

DOMESTIC MARKET OVERVIEW

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KEY RESEARCH QUESTIONS

**1.
How are
consumers
feeling about the
coronavirus?**

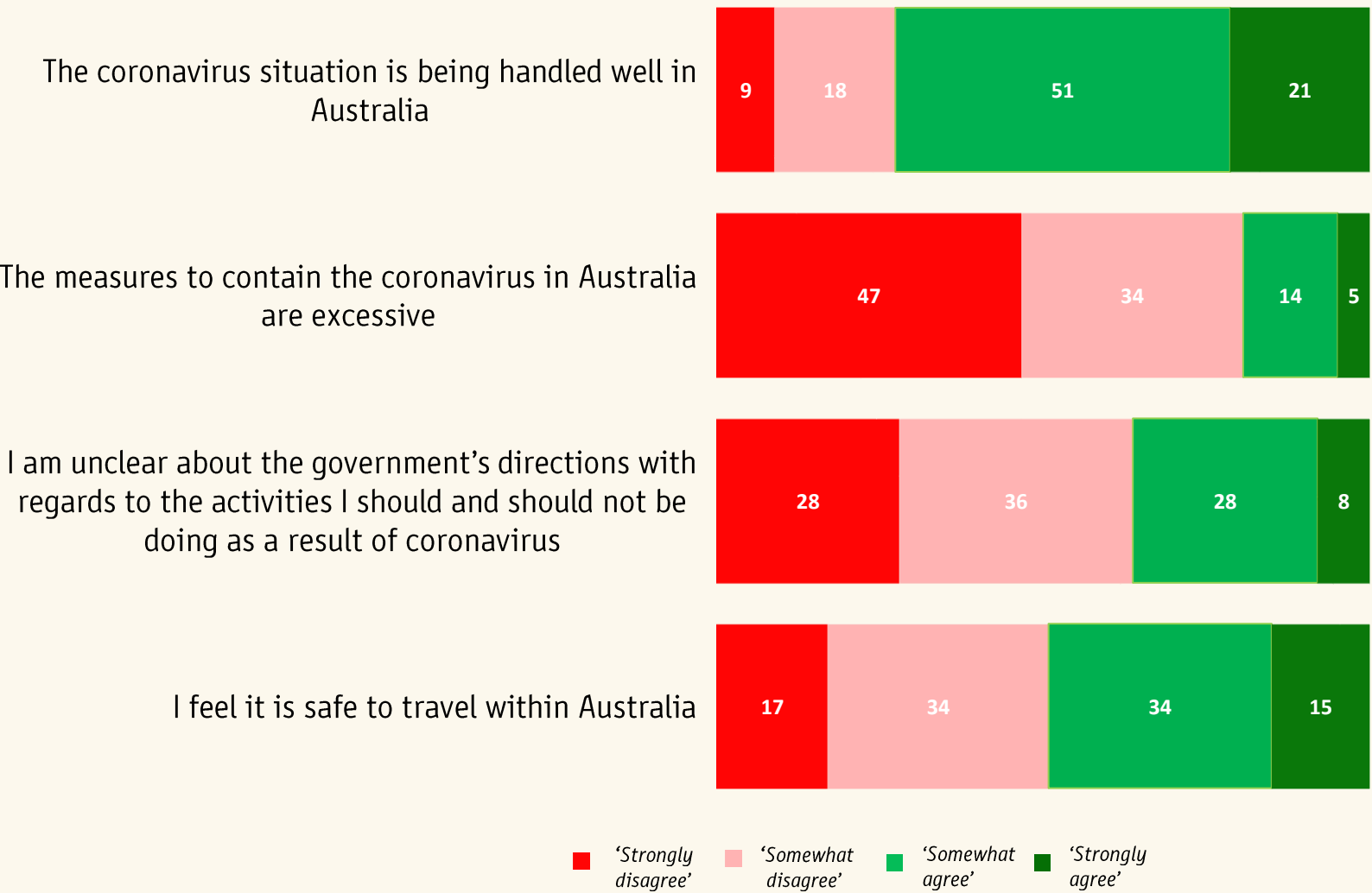
**2.
What are
consumer
attitudes towards
travel in the
current
environment?**

**3.
When are
consumers
planning to start
travelling again?**

ATTITUDES TOWARDS COVID-19

Broad support for how Covid-19 is being managed, most understand the rules and don't think current measures are excessive. ~1/2 believe it is safe to travel in Australia.

Attitudes towards Coronavirus (%)



MOOD OF THE NATION

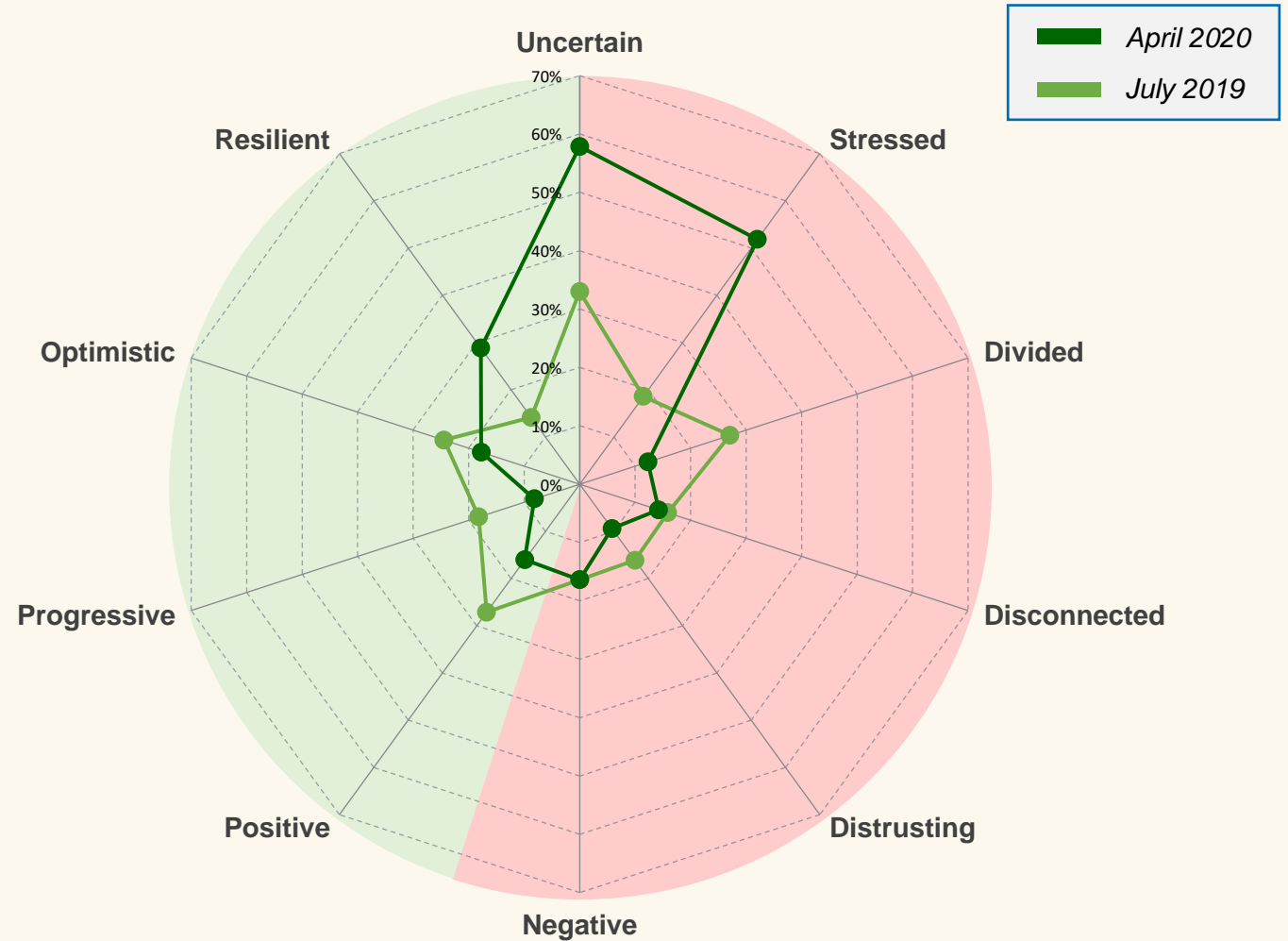
An uncertain and stressed nation

- Clearly the two dominant descriptors and well up from 'normal' levels

Resilient the next most prominent association and has also risen above previous levels

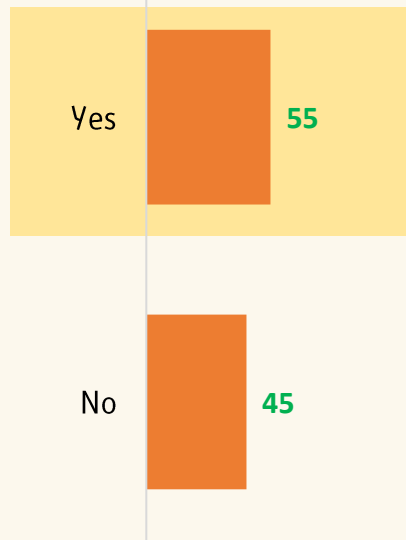
- Other associations (both positive and negative) relatively low

Mood of the nation – Australia (%)



CHANGING HOLIDAY BEHAVIOUR

Anticipated change
in behaviour (%)



A lot of caution, some will travel less overall

- *Less frequent. More considered (for safety). More local*
- *Choose destinations based on accessibility and quality of healthcare*

Many will choose to travel domestically

- *More domestic rather than international destinations*
- *Probably will stay closer to home until the world settles*

Taking precautions, avoiding crowds

- *Practise cleaning of aircraft seat and hotel room*
- *Will be more aware of social distancing*
- *Will be wary of crowded places*

Financial impact limiting travel for some

- *I will hold off on travel as my wife has been made redundant so we need to be strict with money for a while*

Wariness around Cruises

- *Won't be looking at a cruise anytime soon*
- *Not sure if we will cruise again*

A few are changing booking habits

- *Might not book things too far ahead*
- *I will not book my holidays so far in advance*

While many are cautious, some are chomping at the bit

- *I'll travel more after being isolated for so long*
- *Have lots of ideas where to book, can't wait*

CURRENT ATTITUDES TOWARDS TRAVEL

60% are not thinking about their next holiday

- 1/4 are in the early stages (i.e. thinking / dreaming)

A minority are more active

- 7% are researching and 7% are actually planning

Attitude towards next holiday (%)



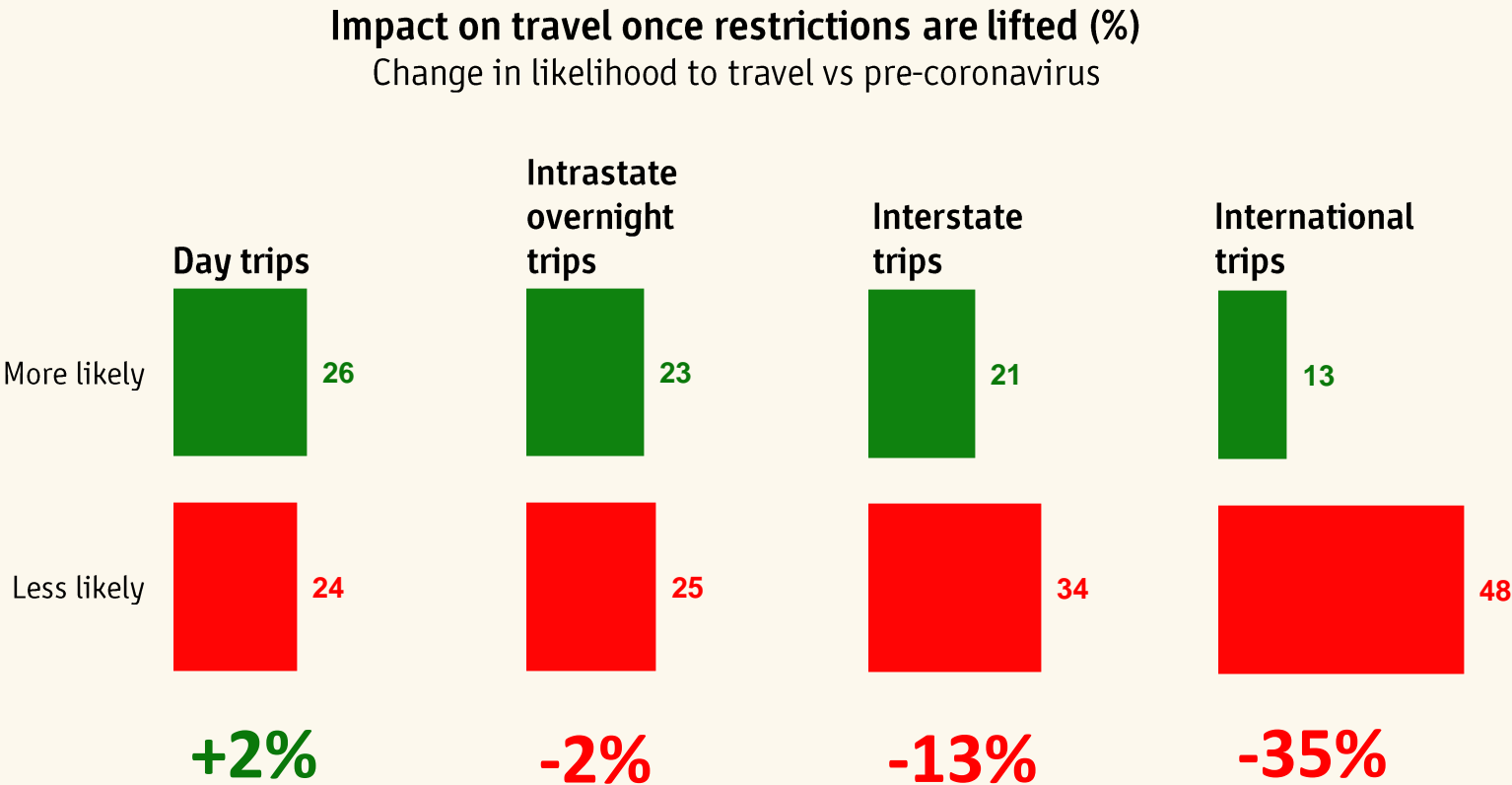
IMPACT ON TRAVEL INTENTION

Largely neutral net impact on day trips & intrastate overnight

- Some more or less likely to travel but these impacts essentially cancel each other out

The impact on Interstate travel is a little more negative

The coronavirus is clearly having a negative impact on intention for international travel

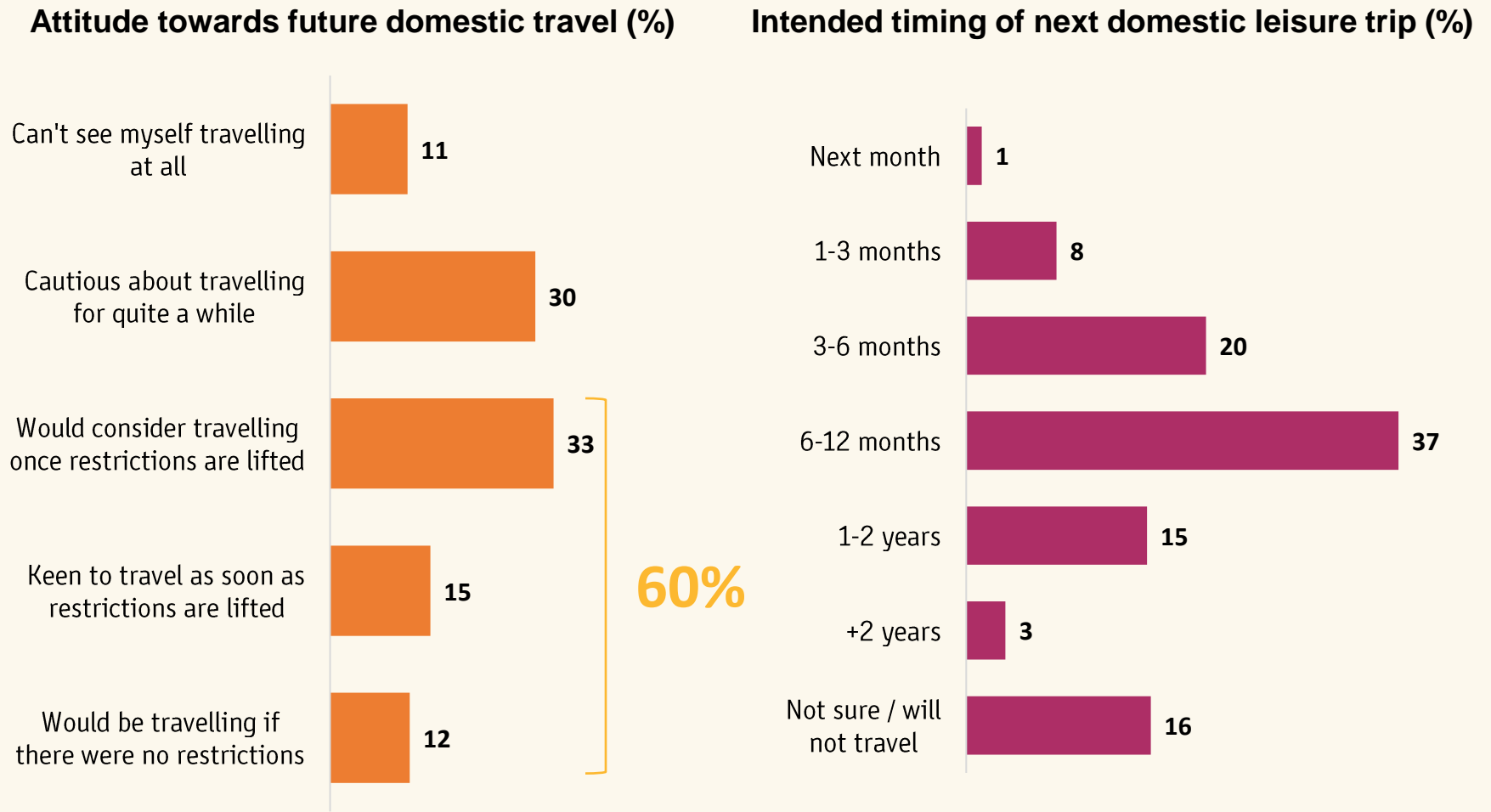


Questions: Which of the following best describes how the coronavirus outbreak will impact your leisure travel in the year after travel restrictions are lifted? Please consider how your travel will change as compared to your travel before the coronavirus outbreak.

Derived by BDA from Travel Sentiment Tracker
Fieldwork conducted: Apr 23-24

FUTURE DOMESTIC TRAVEL

While caution exists around future domestic travel for many, ~60% are positive about travel and 27% are keen to travel straight away. 6-12 months is the most likely timing of next trip for 37%, while 20% are aiming to travel in 3-6 months.





1. COVID-19

Australians are **broadly supportive** of the handling of the coronavirus in Australia and the restrictions that have been put in place



2. TRAVEL ATTITUDES

There is still **significant uncertainty** and stress in the community and many are cautious about travelling

For those who will travel, **domestic travel** is likely to be favoured.

- The virus has a largely neutral impact on intention for day trips and intrastate overnight trips
- A moderate net negative impact of 10-15% is evident for interstate trips
- Intention for international travel is clearly the most negatively impacted, down by more than 1/3



3. TRAVEL TIMINGS

6-12 months is the most common intended time frame for domestic travel

- 37% intend to travel in this time frame while 21% are aiming to travel in the 3-6 months

Travel behaviour will also change with many travellers likely to be conscious of **social distancing** and **hygiene practices** in both destination choice and personal practices

A scenic photograph of a beach at sunset. Two surfers in black wetsuits are walking on the wet sand, carrying a long surfboard. The ocean waves are breaking in the background, and a kitesurfer is visible in the distance. The sky is a mix of blue and orange. A large, bold, white text overlay reads "THANK YOU".

THANK YOU