

What's the future of Future Unlimited?

Rebecca Hall
Senior Industry Specialist
International Education
Austrade



Australian Government

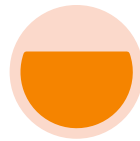
Australian Trade and Investment Commission



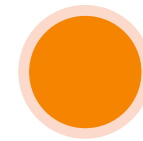
In the next 40 mins



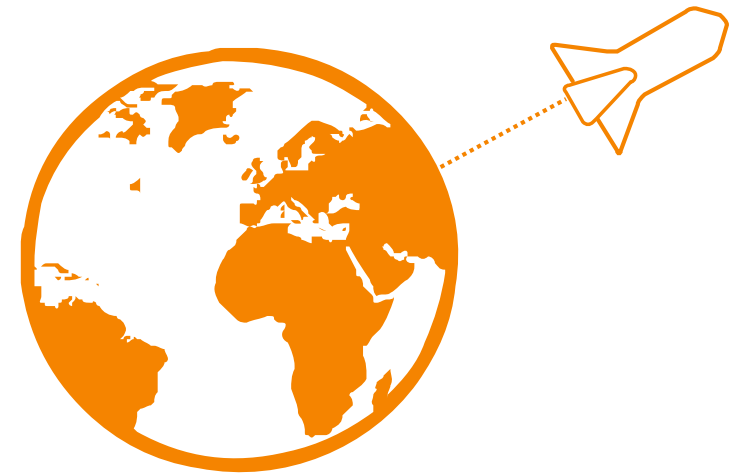
Where we've
been



Current state



Where we're
going



Flash back to 2010



Keynote speaker was Simon Anholt on nation brands & reputation

Australia world's 'dumb blonde'

By Dan Harrison
14 October 2010 – 3:00am

f t e | A A A

AUSTRALIA is viewed as the "dumb blonde" of the world, attractive but shallow and unintelligent, according to a visiting British branding expert.

Simon Anholt, who has advised the governments of more than 40 countries on national identity and reputation, said Australia's one-dimensional image meant that events such as attacks on Indian students could do greater damage here than in countries with which people were more familiar.

"A well-rounded national reputation is an insurance policy against that kind of thing," Mr Anholt told *The Age*.

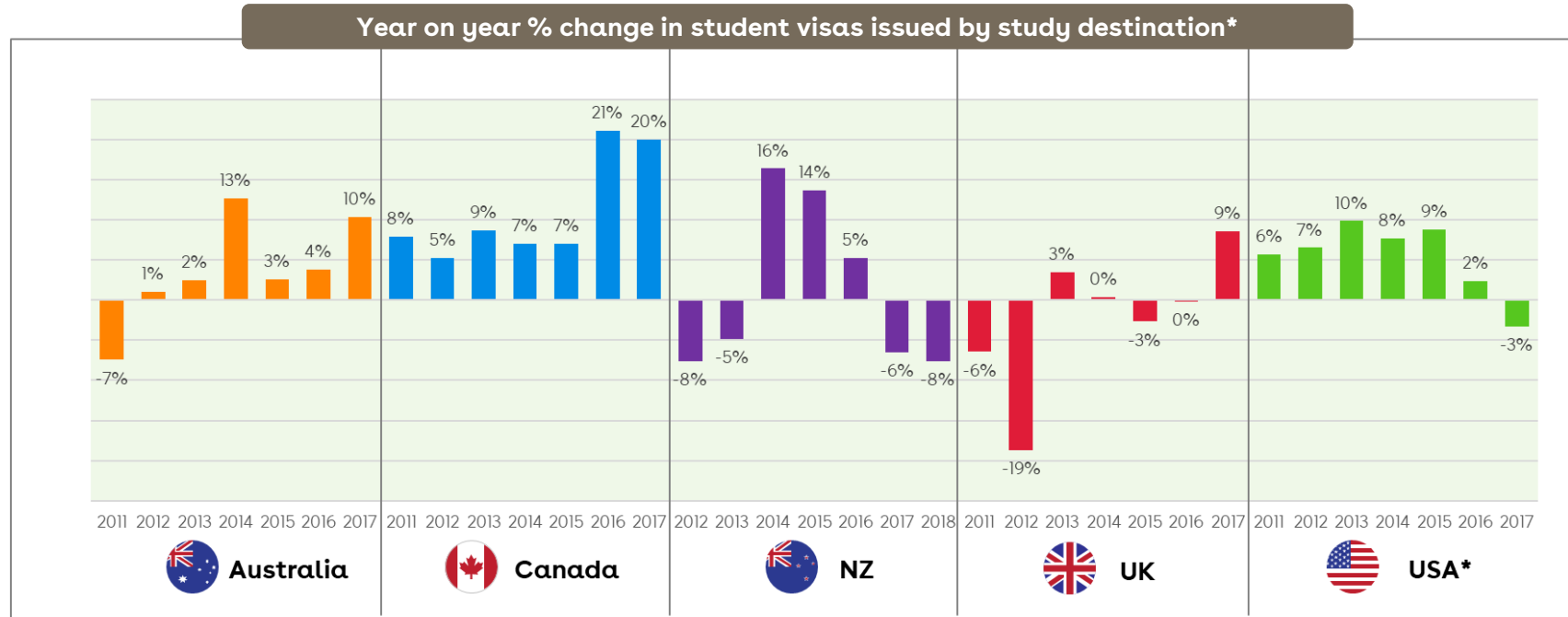
Mr Anholt yesterday addressed a conference on international education in Sydney organised by IDP Education, the international student recruitment company half-owned by 38 Australian universities.

- A strong brand can give a greater sense of purpose to the experience of studying in Australia
- It can build loyalty, reduce promotional costs (through quicker & greater recognition) and help market development
- It can unite our sector in striving to deliver on the brand values
- It is a symbol of trust your organisation can leverage to position itself



Austrade shares Future Unlimited

A lot has happened since 2010 and experts suggest we are entering “a new period of profound instability in international higher education”



Data based on Australia – total, NZ – full-fee paying, UK - offshore, non-EU only, Canada – total, US – HE only

* USA visa data not shown as it is not comparable to previous years due to changes in visa policy and processes; alternatively Open Doors new enrolments data is shown

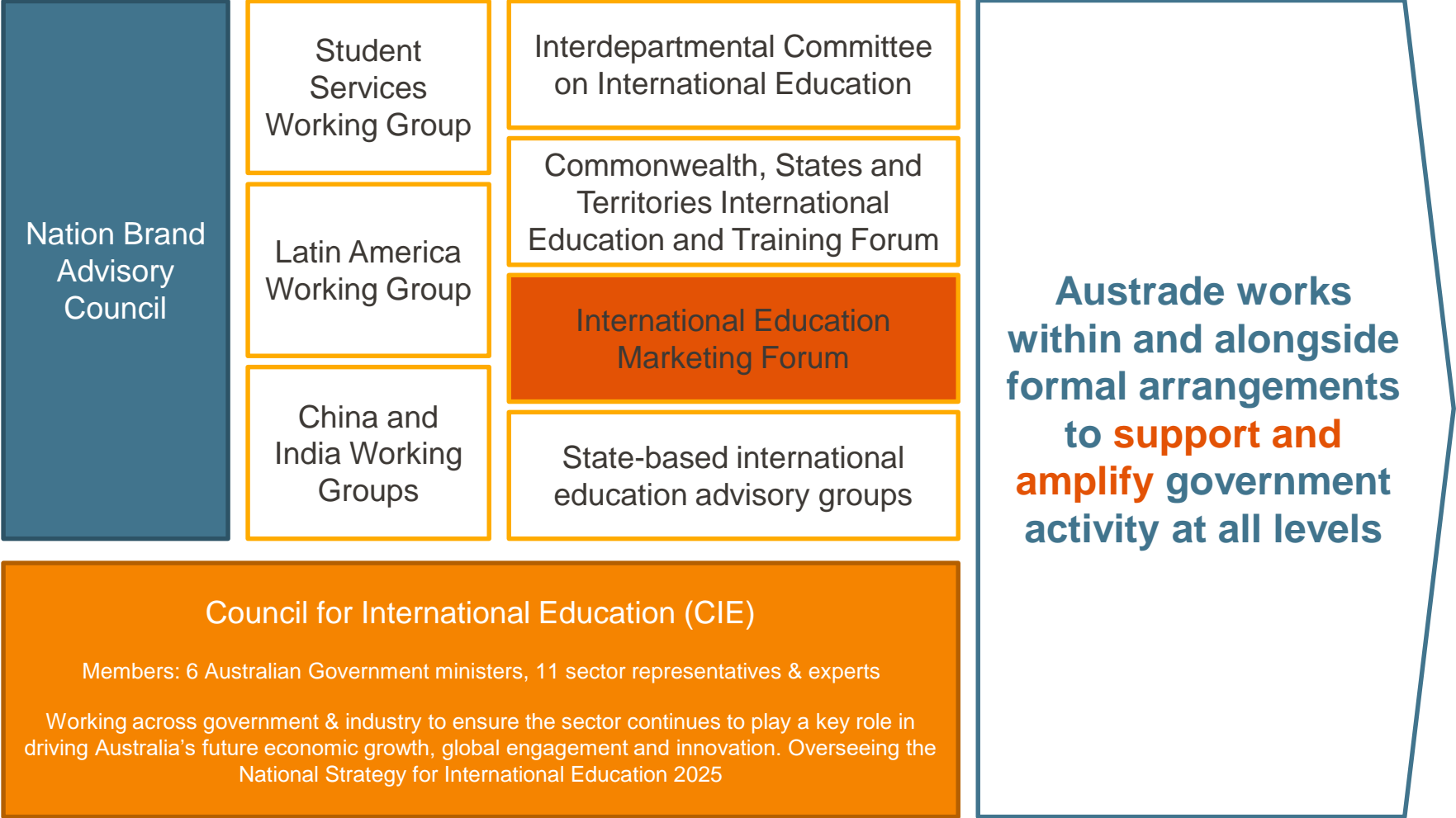
Sources: Australia Dept of Home Affairs, Canada CIC, NZ Department of Labour (Immigration), UK Home Office, US Institute of International Education. Open Doors Report.

Acknowledgements: IDP Australia and <https://www.insidehighered.com/blogs/world-view/dramatic-instability-international-higher-education>

CURRENT STATE



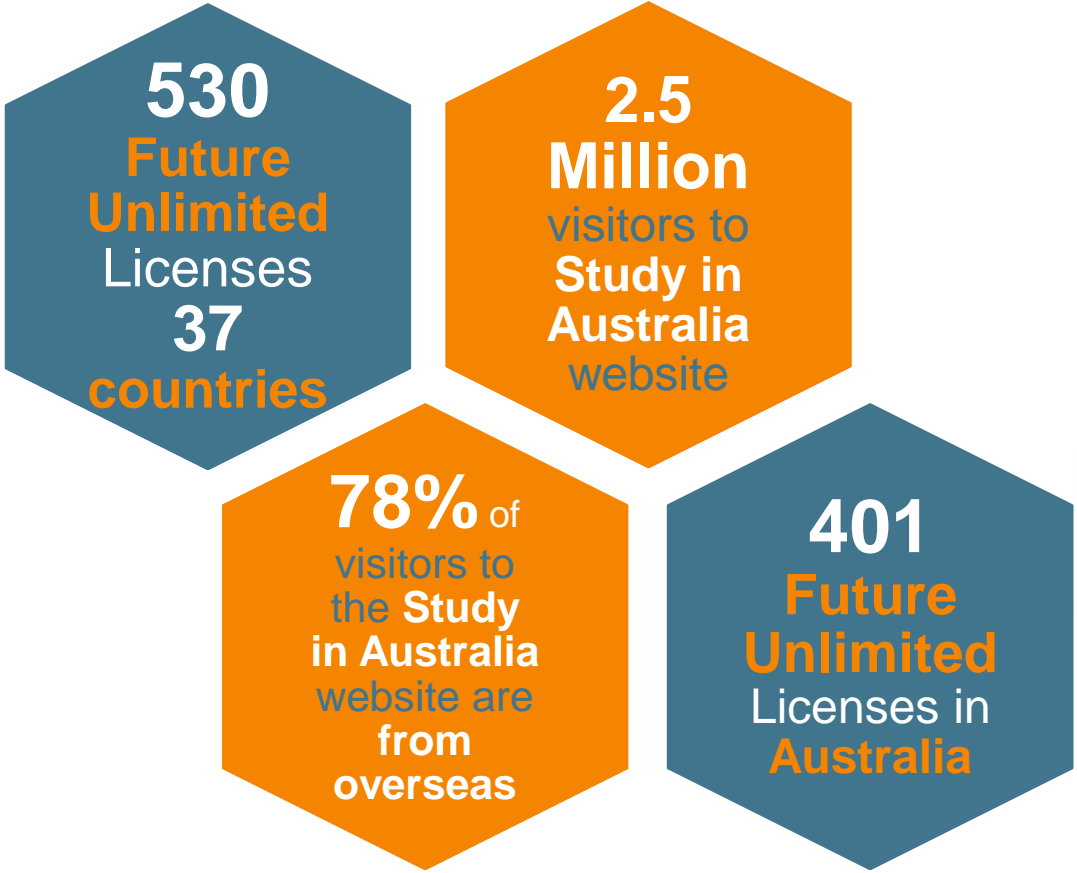
Formal arrangements designed to enable a whole-of-government approach



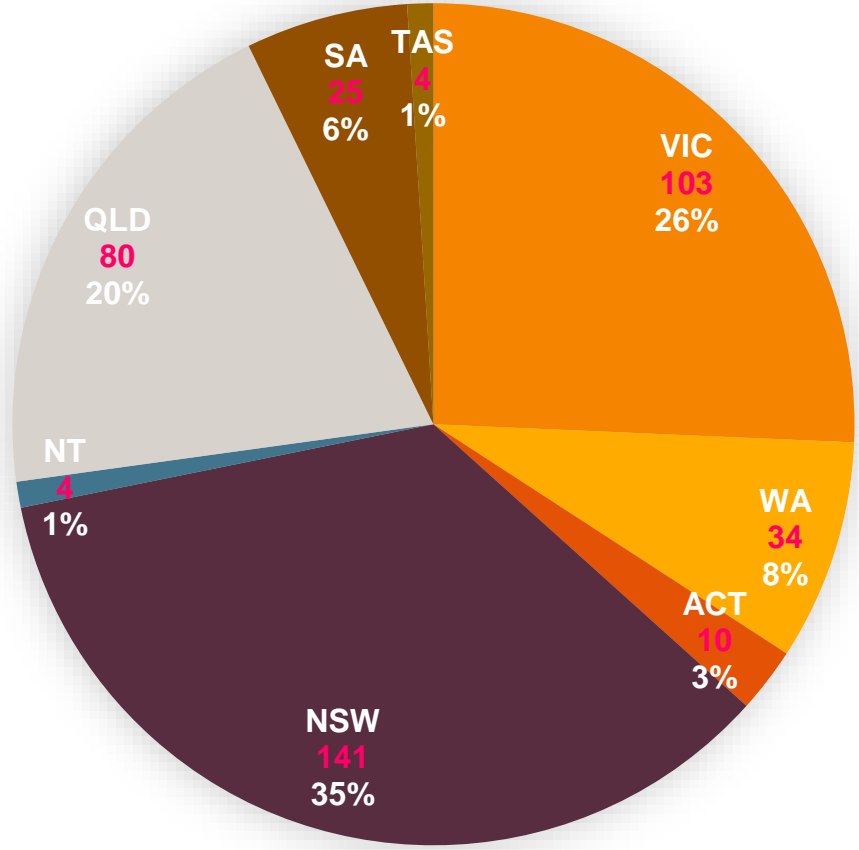
We are getting on with the business of promoting Australia as a destination and a partner for international education, training and research



- Thailand – 21
- China – 11
- Philippines – 10

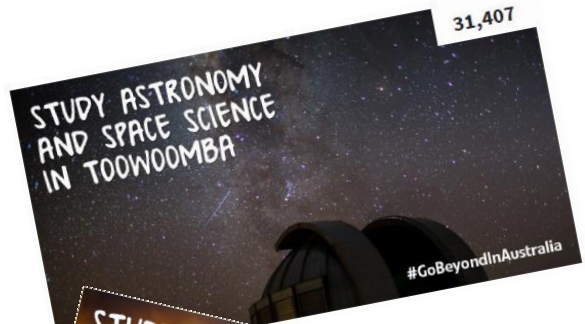


Future Unlimited Licenses by State and Territory



■ VIC ■ WA ■ ACT ■ NSW ■ NT ■ QLD ■ SA ■ TAS

CAMPAIGNS AND ACTIVITIES



12,825,398
people reached



Study In Australia



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Education

500

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Study In Australia

September 24 at 4:54 PM

Ceremonia de bienvenida para los participantes en el Taller de Educación Superior de Australia en la Universidad Sergio Arboleda.

¡Hola a todos! Estamos muy felices de recibirlos en Bogotá. Hoy les damos la bienvenida a la ciudad y les presentamos a los miembros del equipo de la Embajada de Australia en Colombia y Venezuela.

¡Bienvenidos a Bogotá! Esperamos que disfruten de su estancia en la ciudad y de la experiencia de vivir en Australia.

See Translation



Austrade Education

@Austrade_Ed

Contributing to the building of a sustainable international education sector

austrade.gov.au/education

Tweets 1,427 Following 299 Followers 3,604 Likes 427



A priority is aligning and amplifying the efforts of Commonwealth, States & Territories, and local governments to promote Australia



Collaboration will ensure that the whole is greater than the sum of its parts

There are some important policy conversations underway that may impact our brand promise, products, channels to market

Migrant Worker Taskforce

Work-rights are a key determinant for student choice and to enhance employability

Australian Qualifications Framework Review

Last reviewed in 2011, an important foundation for the sector and our international product offerings

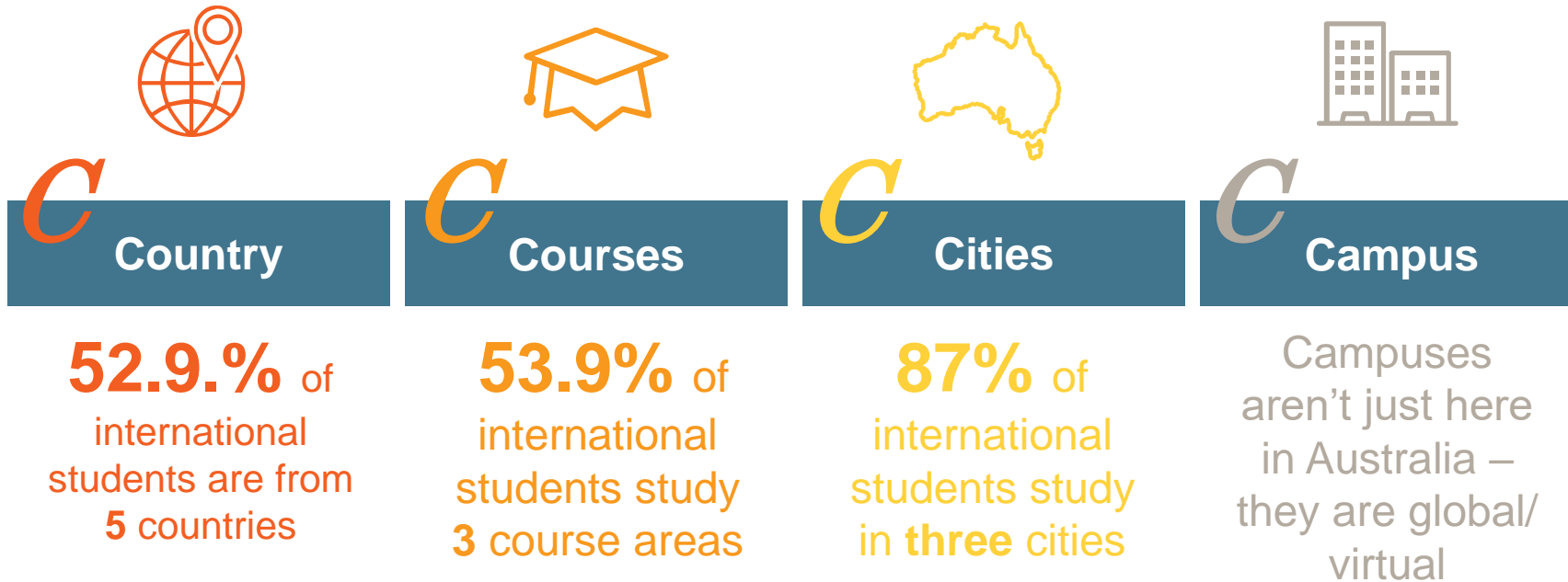
Soft Power Review

An initiative of the Foreign Policy White Paper, opportunity to show education as a soft power asset

Migration Agent Enquiry

Shifted to have a strong focus on how we engage and regulate education agents

Delivering on diversity - 5 Cs



Collaborate



AUSTRALIA'S NATION BRAND



Australian Government
Austrade



FOREIGN POLICY WHITE PAPER - 2017

We will develop a stronger nation brand that reinforces our reputation as

- an internationally competitive investment destination
- a great place to visit
- a quality provider of education
- a trusted exporter of premium quality goods and services.



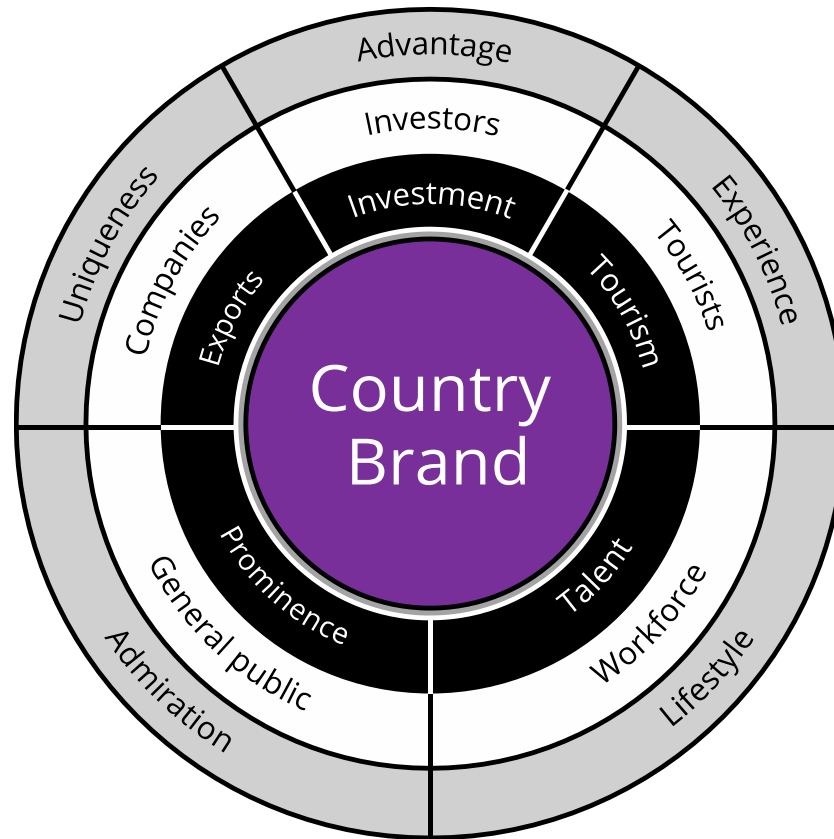
WHAT IS A NATION BRAND?



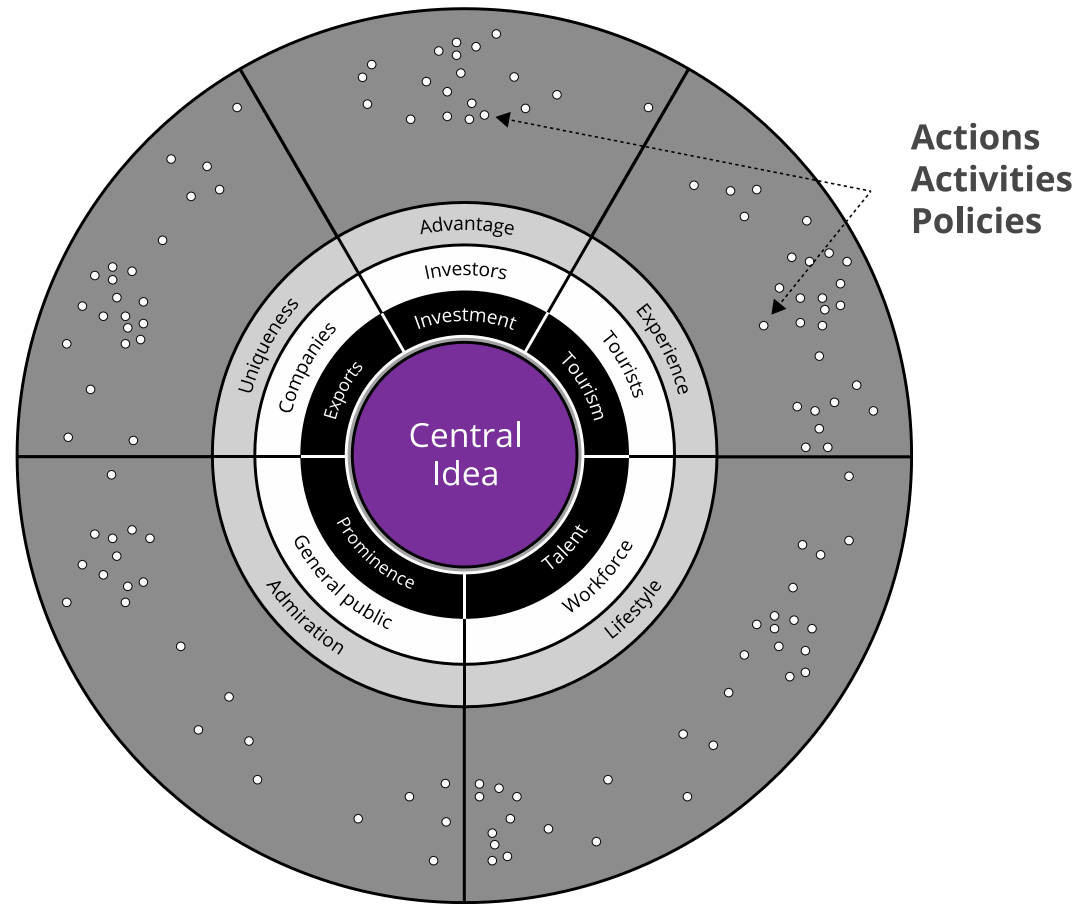
WHAT IS A NATION BRAND?



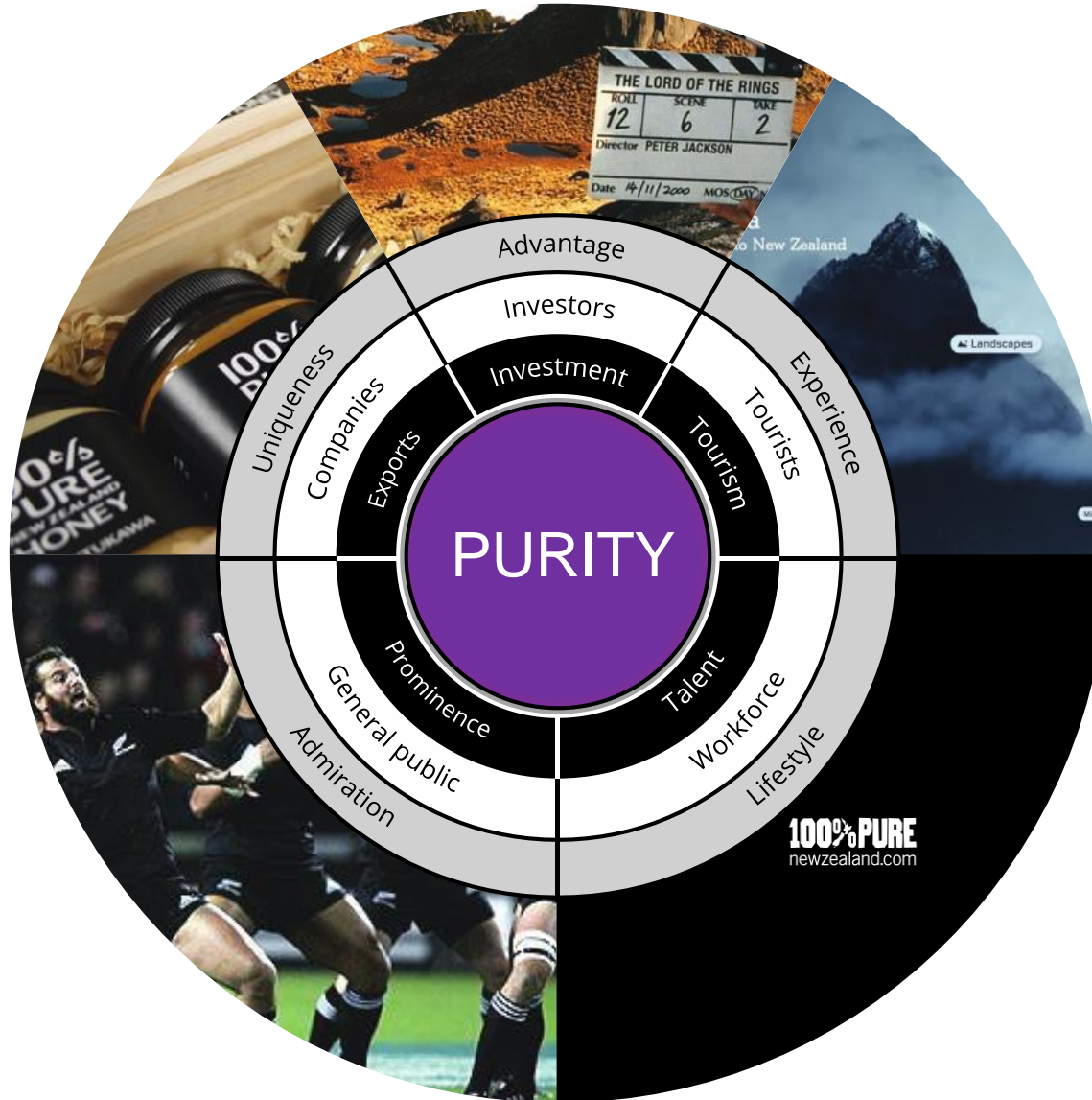
WHAT IS A NATION BRAND?



WHAT IS A NATION BRAND?



FOR EXAMPLE



NEW ZEALAND



Launched in 2012 by the NZ tourism, education, trade and enterprise departments invested **NZD \$9.8m** over 4 years.

The nation brand's vision is to enhance NZ's reputation beyond natural beauty. It followed the success of the "100% pure" brand focused on the tourism sector.

NEW ZEALAND



NEW ZEALAND
EDUCATION

ThinkNew®

100% PURE NEW ZEALAND

newzealand.com 

The image is a promotional graphic for New Zealand Education. It features a background of a scenic landscape with snow-capped mountains and a blue lake. A central white box contains the New Zealand Education logo (a fern frond) and the 'ThinkNew' brand name. Below this box, the slogan '100% PURE NEW ZEALAND' is written in large, bold, white letters. At the bottom right, the website 'newzealand.com' is displayed with a small fern logo.

NEW ZEALAND



THE NEW ZEALAND FERNMARK LICENCE PROGRAMME



UK - 'GREAT' BRITAIN



From 2012 to March 2015 the UK invested **£113.5m** in the GREAT campaign generated a **£1.2bn return**, successfully attracting endorsement and sponsorship from the private sector.

Currently used by 17 UK government and related organisations.

UK - 'GREAT' BRITAIN

RESEARCH IS GREAT
BRITAIN



Scientists from Manchester University are developing innovative water monitoring systems to prevent contamination of water bodies. For cutting-edge research with global impact, choose the UK.

[visitbritain.com](#)

FOOD IS GREAT
BRITAIN



From genetics to herd standards, Britain has pioneered advancements in the livestock sector. For the highest quality meat products, choose the UK.

[visitbritain.com](#)

ADVENTURE IS GREAT
BRITAIN



Sir Robin Knox-Johnston, the first person to sail non-stop around the world and founder of the Clipper Race. Discover your next adventure in Britain.

[visitbritain.com](#)

ENTREPRENEURS ARE GREAT
BRITAIN



Jill Haines, creator of world renowned haircare brand L'Oréal Professionnel. In Spain, she is creating a new business for women. For the best innovators, choose the UK.

[visitbritain.com](#)

INNOVATION IS GREAT
BRITAIN



With the expertise of McLaren Applied Technologies, GAC Systems and the University of Southampton, Britain is a world leader in luge racing. For cutting-edge advanced engineering, choose the UK.

[visitbritain.com](#)

CULTURE IS GREAT
BRITAIN



With world-class attractions like the British Science Museum and three of the world's top live art galleries all free to visit, choose the UK for science, art and culture.

[visitbritain.com](#)

HERITAGE IS GREAT
BRITAIN



London's stunning historic architecture provided a grand setting for many 2012 Olympic events. With the world's finest sporting plants to explore, discover more in the UK.

[visitbritain.com](#)

SHOPPING IS GREAT
BRITAIN



Britain's world famous designers such as Aquilano K. continue to lead global fashion. For expertise in creating luxury brands, choose the UK.

[visitbritain.com](#)

LUXURY IS GREAT
BRITAIN



British talent lies behind some of the world's most exclusive names in luxury, the Clive Christian. For expert craftsmanship and innovation that builds global brands, choose the UK.

[visitbritain.com](#)

SPORT IS GREAT
BRITAIN



With 36,000 competitors and £17 million raised for charity last year, the London Marathon is just one of the huge sporting events regularly held in the UK. For world-class sporting events choose the UK.

[visitbritain.com](#)

WHAT ABOUT AUSTRALIA?



INTERNATIONAL REPUTATION TRACKERS - AUS



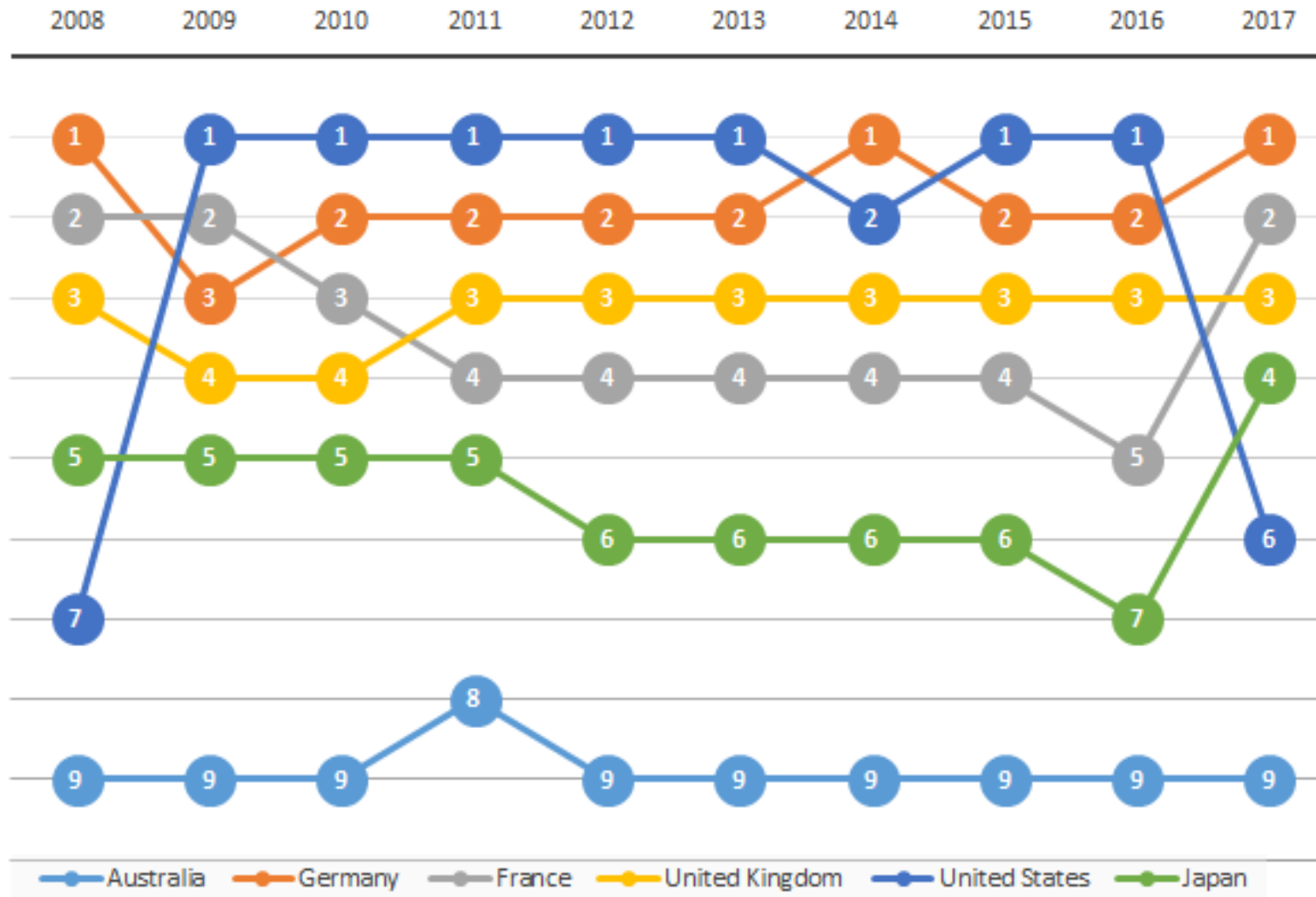
6th Reputation Institute
Country RepTrack ® 2018

9th Anholt-GfK
Nation Brands Index 2017

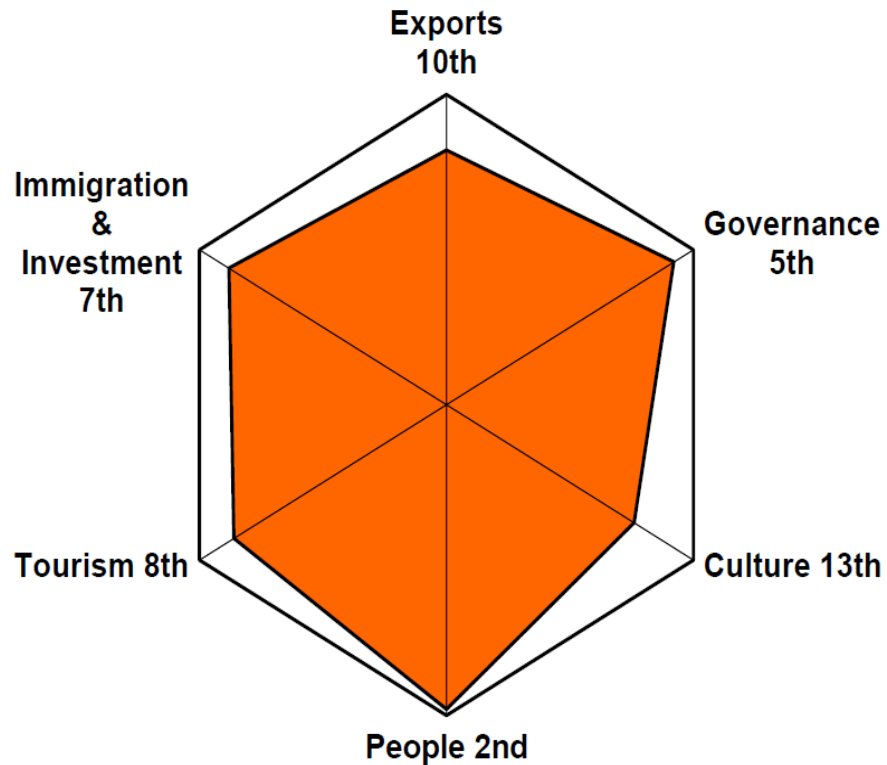
6th Digital Country Index
Bloom consulting 2017

10th The Soft Power 30
Portland Communications 2018

ANHOLT GFK NATION BRAND INDEX



AUSTRALIA RANKS IN THE TOP 10 ON 5 OF 6 INDICES



Rank*	Overall NBI SM	Exports	Governance	Culture	People	Tourism	Immigration & Investment
1	Germany	Japan	Canada	France	Canada	Italy	Canada
2	France	United States	Switzerland	United States	Australia	France	Germany / Switzerland
3	United Kingdom	Germany	Sweden	Italy	Italy	United Kingdom	-
4	Canada / Japan	United Kingdom	Germany	Germany	Germany	Spain	United Kingdom
5	-	France	Australia	United Kingdom	Switzerland	Greece	United States
6	United States	Switzerland	Norway	Spain	United Kingdom	United States	France
7	Italy	Canada	Denmark	Japan	Sweden	Japan	Australia
8	Switzerland	Sweden	Finland	China	Japan	Australia	Sweden
9	Australia	Italy	Holland	Russia	France	Canada	Japan
10	Sweden	Australia	France	Brazil	Spain	Germany	Norway
11	Spain	Holland	United Kingdom	Greece	United States	Switzerland	Italy
12	Holland	China	New Zealand	Canada	New Zealand	Scotland	Holland
13	Norway	Norway	Austria	Australia	Holland	Sweden	Denmark
14	New Zealand	Denmark	Japan	Holland	Norway	New Zealand	New Zealand
15	Denmark	Finland	Scotland	Sweden	Scotland	Austria	Austria

*Rankings are among a total of 50 nations. Only the nations ranked 1-15 on each Index are displayed here.

© GfK 2018 | Australia's Nation Brand | July 19, 2018

AUSTRALIA'S DIGITAL DEMAND BY MARKET

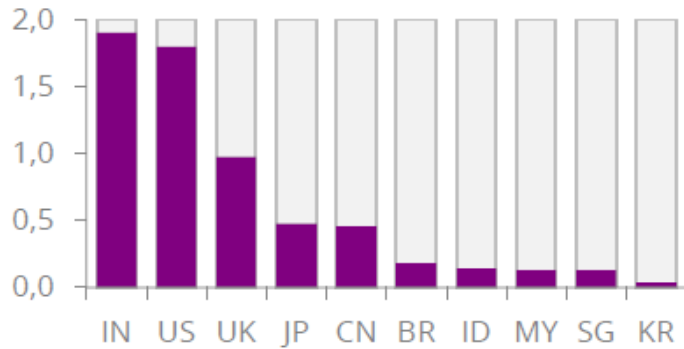
Bloom Consulting

Countries Regions and Cities



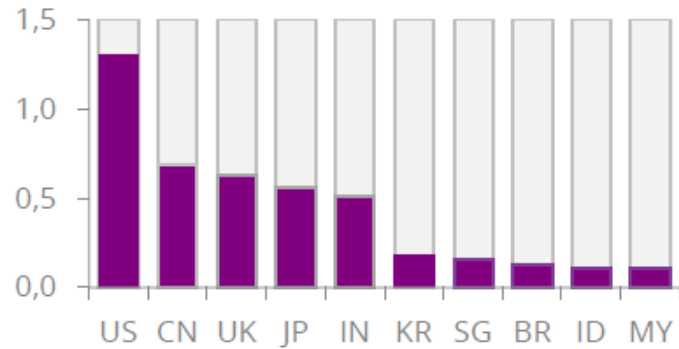
Prominence

Search volume (m)



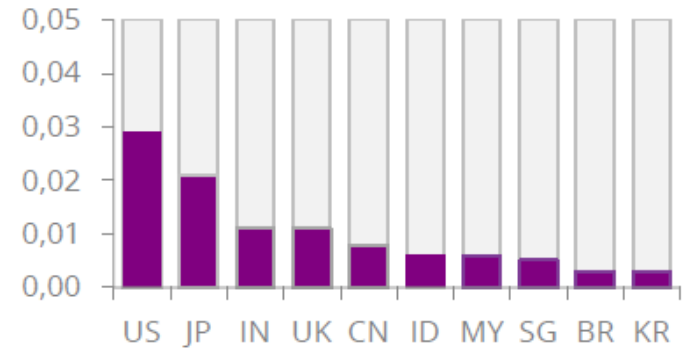
Tourism

Search volume (m)



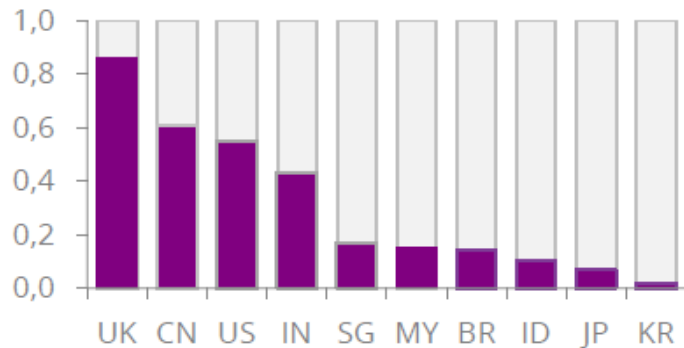
Business & Exports

Search volume (m)



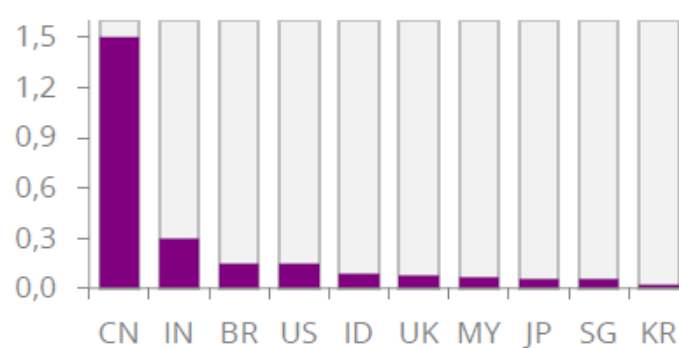
Work and Live

Search volume (m)



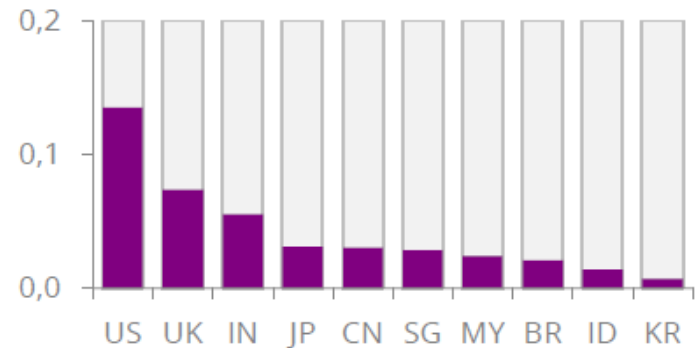
Study

Search volume (m)



Investment

Search volume (m)

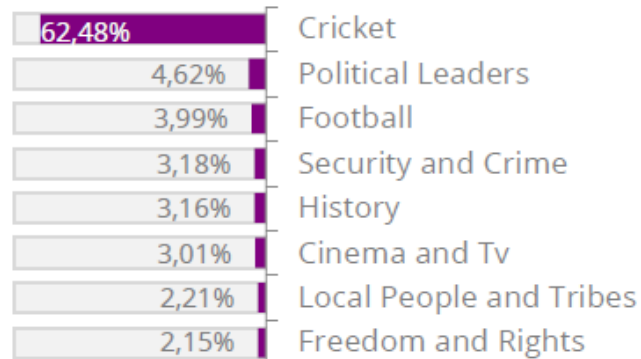


AUSTRALIA'S DIGITAL DEMAND BY DIMENSION

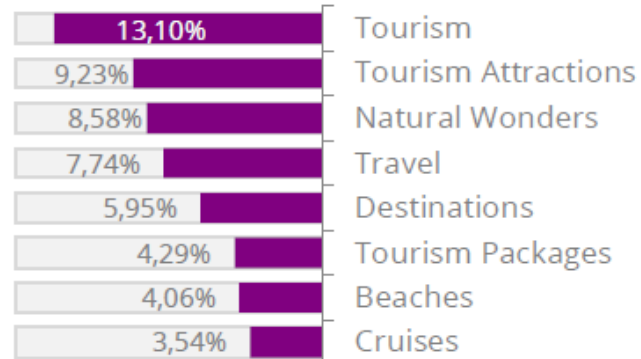
Bloom Consulting

Countries Regions and Cities

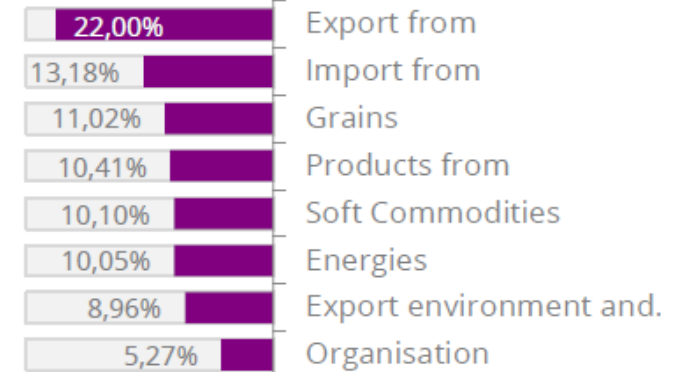
Prominence



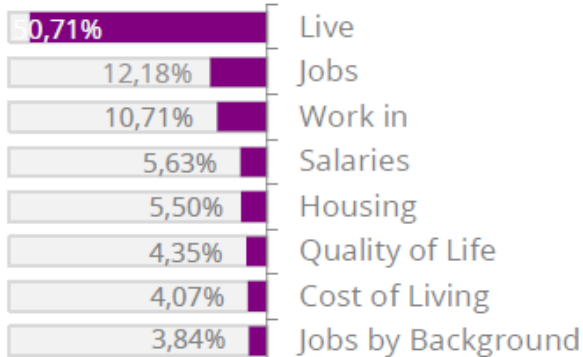
Tourism



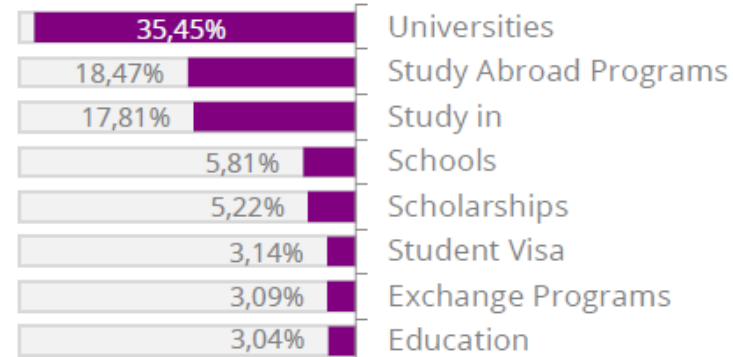
Business & Exports



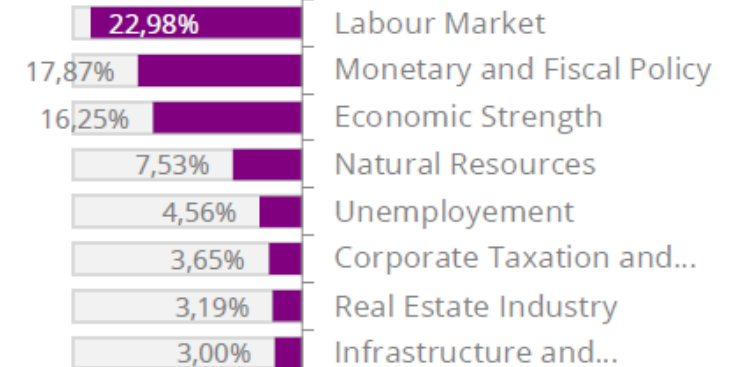
Work and Live



Study



Investment



Australia's reputation ranks **#1** across all dimensions

Australia's reputation ranks **#1** in all competitor
country

CHINA MARKET QUANTITATIVE RESEARCH RESULTS

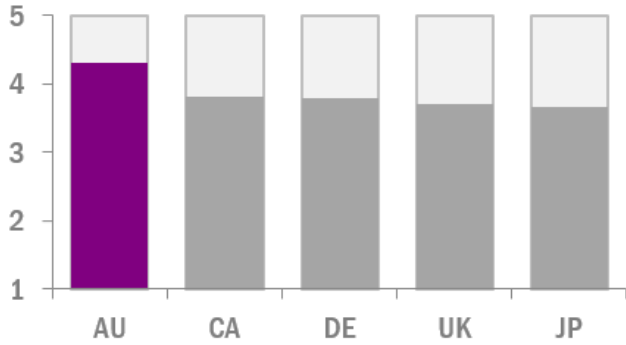
Bloom Consulting

Countries Regions and Cities



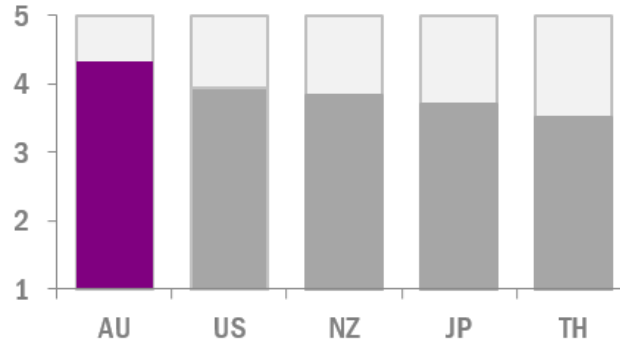
Prominence

Average: 1= Very Negative; 5 = Very Positive



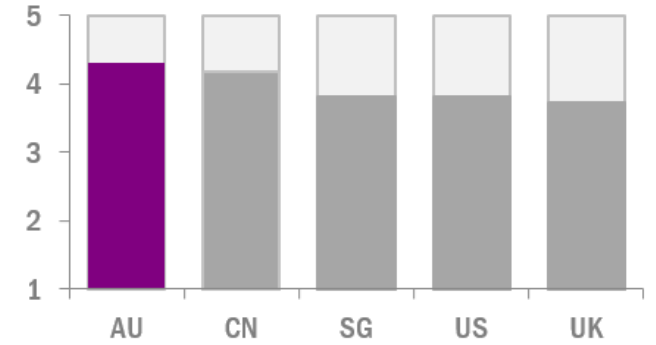
Tourism

Average: 1= Very Negative; 5 = Very Positive



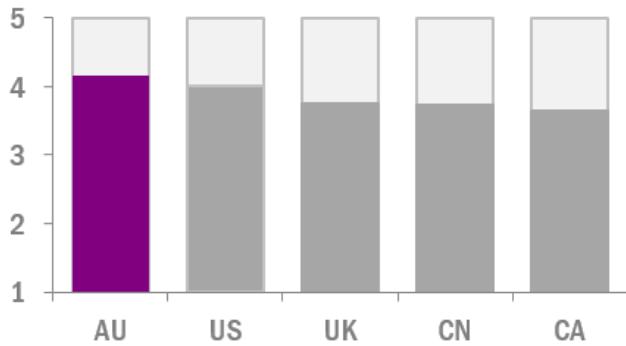
Business

Average: 1= Very Negative; 5 = Very Positive



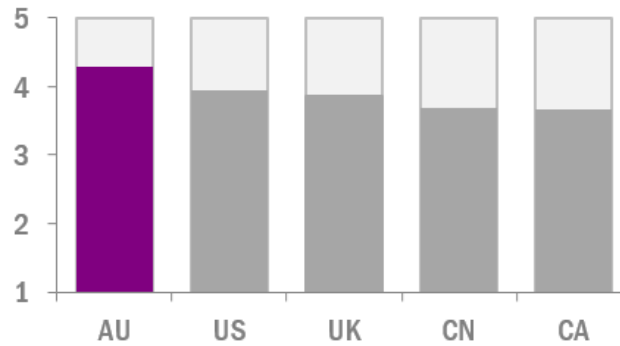
Work and Live

Average: 1= Very Negative; 5 = Very Positive



Study

Average: 1= Very Negative; 5 = Very Positive



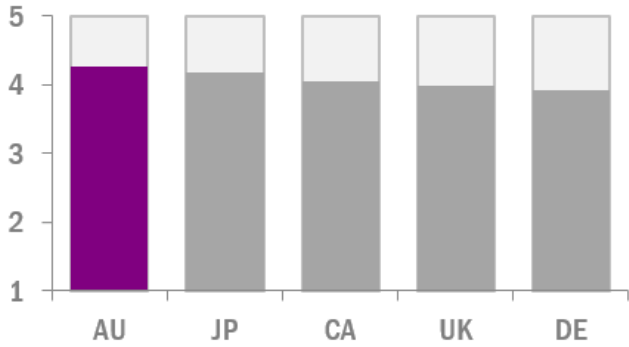
CHINA

ASIA - OUTSIDE CHINA QUANTITATIVE RESEARCH RESULTS

Bloom Consulting Countries Regions and Cities

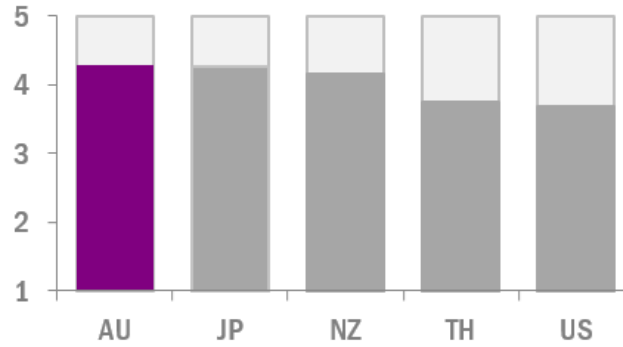
Prominence

Average: 1= Very Negative; 5 = Very Positive



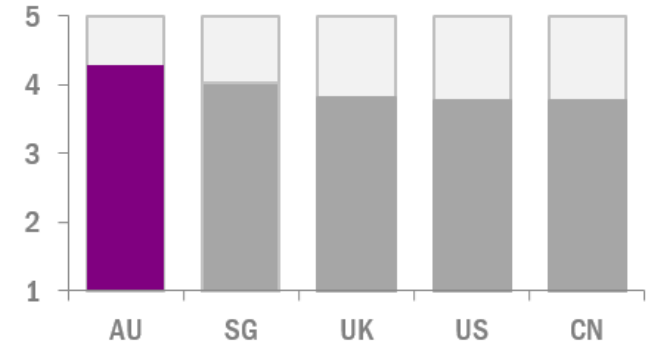
Tourism

Average: 1= Very Negative; 5 = Very Positive



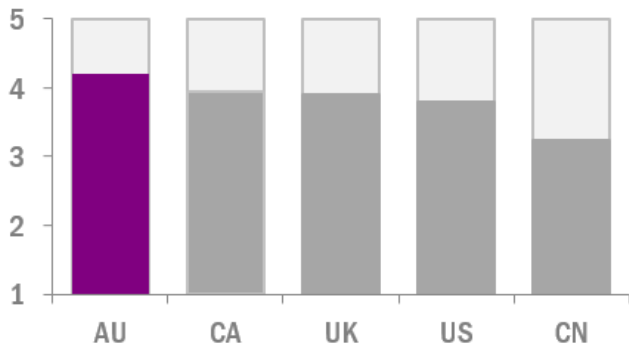
Business

Average: 1= Very Negative; 5 = Very Positive



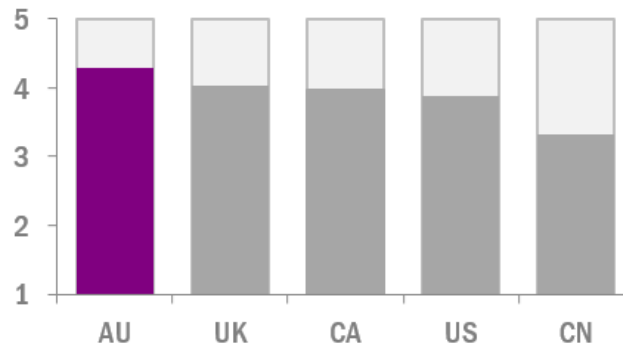
Work and Live

Average: 1= Very Negative; 5 = Very Positive



Study

Average: 1= Very Negative; 5 = Very Positive



ASIA (EX-CHINA)

UNITED KINGDOM QUANTITATIVE RESEARCH RESULTS

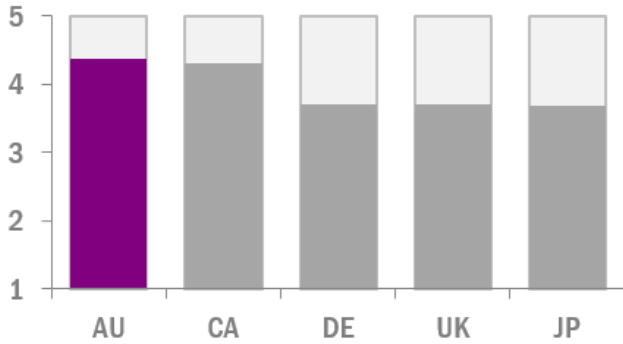
Bloom Consulting

Countries Regions and Cities



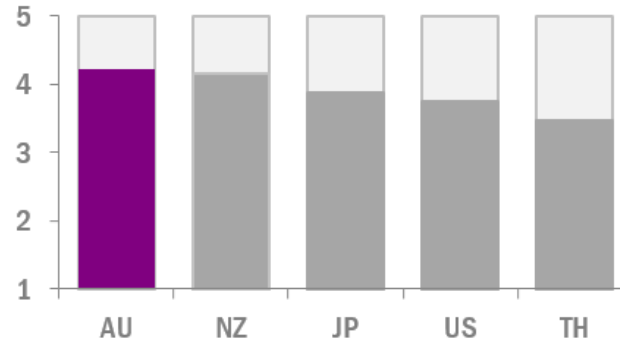
Prominence

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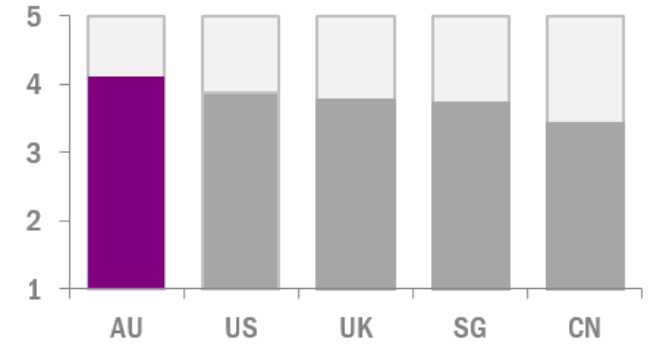
Tourism

Average: 1= Very Negative; 5 = Very Positive



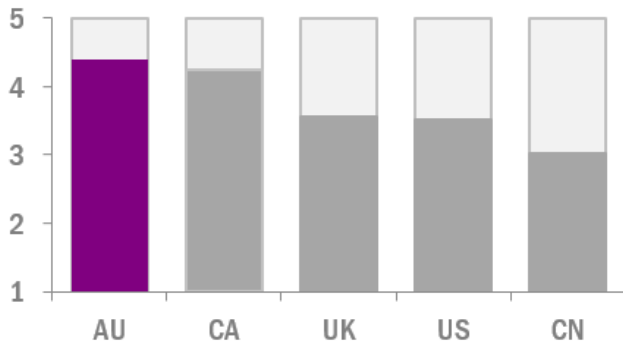
Business

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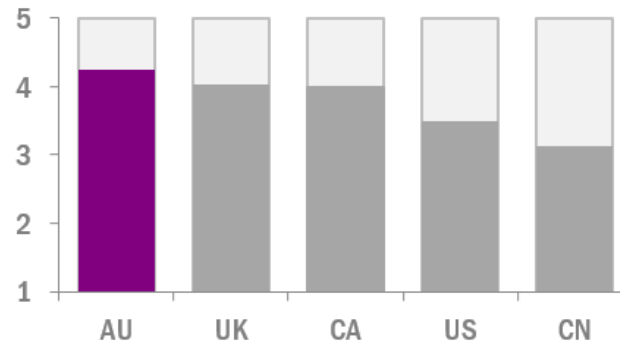
Work and Live

Average: 1= Very Negative; 5 = Very Positive



Study

Average: 1= Very Negative; 5 = Very Positive



UK

UNITED STATES QUANTITATIVE RESEARCH RESULTS

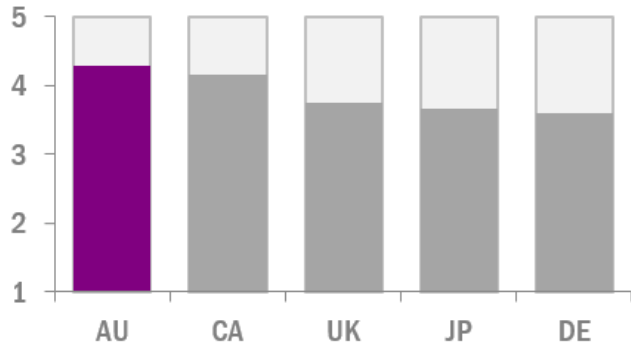
Bloom Consulting

Countries Regions and Cities



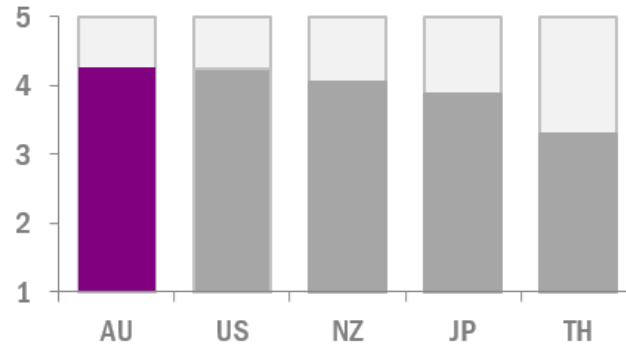
Prominence

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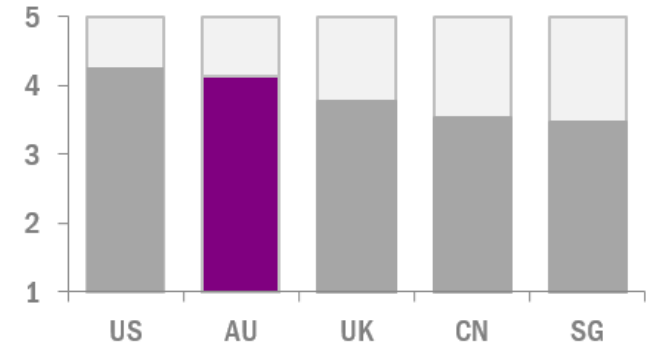
Tourism

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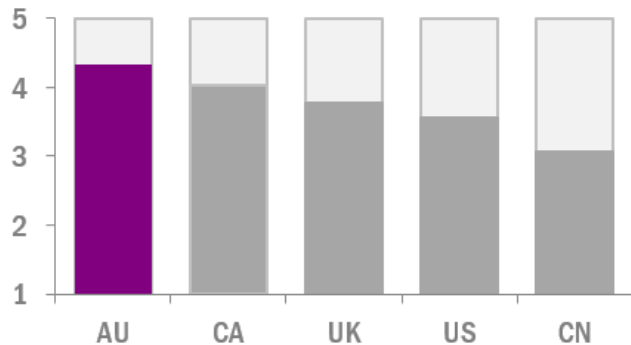
Business

Average: 1= Very Negative; 5 = Very Positive



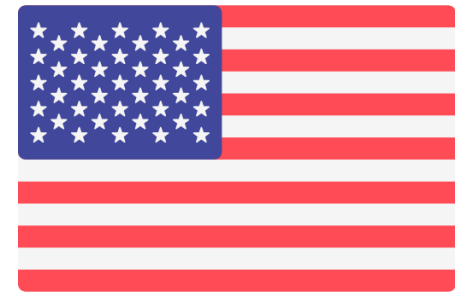
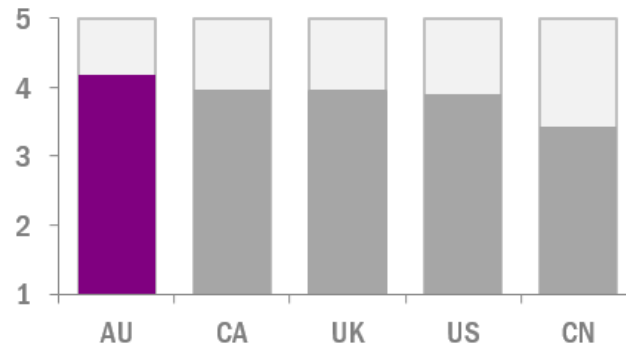
Work and Live

Average: 1= Very Negative; 5 = Very Positive



Study

Average: 1= Very Negative; 5 = Very Positive



USA

HOWEVER...

...this goodwill is not being capitalized for the Australian economy.

AUSTRALIA'S DIGITAL DEMAND IN COMPARISON TO ITS PEERS (SEARCHES)

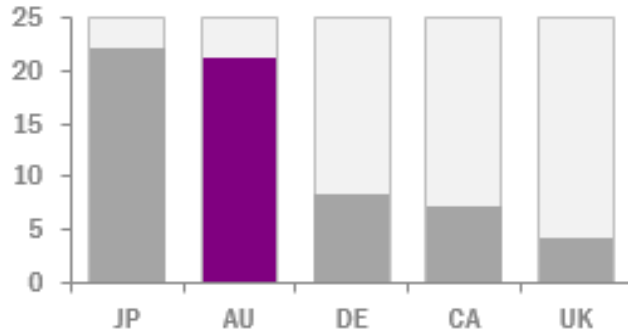
Bloom Consulting

Countries Regions and Cities



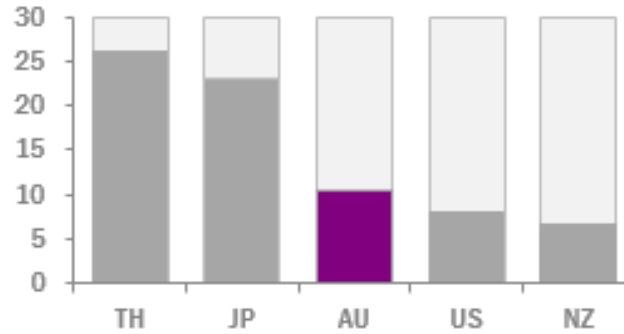
Prominence

Search volume (m)



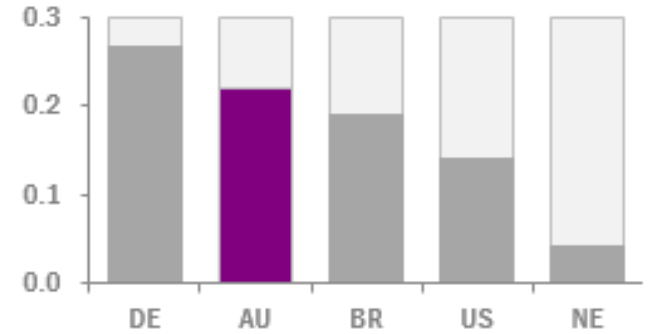
Tourism

Search volume (m)



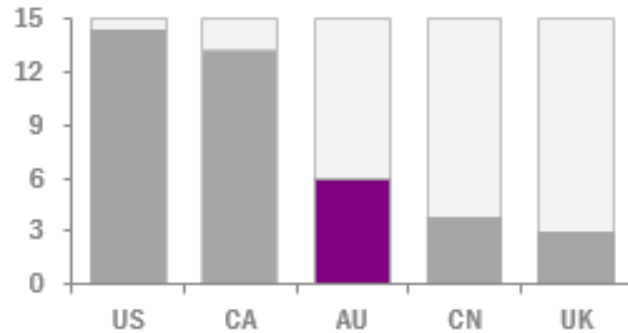
Business & Exports

Search volume (m)



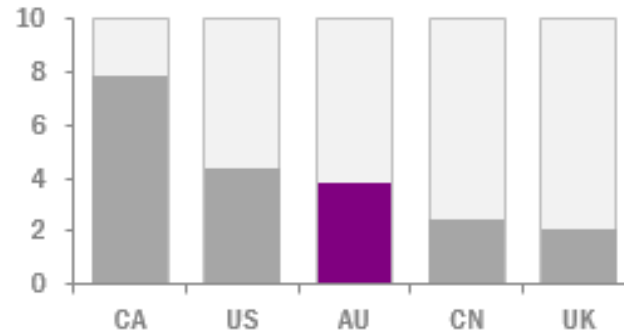
Work and Live

Search volume (m)



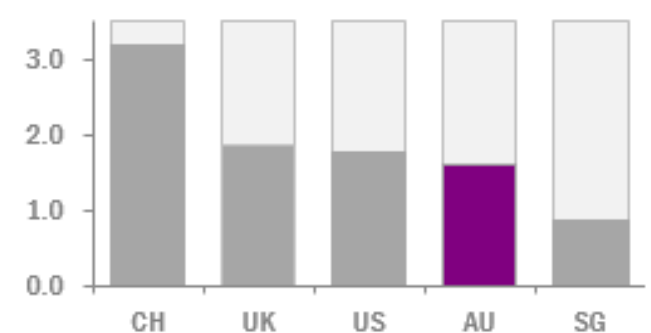
Study

Search volume (m)



Investment

Search volume (m)



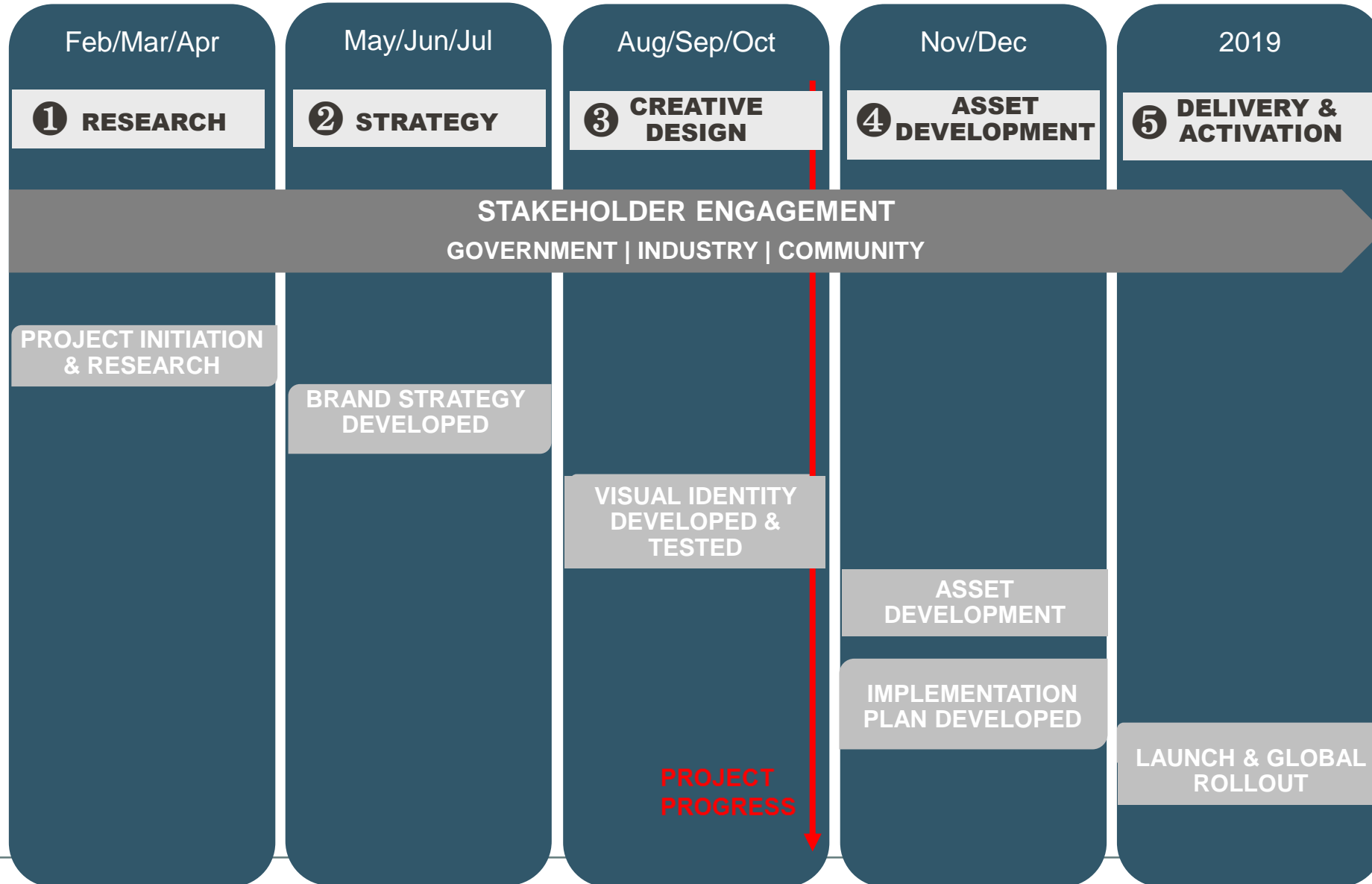
“For Australia the longer term challenge is to progress from being merely popular to truly respected”



PROJECT APPROACH AND TIMELINE



PROJECT MAP



AUSTRALIA'S NATION BRAND ADVISORY COUNCIL



Andrew Forrest AO
Non-executive
Chairman, Fortescue
Metals Group (FMG),
Former Chief Executive
Officer of FMG.



Bob East
Chief Executive
Officer, Mantra,
Chairman Tourism
Australia



Christine Holgate
Chief Executive
Officer,
Australia Post



Wesley Enoch
Sydney Festival
Artistic Director



Michael O'Keefe
Chief Executive
Officer, Aesop



Dr Stephanie Fahey
Chief Executive
Officer, Austrade



Alan Joyce AC
CEO,
Qantas



**Mike Cannon-
Brookes**
Co-Founder and Co-
CEO, Atlassian



Jayne Hrdlicka
Chief Executive
Officer, A2 Milk
Company



Glenn Cooper AM
Chairman,
Coopers Breweries



Rod Jones
Former Group
Chief Executive
Officer, NAVITAS



Edwina McCann
Board Director
Australian Fashion
Council, Editor in Chief,
Vogue Australia

INDUSTRY, GOVERNMENT & COMMUNITY ENGAGEMENT



INDUSTRY ENGAGEMENT PROGRAM

1

Raise awareness of Australia's Nation Brand project

- Context and genesis, objectives, intent and anticipated benefits

2

Gather feedback, perspectives and insights

- What matters to stakeholders and how they regard the opportunity

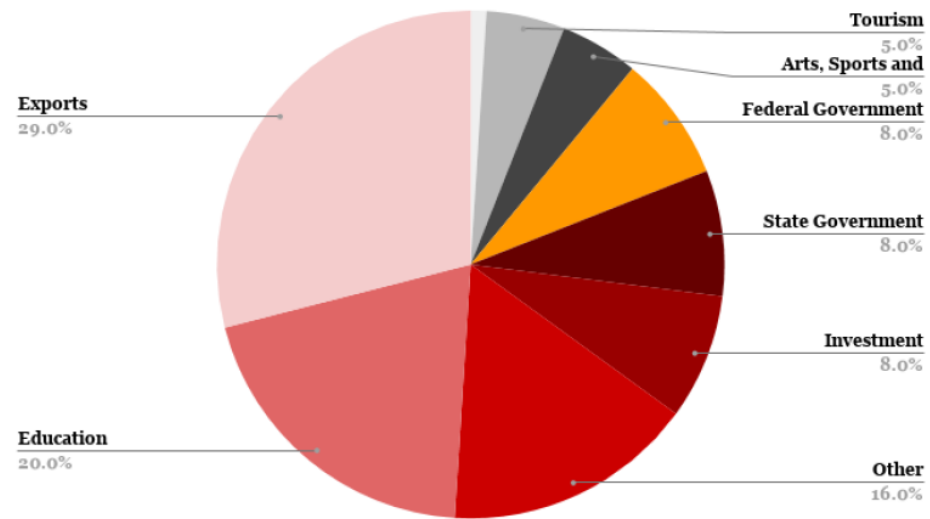
3

Explore the opportunity to bring Australia's Nation Brand to the world

- What good execution looks like and how to make it a reality

INDUSTRY FORUMS & DIGITAL PLATFORMS

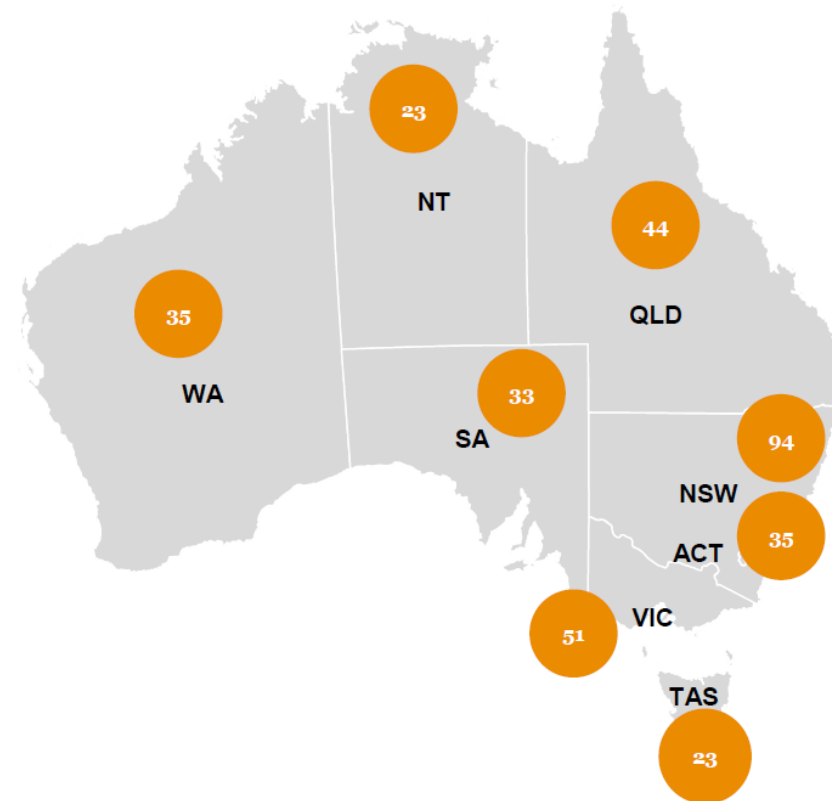
Participation by Sector and Government



Participation by geography

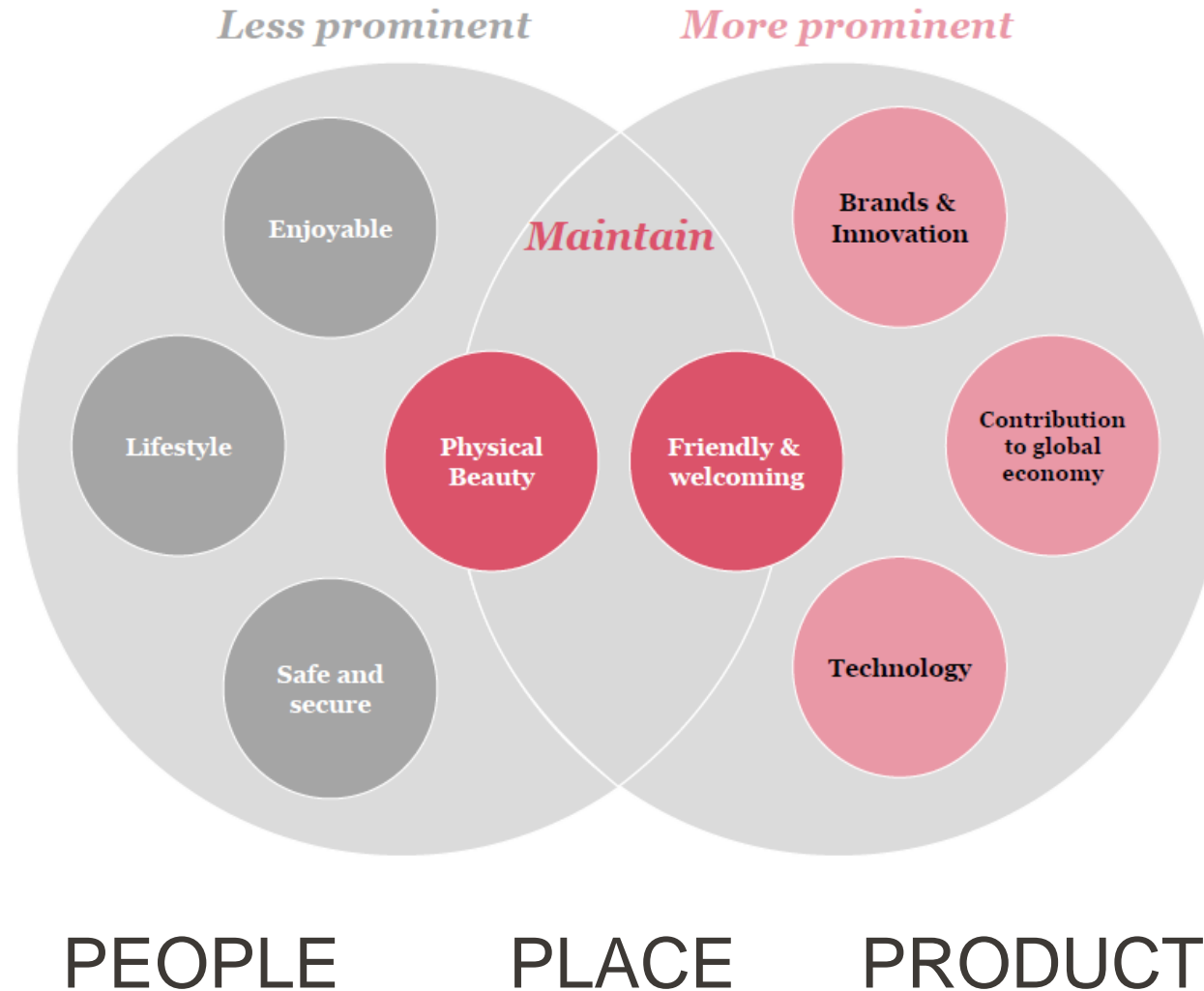


International: 17
[Digital Forum]





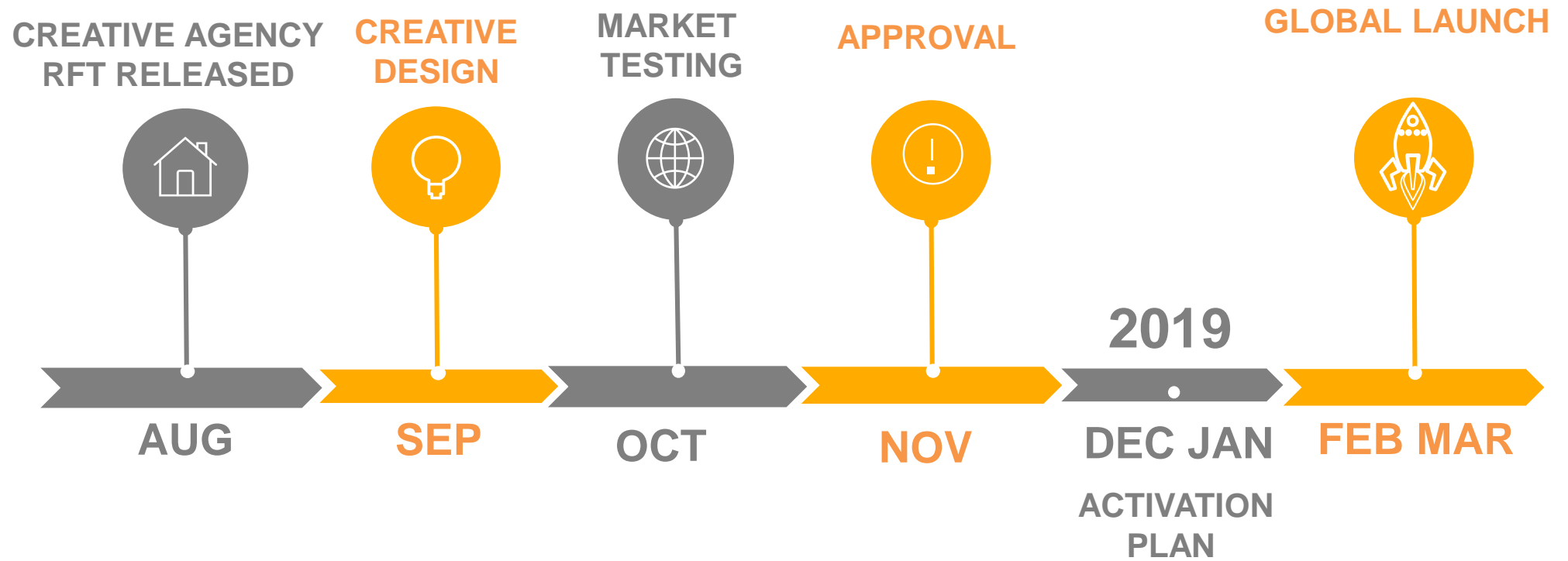
INDUSTRY ASPIRATION FOR A NATION BRAND



WHAT'S NEXT?



KEY DATES



Nation Brand Implementation Framework



Governance

The framework employed to fund, manage and oversee the Nation Branding effort



Strategy

Strategic framework that defines how the Nation Brand will transition from current to aspirational state. Covers brand, marketing, communication and broader experience across policies, practices and activities



Experience

How the strategy is lived and delivered over a sustained period across economic, political, social, cultural, education and other activities



Expression

How the country positioning and brand narrative is expressed through promotional channels. The symbolic activities and actions that are emblematic of the strategy.



Operational support

Nation brand assets, campaign materials, tools and tactical support, aswell as the brand guardianship model

SUCCESS IS A NATION BRAND THAT

- instills a sense of **pride and confidence** in Australians
- **resonates** with international audiences
- is **embraced and championed** by Australian industry, business and government
- being Australian enhances competitiveness and **supports economic growth**
- is used by all industry sectors to project a **united 'Team Australia'** in international markets
- is **enduring** and built for the **future** global marketplace



WEBSITE

<https://www.austrade.gov.au/nation-brand>



OVERVIEW

REGISTER YOUR INTEREST

Australia's Nation Brand

Australia's Nation Brand will help drive our nation's competitive edge in international markets. To keep Australia globally competitive – now and in the future – we are developing a nation brand that is applicable to all Australian industries, services and experiences and recognisable globally.

This project is a unifying initiative for the nation and will be an opportunity for businesses to build on Australia's strong international brand to open international doors and keep them open.



QUESTIONS?

