METHODOLOGY DISCLOSURE STATEMENT

Client	Tourism & Transport Forum
Project name	Tourism Business Outlook 2021
Project reference	NGR 2104010

Research dates:	13th July – 3rd August 2021
Target population:	Business owners and representatives from organisations operating in Australia with a focus on those in the tourism sector. A sample of non-tourism businesses was collected as a point of comparison.
Research methodology:	10-minute online survey with n=546 participants sourced from a professional market research business panel and via the Travello database. 12 x 30-minute qualitative in-depth interviews conducted online using Teams.
Weighting approach:	The survey sample was weighted to match the estimated population of tourism exposed businesses by jurisdiction, using data from Stafford Strategy. Weighting was applied separately to tourism-exposed businesses and businesses from other sectors. The total effective sample size after weighting was n=512 with a margin of error +/- 5.9% (at the 95% confidence interval) for estimates made using the total sample of tourism exposed businesses.
Research questions:	A combination of single choice, multiple choice, rating scale and open-ended (text response) questions were used in both stages of the research. Additional open-ended questions were asked in the interviews but not in the survey. All questions and response options were displayed in full or read out in full during interviews. The full question lines are contained overleaf.

This research was conducted in accordance with the Australian Polling Council Quality Mark standards which can be viewed here: https://www.australianpollingcouncil.com/

Research questions

Online survey

SCREENING
The first few questions are for classification purposes. Please select the option that best describes your business.

1) Where does your business operate?
Please select all locations where the business operates.
ALLOW MULTIPLE RESPONSE
1.   Sydney
2.   Regional NSW
3.   Melbourne
4.   Regional Victoria
5.   Brisbane
6.   Regional Queensland
7.   Perth
8.   Regional WA
9.   Adelaide
10.   Regional SA
11.   Hobart
12.   Regional Tasmania
13.   Darwin
14.   Regional NT
15.   Canberra
16.   Regional ACT
17.   Other offshore Australian territory

[ASK IF MORE THAN ONE LOCATION SELECTED AT Q1]
[AUTOCODE IF ONLY ONE LOCATION SELECTED]
2) And what is the business' primary location (i.e. head office)?
1.   Sydney
2.   Regional NSW
3.   Melbourne
4.   Regional Victoria
5.   Brisbane
6.   Regional Queensland
7.   Perth
8.   Regional WA
9.   Adelaide
10.   Regional SA
11.   Hobart
12.   Regional Tasmania
13.   Darwin

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14.   Regional NT
15.   Canberra
16.   Regional ACT
17.   Other offshore Australian territory

3) Apart from you, how many people does the business currently employ?
1.   0 (i.e. sole trader)
2.   1-4
3.   5-19
4.   20-99
5.   100-199
6.   200-499
7.   500+

4) What is your position in the business?
1.   Owner
2.   Manager
3.   Full-time employee CLOSE
4.   Part-time employee CLOSE
5.   Casual employee CLOSE

5) Is the business dependent on the tourism market?
1.   Directly dependent (i.e. customers are tourists)
2.   Indirectly dependent (i.e. supplier to tourism businesses)
3.   Not at all dependent on the tourism market CLASSIFY AS 'NON TOURISM BUSINESS'

[IF DEPENDENT]
6a) What proportion of the business' total revenue comes from tourism (either directly or indirectly)?
Your best estimate is fine.
SLIDER – RANGE 0% TO 100%
•   Record %
•   IF 25% OR HIGHER CLASSIFY AS 'TOURISM EXPOSED BUSINESS'
•   IF LESS THAN 25% CLASSIFY AS 'NON TOURISM BUSINESS'

[IF DEPENDENT]
6b) And thinking about the revenue that comes from tourism (either directly or indirectly) approximately what proportion of this revenue comes from…?
Your best estimate is fine.
NUMERIC RESPONSE. ENSURE SUM EQUALS 100%
•   Domestic tourism ENTER % BETWEEN 0 – 100
•   International tourism ENTER % BETWEEN 0 – 100

[TOURISM EXPOSED BUSINESSES ONLY]
7) Which of the following best describes the nature of the business?
1.	Accommodation
2.	Air, water and other transport
3.	Attractions
4.	Business events and convention centres
5.	Cafes, restaurants and takeaway food services
6.	Casinos and other gambling services
7.	Clubs, pubs, taverns and bars
8.	Cultural services
9.	Education and training
10.	Rail transport
11.	Retail trade
12.	Road transport and transport equipment hire
13.	Sports and recreation services
14.	Travel agency and tour operator services
15.	Other SPECIFY

[NON TOURISM BUSINESSES]
8) What industry is the business in?
1.	Accommodation and Food Services
2.	Administrative and Support Services
3.	Arts and Recreation Services
4.	Construction
5.	Education and Training
6.	Electricity, Gas, Water and Waste Services
7.	Financial and Insurance Services
8.	Health Care and Social Assistance
9.	Information Media and Telecommunications
10.	Manufacturing
11.	Mining
12.	Professional, Scientific and Technical Services
13.	Rental, Hiring and Real Estate Services
14.	Retail Trade
15.	Transport, Postal and Warehousing
16.	Wholesale Trade
17.	Other Services

OPERATING ENVIRONMENT AND OUTLOOK
The next set of questions ask about the current business environment and your outlook for the future.

[TOURISM EXPOSED BUSINESSES ONLY]
9) In a few words, please describe the current state of tourism in Australia
•	Open ended question

[TOURISM EXPOSED BUSINESSES ONLY]

10) What is your assessment of tourism performance in the destination(s) you operate in, compared to what you would reasonably expect for this time of year (that is, before the COVID-19 pandemic)?

Please rate performance for each of the following aspects of the tourism industry.

RANDOMISE ORDER OF CATEGORIES (A TO K)

1.   Much worse
2.   Somewhat worse
3.   Equal
4.   Somewhat better
5.   Much better
6.   Don't know

A.   International tourism
B.   Interstate domestic tourism
C.   Intra-state domestic tourism
D.   Overnight trips
E.   Day trips
F.   Corporate travel
G.   Business events travel
H.   Major events travel
I.   Budget segment travellers
J.   Mid-range segment travellers
K.   Luxury segment travellers

11) DELETED

[SHOW NEXT TWO QUESTIONS ON SAME SCREEN]

12) How is your business performing, compared to the same time last year (i.e. July 2020)?

1.   Much worse
2.   Somewhat worse
3.   The same
4.   Somewhat better
5.   Much better

13) And how is your business performing compared to what you would reasonably expect for this time of year, before the COVID-19 pandemic?

1.   Much worse
2.   Somewhat worse
3.   The same
4.   Somewhat better
5.   Much better

14) Has your business been impacted in any of the following ways as a result of the COVID-19 lockdowns and travel restrictions currently affecting New South Wales?
Please select all that apply
RANDOMISE. MULTIPLE RESPONSE
1.   Cancellations
2.   Reduced booking volume
3.   Lower sales
4.   Increased sales
5.   Having to reduce staff hours
6.   Having to let staff go
7.   Lost income
8.   Other impact SPECIFY
9.   None of these EXCLUSIVE

15) Over the next three months, how easy or difficult will it be for the business to meet its financial commitments?
1.   Very difficult
2.   Somewhat difficult
3.   Neither difficult nor easy
4.   Somewhat easy
5.   Very easy
6.   Not applicable (the business does not have any financial commitments over the next three months)
7.   Don't know

[SHOW NEXT TWO QUESTIONS ON SAME SCREEN]
16) Do you expect that business performance will get better or worse in the next 3 months?
1.   Will get much worse
2.   Will get somewhat worse
3.   Will stay the same
4.   Will get somewhat better
5.   Will get much better

17) And do you expect that business performance will get better or worse in the next 12 months?
1.   Will get much worse
2.   Will get somewhat worse
3.   Will stay the same
4.   Will get somewhat better
5.   Will get much better

18) How likely is it that your business will make any of the following changes in the next 3 months?
RANDOMISE ORDER OF CATEGORIES (A TO F)
•   Not at all likely
•   Not very likely
•   Somewhat likely
•   Quite likely

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- Very likely
- Don't know

A.   Invest for growth (i.e. capital, marketing, promotion)
B.   Scale down
C.   Explore other activities or revenue streams
D.   Reduce operating hours
E.   Close down
F.   Sell the business

19) To what extent are the following factors an impediment to your business at this time?
Please indicate the level of impact for each factor.
RANDOMISE ORDER OF CATEGORIES (A TO I)
- No impact
- Low impact
- Medium impact
- High impact

A.   Exchange rate
B.   Shortage of skilled labour
C.   Shortage of unskilled labour
D.   Reputation as a desirable tourist destination
E.   Abnormal weather and/or natural disasters
F.   Lack of attractions in the vicinity
G.   Interstate border closures
H.   International border closure
I.   Other SPECIFY

STAFF AND HIRING
Now there are some questions on staff and hiring.

20) Based on current operations, does the business have a sufficient number of employees?
1.   Yes
2.   No
3.   Don't know

[IF Q20 = NO]
21) Which, if any, of the following factors contribute to the business not having a sufficient number of employees?
Select all that apply
RANDOMISE. MULTIPLE RESPONSE
1.   Availability of existing employees to work
2.   Inability to find suitable staff
3.   Difficulty retaining staff
4.   International border closures
5.   Domestic border closures

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6.   Affordability of additional staff
7.   Uncertainty due to COVID-19
8.   Other factors SPECIFY

[IF HAVING DIFFICULTY FINDING OR RETAINING SUITABLE STAFF] [Q21=2 OR 3]
22) Which, if any, of the following factors contribute to the business having difficulty finding or retaining suitable staff?
Select all that apply
RANDOMISE. MULTIPLE RESPONSE
1.   Location of the jobs
2.   Lack of applicants for jobs
3.   Applicants don't have the skills or qualifications required for jobs
4.   International border closures limiting the recruitment pool
5.   Employment or working conditions (i.e. pay, working days / hours)
6.   Types of employment offered
7.   Uncertain economic conditions
8.   Other factors SPECIFY

23) Over the next three months, does the business plan to take any of the following actions in relation to its workforce?
Select all that apply
RANDOMISE. MULTIPLE RESPONSE
1.   Increase staff numbers
2.   Reduce staff numbers
3.   Increase staff hours
4.   Reduce staff hours
5.   Register for the Australian government's JobMaker Hiring Credit scheme
6.   Outsource work to a third party
7.   Re-train existing staff
8.   Rearrange job roles and responsibilities
9.   Any other actions related to workforce SPECIFY
10.   None of these

GOVERNMENT SUPPORT
[THIS SECTION TO BE ASKED OF TOURISM EXPOSED BUSINESSES ONLY]
[NON TOURISM BUSINESSES SKIP TO NEXT SECTION]

24) Overall, how would you rate the current level of responsiveness and support for the tourism industry from the…?
ASK FOR EACH STATE THE BUSINESS OPERATES IN [Q1]
1.   Very poor
2.   Poor
3.   Average
4.   Good
5.   Excellent
6.   Don't know

A.   Federal Government [ASK ALL]
B.   ACT Government
C.   NSW Government
D.   NT Government
E.   Queensland Government
F.   SA Government
G.   Tasmanian Government
H.   Victorian Government
I.   WA Government

25) [MERGED WITH 24]

26) What do you think would be the most helpful thing that governments (at any level – i.e. federal, state/territory or local) could do to support the tourism industry?
•   Open ended question

27) Following are some ideas for things that governments could do to support tourism related businesses. Please indicate how helpful you feel each initiative might be to the tourism industry.

1.   Not at all helpful
2.   Not very helpful
3.   Somewhat helpful
4.   Quite helpful
5.   Very helpful

RANDOMISE CATEGORIES (A TO Q)
A.   Reinstate JobKeeper payments or an equivalent scheme specifically for tourism related businesses to enable employee wages to be paid
B.   Provide travel vouchers to encourage people to travel within their own state/territory
C.   Provide travel vouchers to encourage people to travel interstate
D.   Introduce a vaccine passport system to enable people who have received the COVID-19 vaccination to travel between states and territories without restriction
E.   Introduce a vaccine passport system to enable people from overseas who have received the COVID-19 vaccination to travel to Australia without restriction
F.   Broaden eligibility for visas to allow skilled migrants into Australia who can work in tourism and hospitality jobs
G.   Provide funding for cultural institutions and attractions to help them remain open or reopen
H.   Provide funding for runway upgrades at regional airports
I.   Provide funding to encourage investment in new experiences and attractions
J.   Implement other COVID safe travel bubbles (i.e. with Singapore, Pacific Island Nations)
K.   Provide funding to help develop a recovery pathway for major events, exhibitions and festivals
L.   Provide funding to help develop a recovery pathway for business events
M.   Undertake forward planning for new aviation processes and issues
N.   Ease restrictions to allow cruise ships to operate
O.   Maintain or extend accommodation voucher schemes to encourage bookings in non-peak periods

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P.   Pilot a program to bring international students and working holiday-makers to Australia to address the labour shortage in the tourism and hospitality sector
Q.   Finalise a plan for fully reopening of Australia's international borders (i.e. to allow inbound and outbound travel)

PROFILING AND CLOSE

Thanks, almost done. There are just a few final questions about the business to finish.

28) How long has the business been in operation?
Your best estimate is fine
1.   Less than a year
2.   1 to 2 years
3.   3 to 5 years
4.   6 to 10 years
5.   More than 10 years
6.   Don't know

29) What was the business' turnover for the financial year 2020/21?
Your best estimate is fine
1.   Less than $50,000
2. $50,000 to $199,999
3. $200,000 to $499,999
4. $500,000 to $999,999
5. $1,000,000 to $1,999,999
6. $2,000,000 or more
7.   Prefer not to say

[SHOW NEXT TWO QUESTIONS ON SAME SCREEN]
30) And was the business' turnover for the financial year 2020/21 higher or lower compared to a typical year (i.e. before the COVID-19 pandemic)?
1.   Much lower
2.   Somewhat lower
3.   About the same
4.   Somewhat higher
5.   Much higher
6.   Don't know / Can't say

ASK IF HIGHER / LOWER (Q30 = 1,2,4,5) AND PIPE WORDING
31) By what magnitude was the business' turnover for the financial year 2020/21 [higher / lower] compared to a typical year (i.e. before the COVID-19 pandemic)?
Please enter a % value that represents the business' turnover for the financial year 2020/21 as a percentage of a typical year's turnover. Your best estimate is fine.
SLIDER – RANGE (-100% TO +100%)
1.   Enter %
2.   More than 100% lower (DISPLAY IF Q30=1,2)

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3.   More than 100% higher (DISPLAY IF Q30=4,5)

In-depth interviews

BUSINESS PROFILE

1) Could you please start by telling me a little about the business and your role…?

•   What mix of revenue comes from domestic and international tourism?
[ASK FOR PERCENTAGE FOR EACH]
•   Can you please give me a brief overview of your role and the main issues you are dealing with at the moment?

OPERATING ENVIRONMENT AND OUTLOOK
I'd like to get your views on the current business environment and your outlook for the future.

2) How would you describe the current state of tourism in Australia?

3) What is your assessment of tourism performance in the destination(s) you operate in, compared to what you would reasonably expect for this time of year (that is, before the COVID-19 pandemic)?

a)   Relatively speaking, which regions are doing well, and which regions are struggling?

4) Which segments of the tourism market would you say are performing well, and which are not performing well, compared to what you would reasonably expect for this time of year?

BUSINESS PERFORMANCE
Now I want to focus on business performance and your expectations over the short and long term.

5) How is the business performing compared to what you would reasonably expect for this time of year (i.e. before the COVID-19 pandemic)?

[RECORD RATING]
1.   Much worse
2.   Somewhat worse
3.   The same
4.   Somewhat better
5.   Much better

a)   What are the main indicators of business performance that you monitor?
b)   IF PERFORMANCE IS WORSE: Can you give me a sense of how bad it is? Can you remember a time prior to COVID-19 when you remember things being this bad?

6) Now thinking about the COVID-19 restrictions currently in place for New South Wales (and Victoria and other parts of the country) – how is this affecting your business?

a)   What has been the single biggest impact to your business as a result of the COVID-19 pandemic?
b)   What is different about the current situation compared to the lockdowns and border closures that were in place last year?
c)   Could you estimate the percentage downturn in your business as a result of this latest round of lockdowns and border restrictions?

8) What changes has your business made as a result of these COVID impacts? And what changes, if any, do you expect to make over the coming months?

9a) Now looking ahead to the future, to what extent do you expect that business performance will get better or worse in the next 3 months?

[RECORD RATING]
1.   Expect it to get much worse
2.   Expect it to get somewhat worse
3.   Expect it to stay the same
4.   Expect it to get somewhat better
5.   Expect it to get much better

9b) And to what extent do you expect that business performance will get better or worse in the next 12 months?

[RECORD RATING]
1.   Expect it to get much worse
2.   Expect it to get somewhat worse
3.   Expect it to stay the same
4.   Expect it to get somewhat better
5.   Expect it to get much better

a)   What things will most influence business performance over the next 3 to 12 months?
b)   How would you describe the mood within the business – among staff, management, the Board?

STAFF AND WORKFORCE
Now, thinking about staff and workforce…

10) What issues, if any, is your business currently experiencing in relation to staff at present?

11) Over the next few months, what actions, if any, does the business plan to take in relation to its workforce?

GOVERNMENT SUPPORT

Now shifting focus to the role of governments in supporting the sector through this challenging period.

12) Overall, how would you rate the current level of responsiveness and support for the tourism industry shown by the government?

[RECORD RATING]
1.   Very poor
2.   Poor
3.   Average
4.   Good
5.   Excellent

a)   To what extent do you feel this has varied between different state and territory governments, as well as the federal government?
b)   Which government(s) have been most responsive and supportive of the tourism sector? What things have they done that have been helpful?

13) What do you think would be the most helpful thing that government (at any level – i.e. federal, state/territory or local) could do to support the tourism industry?

a)   And what would be the most helpful thing for your business?

FINAL ADVICE AND CLOSE

14) Wrapping it all up, what one thing would you say will be most critical if the tourism sector is to recover from the impact of the COVID-19 pandemic?