.

Some things are the same the world over – the trick is to know which ones.

The Tourism White Paper points out, "*As the global tourism market becomes increasingly competitive, quality research and statistics will be crucial in maintaining Australia's competitive edge. Over coming years, the tourism industry will need better information for investment decisions, developing niche markets and understanding consumer needs*".

"Industry sustainability is derived from maintaining an appropriate balance between tourism numbers and yield. To date, the industry has tended to be more numbers focused to the detriment of maximizing yield. Effective niche marketing targets at high-yield markets will see to ensure the industry gains optimal returns on tourism investment. By understanding the yield potential of different source markets and segments, the industry will know why and how to target them".

Most of us know that we can't equate a US dollar to an Australian dollar – any Australian travelling in the USA does so at their peril.

Most also know that the US gallon is not the same as an Imperial gallon; a US ton is not the same as a tonne.

[1] Source: Roy Morgan Single Source USA Mar 2002-Feb 2004, Australia Apr 2003-Mar 2004

But how many organisations operating across different countries are unaware of the less obvious or less easily defined differences that can distort their perspective?

The following example is from the media market (most companies operating internationally make media decisions in countries outside their own).

Looking at the reader-per-copy of well-known magazines in four markets using the local readership currency, we would be led to believe that magazines are "passed on" to a lot more people in the USA and NZ than Australia.

Discover your edge

Readership currency readers-per-copy estimates

Magazine	Aust. Roy Morgan (18+)	NZ Neilsen (10+)	USA MRI (18+)	UK NRS (15+)
People/Who*	5.2	12.9	9.8	NP
Readers Digest	2.9	6.5	3.6	3.2
Cosmopolitan	3.5	8.0	5.8	4.9
TIME	4.1	8.1	5.0	NM
Newsweek/ Bulletin**	4.5	-	6.2	NP

* In Australia and NZ, People is Who **In Australia, Newsweek is included in The Bulletin
NP: Not Published NM: Not Measured
Sources: Australia: Roy Morgan Research Apr 2003-Mar2004, Circulation: Jul-Dec2003
New Zealand: Nielsen Jan-Dec 2003, Circulation: Jul-Dec2003
United States: MRI Spring 2004, Circulation: Jul-Dec2003
United Kingdom: NRS April 2003-Mar2004, Circulation Jul-Dec2003

5 Roy Morgan Research

For instance, that an average copy of *People* is read by 9.8 people aged 18+ in the USA, and the same magazine (called *Who* in Australia and NZ) is read by 12.9 people aged 10+ in NZ, but only 5.2 people aged 18+ in Australia.

Similarly, an average copy of *Reader's Digest* is read by 6.5 people aged 10+ in NZ, 3.6 people aged 18+ in the USA, 3.2 people aged 15+ in the UK and only 2.9 people aged 18+ in Australia.

Differences shown for *Cosmopolitan, Time* and *Newsweek* are similar.

However, the next table shows that when Roy Morgan Research applies the same measurement methodology across the different countries, the differences all but disappear.

Discover your edge

Roy Morgan Research readers-per-copy estimates

Magazine	Aust. Roy Morgan (14+)	NZ Roy Morgan (14+)	USA Roy Morgan (14+)	UK Roy Morgan (14+)
People/Who*	5.6	3.8	4.0	NP
Readers Digest	3.0	3.0	2.8	1.8
Cosmopolitan	4.5	3.6	4.1	3.6
TIME	4.4	4.2	5.1	3.0
Newsweek/ Bulletin	4.6	NP	5.3	NP

* In Australia and NZ, People is Who **In Australia, Newsweek is included in The Bulletin
NP: Not Published
Sources: Australia: Roy Morgan Research Apr 2003-Mar 2004, Circulation: Jul-Dec2003
New Zealand: Roy Morgan Research Apr 2003-Mar 2004, Circulation: Jul-Dec2003
United States: Roy Morgan Research Mar 2002-Feb 2004, Circulation: Jul-Dec2003
United Kingdom: Roy Morgan Research Oct 2003-Feb2004, Circulation Jul-Dec2003

6 Roy Morgan Research

People (or *Who*) has readers-per-copy aged 14 and over of 5.6 in Australia, 3.8 in NZ, and 4.0 in the USA, and *Reader's Digest* has readers-per-copy of 3.0, 3.0 and 2.8 respectively. *Time* has readers-per-copy aged 14 and over of 4.4 in Australia, 4.2 in NZ and 5.1 in the USA. A similar pattern of result is shown for *Newsweek* with a slightly higher reader-per-copy in the USA than Australia.

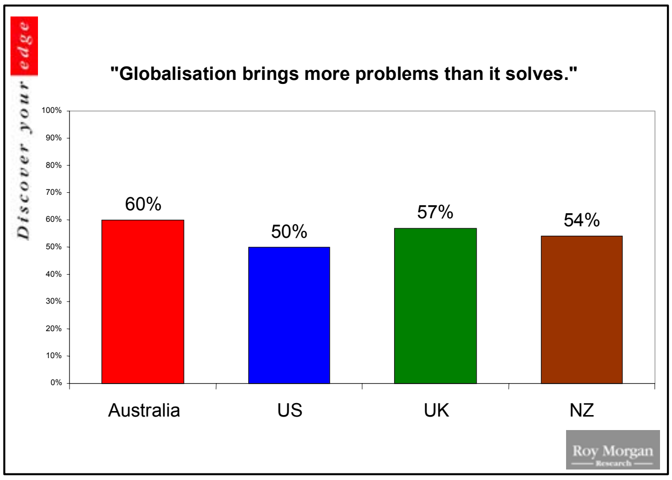
In other words, when a consistent proven methodology is applied to different markets on the same magazines, the magazines attract fairly similar readers-per-copy estimates despite the marketplace differences. Common sense would say this is correct.

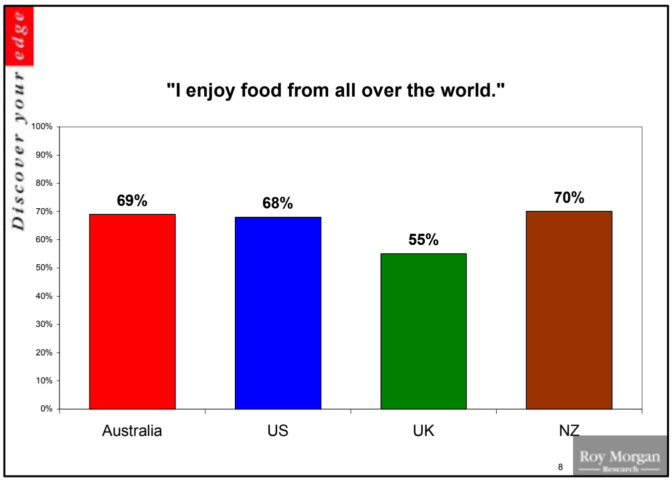
The critical point for anyone wanting to understand their industry across international markets is that there are traps for the unwary in just taking local measures at face value, and drawing conclusions outside the local arena.

But consistent international data is valuable – we can see the differences that make a difference and realise the extraordinary degree of similarity.

The latest Roy Morgan International Single Source research[1] shows that *"Globalisation brings more problems than it solves"* is a fairly widely held view – even in the US. A majority of Australians (60%) believe "*Globalisation brings more problems than it solves"*, as do 57% in the UK, 54% in New Zealand and 50% in the US.

Yet at a more practical level, people across the world agree they "*enjoy food from all over the world"*.



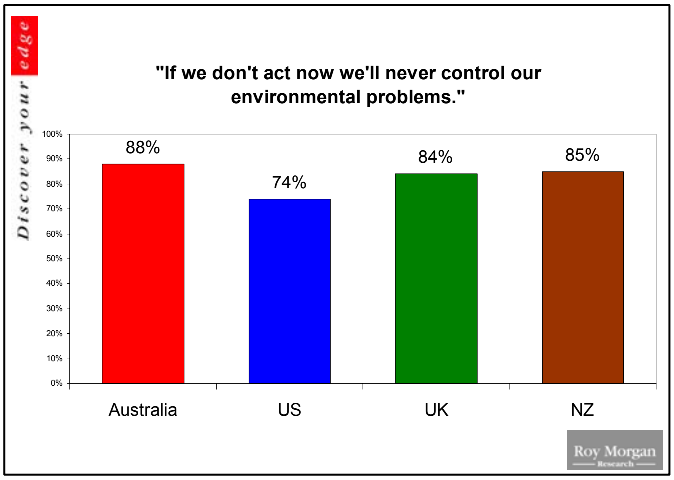


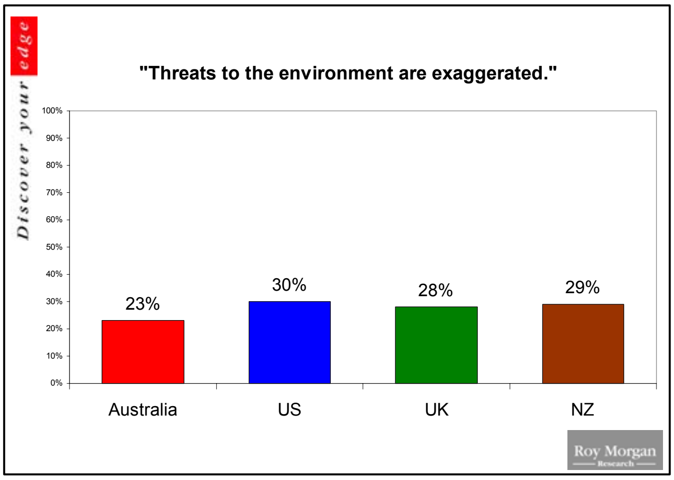
The environment as an issue evokes a strong response. There was overwhelming support in all four countries for the belief that "*if we don't act now we'll never control our environmental problem"***.** Few, less than one-in-three believe "*threats to the environment are exaggerated"*. And while substantial majorities of people in all countries claimed to recycle, and even to be *"an environmentalist at heart"*, most felt *"environmentally friendly products are overpriced"*.

[1] Roy Morgan International Single Source research is part of the continuous Roy Morgan Single Source Survey.
http://www.roymorgan.com/products/single-source/single-source_home.cfm
The data reported in this paper is based on surveying cross-sections of the population aged 14 years and over:
- In Australia: 27,659 interviews October 2003 - March 2004
- In USA: 2,499 interviews October 2003 – February 2004
- In UK: 1,570 interviews October 2003 – February 2004
- In NZ: 4,958 interviews October 2003 – February 2004

Analysis of the four countries shows consistent differences in degree of environmental engagement.

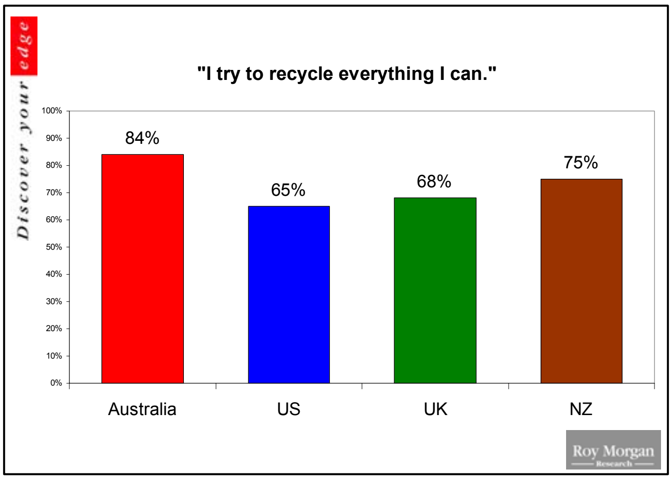
Australia at 88% is ahead of all the countries in terms of the belief "*if we don't act now we'll never control our environmental problems*". The US at 74% is well below the other countries – UK at 84% and NZ at 85%.

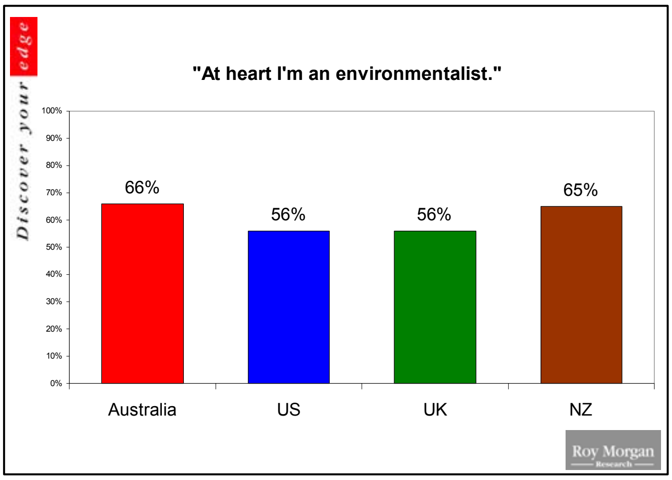




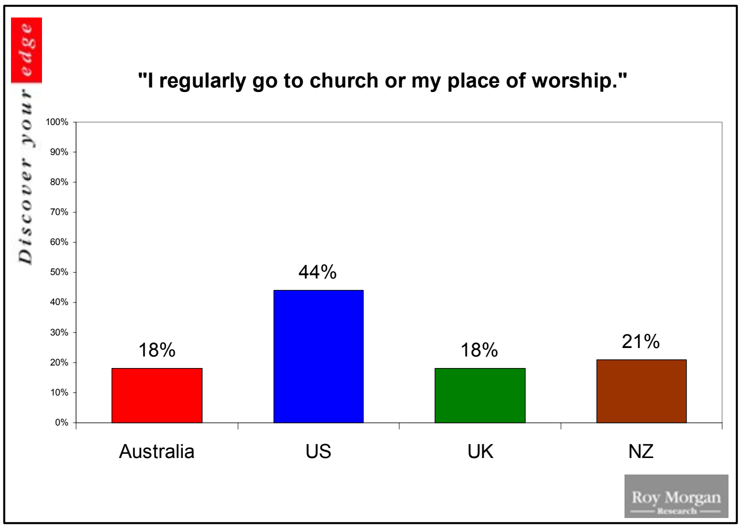
Consistent with this is the poor support registered for the idea that "*threats to the environment are exaggerated*" – less than one-in-three agreed with this view in any country. Australians were least likely (at 23%) to agree and the US being most likely to agree (at 30%) with the UK (28%) and NZ (29%).

This pattern continues in terms of behaviour with Australians most likely to "*try to recycle everything I can*" (84%), Americans least likely (65%), UK (68%) and NZ (75%).





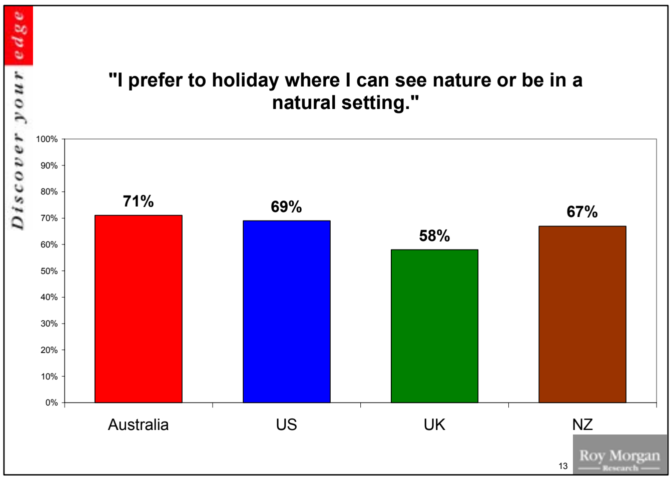
Australians were also most likely at (66%) to consider themselves "*an environmentalist at heart*", Americans at 56% were equally least likely with those from the UK. 65% of New Zealanders consider themselves 'environmentalists'.

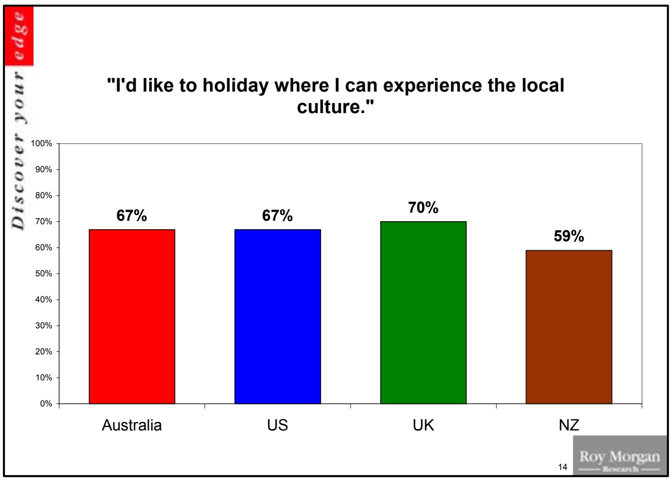


But when it comes to church going, Americans are way out in front – 44% of Americans '*regularly go to church or their place of worship'*. This is more than double Australia (18%), or UK (18%) and NZ (21%).

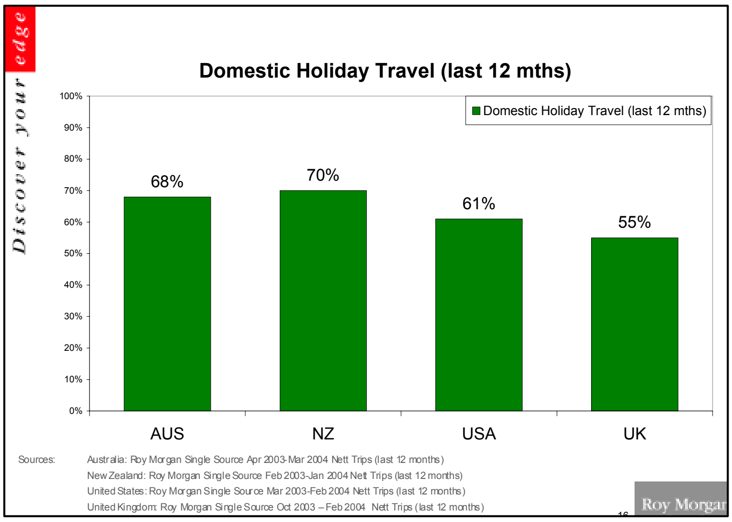
So let's look at some data that relates to travel and tourism – starting with a broad-brush picture.

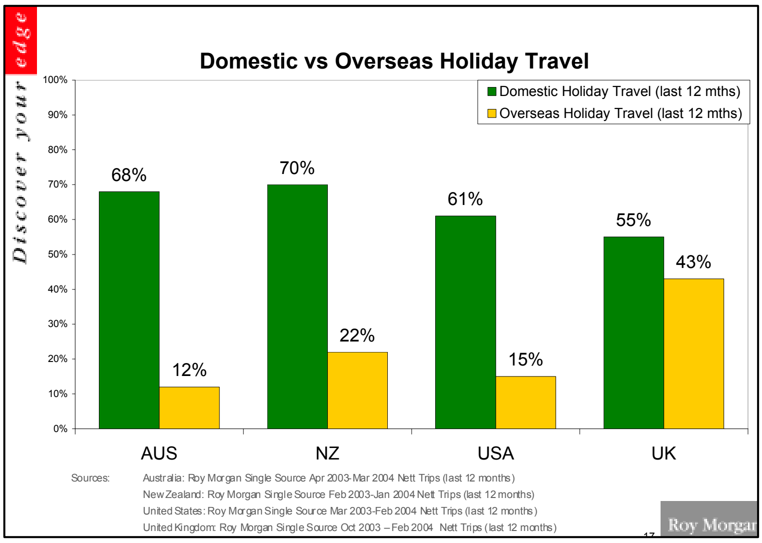
A majority in all countries say, *"I prefer to holiday where I can see nature or be in a natural setting"* and *"I'd like to holiday where I can experience the local culture"*.



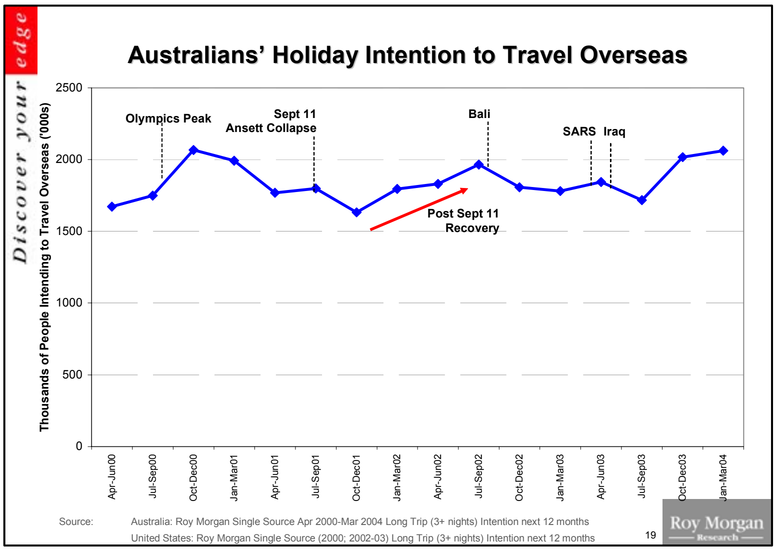


Domestic holiday travel is higher in Australia and NZ than in the US or the UK. Overseas holiday travel is highest in the UK – not surprising given their geographic proximity to overseas destinations.





This picture of Australians' holiday travel intention would be familiar to everyone in the travel industry – the Olympic's Peak, September 11, Bali, SARS, and Iraq – there are lots of bumps but a fundamental resilience. Today, intention to travel is as high as at the Olympic's Peak.



And what about the US? When we talk to people in the US, they tell us that Americans don't want to go up in planes – they are all wanting to stay close to home. Our data – Roy Morgan Single Source (using the same questions as in Australia) – tells a different story.

In the year 2000, 12% of Americans were intending to travel overseas in the next 12 months. In the 12 months to February 2003, the figure was 13.5% – if anything, a marginal increase!!

Whether we put this down to 'pent-up' demand, or high 'consumer confidence' in the US, the reality is Americans are looking to be on the move again. Is our potential market really that big?

So are there really millions of people wanting to travel overseas, possibly to Australia?

In short, yes. An estimated 35 million Americans travelled overseas for a holiday in the last 12 months and an estimated 45 million people intend to travel overseas in the next 12 months. An estimated 21 million people from the UK travelled overseas in the last 12 months and an estimated

19 million people intend to travel overseas in the next 12 months. An estimated 689,000 New Zealanders traveled overseas in the last 12 months and an estimated 711,000 people intend to travel overseas for a holiday in the next 12 months.

The market is there - so what of our product or our brand – **'Brand Australia'**? 'Brand Australia' is doing well!

If we look at the top 10 preferred destinations – for Americans and New Zealanders, Australia is top; for people in the UK, Australia is second only to the US.

Discover your edge

Top 10 Preferred Destinations

Top 10 Preferred International Destinations

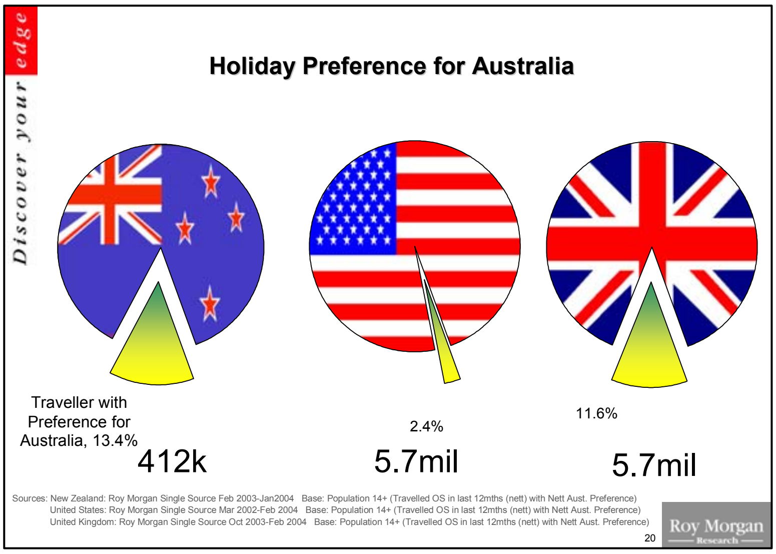
Rank	USA (14+)	UK (14+)	NZ (14+)	AUST (14+)
1	**Australia**	US	**Australia**	UK
2	UK	**Australia**	UK	US
3	Italy	NZ	US	Canada
4	France	Canada	Europe (unspec.)	NZ
5	Germany	Spain	Canada	Europe (unspec.)
6	Europe (unspec.)	Italy	Italy	Italy
7	Ireland	France	France	France
8	Spain	South Africa	Fiji	Ireland
9	NZ	India	Greece	Greece
10	Japan	China	Ireland	Germany

Source: Roy Morgan Research International Trave & Tourism Study Nov/Dec 2003 (Places would like to visit)
Australia: n=1,032, New Zealand: n=2,315, United States: n=2,022 United Kingdom: n=2,185

Roy Morgan

As you can see, 'Brand Australia' is doing well.

Focusing conservatively only on overseas travellers (those who've travelled overseas for a holiday in the last 12 months), an estimated 5.7 million American overseas travellers would like to come to Australia, 5.7 million UK overseas travellers would like to come to Australia and 412,000 New Zealand overseas travellers would like to come to Australia. So, yes, there are millions wanting to come.



It is really back to a very traditional communications and marketing game – albeit on a larger stage.

Those of you who have worked with Roy Morgan data in Australia will already be thinking about the questions – what we need to know about our target (potential customers):

> *Who are they?*
> *Where are they?*
> *What is our competition?*
> *How do we reach them?*
> *How do we move them?*

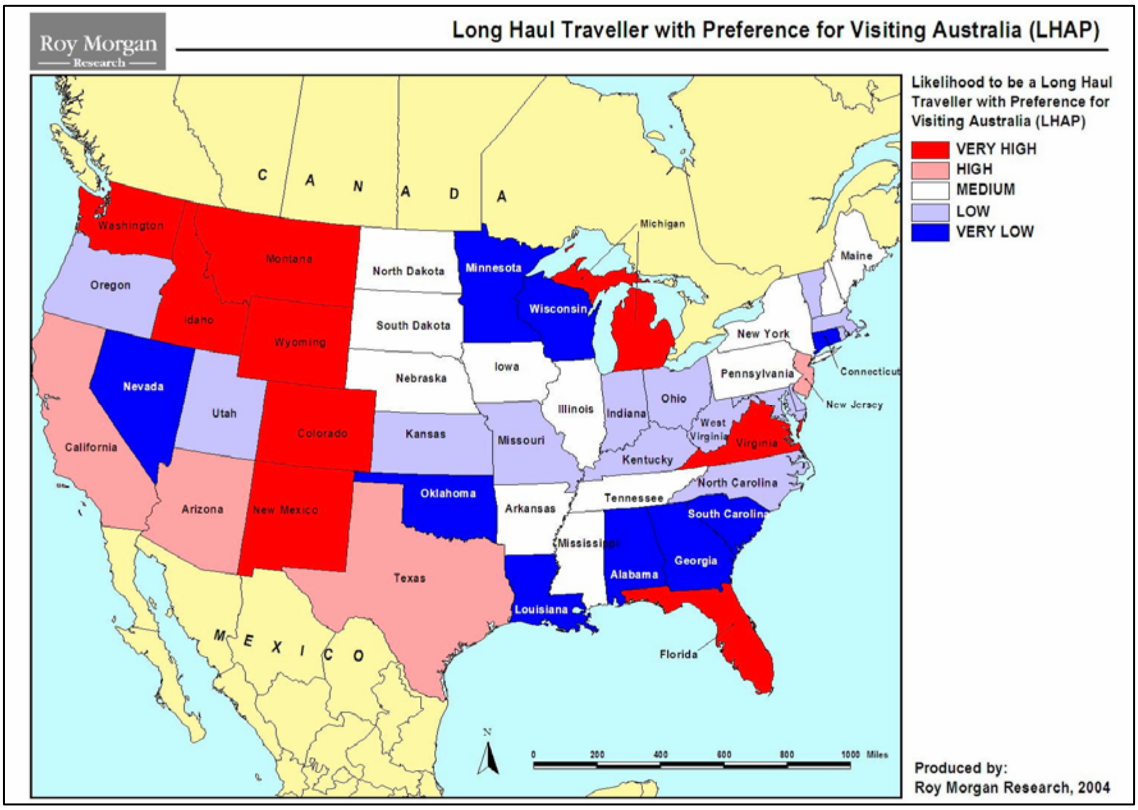
As an example, let's take the US.

Who are they?

If we were to draw a pen portrait of the target – American overseas holiday travellers who would like to come to Australia – she would, more likely than the average American, be female (59% vs 51% in the US population); under 35 (53% vs 37%); with a degree or diploma (49% vs 29%) in a professional or semi-professional occupation (20% vs 13%) in the top socio-economic grouping (45% vs 20%), and Socially aware (16% vs 10%) or Young optimism (17% vs 5%).

Where are they?

A very rough cut of the Roy Morgan Single Source data shows: States with more than their fair share of our target include Florida, Michigan, Washington, Virginia, Montana, Idaho, Wyoming, Colorado and New Mexico (the regions with a high propensity are shaded in red). Of course given where the population is, the biggest numbers of overseas travellers who would like to come to Australia are still California (an estimated 938,000), Florida (668,000), Texas (531,000), Washington (393,000), and Michigan (365,000).



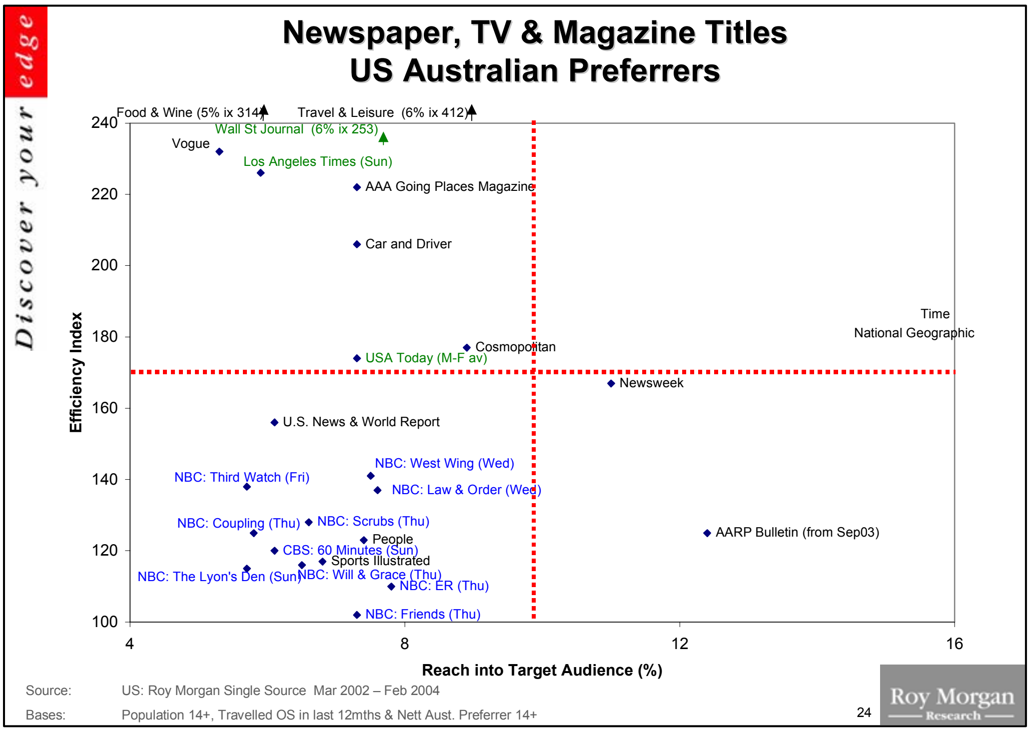
What is our competition?

Australia's competition, in the American market, at least for the hearts of the American people, is the UK, followed by Italy, France, Germany, and other European destinations, Ireland, Spain, NZ and Japan (see previous Top 10 Preferred Destinations chart).

How do we reach them?

Analysis of the media habits of US overseas travellers who would like to come to Australia shows they are relatively heavy consumers of print media with 42% having read 7+ newspapers in the last week) and 48% read 5+ magazines in the last week. They are also relatively heavy 48% Internet users (56% have used the Internet 8 or more times in the last week) and heavy cinema attendees (67% have visited the cinema two or more times in the last three months). They are marginally more likely than the average American to be light TV viewers and light radio users.

An example of a more detailed analysis of television, magazines and newspapers – still at a very simplistic level – is shown in the chart below.



National daily newspapers are in green, TV in blue and magazines in black. The media of most interest are those with a high reach and high efficiency (an index over 100 compared to the population 14+) – the top right hand corner.

National Geographic and *Time* magazines are good media choices with 16% (or over 900,000 of our target) reading an average issue and both titles have an efficiency index of over 180 respectively (compared to the average US population 14 years and over).

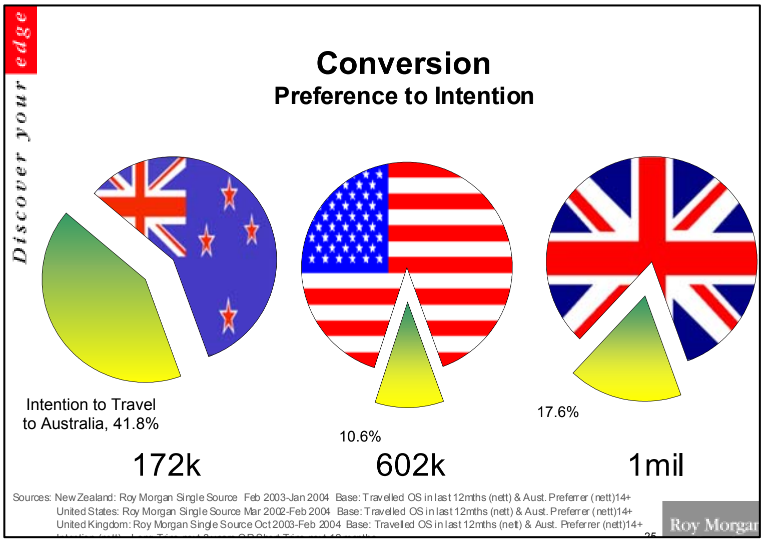
Also magazine titles such as *Travel & Leisure* and *Food & Wine* are interesting media considerations with efficiency indexes of over 300, although these titles will reach a smaller proportion of our target.

Of course this is only part of the picture and many other factors go into choosing a "best fit" media strategy. Price, content, message and other media information are all taken into account when agencies undertake media planning.

How do we move them? What are the barriers?

Many travellers who have an inclination or are attracted to Australia as a holiday destination don't get around to visiting.

Of the 5.7 million American travellers who would like to visit Australia, only 10.6% (602,000) have a trip to Australia planned over the next 12 months.



Converting preference or desire to intention, then ultimately, to travel to Australia is the key challenge.

Competition is coming from both domestic and international holiday destinations. Domestically, 90% of American travellers who would like to visit Australia, actually plan to travel within the USA in the next 12 months. Our target, as well as wanting to visit Australia, would also like to visit Italy, the Caribbean, France, NZ, and England, as shown below.

Discover your edge

The Competition

Top 5 Competitive Destinations for Australian Preferrers

Rank	USA (14+)	UK (14+)	NZ (14+)
1	Italy	US	England
2	Caribbean	France	US
3	England	Caribbean	Fiji
4	NZ	NZ	Italy
5	France	Italy	France

Sources: New Zealand: Roy Morgan Research Feb 2003-Jan 2004 Base: Travelled OS in last 12mths (nett) & Aust. Preferrer (nett)1
United States: Roy Morgan Research Mar 2002-Feb 2004 Base: Travelled OS in last 12mths (nett) & Aust. Preferrer (nett)14+
United Kingdom: Roy Morgan Research Oct 2003-Feb 2004 Base: Travelled OS in last 12mths (nett) & Aust. Preferrer (nett) 14+

Roy Morgan

As quoted in *"How the goss is dimming the gloss"* Sydney Morning Herald, July 22, 2004, Christopher Brown, CEO of Tourism & Transport Forum, said *"New Zealand is catching up to Australia as a tourist destination. For 20 years they have been chasing us down and now they've done it.*" As you can see, they're in the running at the very least.

The real barrier? – Australia is perceived as too expensive.

In a special Roy Morgan International Tourism and Travel Study conducted in late 2003, a series of questions were asked to understand why people aren't actually travelling to countries that they've expressed a desire to visit. Australia was perceived as "too expensive" to travel to by people living in the UK and USA. Indeed, Australia tops the list among Americans and those in the UK as the place they would like to visit but it is "too expensive".

Discover your edge

Which countries would you like to visit but are too expensive

Top 10 countries would like to visit but believe they are too expensive to travel to

Rank	USA (14+)	UK (14+)	NZ (14+)	AUST (14+)
1	**Australia**	**Australia**	UK	US
2	France	US	US	UK
3	UK	**NZ**	Canada	Japan
4	Japan	Japan	Japan	France
5	Italy	Canada	France	Canada
6	Germany	China	**Australia**	Italy
7	**NZ**	France	Italy	Switzerland
8	China	Italy	Switzerland	Germany
9	Swizterland	Switzweland	Germany	**NZ**
10	Ireland	Germany	China	China

Source: Roy Morgan Research International Trave & Tourism Study Nov/Dec 2003

Roy Morgan

This is a dangerous perception for Australia – and note it is "perception" because NZ doesn't share the same fate. However, reduced airfares from more competition across the Pacific would make a huge difference.

Apart from the barriers, what else do we know about our target – the more we know the more likely we can "push the right buttons".

With the wealth of data available from Roy Morgan Single Source, we are spoilt for choice. But for example, in the US, those overseas travellers who would like to visit Australia are more likely than the average Americans to be relatively affluent, employed in professional occupations, and agree *"It doesn't feel like a holiday unless I've left the country"*. Their attitudes are reflective of the international citizen they see themselves as – being more likely to say, *"I enjoy food from all over the world"* (90% vs 66%) and to consider themselves *"a bit of an intellectual"* (70% vs 48%).

Our target actively engage with experiences of many kinds. They are also more likely to support the statements "*I believe in taking risks"* (72% vs 46%) and *"I look for new experiences every day"* (57% vs 47%). People and the social side are important as well. *"It is important to have a full social life"* (64% vs 42%) and they say *"I live a full and busy life"* (81% vs 73%).
They are more likely to be vegetarian (13% vs 8%), into organic foods (30% vs 19%) and against genetically modified food (53% vs 46%); more likely to be interested in experiencing local culture (86% vs 67%), environmentalism (65% vs 56%), ecotourism (30% vs 16%).

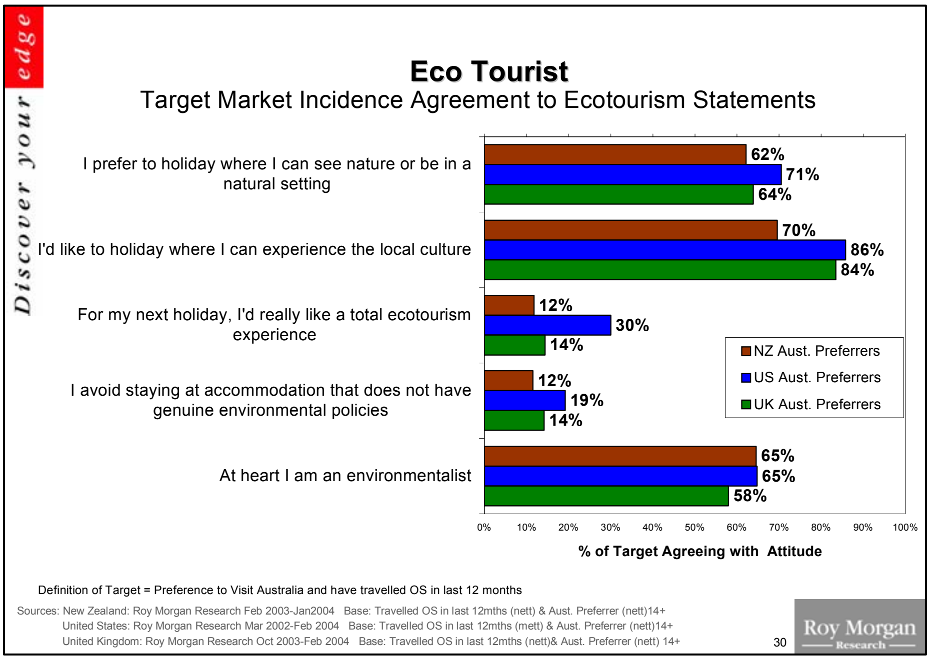
These views and attitudes provide both a richer picture of the target; and a series of potential hooks and product development possibilities.

Shaping 'Brand Australia' requires much more digging than this into the psyche of the global market. But the picture is emerging of a brand and market that can fit well.

Beyond 'Brand Australia'

Getting more practical – there are multitudes of products that both make up 'Brand Australia' – and have their own markets and market strategies. Two come to mind that serve as good examples – **ecotourism** and the **Australian Open** (tennis).

The ecotourism trend, including environmentalism and local cultural experiences, which has emerged over the last few years, is seen in the following chart.



Clear majorities of overseas travellers who would like to visit Australia agree: *"I'd like to holiday where I can experience the local culture"; "I prefer a holiday where I can see nature or be in a natural setting";* and *"At heart I am an environmentalist".*

Almost one-in-three American overseas travellers who would like to visit Australia are looking for a total ecotourism experience. This represents almost 2 million people.

If Australia can package "ecotourism" the marketing is as simple as marketing within Australia. The product and imagery need to resonate with the attitudes and values espoused by the target and the activities they like to engage in (briefly described earlier).

With consistent information across the countries, we identify the proportion of "Australian preferrers" in each country that are "eco tourists" and understand them demographically, the activities they are interested in and their net worth by analysing their median spend on their last holiday.

Determining how to communicate with them is as simple as defining the target (more fine-tuned now to focus on those who express an interest in ecotourism, local culture, and environmental sustainability), analysing the media consumption habits, and identifying appropriate media strategies for communicating a particular message about the brand attributes and image, and more specifically, a call to action such as a holiday package.

The Australian Open

Australia is recognized as a world leader in staging major events. In particular, major sporting events – Olympics, World Rugby, Grand Prix, Australian Open (tennis), etc. In 2002, the Australian Open attracted over 518,000 spectators (Tourism White Paper). Let's say we are interested in developing a holiday package around the Australian Open, and communicating this to those who are most likely to be interested in and attracted to what we have to offer.

Focusing as an example this time on the New Zealand market and identifying those with a preference to travel to Australia AND who have an interest in tennis (play tennis, watch tennis on TV or are a spectator of tennis) – delivers an estimated 155,000 in the target audience. With the critical "hooks" from Roy Morgan Single Source, we are able to leverage their propensity to come to our event.

A comprehensive picture of who they are, how they live their lives, and what types of holidays and activities appeal to them, will guide our marketing effort and provide a backdrop to the offer, message, and language to communicate most effectively with them and provide the most appealing package - one that they identify with and say "this is the perfect holiday for me".

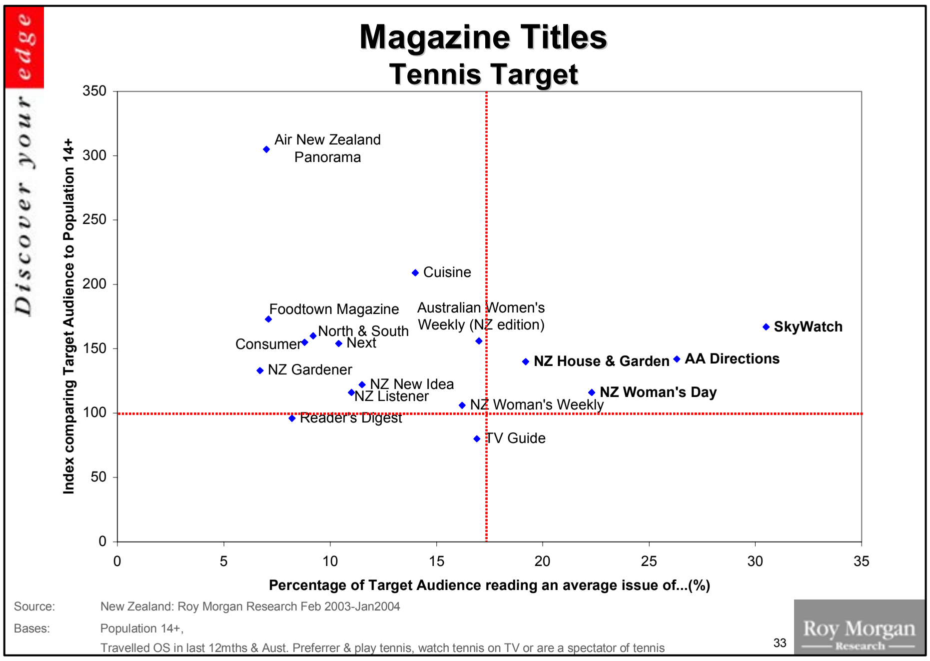
In other words: *"The right offer, to the right customer, at the right time".*

Communication is optimised by tailoring the offer and message, but we must also select the best distribution channels to reach the target most effectively. Their media consumption patterns indicate which media are most efficient – TV, newspapers, magazine, radio, internet or cinema?

An analysis of the media habits of those with a preference for both travel to Australia <u>and</u> an interest in tennis identifies that they are more likely to be: heavy Internet users (39% have used the Internet 8+ times in the last week); heavy cinema goers (48% have visited the cinema 2 or more times in the last three months); heavy newspaper readers (37% read 7+ issues in one week); heavy magazine readers (48% read 5+ issues); medium TV watchers; and light radio listeners.

Having identified that our target is more likely to be heavy magazine readers we then delve further into types of magazines and further again to find out which particular titles would be the most efficient at reaching our target. This would typically be magazines with high reach and higher than average proportion of their readers amongst our target.

As seen earlier the chart shows those in the top right hand corner have a high reach and efficiency (an index over 100 compared to the population 14+). The analysis shows that Sky Watch, AA Directions, NZ House and Garden and NZ Women's Day are the better magazine choices for this target group. For example 22.3% or 35,000 of our target read an average issue of NZ Woman's Day.



Having identified the magazines that are potentially the most effective in reaching our target audience we utilise the ASTEROID MediaPLANNER tool, which a client's media agency would use, to arrive at the optimum advertising schedule, in terms of reach, average frequency and/or cost efficiency, using these magazines. This example only highlights magazines, but newspapers, TV, can all be put into the mix to get the most effective outcome for your dollar.

Discover your edge

Magazine Media Schedule

Tennis Target

Schedule: tennis

Overall filter: ALL
Current filter: OS Traveller (last 12mths) & Preference for Aust.(nett) & Interest in Tennis
(unweighted) 599
(popn. '000) 155

NZ Woman's Day	-	1	3	2
NZ House & Garden	6	2	3	3
AA Directions	6	6	3	4
SkyWatch	6	6	3	4
Reach ('000)	127	128	129	129
(%):	81.9%	82.7%	83.3%	83.4%
Avge. freq. (OTS)	5.57	4.86	3.54	3.95
Total cost ($)	172500	167684	172002	163818
Cost/'000 reached	1359.69	1309.69	1332.43	1268.65

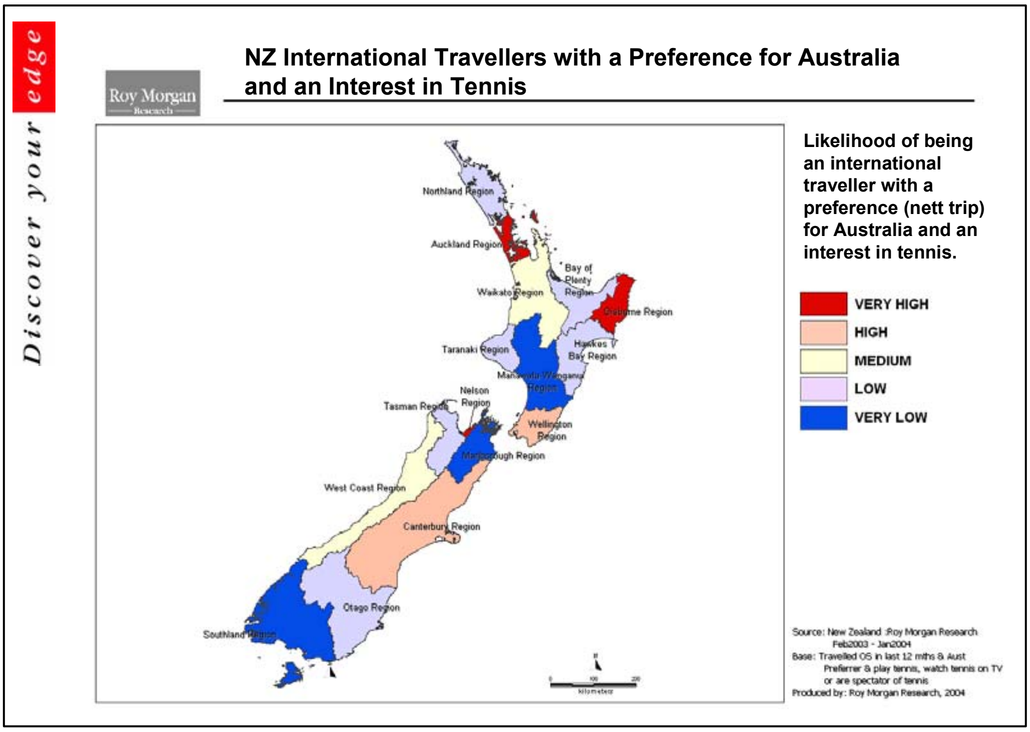
Source: New Zealand: Roy Morgan Research Feb 2003-Jan2004
Base: Travelled OS in last 12mths & Aust. Preferrer & play tennis, watch tennis on TV or are a spectator of tennis

34 Roy Morgan Research

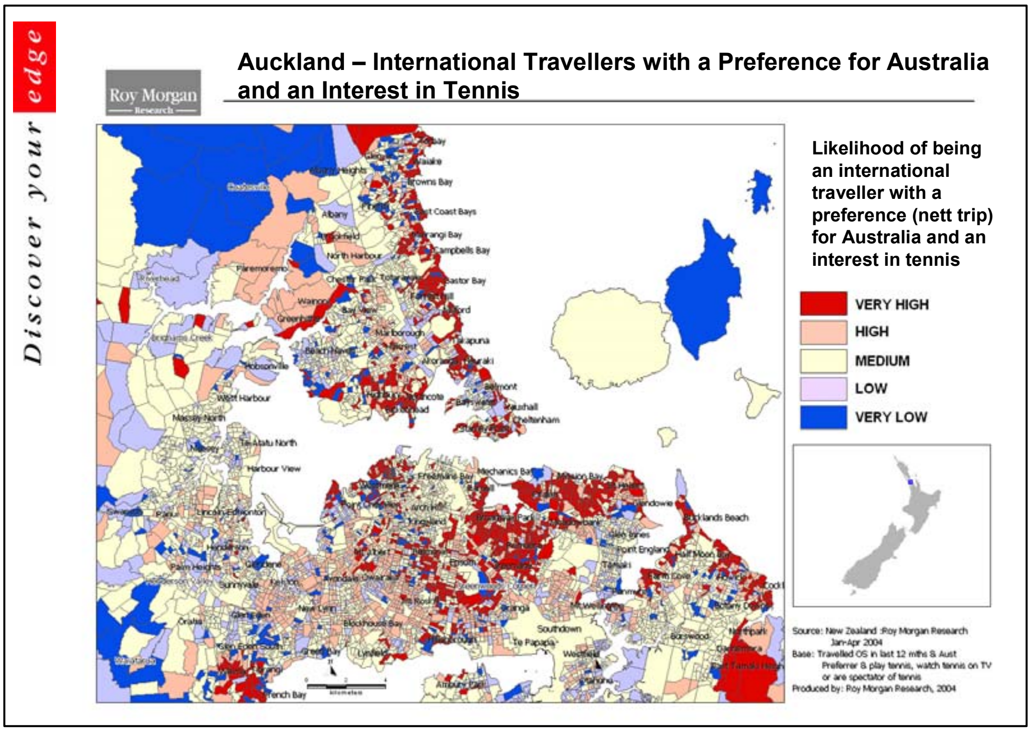
An experienced media buyer and planner will make judgement on the best media placement taking into account many factors in addition to "the numbers" (audience size) such as advertising objectives, environment, price, availability etc. There may also be special TV, and Internet, cinema opportunities that can then be built into the plan.

This is, of course, only part of the picture, and many other factors are taken into account, including other media information, when deciding on an overall "best-fit" media strategy.

Traditional **below the line activities** are also worth considering and the map below pinpoints exactly where our target is located – ie, areas that have more than their fair share.



Using Roy Morgan Single Source (NZ) data and applying predictive modelling using census data, more fine tuning is possible to identify the areas that are most likely to include those in our target group.



Those with a preference to travel to Australia AND have some interest in tennis are more likely to come from Auckland, Gisborne and Nelson regions – the regions with a high propensity are shaded in red. It is possible to drill down even further to look more closely at the Auckland regions and using meshblock information, identify areas direct marketing efforts will be most effectively directed.

Measuring success

There are many ways to track and measure success, dependent on the ultimate aim of the program. The key to measuring success is setting your targets and measuring the response.

The final measure of the success of the campaign or strategy is in dollars, visitors and visitor nights. However, to know how it's going along the way – it's back to basics – awareness; interest/preference; intention - behavior; segmentation to focus on high value targets (defined in whatever way the strategy determines); metrics of the critical determinants, eg number of nights per visitor, dollars per visitor, number of States (places) visited within Australia; and satisfaction (to drive repeat visitation and word-of-mouth).

Let's look at '**Brand Australia**'. The new campaign presents a new image of Australia's cosmopolitan culture and diversity to reposition Australia in the eyes of the world. The signature line is: "**Australia. A different light**."

How will this tagline perform upon entry in different markets? Its performance can be measured in terms of awareness: "Do people recall the line?"; and image change: "Does the perception of Australia change with exposure to the line?" However, the critical measures of success will relate to whether it is able to move the right people.

Ultimately, the measure of success is not simply an increase in visitors, but an increase in the right visitors with the right value contribution. And one last thought to leave you with, but in the words of Andrew McEvoy from Tourism Australia, "*Our business is a simple one. We use Roy Morgan Single Source so we can find the people we want to market to.*"

For further details contact:
Michele Levine, Chief Executive, Roy Morgan Research
Office - +61 (0)3 9224 5215 Facsimile - +61 (0)3 9629 1250 Mobile - +61 (0)411 129 093
E-mail: michele.levine@roymorgan.com

Ref: [\\rmmelnts1\clients\clients\present\industry\tourism\tourism futures\tourism futures townsville 05.08.04.doc;5]