

COVID-19

Australians during Covid-19: their holidays, current travel plans, and domestic dream destination

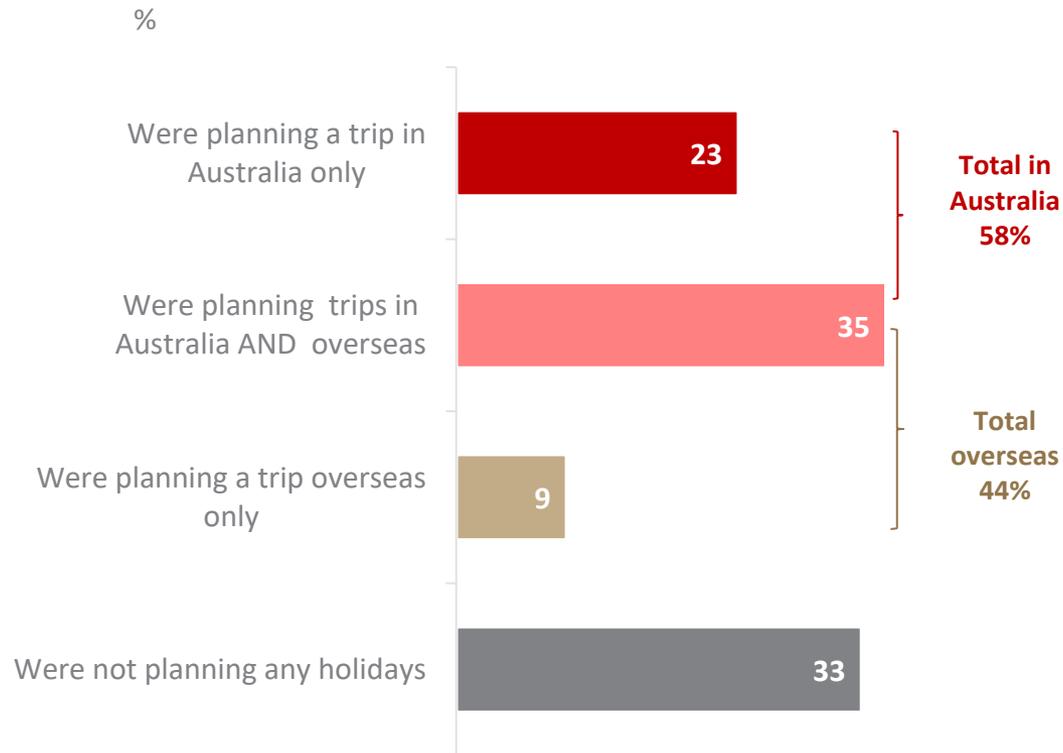
2 June 2020



Two thirds of Australians had holidays/travel plans before the start of the Covid-19 situation

■ Before the start of the Covid-19 situation, two in three adults aged 18+ (67%) were planning a trip/holiday in the next 12 months :

- 23% were planning a trip in Australia only
- 9% were planning a trip overseas only, and
- 35% were planning both domestic and overseas trips

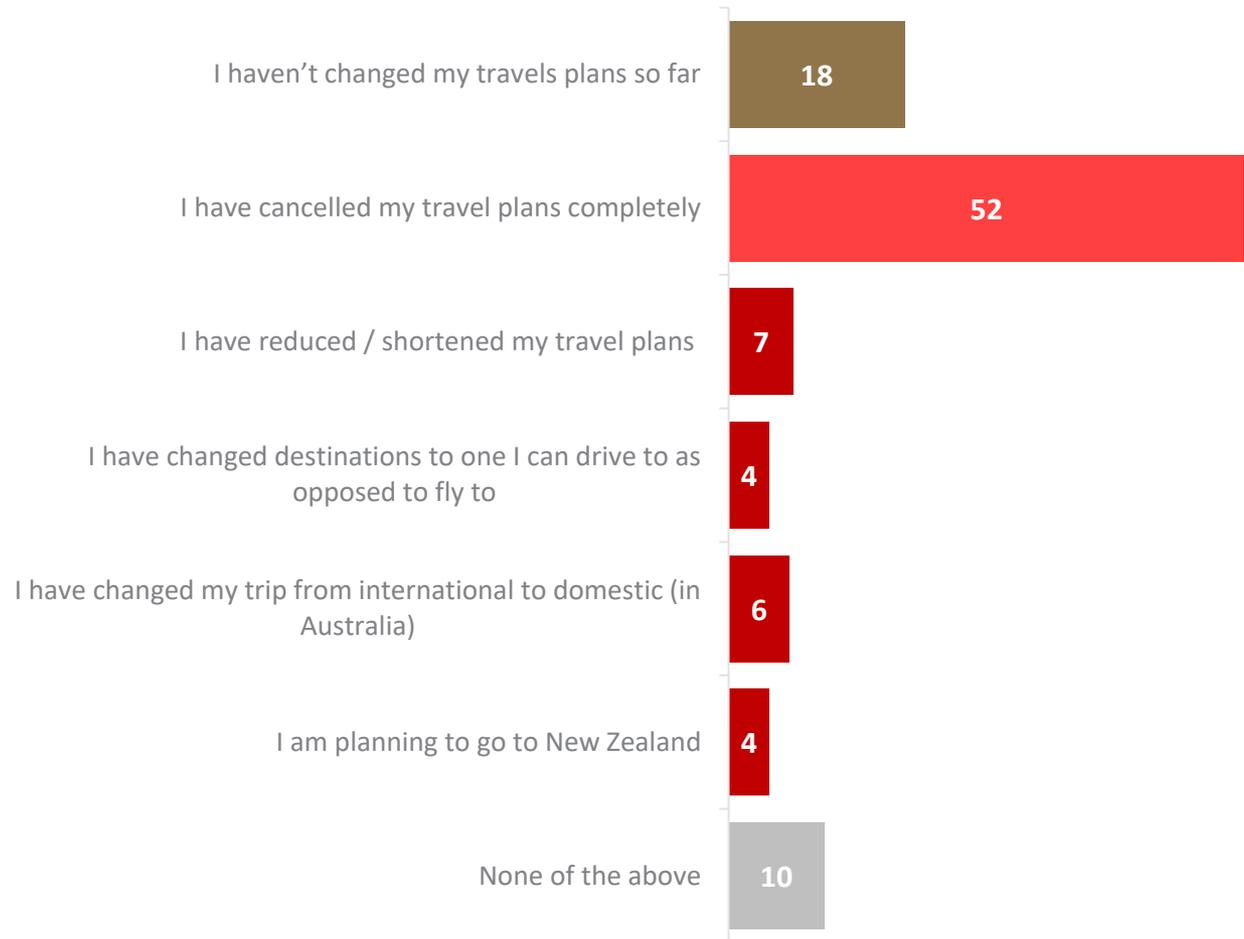


Methodology: Conducted nationally online over the period May 21-25, 2020, among a sample of 1229 people aged 18 years and over. Results were post-weighted to reflect the population distribution for age, education, sex and area

** Question: Before the start of the Covid-19 situation, were you and your household planning some holidays/travel in the next 12 months?

Half of those with travel plans have already cancelled their plans completely*

%



* Question: Thinking now about your travel plans for the next 12 months. Which statement best describes you and your household? Base People wit travel plans (n= 840)

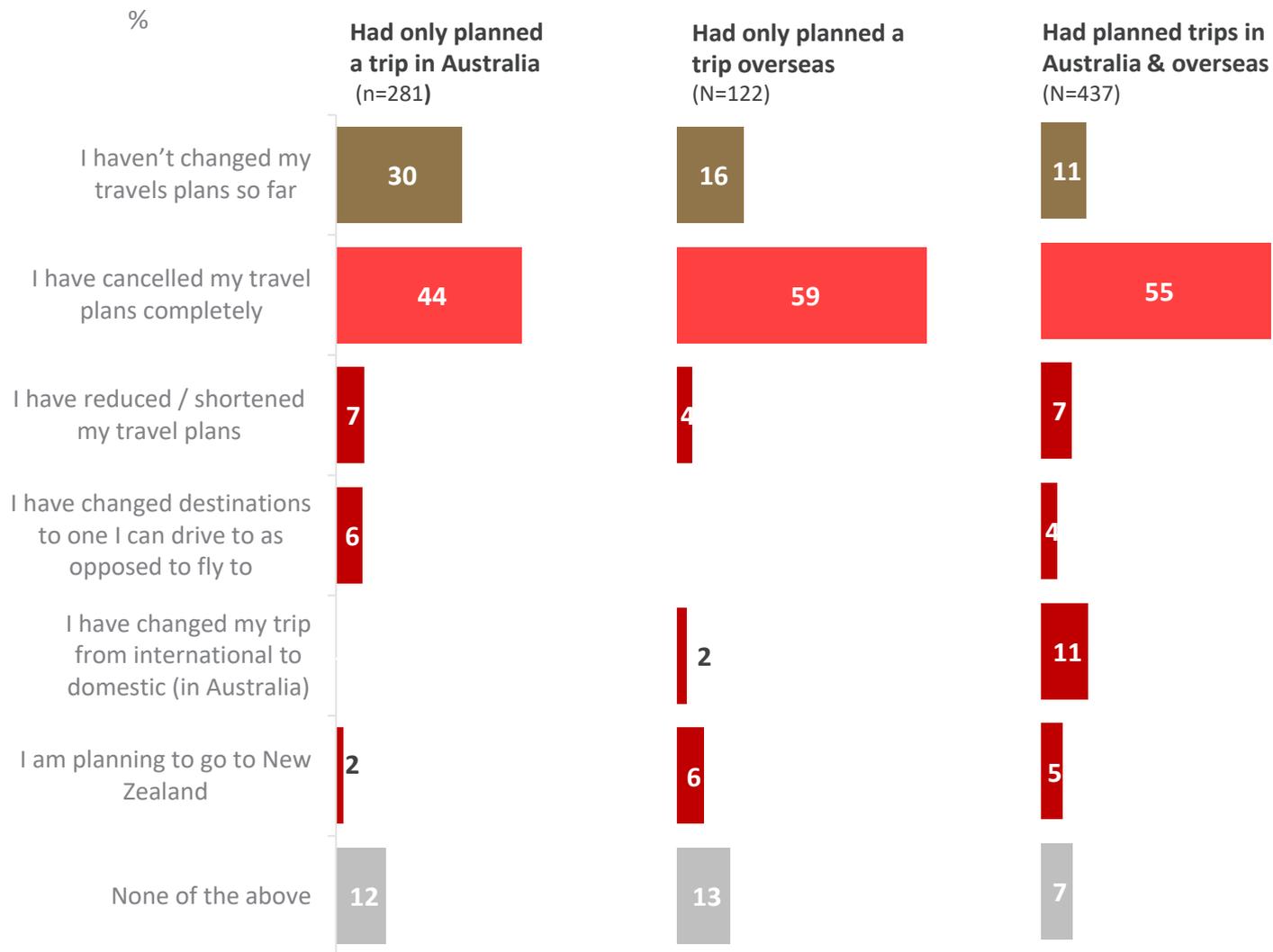
- 18% of those with travel plans haven't changed anything yet.

- This means that a large majority have already made changes to their travel plans, including half who have already cancelled their trip completely.

- Travelers will now probably fall into three categories:

1. **READY TO GO:** I'm out of here as soon as the restrictions are lifted.
2. **TRAVEL SAFE:** I'll travel again, but only when where it is considered "SAFE"
3. **NOT NOW:** Unlikely to travel until there is a vaccine (or a treatment)

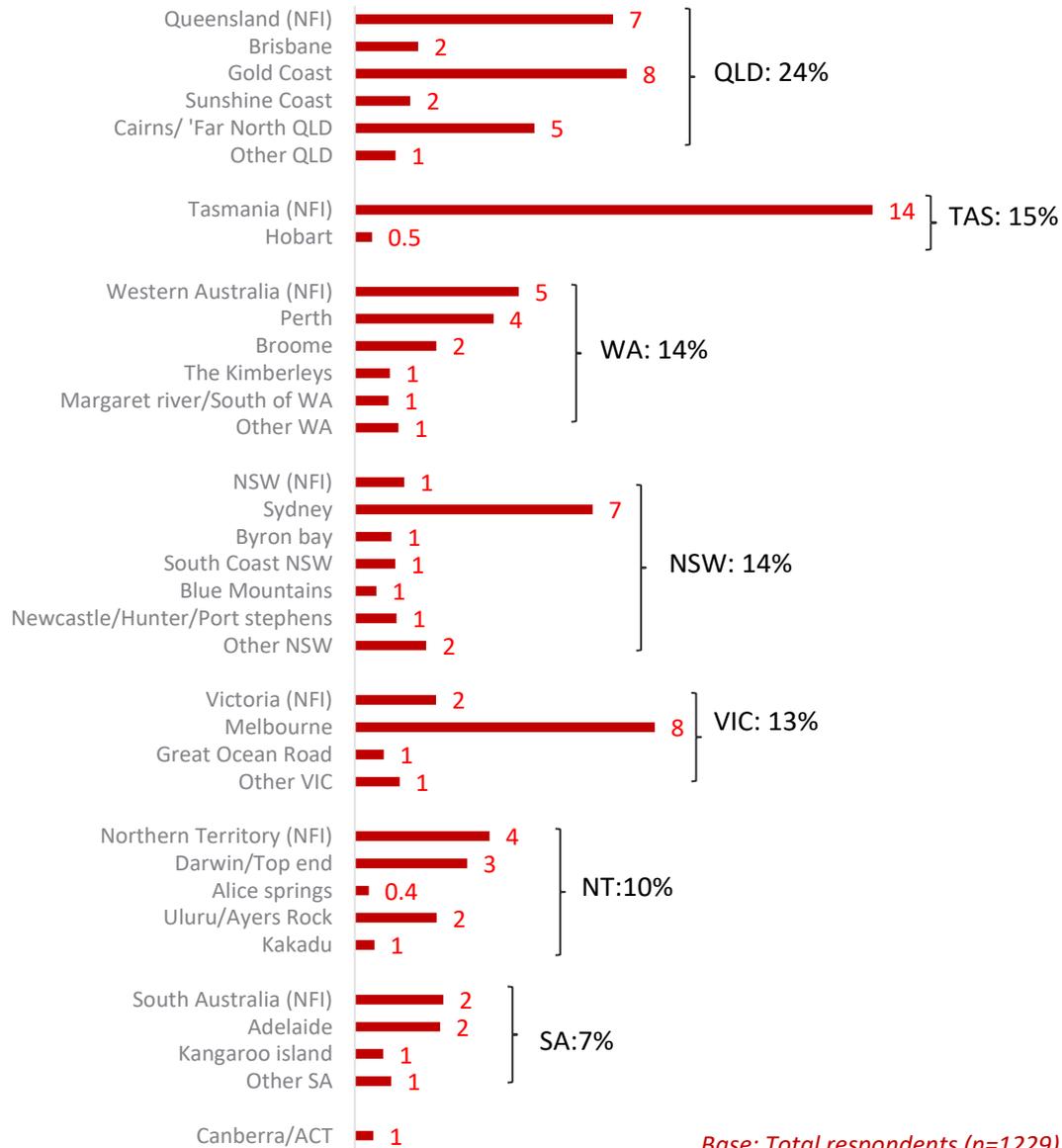
Two thirds of those who only had planned a domestic holiday/trip, have already cancelled or made some changes to their travel plans



* Question: Thinking now about your travel plans for the next 12 months. Which statement best describes you and your household?

- Unsurprisingly, those who had planned an overseas holiday are more likely to have changed their travel plans.
- Instead of changing their destination to domestic, overseas travelers – especially the under 35's - have preferred to cancel their trip completely and they might re-assess their options later in the year.
- Nonetheless, 44% of those who were only planning holidays in Australia - especially families with children - have also cancelled their travel plans, and this could be a direct result of...
 - the financial concerns and issues that some households are experiencing because of the Covid-19 situation;
 - the interstate travel restrictions that currently also limit travelers' options.

Their dream domestic destination



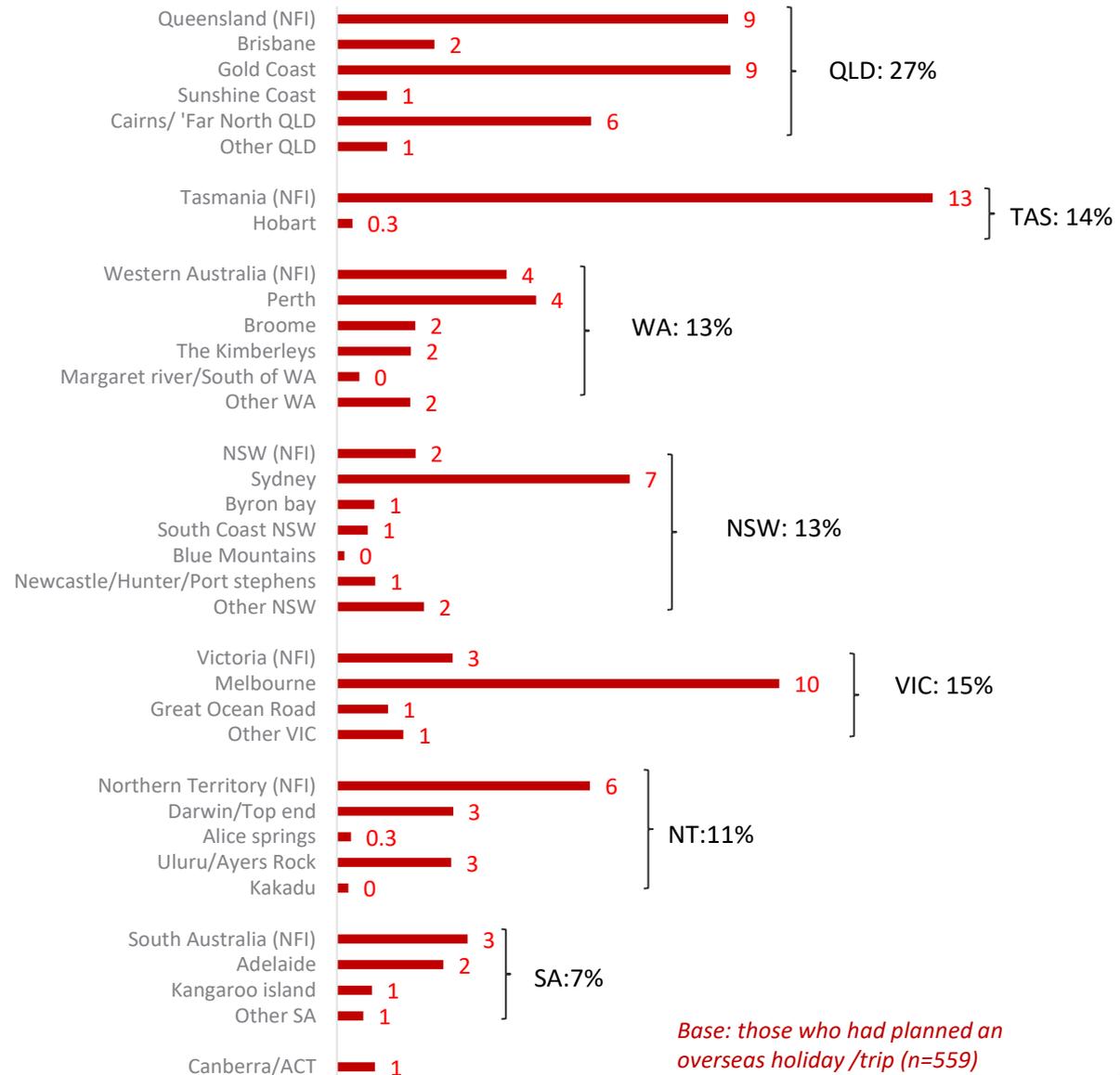
Base: Total respondents (n=1229)

* Question: If you could afford a holiday in Australia, which location in Australia would you like to visit most? (unprompted)

- As domestic travel restrictions will be gradually lifted before international travel restrictions are, the focus of the Tourism industry will be on domestic travel, where they will be strongly encouraging Australians to holiday here in Australia this year. But where would Australians like to go?
- About 1 in 4 adult Australians dream about holidays in Queensland.
- Less populated states like Tasmania and Western Australia (2.3m adult population) are mentioned by 3 in 10 Australians (5m votes).
- NSW and Victoria are also cited by 3 in 10 Australians, with Sydney and Melbourne receiving half of the votes.
- From a specific location point of view, three places/cities dominate the votes: Melbourne, Sydney and the Gold Coast. These three cities/destinations appeal specifically to the younger age-groups (18-24 and 24-35).

Australians who had planned an overseas holiday /trip before Covid-19 and their dream domestic destination

- Because of COVID-19 and while the international borders remain closed, it might be time for Australians who were planning an overseas trip to consider the island we live on.
- Like for all Australians, QLD is their preferred state (27%), but Tasmania, WA, NSW and Victoria all receive about 15% of votes each.



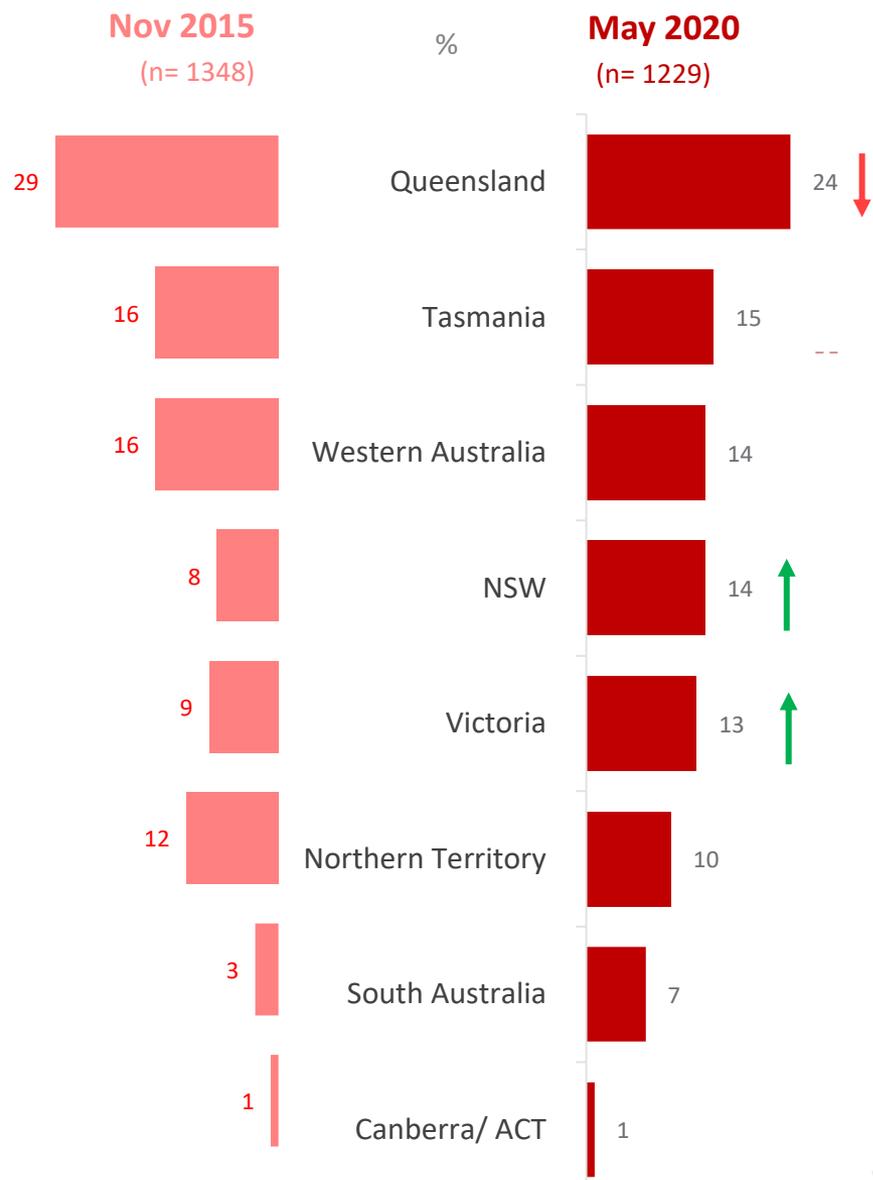
Base: those who had planned an overseas holiday /trip (n=559)

* Question: If you could afford a holiday in Australia, which location in Australia would you like to visit most? (unprompted)

Domestic dream destination by State (2020 vs 2015)

■ That same question was asked 5 years ago. Since 2015, the ranking of states as dream domestic destinations has not changed much:

- The Sunshine State - Queensland - remains the most preferred state, however, Queensland has lost some ground to NSW and Victoria.
- Tasmania and WA attractiveness scores remain unchanged in 2020 as they are preferred by 3 in 10 Australians



* Question: If you could afford a holiday in Australia, which location in Australia would you like to visit most? (unprompted)