

Roy Morgan — International —

Roy Morgan Research Pty. Ltd.
A.B.N. 91 007 092 944
Quality System Certified to AS/NZS ISO 9001

International Travel & Tourism Study

In November and early December, Roy Morgan International conducted an International Travel and Tourism Study in Australia, New Zealand, the United States and the United Kingdom.

The objective of this International Travel and Tourism Study is to create a substantive international framework of airline, travel and destination relevant benchmarks. So far we have interviewed respondents from Australia (n=1,032), New Zealand (n=2,315), the United Kingdom (n=2,022) and the United States of America (n=2,185). However, plans are in progress to conduct interviews in various Asian and European countries in early 2004.

The questions asked of respondents include:

1. **Travel intentions and recent travel** (with the aim of modelling intentions given terrorist activity in various locations)
 - a) Which countries people would like to visit;
 - b) Which countries people plan to visit (all and main destinations);
 - c) Which countries people would travel to if there were terrorist activity in or near their destination.

2. **Perceptions of countries** in terms of:
 - a) Would like to visit but too expensive to travel to;
 - b) Would like to visit but would not now because they are not safe;
 - c) Would not visit because don't like their political beliefs;
 - d) Would not visit because believe there is too much corruption.

3. **Airlines**
 - a) Preferred airlines for next international trip;
 - b) Perception of airlines in terms of safest in the world
 - c) Perception of airlines in terms of best value for money

We have also collected benchmark information on the level of safety in the country of survey (incidence of physical attacks or threats to safety on the street).

The following tables show the results for selected questions on international travel intention, behaviour, as well as attitudes to countries in terms of safety, expense, corruption, and political beliefs.

If you require more information on these results or any of the other questions in the survey, please contact:

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Offices also in: Sydney, Brisbane, Adelaide, Perth, Canberra, London, Auckland and USA

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Which countries would you like to visit?

Australia is the most popular country people would like to visit across all countries surveyed, closely followed by the USA and the United Kingdom.

Italy (23%), Germany (14%), Japan (8%) and Mexico (6%) are considerably more appealing destinations for Americans in comparison with the other three countries surveyed.

Interestingly, compared to Australian respondents, a greater proportion of respondents from the UK would like to visit NZ (21% cf 16%)

	COUNTRY SURVEYED			
	USA	Australia	NZ	UK
(unweighted)	2,185	1,032	2,312	2,022
USA	-	28%	28%	38%
Australia	33%	-	36%	35%
United Kingdom	29%	29%	31%	-
Italy	23%	13%	10%	11%
France	18%	11%	10%	9%
Germany	14%	6%	4%	3%
Europe - Unspecified	13%	16%	19%	5%
Ireland	11%	8%	5%	2%
Spain	9%	5%	4%	13%
New Zealand	9%	17%	-	21%
Japan	8%	4%	4%	5%
Canada	6%	18%	15%	16%
Mexico	6%	1%	1%	2%
Greece	6%	7%	5%	5%
Africa - Unspecified	6%	5%	3%	4%
China	5%	4%	4%	5%
Switzerland	5%	3%	3%	3%
Sweden	4%	1%	2%	0.5%
Brazil	4%	2%	2%	2%
Israel	3%	0.5%	1%	0.5%
Netherlands/ Holland	3%	2%	2%	1%
Russia	3%	3%	2%	3%
Austria	3%	3%	1%	2%
Egypt	3%	5%	4%	5%
South Africa	2%	3%	4%	5%
Thailand	2%	3%	3%	4%
India	2%	3%	3%	5%

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Thinking of the next three years, do you actually plan to travel to another country in the next 3 years?

Respondents in the UK (73%) and NZ (65%) are more likely to be planning to travel overseas in the next three years than those in Australia (45%) or the USA (49%).

	COUNTRIES SURVEYED			
	USA	UK	Australia	NZ
(unweighted sample size)	2185	2022	1032	2312
TRAVEL IN NEXT 3 YEARS				
Yes	49%	73%	45%	65%
No	47%	23%	51%	32%
Can't Say	5%	4%	4%	3%

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Which is the main country you plan to travel to for your next international trip (in the next 3 years)?

Around a third (34%) of New Zealanders planned to visit Australia as their main destination in the next three years, yet only 7% of Australians plan to visit New Zealand as their main destination in the next three years.

Spain (11%) and France (7%) are the most popular European destinations for people from the UK.

For Americans, the UK (6%) is the most common main destination for international travel in the next three years, edging out Mexico (5%) and Italy (5%).

	COUNTRY SURVEYED			
	USA	Australia	NZ	UK
(unweighted)	2,185	1,032	2,312	2,022
USA	-	5%	5%	13%
United Kingdom	6%	7%	7%	-
Mexico	5%	0%	0%	0%
Italy	5%	3%	0.5%	3%
Canada	4%	3%	2%	3%
Australia	3%	-	34%	4.0%
Germany	3%	0.5%	0.5%	2%
France	3%	1%	1%	7%
Ireland	2%	1%	0.5%	1%
Spain	1%	0.5%	0%	11%
New Zealand	0.5%	7%	-	2%
TOTAL INTEND TO TRAVEL IN NEXT 3 YEARS	49%	45%	65%	73%
TOTAL NOT INTEND TO TRAVEL IN NEXT 3 YEARS	51%	55%	35%	27%

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Which countries would you like to visit but believe they are too expensive to travel to?

Australia ranked highest amongst Americans (20%) and Britons (26%) as a country they would like to visit but consider too expensive to travel to.

The US was seen as a desirable but expensive location for high proportions of Australians (23%), New Zealanders (23%) and Britons (20%).

New Zealanders (30%) and Australians (21%) considered the UK to be a country they would like to visit but considered it too expensive.

	USA	UK	Australia	NZ
(unweighted sample size)	2185	2022	1032	2312
United States	–	20%	23%	23%
Australia	20%	26%	–	4%
France	11%	2%	5%	4%
United Kingdom	10%	–	21%	30%
Japan	10%	6%	6%	4%
Italy	8%	2%	3%	3%
Germany	5%	1%	2%	1%
New Zealand	4%	13%	2%	–
China	3%	3%	1%	1%
Switzerland	3%	2%	3%	2%
Ireland	3%	1%	2%	1%
Canada	1%	5%	4%	5%

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Which countries would you like to visit but would not visit now because they are not safe?

Amongst Americans, Israel (18%) and Iraq (15%) were most likely to be mentioned as countries they would like to visit but would not due to safety concerns.

Iraq (13%) and Turkey (10%) received the most mentions by Britons.

Amongst Australians, the United States (13%), Indonesia (11%) and Iraq (10%) ranked highest.

Similarly in New Zealand, the US (14%), Iraq (13%) and Indonesia (11%) were countries that New Zealanders would like to visit but considered unsafe.

	USA	UK	Australia	NZ
(unweighted sample size)	2185	2022	1032	2312
USA	—	7%	13%	14%
Israel	18%	8%	6%	7%
Iraq	15%	13%	10%	13%
Egypt	7%	6%	8%	3%
Turkey	4%	10%	6%	3%
Afghanistan	4%	3%	5%	6%
Iran	4%	3%	3%	5%
China	3%	1%	1%	1%
Indonesia	1%	3%	11%	11%

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For respondents planning to travel to either Australia, NZ, USA or the UK in the next 3 years, only a very small percentage of people felt that these countries were not safe at present. Of the respondents planning to visit the USA, only 3% felt that the US was currently unsafe.

Countries plan to visit in next 3 years.

	USA	Australia	NZ	UK
(unweighted sample size)	755	1253	210	615
Which Countries would you like to visit but believe that they are not safe?				
USA	3%	3%	5%	1%
UK	0%	1%	0%	1%
Australia	0%	1%	0%	0%
NZ	0%	0%	0%	0%

Which countries would you not visit because of their political beliefs?

Iraq ranked highest in all countries (US - 16%, UK - 10%, Australia - 9%, NZ - 10%) as a place people would not visit because of the country's political beliefs.

Interestingly, the US ranked quite highly in Australia (7%) and New Zealand (7%) as a country that would not be visited because of its political beliefs.

	USA	UK	Australia	NZ
(unweighted sample size)	2185	2022	1032	2312
USA	–	4%	7%	7%
Iraq	16%	10%	9%	10%
Iran	9%	4%	5%	6%
France	9%	2%	0%	0%
China	8%	4%	6%	6%
Russia	7%	3%	5%	3%
North Korea	5%	1%	2%	2%
Cuba	5%	1%	1%	1%
Saudi Arabia	4%	2%	3%	2%
Germany	4%	1%	1%	1%
Afghanistan	3%	2%	4%	4%
Israel	3%	3%	3%	3%
South Africa	1%	4%	3%	3%
Zimbabwe	0%	4%	8%	4%

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Which countries would you not visit because you believe there is too much corruption?

Amongst Americans, Iraq (13%) received the most mentions as country that would not be visited because of corruption, with Russia being mentioned by 9% and Mexico by 6% of Americans.

Britons most mentioned Iraq (7%), Russia (6%) and the US (5%).

The US ranked highest amongst Australians with 8% saying they would not visit the country because of a perception of corruption, followed by Russia (6%) and Iraq (5%).

New Zealanders mentioned Iraq (8%), the US (7%) and Russia (5%) as countries they would not visit because of a perception of corruption in those countries.

	USA	UK	Australia	NZ
(unweighted sample size)	2185	2022	1032	2312
USA	–	5%	8%	7%
Iraq	13%	7%	5%	8%
Russia	9%	6%	6%	5%
Mexico	6%	1%	1%	1%
Colombia	5%	3%	3%	1%
Iran	5%	2%	2%	3%
China	4%	2%	2%	3%
Afghanistan	4%	1%	1%	3%
Cuba	4%	2%	1%	1%
North Korea	2%	0%	1%	1%
Saudi Arabia	2%	1%	1%	1%
South Africa	2%	3%	2%	3%
India	1%	2%	3%	3%
Pakistan	1%	2%	1%	2%
Nigeria	1%	3%	0%	1%
Philippines	1%	1%	3%	2%
Zimbabwe	0%	3%	3%	3%