Rebecca Hall
Senior Industry Specialist
International Education
Austrade
In the next 40 mins

Where we’ve been

Current state

Where we’re going
Australia world’s ‘dumb blonde’

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

Keynote speaker was Simon Anholt on nation brands & reputation
A lot has happened since 2010 and experts suggest we are entering “a new period of profound instability in international higher education”

![Year on year % change in student visas issued by study destination](chart)

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


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

**Council for International Education (CIE)**

Members: 6 Australian Government ministers, 11 sector representatives & experts

Working across government & industry to ensure the sector continues to play a key role in driving Australia’s future economic growth, global engagement and innovation. Overseeing the National Strategy for International Education 2025

**Austrade works within and alongside formal arrangements to support and amplify government activity at all levels**
We are getting on with the business of promoting Australia as a destination and a partner for international education, training and research.

- **530 Future Unlimited Licenses** in 37 countries
- **2.5 Million** visitors to the Study in Australia website
- **78%** of visitors to the Study in Australia website are from overseas
- **401 Future Unlimited Licenses** in Australia

**Future Unlimited Licenses by State and Territory**

- VIC: 103 (26%)
- NSW: 141 (35%)
- QLD: 80 (20%)
- WA: 34 (8%)
- ACT: 15 (3%)
- SA: 25 (6%)
- NT: 4 (1%)
- TAS: 4 (1%)
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

Country: 52.9% of international students are from 5 countries

Courses: 53.9% of international students study 3 course areas

Cities: 87% of international students study in three cities

Campus: Campuses aren’t just here in Australia – they are global/ virtual

Collaborate
AUSTRALIA'S NATION BRAND
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?

USA
WHAT IS A NATION BRAND?
WHAT IS A NATION BRAND?
FOR EXAMPLE

For example, consider the concept of purity in various contexts such as:

- **Purity in Companies**: Ensuring ethical business practices.
- **Purity in Exports**: Guaranteeing quality and safety standards.
- **Purity in Prominence**: Maintaining a clean public image.
- **Purity in General Public**: Promoting transparent and trustworthy relationships.
- **Purity in Admiration**: Encouraging positive public perception and respect.
- **Purity in Investors**: Building trust through reliable financial strategies.
- **Purity in Tourism**: Providing a genuine and unspoiled travel experience.
- **Purity in Talent**: Developing skills without compromise on quality.
- **Purity in Workforce**: Cultivating an environment that values its employees.
- **Purity in Lifestyle**: Promoting a healthy and sustainable way of living.

These aspects collectively contribute to a holistic understanding of purity, emphasizing integrity and authenticity across different sectors.
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

AUSTRALIA'S NATION BRAND
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
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’S NATION BRAND
AUSTRALIA RANKS IN THE TOP 10 ON 5 OF 6 INDICES

<table>
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<th>Rank*</th>
<th>Overall NBI™</th>
<th>Exports</th>
<th>Governance</th>
<th>Culture</th>
<th>People</th>
<th>Tourism</th>
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*Rankings are among a total of 50 nations. Only the nations ranked 1-15 on each Index are displayed here.

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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

**Prominence**
- Cricket: 67.48%
- Political Leaders: 4.62%
- Football: 3.99%
- Security and Crime: 3.18%
- History: 3.16%
- Cinema and TV: 3.01%
- Local People and Tribes: 2.21%
- Freedom and Rights: 2.15%

**Tourism**
- Tourism: 13.10%
- Tourism Attractions: 9.23%
- Natural Wonders: 8.58%
- Travel: 7.24%
- Destinations: 5.95%
- Tourism Packages: 4.29%
- Beaches: 4.06%
- Cruises: 3.54%

**Business & Exports**
- Export from: 22.00%
- Import from: 13.18%
- Grains: 11.02%
- Products from: 10.41%
- Soft Commodities: 10.10%
- Energies: 10.05%
- Export environment and Organisation: 8.96%

**Work and Live**
- Live: 0.71%
- Jobs: 12.18%
- Work in: 10.71%
- Salaries: 5.63%
- Housing: 5.50%
- Quality of Life: 4.35%
- Cost of Living: 4.07%
- Jobs by Background: 3.84%

**Study**
- Study: 35.45%
- Study Abroad Programs: 18.47%
- Study in Schools: 17.81%
- Scholarships: 5.81%
- Student Visas: 5.22%
- Exchange Programs: 3.14%
- Education: 3.09%

**Investment**
- Labour Market: 22.98%
- Monetary and Fiscal Policy: 17.87%
- Economic Strength: 16.25%
- Natural Resources: 7.53%
- Unemployment: 4.56%
- Corporate Taxation and...: 3.65%
- Real Estate Industry: 3.19%
- Infrastructure and...: 3.00%
Australia’s reputation ranks #1 across all dimensions
Australia’s reputation ranks #1 in all competitor country
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 STATES QUANTITATIVE RESEARCH RESULTS
HOWEVER…

…this goodwill is not being capitalized for the Australian economy.
“For Australia the longer term challenge is to progress from being merely popular to truly respected”
PROJECT APPROACH AND TIMELINE
PROJECT MAP

Feb/Mar/Apr

1 RESEARCH

May/Jun/Jul

2 STRATEGY

Aug/Sep/Oct

3 CREATIVE DESIGN

Nov/Dec

4 ASSET DEVELOPMENT

2019

5 DELIVERY & ACTIVATION

STAKEHOLDER ENGAGEMENT
GOVERNMENT | INDUSTRY | COMMUNITY

PROJECT INITIATION & RESEARCH

BRAND STRATEGY DEVELOPED

VISUAL IDENTITY DEVELOPED & TESTED

ASSET DEVELOPMENT

IMPLEMENTATION PLAN DEVELOPED

LAUNCH & GLOBAL ROLLOUT

PROJECT PROGRESS
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
AUSTRALIA'S NATION BRAND
INDUSTRY ASPIRATION FOR A NATION BRAND

LESS PROMINENT

- Enjoyable
- Lifestyle
- Safe and secure

MORE PROMINENT

- Brands & Innovation
- Contribution to global economy
- Technology

Maintain

PEOPLE PLACE PRODUCT
WHAT’S NEXT?
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, as well 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
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?