TRAVEL SENTIMENT TRACKER

Market Outputs
20 - 24 January 2021
INTRODUCTION

• The Travel Sentiment Tracker was established to provide a regular assessment of the key confidence and travel indicators for key Tourism Australia markets.

• Australia, Canada, China, France, Germany, Hong Kong, India, Indonesia, Italy, Japan, New Zealand, Singapore, South Korea, United Kingdom, USA.

• This report includes findings for all markets.

• Sample: n=4519 across the 15 international markets, minimum n=300 per market. Sample for Australia n=1002.

• Sample is nationally representative.

• This was the 20th wave of fieldwork, conducted from 20/01/2021 to 24/01/2021.
KEY FINDINGS SUMMARY

• Recent drop in Australian domestic travel sentiment has largely stabilised as case numbers from recent outbreaks have fallen
  • Travel intention still down marginally but booking intention is starting to improve and perceptions of Australia as a safe destination are clearly recovering

• Travel sentiment is down across most international markets this wave, with rising Covid-19 cases and further lockdowns across a number of markets seemingly impacting
  • Intention in the next 6 months in particular is down across most markets, biggest declines in NZ, UK, India and across South East Asia
  • General consumer confidence is largely holding up better than travel sentiment
    • Down for China and Malaysia, but largely steady or up in most other markets, lifting strongly in the US

• Sentiment around travel to Australia is mixed this wave
  • Perceptions of Aus a safe destination up in most markets, though down a little in China and India
  • Consideration and intention for Aus largely steady for most markets
    • Some improvement with NZ, USA and Singapore, though metrics weaker for China, India & UK
CONSUMER CONFIDENCE

CONSUMER CONFIDENCE INDEX

Consumer confidence indicates positive/negative sentiment towards the future economic situation
(<100 is negative, >100 positive)

Questions: How has the financial / employment situation of your household changed over the last year? How do you expect the financial / employment situation of your household to change in the next year? Generally, do you think now is a good time to make major lifestyle purchases e.g. cars, holidays, household appliances, etc.? How has the economic situation in your country changed over the last year? How do you anticipate the economic situation in your country to change over the next year?

Source: Travel Sentiment Tracker.
ATTITUDES TOWARDS NEXT HOLIDAY

% RESEARCHING OR ACTIVELY PLANNING THEIR NEXT HOLIDAY

**Question**: Which of the following best describes your thinking around your next holiday?

**Source**: Travel Sentiment Tracker.
TRAVEL INTENTION NEXT 6 MONTHS

% INTENDING TO AN INTERNATIONAL LEISURE TRIP IN THE NEXT 6 MONTHS

Question: When do you think you would be likely to next travel for leisure to any international destination?

Source: Travel Sentiment Tracker.
BOOKING INTENT

% VERY LIKELY/CERTAIN TO BOOK AN INTERNATIONAL LEISURE TRIP IN THE NEXT MONTH

Wave 19 (06-09 Jan 2021)  Wave 20 (20-24 Jan 2021)

Question: How likely are you to book a leisure trip within Australia in the next month?
Source: Travel Sentiment Tracker.
MARKET BREAKDOWN
General confidence just levelled now at around the 100 mark. Travel intention is down in recent waves though decline looks to be slowing and booking intention has started to edge back up. Perception of Australia as a safe place to travel is coming back more strongly, as cases from recent Covid-19 outbreaks fall.
SUMMARY METRICS - AUSTRALIA

ATTITUDES TO NEXT HOLIDAY
- Not thinking about my next holiday right now: 40 (-3)
- Thinking/dreaming about my next holiday: 33 (+2)
- I’m researching/actively planning my next holiday: 26 (-1)

ATTITUDES TO FUTURE LEISURE TRIPS WITHIN AUSTRALIA
- Can’t see myself travelling within Aus at all: 8 (-3)
- Cautious about travelling within Aus for a while: 31 (-2)
- Considering travelling within Australia: 27 (-2)
- Keen to travel within Australia as soon as possible: 23 (+6)
- Would be travelling within Australia now but travel restrictions are stopping me: 10 (+1)

INTENDED TIMING OF NEXT DOMESTIC TRIP

TOP 3 TRIGGERS FOR DOMESTIC TRAVEL (NEXT 6 MONTHS)
- N=547
- 52 (+6)
- 45 (0)
- 22 (-6)

CONSIDERING TRAVELING WITHIN AUSTRALIA IN THE NEXT 4 YEARS
- 81 (+1)

INTENDING TO TRAVEL WITHIN AUSTRALIA IN THE NEXT 2 YEARS
- 68 (+2)

TOP 3 BARRIERS FOR DOMESTIC TRAVEL (NEXT 6 MONTHS)
- N=455
- 38
- 35
- 33

ATTITUDES TOWARDS AUSTRALIA (% AGREE)
- 90 (+2)

Source: Travel Sentiment Tracker (latest wave n=1002).
Fieldwork for latest wave was conducted 06-09 January 2021. Results compared to previous wave conducted 14-17 December 2020. Sample: general Australian’s – nationally representative
SUMMARY METRICS – AUS TRAVELLERS

ATTITUDES TO NEXT HOLIDAY

- Not thinking about my next holiday right now: 33%
- Thinking/dreaming about my next holiday: 37%
- I’m researching/actively planning my next holiday: 30%

ATTITUDES TO FUTURE LEISURE TRIPS WITHIN AUSTRALIA

- Can’t see myself travelling within Aus at all: 4%
- Cautious about travelling within Aus for a while: 27%
- Considering travelling within Australia: 28%
- Keen to travel within Australia as soon as possible: 28%
- Would be travelling within Australia now but travel restrictions are stopping me: 11%

INTENDED TIMING OF NEXT DOMESTIC TRIP

- In the next month: 15%
- In 1 to 3 months: 24%
- In 3 to 6 months: 24%
- In 6 to 12 months: 22%
- In 1 to 2 years: 9%
- More than 2 years: 2%
- Not sure / will not travel: 5%

TOP 3 TRIGGERS FOR DOMESTIC TRAVEL (NEXT 6 MONTHS)
N=488

- I feel like I really need a holiday: 54% (+8%)
- I would like to visit friends and relatives: 47% (+2)
- I would like to replace a previous delayed trip: 23% (-5)

TOP 3 BARRIERS FOR DOMESTIC TRAVEL (NEXT 6 MONTHS)
N=283

- I am concerned that travel restrictions may change and impact my travel plans: 44%
- I am afraid I will contract coronavirus: 35%
- Travel restrictions won’t allow it: 30%

ATTITUDES TOWARDS AUSTRALIA (% AGREE)

- I feel Australia is less impacted by the coronavirus than most other countries: 92% (+3)

Source: Travel Sentiment Tracker (latest wave n=781). Fieldwork for latest wave was conducted 20 - 24 January 2021. Results compared to previous wave conducted 06 - 09 January 2021. Sample: general Australian’s – nationally representative.
TOP LINE
NEW ZEALAND

Consumer confidence in NZ just peaked after strong growth. International travel and booking intention are weaker this wave, travel intention in particular down sharply this wave. Perception of Australia as a safe destination has recovered some lost ground but still well down on levels in December.

CONSUMER CONFIDENCE INDEX
Consumer confidence indicates positive/negative sentiment towards current and expected personal & economic circumstances (<100 is negative, >100 positive)

TRAVEL INTENTION
(0-6M)
(%)  

BOOKING INTENTION
(NEXT MONTH)
(%)  

AUSTRALIA IS A DESTINATION THAT SEEMS SAFE TO TRAVEL
(%)  

Indicates a statistically significant shift

Booking Intention = those who are ‘very likely’ or ‘certain’ to book in the next month.
Source: Travel Sentiment Tracker (latest wave n=302). Fieldwork was conducted 20-24 January 2020. International booking intention results only available from wave 2.
**SUMMARY METRICS – NEW ZEALAND**

**ATTITUDES TO NEXT HOLIDAY**

- Not thinking about my next holiday right now: 43 (-2)
- Thinking/dreaming about my next holiday: 32 (0)
- I'm researching/actively planning my next holiday: 23 (+2)

**ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS**

- I can't see myself travelling internationally at all in the future: 23 (+2)
- I would be cautious about travelling internationally for quite a while: 48 (-5)
- I am considering travelling internationally: 14 (+2)
- I am keen to travel internationally as soon as possible: 9 (0)
- I would be travelling internationally now but travel restrictions are stopping me: 7 (+1)

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**INTENDED TIMING OF NEXT INTERNATIONAL TRIP**

- In the next month: 2
- In 1 to 3 months: 6
- In 3 to 6 months: 16
- In 6 to 12 months: 27
- In 1 to 2 years: 18
- In more than 2 years: 31

**TOP 3 BARRIERS FOR INTL’ TRAVEL (NEXT 6 MONTHS)**

- I am afraid I will contract coronavirus: 42 (+4)
- Travel restrictions won’t allow it: 39 (+3)
- The destination where I would like to travel is not safe yet: 36 (+1)

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**CONSIDERING TRAVELING TO AUSTRALIA IN THE NEXT 4 YEARS**

- 50 (+2)

**INTENDING TO TRAVEL TO AUSTRALIA IN THE NEXT 2 YEARS**

- 39 (+6)

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**ATTITUDES TOWARDS AUSTRALIA**

- I would like to travel to Australia just not now: 70 (+3)
- Australia is on my top list countries to travel as soon as the crisis is over: 63 (+6)
- I feel Australia is less impacted by the coronavirus than most other countries: 59 (+8)

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**Note:** Insufficient sample for triggers for international travel.
Consumer confidence has improved to late January (change of Gov’t potentially impacting), though travel and booking intention is largely stable. Perception of Australia as a safe destination continues to improve.
**SUMMARY METRICS - USA**

**ATTITUDES TO NEXT HOLIDAY**

- Not thinking about my next holiday right now: 52 (+6)
- Thinking/dreaming about my next holiday: 29 (0)
- I'm researching/actively planning my next holiday: 19 (-2)

**ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS**

- I can't see myself travelling internationally at all in the future: 32 (-4)
- I would be cautious about travelling internationally for quite a while: 43 (+5)
- I am considering travelling internationally: 12 (-2)
- I am keen to travel internationally as soon as possible: 5 (-1)
- I would be travelling internationally now but travel restrictions are stopping me: 7 (+1)

**INTENDED TIMING OF NEXT INTERNATIONAL TRIP**

- In the next month: 2
- In 1 to 3 months: 6
- In 3 to 6 months: 9
- In 6 to 12 months: 15
- In 1 to 2 years: 18
- In more than 2 years: 16
- Not sure / will not travel: 35

**TOP 3 TRIGGERS FOR INT'L TRAVEL (NEXT 6 MONTHS)**

(N = 51)

- I feel like I really need a holiday: 39 (0)
- I would like to visit friends and relatives: 27 (-6)
- I would like to replace a previous delayed trip: 25 (-2)

**TOP 3 BARRIERS FOR INT'L TRAVEL (NEXT 6 MONTHS)**

(N = 250)

- I am afraid I will contract coronavirus: 45 (-4)
- I am not interested in international travel at the moment: 39 (+6)
- I wouldn't like to risk spreading the virus: 32 (+3)

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Small sample for triggers for International travel, Indicative only.

Source: Travel Sentiment Tracker, latest wave n=301. Fieldwork was conducted 20th–24th January 2020. Results compared to previous wave conducted 14th/17th December 2020.
Consumer confidence steadies this wave after lifting recently. Travel and booking intention remain largely steady at quite low levels. Perceptions of Australia as a safe destination are improving however.

**TOP LINE CANADA**

**CONSUMER CONFIDENCE INDEX**

Consumer confidence indicates positive/negative sentiment towards current and expected personal & economic circumstances (<100 is negative, >100 positive)

**TRAVEL INTENTION (0-6M)**

(%) 10% 10%

**BOOKING INTENTION (NEXT MONTH)**

(%) 5% 6%

**AUSTRALIA IS A DESTINATION THAT SEEMS SAFE TO TRAVEL**

(%) 50% 54%

*Booking Intention = those who are 'very likely' or 'certain' to book in the next month.*

*Source: Travel Sentiment Tracker (latest wave n=300). Fieldwork was conducted 20-24 January 2020. International booking intention results only available from wave 2.*
SUMMARY METRICS – CANADA

ATTITUDES TO NEXT HOLIDAY

- Not thinking about my next holiday right now: 55% (-2)
- Thinking/dreaming about my next holiday: 30% (+1)
- I'm researching/actively planning my next holiday: 14% (+1)

ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS

- I can't see myself travelling internationally at all in the future: 29% (+1)
- I would be cautious about travelling internationally for quite a while: 47% (-2)
- I am considering travelling internationally: 13% (+3)
- I am keen to travel internationally as soon as possible: 6% (-2)
- I would be travelling internationally now but travel restrictions are stopping me: 5% (+1)

INTENDED TIMING OF NEXT INTERNATIONAL TRIP

- In the next month: 1% (+0)
- In 1 to 3 months: 2% (-1)
- In 3 to 6 months: 6% (+0)
- In 6 to 12 months: 16% (+0)
- In 1 to 2 years: 28% (-3)
- In more than 2 years: 19% (+3)
- Not sure/will not travel: 26% (-2)

TOP 3 BARRIERS FOR INT'L TRAVEL (NEXT 6 MONTHS)

- I am afraid I will contract coronavirus: 53% (+1)
- Travel restrictions won't allow it: 43% (+3)
- I wouldn't like to risk spreading the virus: 42% (+6)

Note: Insufficient sample for triggers for international travel

Small sample for triggers for International travel, Indicative only.
Source: Travel Sentiment Tracker (latest wave n=300). Fieldwork was conducted 20th-24th January 2020. Results compared to previous wave conducted 14th-17th December 2020
Consumer confidence has started to ease again and travel sentiment is down sharply as new lockdowns have been introduced. Perception of Australia as a safe destination is largely steady at 55%.

**TOP LINE UK**

**CONSUMER CONFIDENCE INDEX**
Consumer confidence indicates positive/negative sentiment towards current and expected personal & economic circumstances
(<100 is negative, >100 positive)

**TRAVEL INTENTION (0-6M) (%)**

**BOOKING INTENTION (NEXT MONTH) (%)**

**AUSTRALIA IS A DESTINATION THAT SEEMS SAFE TO TRAVEL (%)**

*Booking Intention = those who are ‘very likely’ or ‘certain’ to book in the next month.*

*Source: Travel Sentiment Tracker (latest wave n=300). Fieldwork was conducted 20-24 January 2020. International booking intention results only available from wave 2.*
**SUMMARY METRICS – UK**

**ATTITUDES TO NEXT HOLIDAY**

- Not thinking about my next holiday right now: **51%** +6%
- Thinking/dreaming about my next holiday: **32%** -2%
- I’m researching/actively planning my next holiday: **16%** -3%

**ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS**

- I can’t see myself travelling internationally at all in the future: **18%** -1%
- I would be cautious about travelling internationally for quite a while: **46%** -1%
- I am considering travelling internationally: **16%** +1%
- I am keen to travel internationally as soon as possible: **12%** +1%
- I would be travelling internationally now but travel restrictions are stopping me: **7%** -0%

**INTENDED TIMING OF NEXT INTERNATIONAL TRIP**

- In the next month: **1%**
- In 1 to 3 months: **5%**
- In 3 to 6 months: **11%**
- In 6 to 12 months: **24%**
- In 1 to 2 years: **21%**
- In more than 2 years: **10%**
- Not sure / will not travel: **28%**

**TOP 3 TRIGGERS FOR INT’L TRAVEL (NEXT 6 MONTHS)**

- I feel like I really need a holiday: **55%** +7%
- I would like to visit friends and relatives: **34%** -8%
- I have found very good deals: **25%** -13%

**TOP 3 BARRIERS FOR INT’L TRAVEL (NEXT 6 MONTHS)**

- Travel restrictions won’t allow it: **51%** +21%
- I am afraid I will contract coronavirus: **49%** +6%
- I wouldn’t like to risk spreading the virus: **41%** 0%

**CONSIDERING TRAVELING TO AUSTRALIA IN THE NEXT 4 YEARS**

- **15%** -8%

**INTENDING TO TRAVEL TO AUSTRALIA IN THE NEXT 2 YEARS**

- **9%** -7%

**ATTITUDES TOWARDS AUSTRALIA (% AGREE)**

- I feel Australia is less impacted by the coronavirus than most other countries: **66%** +12%
- I would like to travel to Australia just not now: **55%** -7%
- Australia is on my top list countries to travel as soon as the crisis is over: **29%** -5%

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Small sample for triggers for International travel, Indicative only. Source: Travel Sentiment Tracker (latest wave n=300). Fieldwork was conducted 20th-24th January 2020. Results compared to previous wave conducted 14th-17th December 2020.
General confidence and travel intention in the next 6 months have improved for Germany this wave, though very few are planning to book in the next month. Australia’s safety perceptions are steady.

**Consumer Confidence Index**
Consumer confidence indicates positive/negative sentiment towards current and expected personal & economic circumstances (<100 is negative, >100 positive)

**Travel Intention (0-6M)**
(%) 

**Booking Intention (Next Month)**
(%) 

**Australia is a Destination That Seems Safe to Travel**
(%) 

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*Booking Intention* = those who are 'very likely' or 'certain' to book in the next month.

*Source: Travel Sentiment Tracker (latest wave n=300). Fieldwork was conducted 20-24 January 2020. International booking intention results only available from wave 2.*
**SUMMARY METRICS - GERMANY**

### ATTITUDES TO NEXT HOLIDAY

<table>
<thead>
<tr>
<th>Not thinking about my next holiday right now</th>
<th>Thinking/dreaming about my next holiday</th>
<th>I'm researching/actively planning my next holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>44</td>
<td>38</td>
<td>17</td>
</tr>
</tbody>
</table>

### ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS

<table>
<thead>
<tr>
<th>I can't see myself travelling internationally at all in the future</th>
<th>I would be cautious about travelling internationally for quite a while</th>
<th>I am considering travelling internationally</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>40</td>
<td>17</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I am keen to travel internationally as soon as possible</th>
<th>I would be travelling internationally now but travel restrictions are stopping me</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>7</td>
</tr>
</tbody>
</table>

### INTENDED TIMING OF NEXT INTERNATIONAL TRIP

<table>
<thead>
<tr>
<th>-0</th>
<th>+0</th>
<th>+4</th>
<th>+1</th>
<th>-4</th>
<th>-1</th>
<th>-1</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the next month</td>
<td>In 1 to 3 months</td>
<td>In 3 to 6 months</td>
<td>In 6 to 12 months</td>
<td>In 1 to 2 years</td>
<td>In more than 2 years</td>
<td>Not sure / will not travel</td>
</tr>
<tr>
<td>0</td>
<td>3</td>
<td>14</td>
<td>31</td>
<td>22</td>
<td>9</td>
<td>20</td>
</tr>
</tbody>
</table>

### TOP 3 TRIGGERS FOR INT'L TRAVEL (NEXT 6 MONTHS) N=53

<table>
<thead>
<tr>
<th>I feel like I really need a holiday</th>
<th>I would like to replace a previous delayed trip</th>
<th>I would like to visit friends and relatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>42</td>
<td>36</td>
<td>32</td>
</tr>
</tbody>
</table>

### TOP 3 BARRIERS FOR INT'L TRAVEL (NEXT 6 MONTHS) N=247

<table>
<thead>
<tr>
<th>Travel restrictions won't allow it</th>
<th>I am afraid I will contract coronavirus</th>
<th>I wouldn't like to risk spreading the virus</th>
</tr>
</thead>
<tbody>
<tr>
<td>49</td>
<td>48</td>
<td>44</td>
</tr>
</tbody>
</table>

### CONSIDERING TRAVELING TO AUSTRALIA IN THE NEXT 4 YEARS

- 14
- 3

### INTENDING TO TRAVEL TO AUSTRALIA IN THE NEXT 2 YEARS

- 6
- 4

### ATTITUDES TOWARDS AUSTRALIA (% AGREE)

- I would like to travel to Australia just not now: 58 +1
- I feel Australia is less impacted by the coronavirus than most other countries: 55 +10
- Australia is on my top list countries to travel as soon as the crisis is over: 38 -5

Small sample for triggers for International travel. Indicative only.
Source: Travel Sentiment Tracker (latest wave n=300). Fieldwork was conducted 20th-24th January 2020. Results compared to previous wave conducted 14th-17th December 2020.
General confidence remains steady this wave, though travel and booking sentiment is down (after improving last wave). Perception of Australia as a safe destination is down a little.
SUMMARY METRICS – FRANCE

ATTITUDES TO NEXT HOLIDAY

Not thinking about my next holiday right now
- 54% +5

Thinking/dreaming about my next holiday
- 24% -6

I’m researching/actively planning my next holiday
- 22% +1

ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS

I can’t see myself travelling internationally at all in the future
- 28% +6

I would be cautious about travelling internationally for quite a while
- 34% -5

I am considering travelling internationally
- 14% -2

I am keen to travel internationally as soon as possible
- 14% 0

I would be travelling internationally now but travel restrictions are stopping me
- 10% 0

INTENDED TIMING OF NEXT INTERNATIONAL TRIP

- 0% -3% -8% +5% +3% +5%

1% in the next month
4% in 1 to 3 months
13% in 3 to 6 months
22% in 6 to 12 months
25% in 1 to 2 years
13% in more than 2 years
22% Not sure/will not travel

TOP 3 TRIGGERS FOR INT’L TRAVEL (NEXT 6 MONTHS)

N = 53

I feel like I really need a holiday
- 51% 0

I would like to visit friends and relatives
- 30% -1

I would like to replace a previous delayed trip
- 17% -14

TOP 3 BARRIERS FOR INT’L TRAVEL (NEXT 6 MONTHS)

N = 249

Travel restrictions won’t allow it
- 41% +3

I am afraid I will contract coronavirus
- 33% -7

My current financial situation wouldn’t allow it
- 31% -3

+/- indicates % change from previous wave
Indicates a statistically significant shift

CONSIDERING TRAVELING TO AUSTRALIA IN THE NEXT 4 YEARS

- 14% +1

INTENDING TO TRAVEL TO AUSTRALIA IN THE NEXT 2 YEARS

- 0% 8%

ATTITUDES TOWARDS AUSTRALIA

I would like to travel to Australia just not now
- 61% -7

I feel Australia is less impacted by the coronavirus than most other countries
- 44% -11

Australia is on my top list countries to travel as soon as the crisis is over
- 27% -4

Small sample for triggers for International travel, Indicative only.
Source: Travel Sentiment Tracker (latest wave n=302). Fieldwork was conducted 20th-24th January 2020. Results compared to previous wave conducted 14th-17th December 2020.
General confidence has improved a little but travel intention is down this wave. Booking intention remains steady at low levels. Perceptions of Australia as a safe destination up slightly.
### SUMMARY METRICS - ITALY

#### ATTITUDES TO NEXT HOLIDAY
- Not thinking about my next holiday right now: 43%
- Thinking/dreaming about my next holiday: 39%
- I'm researching/actively planning my next holiday: 18%

#### ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS
- I can’t see myself travelling internationally at all in the future: 16%
- I would be cautious about travelling internationally for quite a while: 49%
- I am considering travelling internationally: 13%
- I am keen to travel internationally as soon as possible: 13%
- I would be travelling internationally now but travel restrictions are stopping me: 9%

#### INTENDED TIMING OF NEXT INTERNATIONAL TRIP
- In the next month: 27%
- In 1 to 3 months: 29%
- In 3 to 6 months: 12%
- In 6 to 12 months: 20%
- In more than 2 years: 0%

#### TOP 3 BARRIERS FOR INTL’ TRAVEL (NEXT 6 MONTHS)
1. I am afraid I will contract coronavirus: 50% (+1)
2. Travel restrictions won’t allow it: 47% (+14)
3. My current financial situation would not allow it: 26% (-1)

#### CONSIDERING TRAVELING TO AUSTRALIA IN THE NEXT 4 YEARS
- Considering traveling to Australia in the next 4 years: 24% (-2)

#### INTENDING TO TRAVEL TO AUSTRALIA IN THE NEXT 2 YEARS
- Intending to travel to Australia in the next 2 years: 11% (-4)

#### ATITUDES TOWARDS AUSTRALIA (% AGREE)
- I would like to travel to Australia just not now: 69% (+1)
- I feel Australia is less impacted by the coronavirus than most other countries: 57% (-3)
- Australia is on my top list countries to travel as soon as the crisis is over: 41% (+3)

Note: Insufficient sample for triggers for international travel.

Small sample for triggers for International travel, Indicative only.
Source: Travel Sentiment Tracker (latest wave n=300). Fieldwork was conducted 20th-24th January 2020. Results compared to previous wave conducted 14th-17th December 2020.
TOP LINE CHINA

Confidence and travel sentiment falling this wave with recent Covid-19 outbreak in North Eastern China. Perception of Australia as a safe destination continues to ease as well.

CONSUMER CONFIDENCE INDEX
Consumer confidence indicates positive/negative sentiment towards current and expected personal & economic circumstances (<100 is negative, >100 positive)

TRAVEL INTENTION
(0-6M)
(%)

BOOKING INTENTION
(NEXT MONTH)
(%)

AUSTRALIA IS A DESTINATION
THAT SEEMS SAFE TO TRAVEL
(%)

Booking Intention = those who are 'very likely' or 'certain' to book in the next month.
Source: Travel Sentiment Tracker (latest wave n=305). Fieldwork was conducted 20-24 January 2020. International booking Intention results only available from wave 2.
**SUMMARY METRICS - CHINA**

### ATTITUDES TO NEXT HOLIDAY

- Not thinking about my next holiday right now: 39 (+7)
- Thinking/dreaming about my next holiday: 28 (-11)
- I'm researching/actively planning my next holiday: 33 (+3)

### ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS

- I can't see myself travelling internationally at all in the future: 57 (0)
- I would be cautious about travelling internationally for quite a while: 11 (+1)
- I am considering travelling internationally: 9 (-4)
- I am keen to travel internationally as soon as possible: 17 (+5)
- I would be travelling internationally now but travel restrictions are stopping me: 6 (-2)

### INTENDED TIMING OF NEXT INTERNATIONAL TRIP

- In the next month: 5
- In 1 to 3 months: 9
- In 3 to 6 months: 14
- In 6 to 12 months: 18
- In 1 to 2 years: 19
- In more than 2 years: 13
- Not sure/will not travel: 22

### TOP 3 TRIGGERS FOR INT'L TRAVEL (NEXT 6 MONTHS) N=84

1. I feel like I really need a holiday: 48 (+1)
2. I would like to replace a previous delayed trip: 37 (-10)
3. I now have the time to do it: 36 (-6)

### TOP 3 BARRIERS FOR INT'L TRAVEL (NEXT 6 MONTHS) N=221

1. I am afraid I will contract coronavirus: 66 (-5)
2. I wouldn't like to risk spreading the virus: 60 (+2)
3. The destination where I would like to travel is not safe yet: 29 (-8)

**CONSIDERING TRAVELING TO AUSTRALIA IN THE NEXT 4 YEARS**

- 55 (-4)

**INTENDING TO TRAVEL TO AUSTRALIA IN THE NEXT 2 YEARS**

- 41 (-9)

**ATTITUDES TOWARDS AUSTRALIA (%) AGREE**

- I would like to travel to Australia just not now: 75 (0)
- Australia is on my top list countries to travel as soon as the crisis is over: 58 (-6)
- I feel Australia is less impacted by the coronavirus than most other countries: 52 (0)

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Small sample for triggers for International travel, indicative only.
Source: Travel Sentiment Tracker (latest wave n=305). Fieldwork was conducted 20th-24th January 2020. Results compared to previous wave conducted 14th-17th December 2020.
TOP LINE HONG KONG

Confidence and travel intention in the next 6 months both easing this wave. Booking intention in the next 6 months holds up however, and perceptions of Australia as a safe destination improve a little.
SUMMARY METRICS – HONG KONG

ATTITUDES TO NEXT HOLIDAY

- Not thinking about my next holiday right now: 31% (-2)
- Thinking/dreaming about my next holiday: 48% (+1)
- I’m researching/actively planning my next holiday: 21% (+1)

INTENDED TIMING OF NEXT INTERNATIONAL TRIP

- In the next month: 3%
- In 1 to 3 months: 13%
- In 3 to 6 months: 23%
- In 6 to 12 months: 34%
- In 1 to 2 years: 15%
- Not sure / will not travel: 10%

ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS

- I can’t see myself travelling internationally at all in the future: 5% (-3)
- I would be cautious about travelling internationally for quite a while: 49% (+2)
- I am considering travelling internationally: 17% (+1)
- I am keen to travel internationally as soon as possible: 23% (+4)
- I would be travelling internationally now but travel restrictions are stopping me: 7% (-3)

TOP 3 TRIGGERS FOR INTL’ TRAVEL (NEXT 6 MONTHS) N=55

- I feel like I really need a holiday: 44% (+2)
- I have found very good deals: 38% (+12)
- I now have the time to do it: 36% (+12)

TOP 3 BARRIERS FOR INTL’ TRAVEL (NEXT 6 MONTHS) N=248

- I am afraid I will contract coronavirus: 63% (+3)
- I wouldn’t like to risk spreading the virus: 50% (+0)
- Travel restrictions won’t allow it: 46% (-3)

CONSIDERING TRAVELING TO AUSTRALIA IN THE NEXT 4 YEARS

- 52% (+0)

INTENDING TO TRAVEL TO AUSTRALIA IN THE NEXT 2 YEARS

- 40% (+1)

ATTITUDES TOWARDS AUSTRALIA (% AGREE)

- I would like to travel to Australia just not now: 82% (+5)
- I feel Australia is less impacted by the coronavirus than most other countries: 61% (+1)
- Australia is on my top list countries to travel as soon as the crisis is over: 54% (+3)

Small sample for triggers for International travel, Indicative only.
Source: Travel Sentiment Tracker (latest wave n=303). Fieldwork was conducted 20th-24th January 2020. Results compared to previous wave conducted 14th-17th December 2020.

Tourism Australia
Travel Sentiment Tracker
TOP LINE JAPAN

Confidence and travel intention in the next 6 months are both down with recent rise in Covid-19 cases. Booking intention in the next 6 months holds steady, and perceptions of Australia as a safe destination up slightly.
**SUMMARY METRICS - JAPAN**

**ATTITUDES TO NEXT HOLIDAY**

<table>
<thead>
<tr>
<th>Attitude</th>
<th>N</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not thinking about my next holiday right now</td>
<td>67</td>
<td>+3</td>
</tr>
<tr>
<td>Thinking/dreaming about my next holiday</td>
<td>23</td>
<td>-2</td>
</tr>
<tr>
<td>I'm researching/actively planning my next holiday</td>
<td>10</td>
<td>-1</td>
</tr>
</tbody>
</table>

**ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS**

<table>
<thead>
<tr>
<th>Attitude</th>
<th>N</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>I can't see myself travelling internationally at all in the future</td>
<td>32</td>
<td>-3</td>
</tr>
<tr>
<td>I would be cautious about travelling internationally for quite a while</td>
<td>55</td>
<td>+3</td>
</tr>
<tr>
<td>I am considering travelling internationally</td>
<td>6</td>
<td>+1</td>
</tr>
<tr>
<td>I am keen to travel internationally as soon as possible</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>I would be travelling internationally now but travel restrictions are stopping me</td>
<td>3</td>
<td>0</td>
</tr>
</tbody>
</table>

**INTENDED TIMING OF NEXT INTERNATIONAL TRIP**

<table>
<thead>
<tr>
<th>Timing</th>
<th>N</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the next month</td>
<td>1</td>
<td>-3</td>
</tr>
<tr>
<td>In 1 to 3 months</td>
<td>1</td>
<td>-3</td>
</tr>
<tr>
<td>In 3 to 6 months</td>
<td>4</td>
<td>+0</td>
</tr>
<tr>
<td>In 6 to 12 months</td>
<td>4</td>
<td>+0</td>
</tr>
<tr>
<td>In 1 to 2 years</td>
<td>14</td>
<td>+10</td>
</tr>
<tr>
<td>In more than 2 years</td>
<td>30</td>
<td>45</td>
</tr>
<tr>
<td>Not sure / will not travel</td>
<td>45</td>
<td>45</td>
</tr>
</tbody>
</table>

**TOP 3 BARRIERS FOR INTL' TRAVEL (NEXT 6 MONTHS)**

<table>
<thead>
<tr>
<th>Barrier</th>
<th>N</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am afraid I will contract coronavirus</td>
<td>58</td>
<td>-3</td>
</tr>
<tr>
<td>I wouldn't like to risk spreading the virus</td>
<td>40</td>
<td>-5</td>
</tr>
<tr>
<td>The destination where I would like to travel is not safe yet</td>
<td>26</td>
<td>+5</td>
</tr>
</tbody>
</table>

**CONSIDERING TRAVELING TO AUSTRALIA IN THE NEXT 4 YEARS**

<table>
<thead>
<tr>
<th>Attitude</th>
<th>N</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Considering traveling to Australia in the next 4 years</td>
<td>16</td>
<td>+2</td>
</tr>
</tbody>
</table>

**INTENDING TO TRAVEL TO AUSTRALIA IN THE NEXT 2 YEARS**

<table>
<thead>
<tr>
<th>Attitude</th>
<th>N</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intending to travel to Australia in the next 2 years</td>
<td>9</td>
<td>0</td>
</tr>
</tbody>
</table>

**ATTITUDES TOWARDS AUSTRALIA**

<table>
<thead>
<tr>
<th>Attitude</th>
<th>N</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would like to travel to Australia just not now</td>
<td>61</td>
<td>+1</td>
</tr>
<tr>
<td>I feel Australia is less impacted by the coronavirus than most other countries</td>
<td>43</td>
<td>+2</td>
</tr>
<tr>
<td>Australia is on my top list countries to travel as soon as the crisis is over</td>
<td>26</td>
<td>+5</td>
</tr>
</tbody>
</table>

*Note: Insufficient sample for triggers for international travel*
TOP LINE
SOUTH KOREA

General confidence has improved this wave, but travel intention continues to ease. Other metrics largely steady.

CONSUMER CONFIDENCE INDEX
Consumer confidence indicates positive/negative sentiment towards current and expected personal & economic circumstances (<100 is negative, >100 positive)

TRAVEL INTENTION (0-6M) (%)

BOOKING INTENTION (NEXT MONTH) (%)

AUSTRALIA IS A DESTINATION THAT SEEMS SAFE TO TRAVEL (%)

Booking Intention = those who are ‘very likely’ or ‘certain’ to book in the next month.
Source: Travel Sentiment Tracker (latest wave n=3031). Fieldwork was conducted 20-24 January 2020. International booking Intention results only available from wave 2.
**SUMMARY METRICS - SOUTH KOREA**

**ATTITUDES TO NEXT HOLIDAY**

- Not thinking about my next holiday right now: 56
- Thinking/dreaming about my next holiday: 33
- I’m researching/actively planning my next holiday: 11

**ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS**

- I can’t see myself travelling internationally at all in the future: 16
- I would be cautious about travelling internationally for quite a while: 66
- I am considering travelling internationally: 5
- I am keen to travel internationally as soon as possible: 7
- I would be travelling internationally now but travel restrictions are stopping me: 5

**INTENDED TIMING OF NEXT INTERNATIONAL TRIP**

- In the next month: 1
- In 1 to 3 months: 2
- In 3 to 6 months: 5
- In 6 to 12 months: 18
- In 1 to 2 years: 22
- In more than 2 years: 34
- Not sure / will not travel: 17

**TOP 3 BARRIERS FOR INT’L TRAVEL (NEXT 6 MONTHS)**

- I am afraid I will contract coronavirus: 59
- I wouldn’t like to risk spreading the virus: 52
- The destination where I would like to travel is not safe yet: 23

**CONSIDERING TRAVELING TO AUSTRALIA IN THE NEXT 4 YEARS**

- 37

**INTENDING TO TRAVEL TO AUSTRALIA IN THE NEXT 2 YEARS**

- 20

**ATTITUDES TOWARDS AUSTRALIA (% AGREE)**

- I would like to travel to Australia just not now: 76
- Australia is on my top list countries to travel as soon as the crisis is over: 51
- I feel Australia is less impacted by the coronavirus than most other countries: 45

Note: Insufficient sample for triggers for international travel.

Small sample for triggers for International travel, Indicative only.

Source: Travel Sentiment Tracker (latest wave n=303). Fieldwork was conducted 20th-24th January 2020. Results compared to previous wave conducted 14th-17th December 2020.
General confidence continues to edge up but travel intention has fallen sharply. Booking intention remains low while perceptions of Australia as a safe destination hold largely steady.
SUMMARY METRICS - SINGAPORE

ATTITUDES TO NEXT HOLIDAY

Not thinking about my next holiday right now

Thinking/dreaming about my next holiday

I'm researching/actively planning my next holiday

ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS

I can't see myself travelling internationally at all in the future

I would be cautious about travelling internationally for quite a while

I am considering travelling internationally

I am keen to travel internationally as soon as possible

I would be travelling internationally now but travel restrictions are stopping me

INTENDED TIMING OF NEXT INTERNATIONAL TRIP

+1  -3  -5  -2  +14  -0  -4

In the next month  In 1 to 3 months  In 3 to 6 months  In 6 to 12 months  In 1 to 2 years  In more than 2 years  Not sure / will not travel

Note: Insufficient sample for triggers for international travel

CONSIDERING TRAVELING TO AUSTRALIA IN THE NEXT 4 YEARS

57  +2

INTENDING TO TRAVEL TO AUSTRALIA IN THE NEXT 2 YEARS

40  +4

TOP 3 BARRIERS FOR INTL' TRAVEL (NEXT 6 MONTHS)

N=273

I am afraid I will contract coronavirus

Travel restrictions won't allow it

I wouldn't like to risk spreading the virus

ATTITUDES TOWARDS AUSTRALIA (% AGREE)

I would like to travel to Australia just not now

Australia is on my top list countries to travel as soon as the crisis is over

I feel Australia is less impacted by the coronavirus than most other countries

Small sample for triggers for International travel, Indicative only.
Source: Travel Sentiment Tracker (latest wave n=302). Fieldwork was conducted 20th-24th January 2020. Results compared to previous wave conducted 14th/17th December 2020.
Confidence and travel sentiment down in Malaysia with recent rise in Covid-19 cases likely impacting. Perceptions of Australia as a safe destination edging up however.

Booking Intention = those who are ‘very likely’ or ‘certain’ to book in the next month.
Source: Travel Sentiment Tracker (latest wave n=300). Fieldwork was conducted 20-24 January 2020. International booking intention results only available from wave 2.
SUMMARY METRICS - MALAYSIA

ATTITUDES TO NEXT HOLIDAY

Not thinking about my next holiday right now: 50, +5
Thinking/dreaming about my next holiday: 25, -2
I'm researching/actively planning my next holiday: 25, -3

ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS

I can't see myself travelling internationally at all in the future: 24, 0
I would be cautious about travelling internationally for quite a while: 46, +5
I am considering travelling internationally: 15, -7
I am keen to travel internationally as soon as possible: 6, +2
I would be travelling internationally now but travel restrictions are stopping me: 8, 0

INTENDED TIMING OF NEXT INTERNATIONAL TRIP

-1 month: 2
1 to 3 months: 2
3 to 6 months: 13
6 to 12 months: 23
1 to 2 years: 31
more than 2 years: 22
Not sure/will not travel: 1

TOP 3 BARRIERS FOR INTL' TRAVEL (NEXT 6 MONTHS)

- I am afraid I will contract coronavirus: 62, +2
- I wouldn't like to risk spreading the virus: 53, 0
- Travel restrictions won't allow it: 46, +8

Note: Insufficient sample for triggers for international travel

CONSIDERING TRAVELING TO AUSTRALIA IN THE NEXT 4 YEARS

- 57, +1

INTENDING TO TRAVEL TO AUSTRALIA IN THE NEXT 2 YEARS

- 40, -2

ATTITUDES TOWARDS AUSTRALIA (% AGREE)

- I would like to travel to Australia just not now: 81, +3
- Australia is on my top list countries to travel as soon as the crisis is over: 68, +6
- I feel Australia is less impacted by the coronavirus than most other countries: 59, +1

Small sample for triggers for International travel, Indicative only.
Source: Travel Sentiment Tracker (latest wave n=300). Fieldwork was conducted 20th-24th January 2020. Results compared to previous wave conducted 14th-17th December 2020.
TOP LINE
INDONESIA

General confidence had improved but travel intention continues to fall and booking intention also down this wave. Perceptions of Australia as a safe destination at high levels and continuing to edge up.

**CONSUMER CONFIDENCE INDEX**
Consumer confidence indicates positive/negative sentiment towards current and expected personal & economic circumstances (<100 is negative, >100 positive)

**TRAVEL INTENTION (0-6M)**
(%)  

**BOOKING INTENTION (NEXT MONTH)**
(%)  

**AUSTRALIA IS A DESTINATION THAT SEEMS SAFE TO TRAVEL**
(%)  

Booking Intention = those who are 'very likely' or 'certain' to book in the next month.
Source: Travel Sentiment Tracker (latest wave n=301). Fieldwork was conducted 20-24 January 2020. International booking intention results only available from wave 2.
**SUMMARY METRICS - INDONESIA**

### ATTITUDES TO NEXT HOLIDAY

- **Not thinking about my next holiday right now**: 38
- **Thinking/dreaming about my next holiday**: 30
- **I'm researching/actively planning my next holiday**: 31

### ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS

- **I can't see myself travelling internationally at all in the future**: 24
- **I would be cautious about travelling internationally for quite a while**: 42
- **I am considering travelling internationally**: 14
- **I am keen to travel internationally as soon as possible**: 10
- **I would be travelling internationally now but travel restrictions are stopping me**: 9

### INTENDED TIMING OF NEXT INTERNATIONAL TRIP

- **In the next month**: 2
- **In 1 to 3 months**: 3
- **In 3 to 6 months**: 8
- **In 6 to 12 months**: 18
- **In 1 to 2 years**: 26
- **In more than 2 years**: 18
- **Not sure / will not travel**: 25

### TOP 3 TRIGGERS FOR INTL' TRAVEL (NEXT 6 MONTHS) N=66

- **Note: Insufficient sample for triggers for international travel**

### CONSIDERING TRAVELING TO AUSTRALIA IN THE NEXT 4 YEARS

- **61** +2

### INTENDING TO TRAVEL TO AUSTRALIA IN THE NEXT 2 YEARS

- **45** -3

### TOP 3 BARRIERS FOR INTL' TRAVEL (NEXT 6 MONTHS) N=261

- **I am afraid I will contract coronavirus**: 61
- **I wouldn't like to risk spreading the virus**: 45
- **My current financial situation would not allow it**: 39

### ATTITUDES TOWARDS AUSTRALIA (% AGREE)

- **I would like to travel to Australia just not now**: 87
- **Australia is on my top list countries to travel as soon as the crisis is over**: 77
- **I feel Australia is less impacted by the coronavirus than most other countries**: 63

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Small sample for triggers for international travel, Indicative only.
Source: Travel Sentiment Tracker (latest wave n=301). Fieldwork was conducted 20th-24th January 2020. Results compared to previous wave conducted 14th-17th December 2020.
TOP LINE INDIA

General confidence holding steady but travel intention is down quite sharply this wave. Booking intention is steadier. Perception of Australia as a safe destination is down (albeit still > 80%).

**CONSUMER CONFIDENCE INDEX**
Consumer confidence indicates positive/negative sentiment towards current and expected personal & economic circumstances (<100 is negative, >100 positive)

**TRAVEL INTENTION (0-6M)**

**BOOKING INTENTION (NEXT MONTH)**

**AUSTRALIA IS A DESTINATION THAT SEEMS SAFE TO TRAVEL**

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*Booking Intention = those who are ‘very likely’ or ‘certain’ to book in the next month.*
*Source: Travel Sentiment Tracker (latest wave n=300). Fieldwork was conducted 20-24 January 2020. International booking Intention results only available from wave 2.*
**SUMMARY METRICS - INDIA**

**ATTITUDES TO NEXT HOLIDAY**

- Not thinking about my next holiday right now: 30% (0%)
- Thinking/dreaming about my next holiday: 36% (+5%)
- I'm researching/actively planning my next holiday: 34% (-5%)

**ATTITUDES TO FUTURE INTERNATIONAL LEISURE TRIPS**

- I can't see myself travelling internationally at all in the future: 12% (+5%)
- I would be cautious about travelling internationally for quite a while: 42% (+6%)
- I am considering travelling internationally: 23% (-1%)
- I am keen to travel internationally as soon as possible: 14% (0%)
- I would be travelling internationally now but travel restrictions are stopping me: 9% (+1%)

**INTENDED TIMING OF NEXT INTERNATIONAL TRIP**

- In the next month: 5% (0%)
- In 1 to 3 months: 11% (-5%)
- In 3 to 6 months: 18% (+2%)
- In 6 to 12 months: 25% (+2%)
- In 1 to 2 years: 22% (+1%)
- In more than 2 years: 8% (-4%)
- Not sure / will not travel: 11% (+6%)

**TOP 3 TRIGGERS FOR INT'L TRAVEL (NEXT 6 MONTHS)**

- I feel like I really need a holiday: 62% (-4%)
- I have found very good deals: 44% (+7%)
- I would like to visit friends and relatives: 39% (-5%)

**TOP 3 BARRIERS FOR INT'L TRAVEL (NEXT 6 MONTHS)**

- I am afraid I will contract coronavirus: 42% (-5%)
- I wouldn't like to risk spreading the virus: 33% (-12%)
- The destination where I would like to travel is not safe yet: 27% (+5%)

**ATTITUDES TOWARDS AUSTRALIA** (% AGREE)

- Australia is on my top list countries to travel as soon as the crisis is over: 79% (0%)
- I feel Australia is less impacted by the coronavirus than most other countries: 78% (-5%)
- I would like to travel to Australia just not now: 77% (+2%)

Small sample for triggers for International travel, Indicative only.
Source: Travel Sentiment Tracker (latest wave n=300). Fieldwork was conducted 20th-24th January 2020. Results compared to previous wave conducted 14th-17th December 2020.
THANK YOU