

TRAVEL SENTIMENT TRACKER

Market Outputs for Australia
10th – 13th of September 2020

INTRODUCTION

- The Travel Sentiment Tracker was established to provide a regular assessment of the key confidence and travel indicators for key Tourism Australia markets
- This report includes findings for Australia
- Sample: n=1011 for Australia in this wave
- Sample is nationally representative
- This was the 11th wave of fieldwork, conducted from 10/09/20 to 13/09/20

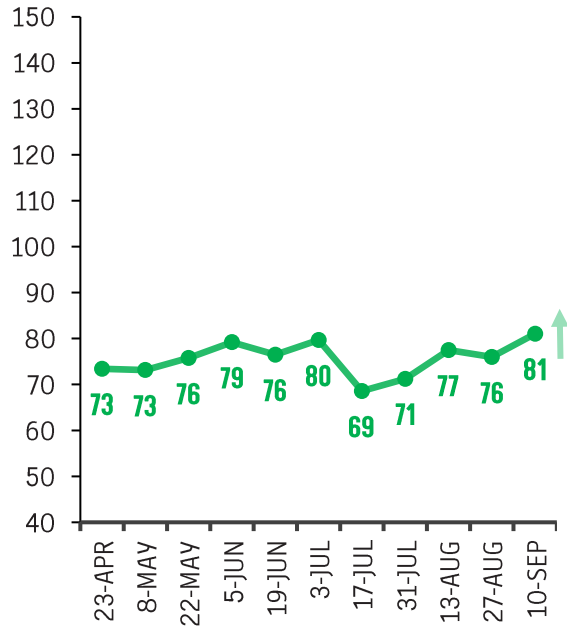
TOP LINE AUSTRALIA

Sentiment has improved this wave with confidence up by almost 5 points and attitudes towards Australia as a safe destination also well up. Travel and booking intention also experience a marginal increase.

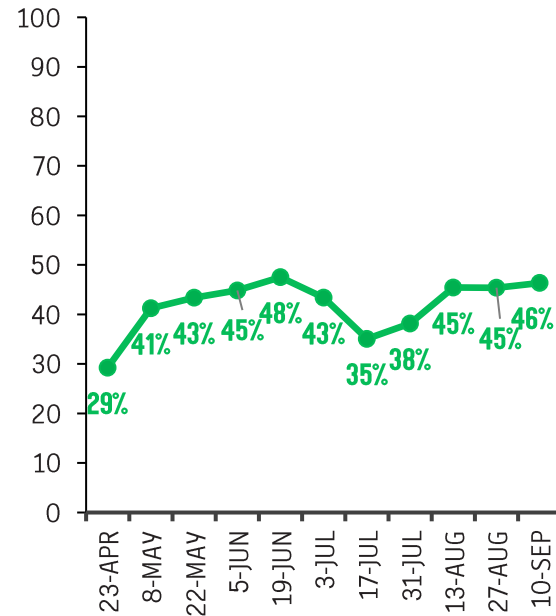
■ Total Australia
 ↑ ↓ Indicates a statistically significant shift

CONSUMER CONFIDENCE INDEX

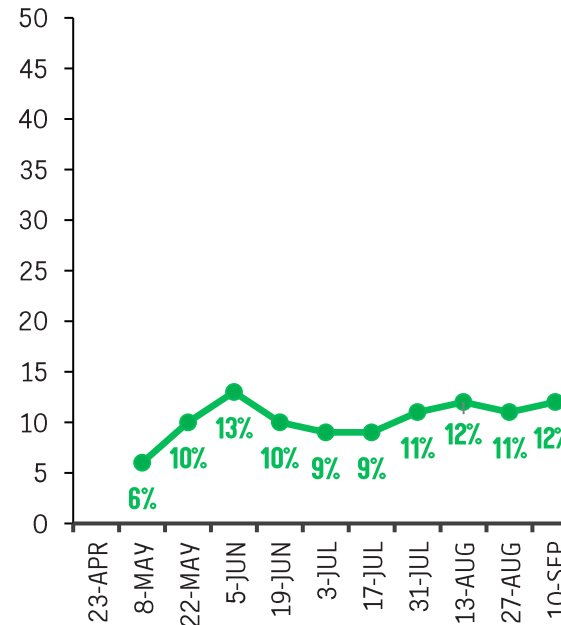
Consumer confidence indicates positive/negative sentiment towards the future economic situation (<100 is negative, >100 positive)



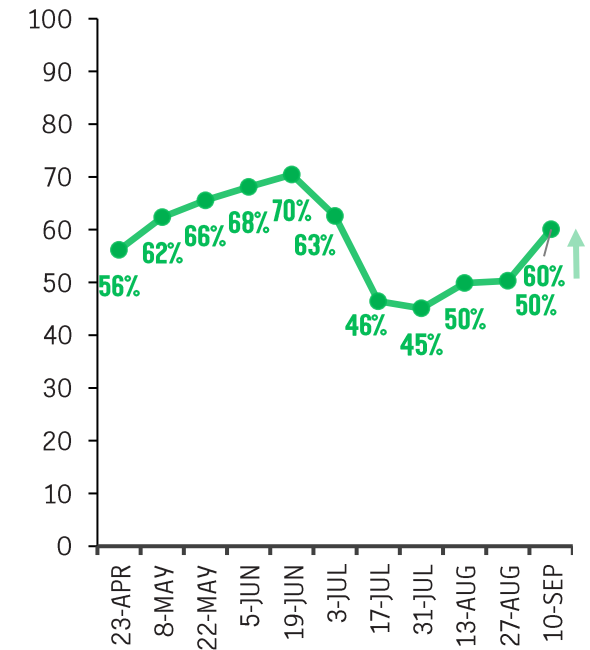
TRAVEL INTENTION (0-6M) WITHIN AUSTRALIA



BOOKING INTENTION (NEXT MONTH) WITHIN AUSTRALIA



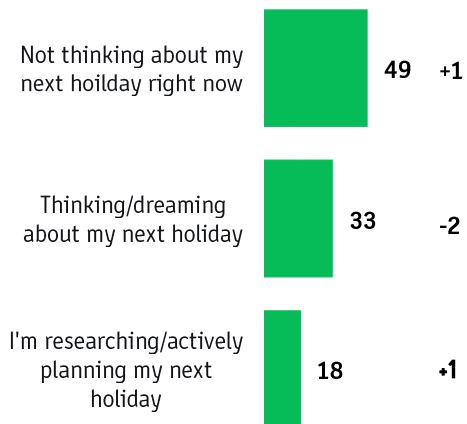
I FEEL IT IS SAFE TO TRAVEL WITHIN AUSTRALIA



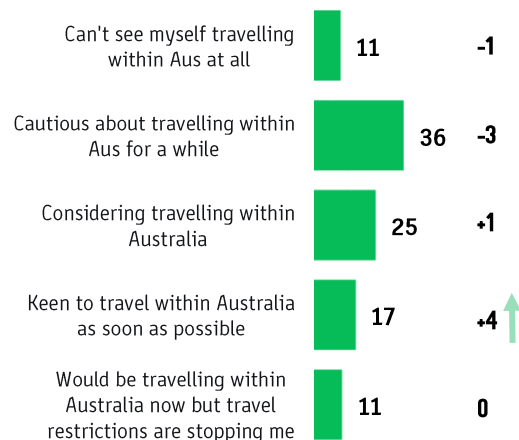
Results reflect Travel Sentiment Tracker (latest wave n=1011). Fieldwork for latest wave was conducted 10th – 13th of September. International booking intention results only available from wave 2. Booking intention = those who are 'very likely' or 'certain' to book in the next month.

SUMMARY METRICS - AUSTRALIA

ATTITUDES TO NEXT HOLIDAY

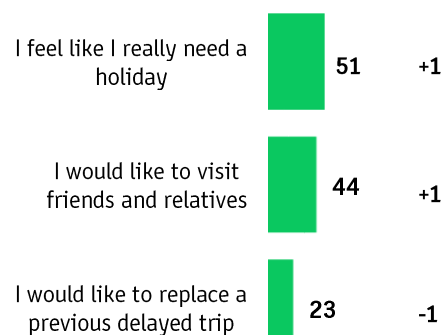


ATTITUDES TO FUTURE LEISURE TRIPS WITHIN AUSTRALIA

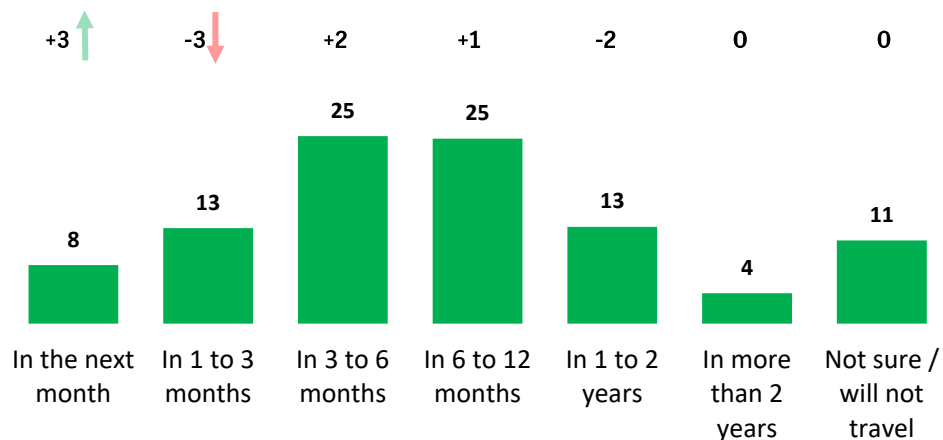


TOP 3 TRIGGERS FOR DOMESTIC TRAVEL (NEXT 6 MONTHS)

N=465

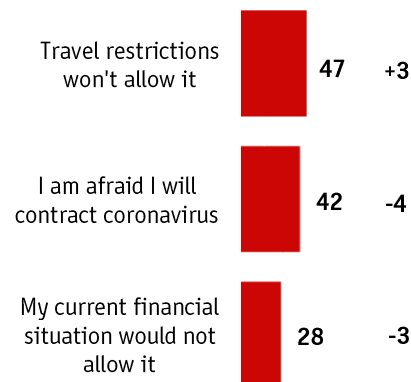


INTENDED TIMING OF NEXT DOMESTIC TRIP



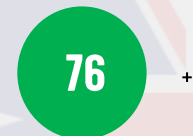
TOP 3 BARRIERS FOR DOMESTIC TRAVEL (NEXT 6 MONTHS)

N=546



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

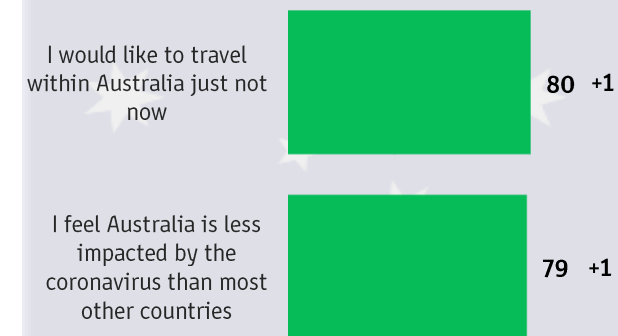
CONSIDERING TRAVELING WITHIN AUSTRALIA IN THE NEXT 4 YEARS



INTENDING TO TRAVEL WITHIN AUSTRALIA IN THE NEXT 2 YEARS



ATTITUDES TOWARDS AUSTRALIA (% AGREE)



Source: : Travel Sentiment Tracker (latest wave n=). Fieldwork was conducted 10th-13th September 2020. Results compared to previous wave conducted 27 of August-1st September 2020.
 Sample: general Australian's - nationally representative

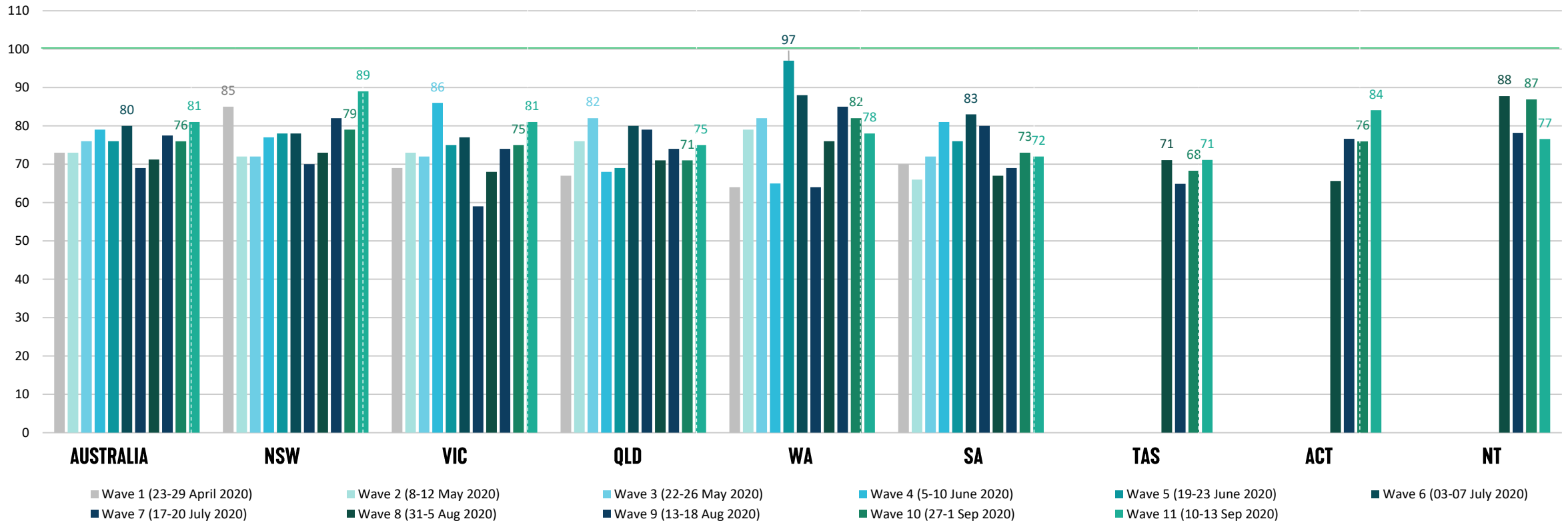
AUSTRALIA – BY STATE



CONSUMER CONFIDENCE INDEX

Consumer confidence is up overall and lifting across the eastern states of Australia. Down somewhat however in WA and NT.

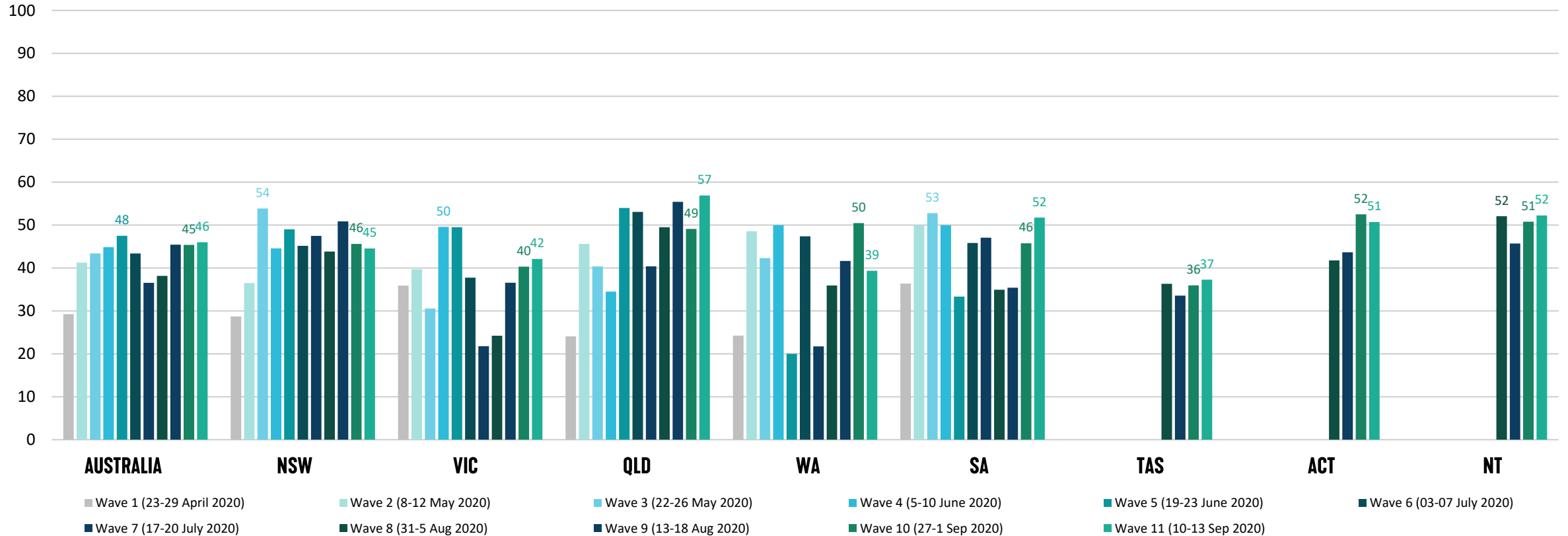
Consumer confidence indicates positive/negative sentiment towards the future economic situation (<100 is negative, >100 positive)



TRAVEL INTENTION NEXT 6 MONTHS

Intention to travel in the next 6 months is largely steady overall this wave, though intention is up in Qld and SA and down for WA.

% INTENDING TO TRAVEL DOMESTICALLY LEISURE TRIP IN THE NEXT 6 MONTHS



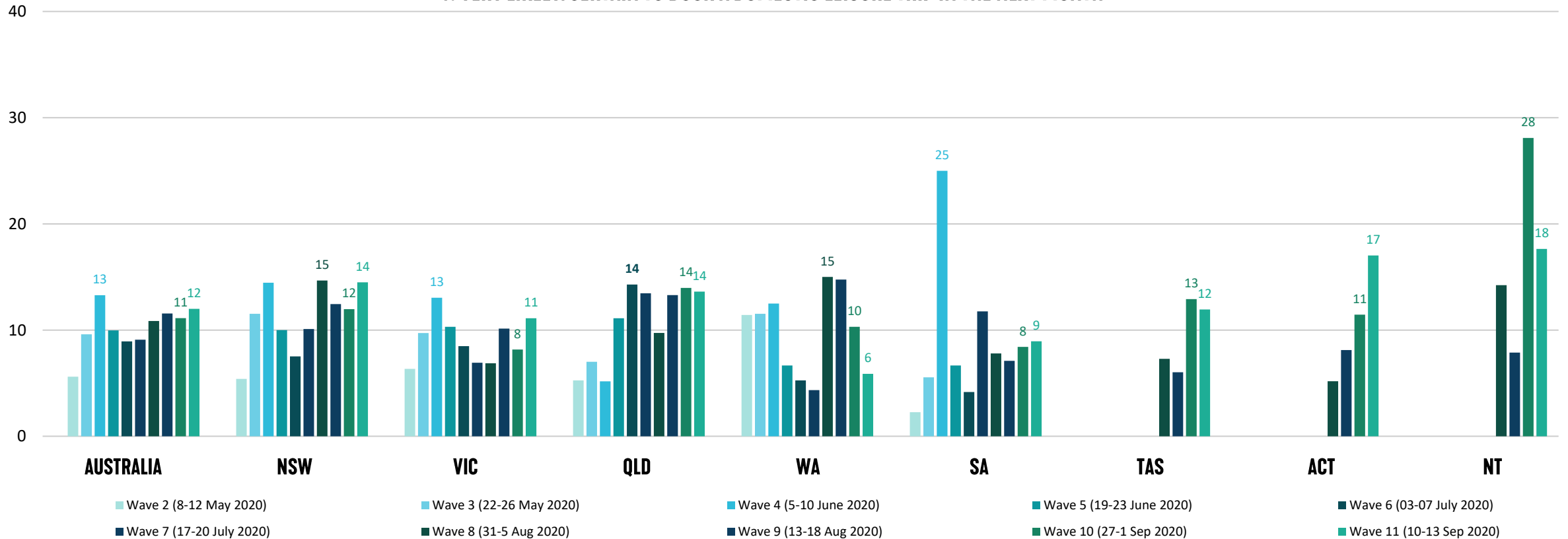
Question: When do you think you would be likely to travel for leisure within Australia?

Source: Travel Sentiment Tracker (latest wave n=1011). Fieldwork was conducted 10th-13th September 2020. **Samples:** Australia: n=1011, NSW: n=280, Vic: n=225, Qld: n=180, WA: n=100, SA: n=72, Tas n=52, ACT: n=50, NT: n=52.

BOOKING INTENT

Booking intention is up marginally this wave though has been gradually building actors recent waves. Intention is up a little this wave for NSW, Vic and ACT and down with WA and NT.

% VERY LIKELY/CERTAIN TO BOOK A DOMESTIC LEISURE TRIP IN THE NEXT MONTH



Question: How likely are you to book a leisure trip within Australia in the next month?

Source: Travel Sentiment Tracker (latest wave n=1011). Fieldwork was conducted 10th-13th September 2020. Samples: Australia: n=1011, NSW: n=280, Vic: n=225, Qld: n=180, WA: n=100, SA: n=72, Tas n=52, ACT: n=50, NT: n=52.

THANK YOU