

International Travel & Tourism Study

(Published March 2005)

Roy Morgan International conducts surveys in the US, UK, Australia, New Zealand and Indonesia on a continuous basis. Respondents are asked about which countries they would like to visit (travel preference) and which countries they intend to travel to on their next holiday (travel intention). Other questions include airlines, hire cars and hotels preferred.

In November and early December 2003, Roy Morgan International conducted a special International Travel and Tourism Study in Australia, New Zealand, the United States and the United Kingdom.

The objective of the 2003 International Travel and Tourism Study was to create a substantive international framework of airline, travel and destination relevant benchmarks. Sample sizes for the survey were: Australia (n=1,032), New Zealand (n=2,315), the United Kingdom (n=2,022) and the United States of America (n=2,185).

The questions asked of respondents included:

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.

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

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The following tables show the results for selected questions on international travel intention, behaviour, from our ongoing Holiday Tracking Surveys, as well as attitudes to countries in terms of safety, expense, corruption, and political beliefs from the special 2003 survey.

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

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Which countries would you like to visit?

England, Australia and Italy are the most popular countries people in the US would like to visit.

People surveyed in the UK were more likely to indicate they would like to visit India than those surveyed in the other three countries

	COUNTRIES SURVEYED			
	USA	UK	Australia	NZ
Sample size	1,681	1,095	9,382	7,819
Time period	Mar 03-Feb 04	Oct 03-Feb 04	Jan-Dec 04	Nov 03-Oct 04
India	3%	5%	3%	3%
United States	-	53%	33%	25%
Australia	25%	28%	-	73%
New Zealand	10%	17%	31%	-
England	28%	-	29%	29%
Canada	21%	20%	17%	14%
Italy	25%	24%	17%	17%
France	19%	36%	16%	16%
Fiji	7%	5%	12%	21%
Greece	13%	12%	9%	11%
Ireland	9%	22%	9%	8%
Thailand	4%	8%	9%	7%
Spain	13%	32%	8%	9%
Switzerland	8%	6%	8%	5%
Japan	8%	6%	7%	5%
Egypt	8%	8%	7%	6%
Germany	11%	8%	7%	7%
Singapore	2%	4%	6%	6%
Hong Kong	4%	6%	5%	5%
China (mainland)	4%	5%	5%	4%
Russia	3%	5%	5%	4%
Malaysia	1%	3%	4%	3%
South Africa	4%	7%	4%	4%
The Netherlands	4%	10%	3%	4%
Portugal	3%	12%	3%	3%

Base: Respondents who have a preference to travel overseas

Source: Single Source Holiday Tracking Studies (Aust, USA, UK, NZ)

Do you intend to travel overseas for at least one night on your next trip?

Respondents in the UK (43%) and NZ (33%) are more likely to be planning to travel overseas on their next trip than those in Australia (19%) or the USA (19%).

	COUNTRIES SURVEYED			
	USA	UK	Australia	NZ
(Unweighted sample size)	3,275	1,570	24,516	12,583
TRAVEL ON NEXT TRIP				
Yes	19%	43%	19%	33%
No	81%	57%	81%	67%

Source: Single Source Holiday Tracking Studies (Aust, USA, UK, NZ)

Which is the main country you plan to travel to for your next international trip?

Almost two thirds (60%) of New Zealanders planned to visit Australia on their next trip, yet only 23% of Australians plan to visit New Zealand on their next trip.

Spain (25%) and France (22%) are the most popular European destinations for people from the UK.

For Americans, Canada (16%) is the most common main destination for intended international travel, edging out England (11%) and Italy (10%). Of the four countries surveyed, Americans had the highest intention to visit India (4%).

	COUNTRY SURVEYED			
Market	USA	UK	Australia	NZ
Sample size	630	685	4,023	4,075
Weighted Population ('000)	44,833	21,087	3,093	1,046
Time period	Mar 03-Feb 04	Oct 03-Feb 04	Jan-Dec 04	Nov 03-Oct 04
India	4%	2%	2%	1%
United States	-	22%	20%	12%
Australia	6%	10%	-	60%
New Zealand	4%	4%	23%	-
England	15%	-	22%	14%
France	10%	22%	13%	6%
Italy	11%	10%	11%	6%
Singapore	0%	3%	8%	5%
Canada	16%	5%	8%	5%
Thailand	1%	3%	8%	4%
Fiji	2%	1%	7%	8%
Germany	7%	3%	6%	3%
Hong Kong	1%	2%	6%	3%
Ireland	5%	9%	5%	3%
Switzerland	4%	2%	5%	2%
Spain	5%	25%	5%	3%
Japan	3%	2%	5%	2%
Malaysia	1%	1%	5%	2%
Greece	5%	4%	5%	3%
China (mainland)	1%	1%	4%	2%
Russia	2%	1%	3%	2%
The Netherlands	4%	4%	3%	2%
Egypt	2%	2%	3%	1%
South Africa	1%	2%	2%	2%
Portugal	1%	3%	1%	1%

Base: Respondents who intend to travel overseas on their next trip

Source: Single Source Holiday Tracking Studies (Aust, USA, UK, NZ)

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
India	0.5%	1%	*	*
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%

* Less than 0.5%

Source: Roy Morgan International Travel and Tourism Survey, Nov-Dec 2003

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
India	1.5%	2%	1.5%	2.5%
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%

Source: Roy Morgan International Travel and Tourism Survey, Nov-Dec 2003

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%

Source: Roy Morgan International Travel and Tourism Survey, Nov-Dec 2003

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
India	1.0%	2.0%	1.5%	2.0%
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%

Source: Roy Morgan International Travel and Tourism Survey, Nov-Dec 2003

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
India	1%	2%	3%	3%
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%
Pakistan	1%	2%	1%	2%
Nigeria	1%	3%	0%	1%
Philippines	1%	1%	3%	2%
Zimbabwe	0%	3%	3%	3%

Source: Roy Morgan International Travel and Tourism Survey, Nov-Dec 2003