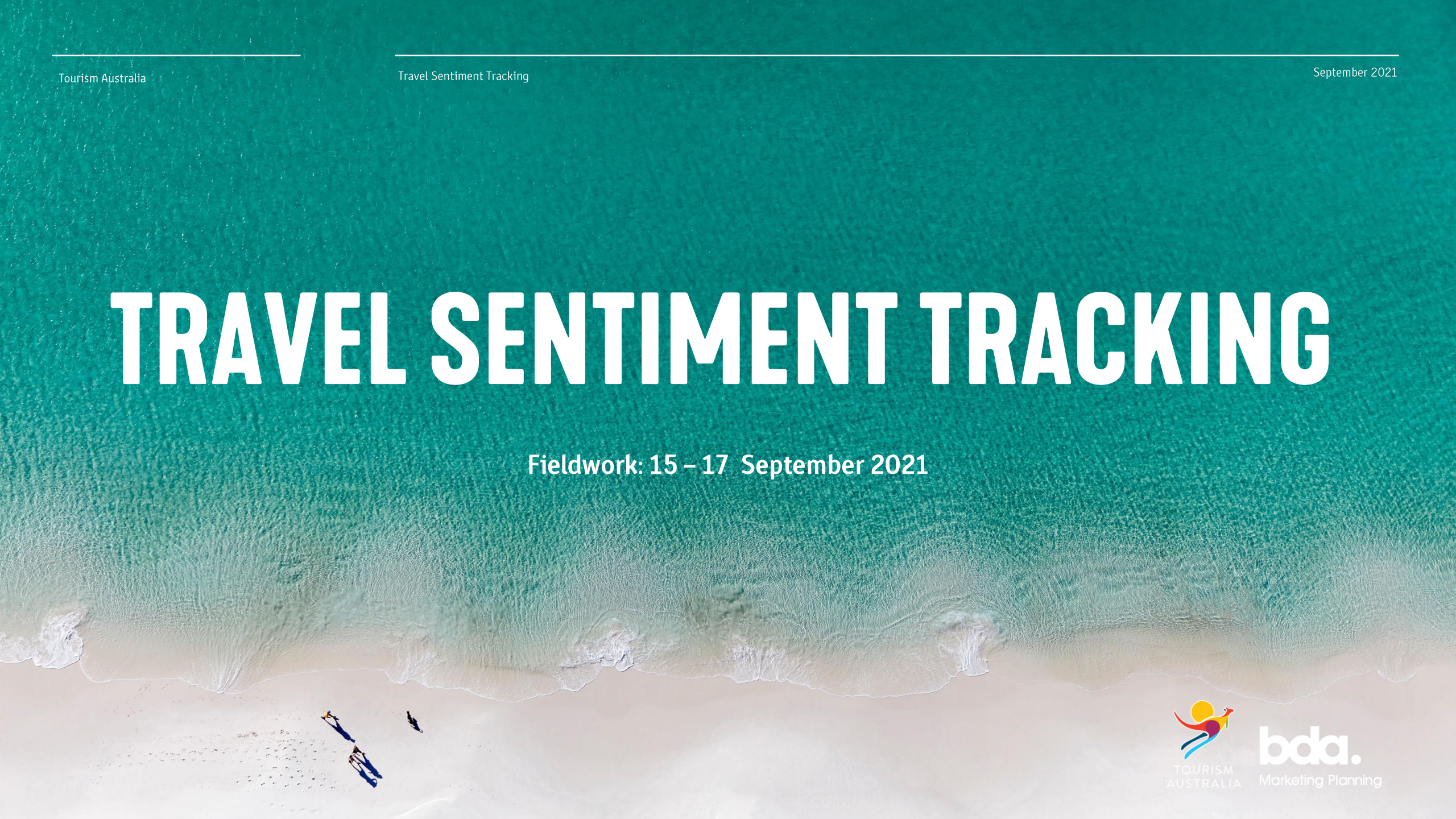
TRAVEL SENTIMENT TRACKING

Fieldwork: 15 – 17 September 2021



TOURISM AUSTRALIA

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ABOUT

TOURISM AUSTRALIA'S TRAVEL SENTIMENT TRACKER

The Travel Sentiment Tracker was established in April 2020 to provide a regular assessment of the key confidence and travel indicators for key Tourism Australia markets:

Current: Australia and New Zealand

Paused: USA, Canada, UK, Germany, France Italy, China, Hong Kong, Japan, South Korea, India, Indonesia, Singapore and Malaysia. *(Most recent read: May 2021)*

The online survey is conducted by BDA Marketing Planning on a monthly basis to understand consumer sentiment in relation to COVID-19 and its impact on travel by looking at:

- Consumer confidence
- Attitudes towards travel
- Travel intention
- Booking intention
- Drivers and barriers to travel
- Impact of vaccinations on travel
- Perceptions of Australia

For more information about Tourism Australia's Travel Sentiment Tracker please email us at insights@tourism.australia.com

WHAT HAS CHANGED IN THE LAST MONTH?

(FIELDWORK 15-17 SEPTEMBER)

New South Wales

- Ongoing lockdown in many parts of NSW. Highest number of cases (1603) on 10th of September
- Roadmap for ending lockdown unveiled on 9th of September
- NSW hits 80% first dose vaccination coverage on 15th of September

Victoria

- Ongoing lockdown #6 in Melbourne and parts of regional Victoria
- Victoria hits 70% first dose vaccination coverage on 16th of September
- Roadmap for ending lockdown unveiled on 19th of September

South Australia

- 7 day lockdown eased, now under level 1 restrictions

Australian Capital Territory

- Ongoing lockdown from 12th of August

Northern Territory

- Greater Darwin and Katherine 3 day lockdown ended on 19th of August

New Zealand

- NZ enters lockdown on 17 of August 2021
- Auckland remained in strict level 4 lockdown until September 23 when lockdown was reduced to level 3 (which still includes stay at home orders). Other regions exited lockdown on September 7.

NEW ZEALAND TRAVEL SENTIMENT

Fieldwork: 15 – 17 September 2021

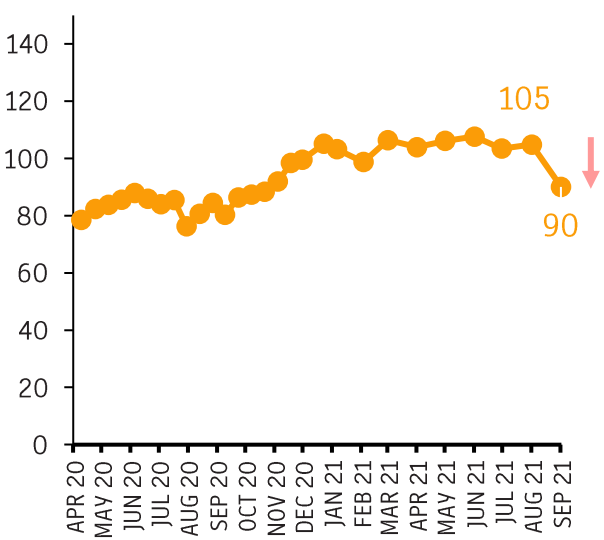
Sample: n=302 nationally representative

NZ SUMMARY

A mix of sentiment with New Zealanders. Consumer confidence down this month to 90 following the recent outbreak and lockdown. International travel intention in the next 6 months is holding up while booking intention is steady at very low levels. Perceptions of Australia as a safe destination are starting to recover.

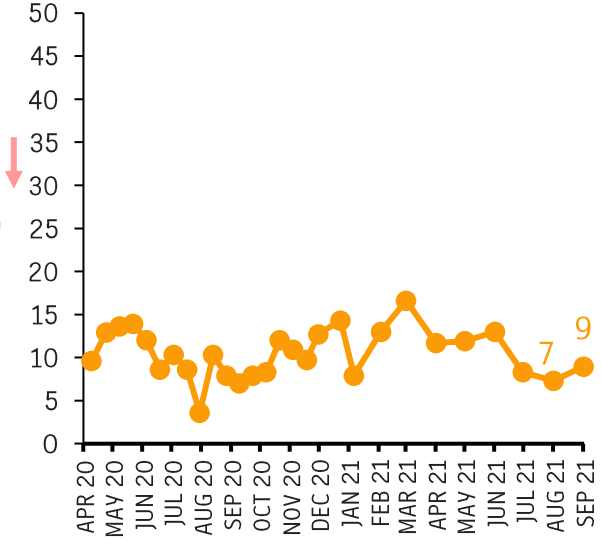
Consumer Confidence

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



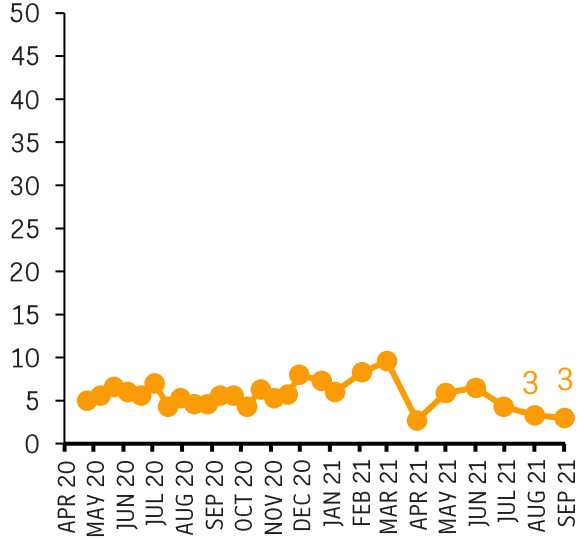
Travel Intention

(0-6 months)
international

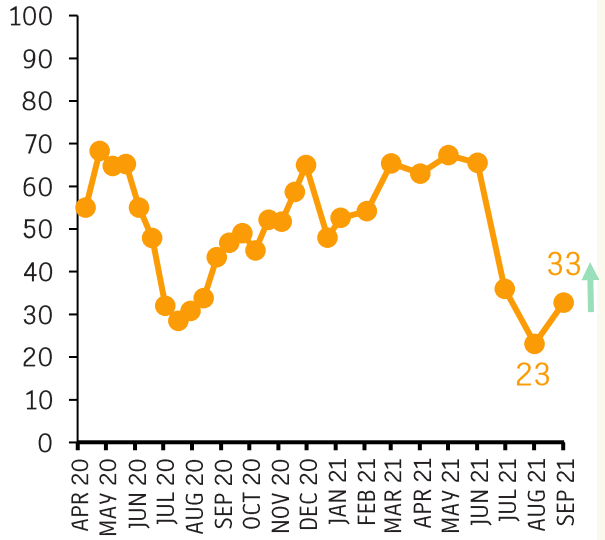


Booking Intention

(Next month)
international



I feel it is safe to travel to Australia



New Zealand

Fieldwork for latest wave was conducted 15-17 September 2021

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

Sample: n=302.

Source: BDA Marketing Planning

+/- indicates % change from previous wave

↑↓ indicates a statistically significant shift

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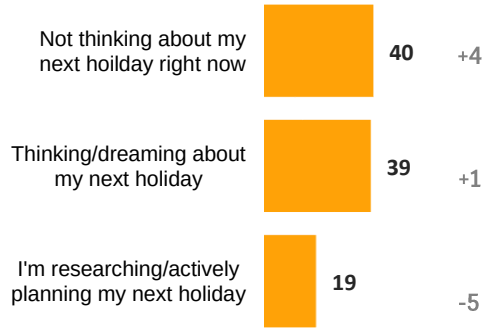
NZ SUMMARY

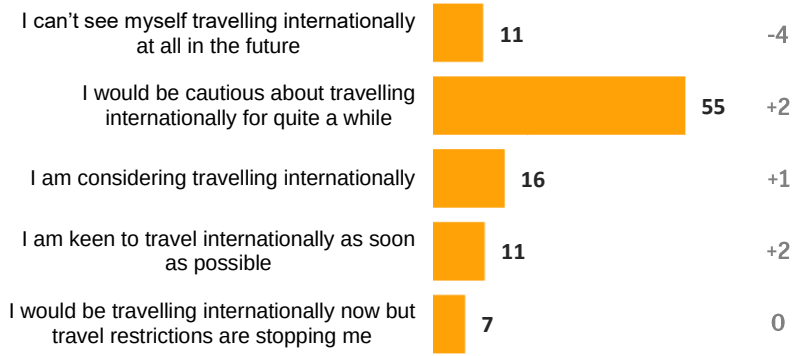
+/- indicates % change from previous wave

↑↓ indicates a statistically significant shift

Attitudes towards next holiday



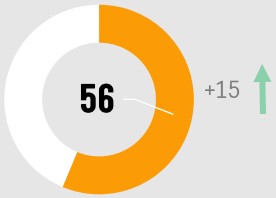
Attitudes towards future international leisure trips



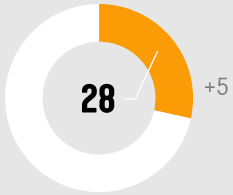
Drivers for international travel (next 6 months)

Low sample size

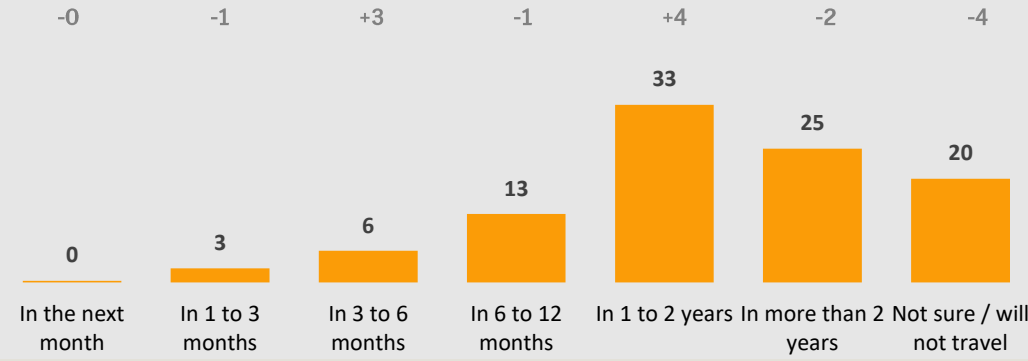
Consideration to visit Aus (next 4 years)



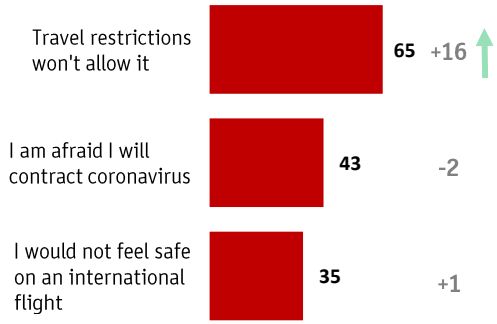
Intention to visit Aus (next 2 years)



Intended timing of next international trip



Barriers for international travel (next 6 months)



Sample: n=302 Sample: general New Zealand

Results compared to previous wave conducted 15 - 17 August 2021.

Source: BDA Marketing Planning

New Zealand

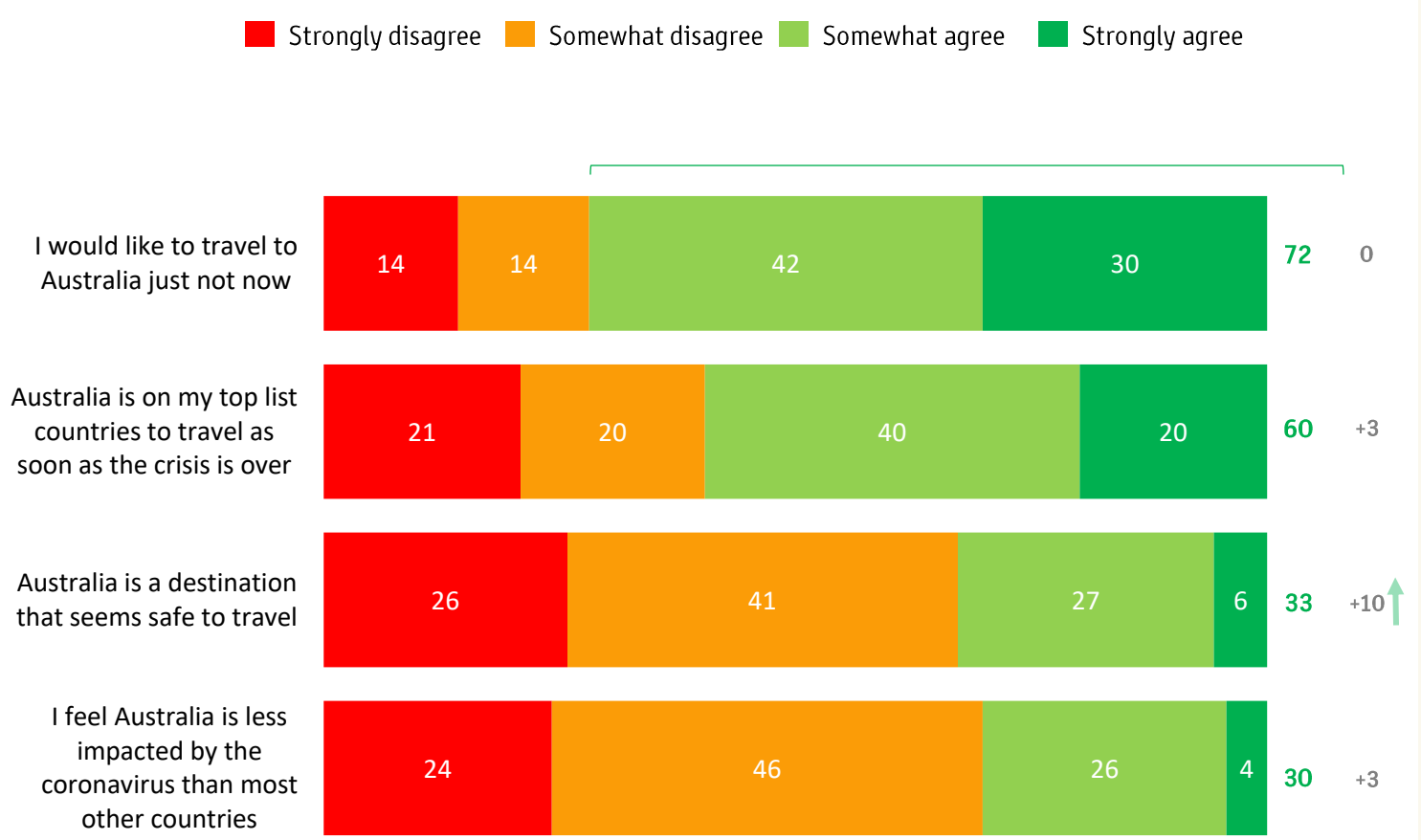
TOURISM AUSTRALIA

72% OF KIWIS WOULD LIKE TO VISIT AUS AND 60% HAVE AUS AT THE TOP OF THEIR BUCKET LIST

Majority of New Zealanders would like to travel to Australia at some point in the future, with 60% having Australia at the top of their list.

~1/3 perceive Australia as a safe destination (well up this wave) and a similar proportion believe Australia is less impacted by the Coronavirus than most other countries.

Attitudes towards Australia



Sample: n=302 Sample: general New Zealand.

Results compared to previous wave conducted 15 - 17 August 2021.

Source: BDA Marketing Planning

+/- indicates % change from previous wave

indicates a statistically significant shift

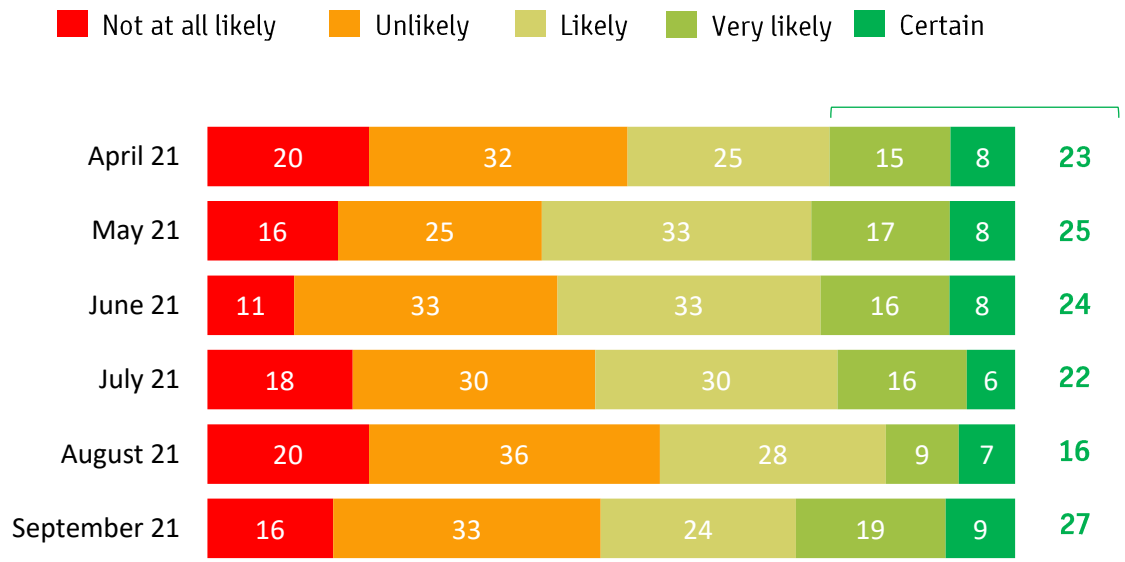
TOURISM AUSTRALIA

INTENTION TO VISIT AUS IS INCREASING

Over ¼ of New Zealanders are intending to travel to Australia, recovering strongly after a drop in August. As with Australians travelling to New Zealand, the most common intended timeframe is 1 to 2 years. Visiting friends and relatives is now the top reason for an intended trip, followed by a holiday.

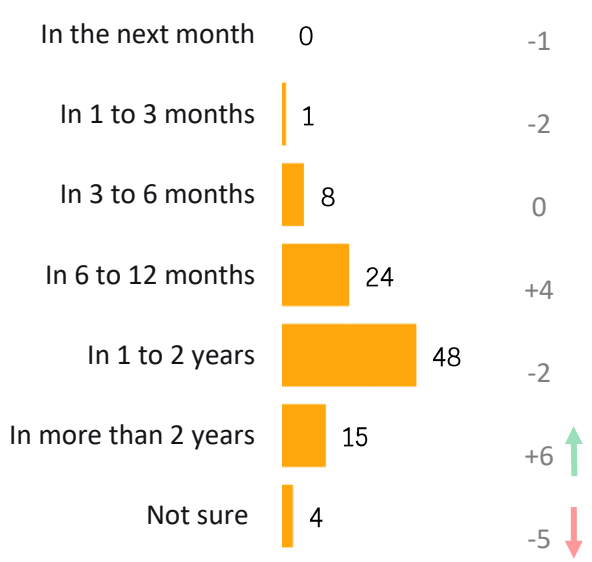
Intention to visit Australia for any purpose

% NZ respondents intending in the next 2 years



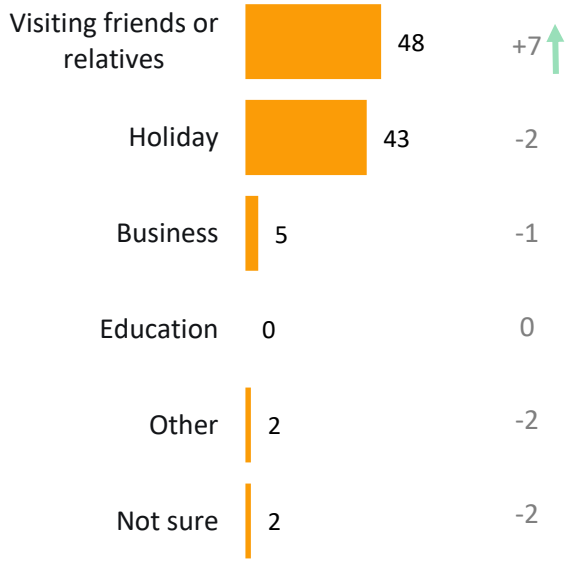
Intended timing of next trip to Aus

% those likely to certain to visit



Intended type of trip to Aus

% those likely to certain to visit



NZ to Aus Sample n= 134

Source: BDA Marketing Planning

+/- indicates % change from previous wave

indicates a statistically significant shift

TOURISM AUSTRALIA

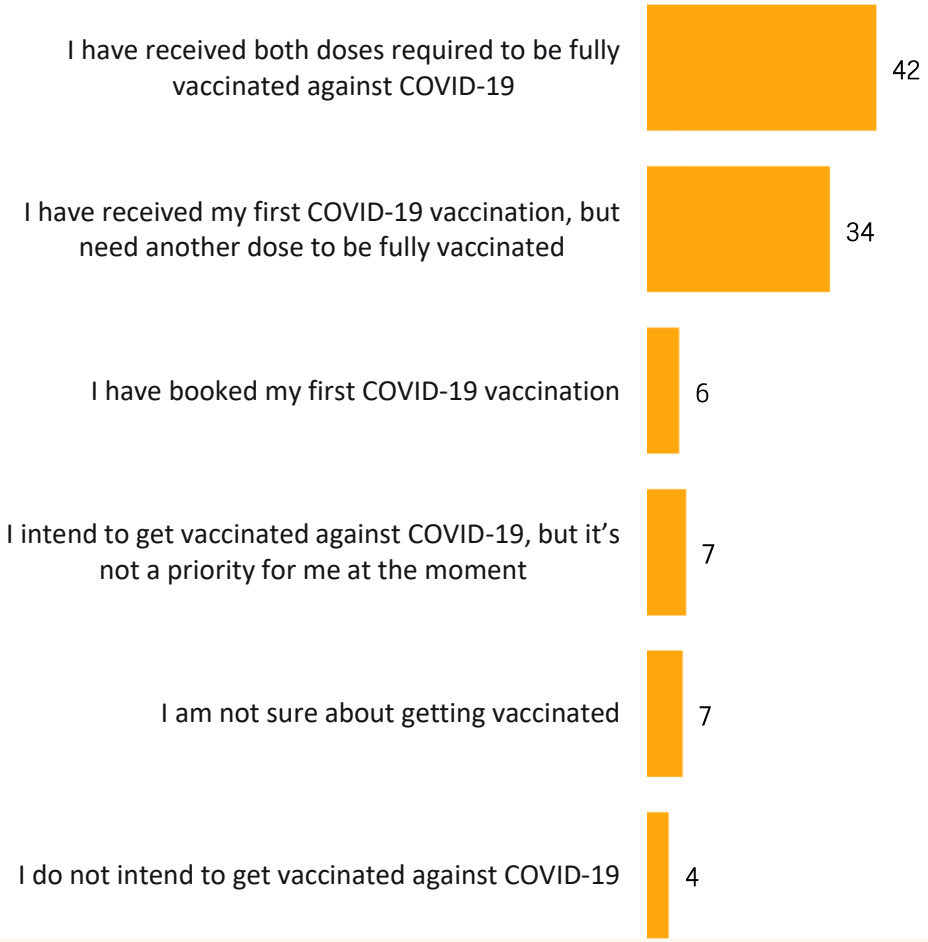
89% OF KIWIS INTEND TO GET VACCINATED, IF NOT ALREADY

42% of New Zealanders are fully vaccinated, while over 34% have received one dose of a Coronavirus vaccine and 6% have booked an appointment already.

7% intend to get vaccinated but do not see it as a priority.

7% of New Zealanders are not sure about the vaccine and 4% do not intend to get vaccinated at all.

Which of the following best reflects your current COVID-19 vaccination status?



Sample: n=302 Sample: general New Zealand

Results reflect Travel Sentiment Tracker (latest wave n=302). Fieldwork for latest wave was conducted 15-17 September 2021

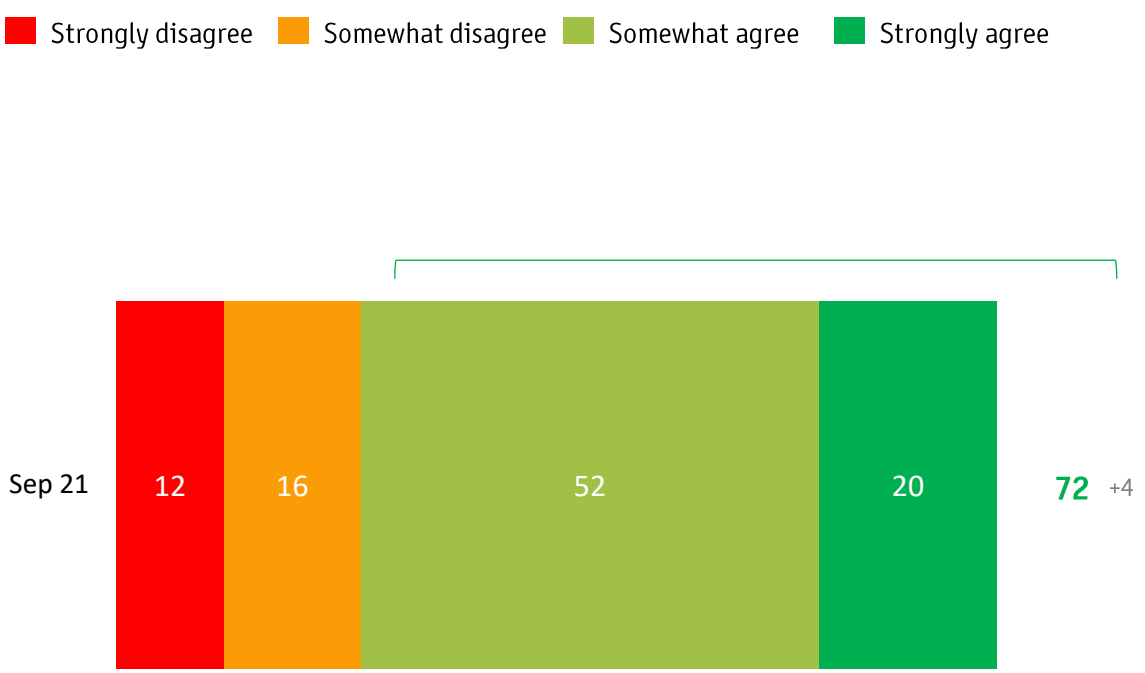
Source: BDA Marketing Planning

TOURISM AUSTRALIA

VACCINES IMPROVE INTERNATIONAL TRAVEL CONFIDENCE

New Zealanders confidence to travel internationally increases as a result of the COVID-19 vaccine.

72% agree with this statement, lifting this wave.



Sample: n=302 Sample: general New Zealand

Results compared to previous wave conducted 15 - 17 August 2021.

Source: BDA Marketing Planning

+/- indicates % change from previous wave

indicates a statistically significant shift

FEAR OF BEING STRANDED AS A RESULT OF SUSPENDED FLIGHTS REMAINS HIGH

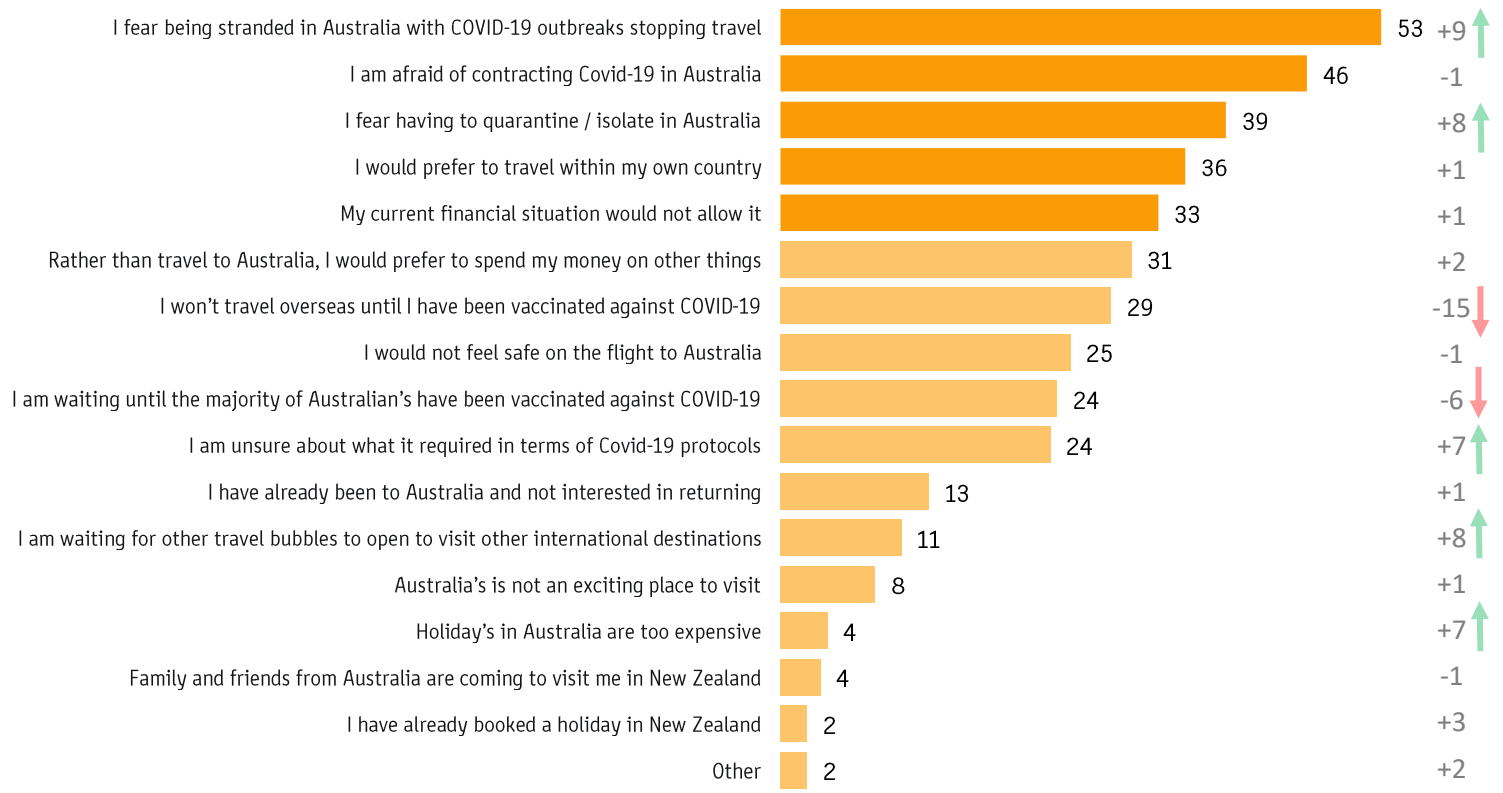
Fear of being stranded in Australia remains the top barrier to visiting, up 9% points this month. The fear of the quarantining in Australia is now the third top barrier and up from August.

Fear of contracting the virus remains a barrier for 46%.

With over ~2/3 New Zealanders now vaccinated with at least the 1st dose, 'not travelling overseas until being vaccinated' is now less of a barrier to travel internationally.

Barriers for a trip to Australia

% NZ respondents 'not at all' or 'unlikely' to travel to Australia for any purpose



Sample: n=147

Results compared to previous wave conducted 15-17 August 2021.

Source: BDA Marketing Planning

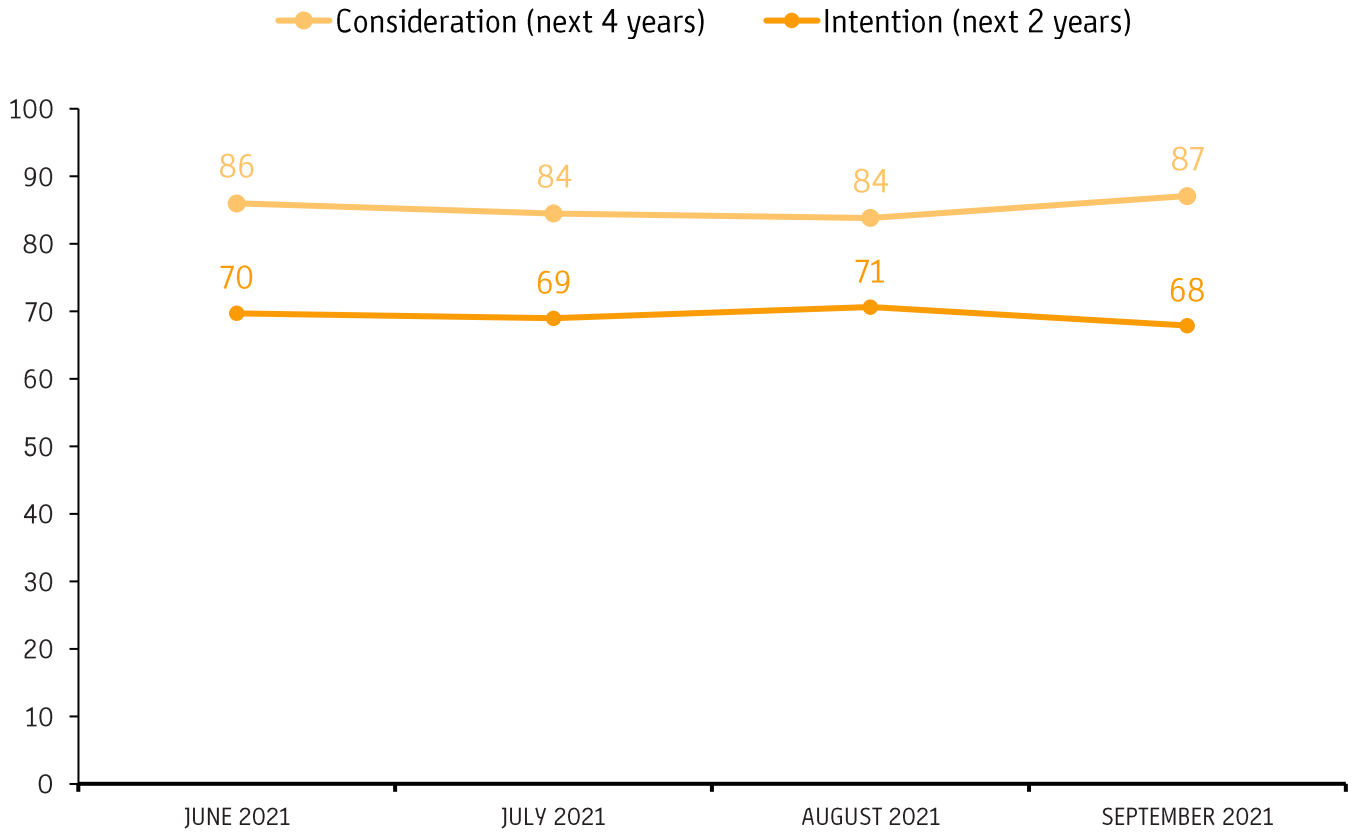
+/- indicates % change from previous wave

indicates a statistically significant shift

TOURISM AUSTRALIA

DOMESTIC CONSIDERATION HAS RECOVERED, THOUGH INTENTION HAS DECLINED

Consideration to take a domestic trip in New Zealand is now at 87% and up this month. Intention slightly down, now at 68%.



Sample: n=302 Sample: general New Zealand

Fieldwork for latest wave was conducted 15-17 September 2021

Source: BDA Marketing Planning

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THANK YOU

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