

KANTAR



Impact of the COVID-19 pandemic on intentions to travel among Australian Active Considerers

June 2022

Fieldwork period:

21st June – 3rd July 2022



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Key insights

Australian Active Considerers (ACs) are ready to travel: 71% of ACs already have a holiday planned in the next 12 months, with New Zealand and domestic destinations being at the top of their list to visit

The urgency of international travel has softened: while most ACs are keen to travel overseas in the next 12 months, they are now more likely to do this later within that period than they intended back in Mar 22

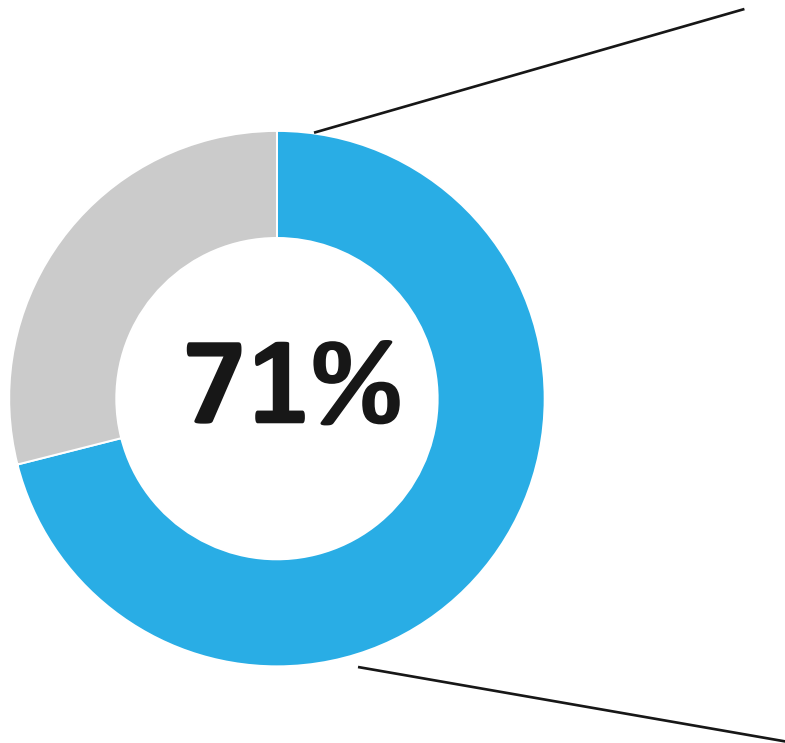
41% of ACs are looking to visit New Zealand by the Summer of 2023, with the most common lead time to book a holiday to New Zealand being 3 months

When booking, most ACs are likely to book their New Zealand holiday either directly with operators or via Online Travel Agencies (OTAs) due to perceived simplicity of the booking process and flexibility in making changes

71% of ACs already have a holiday planned in the next 12 months, with New Zealand and domestic destinations being at the top of their list to visit

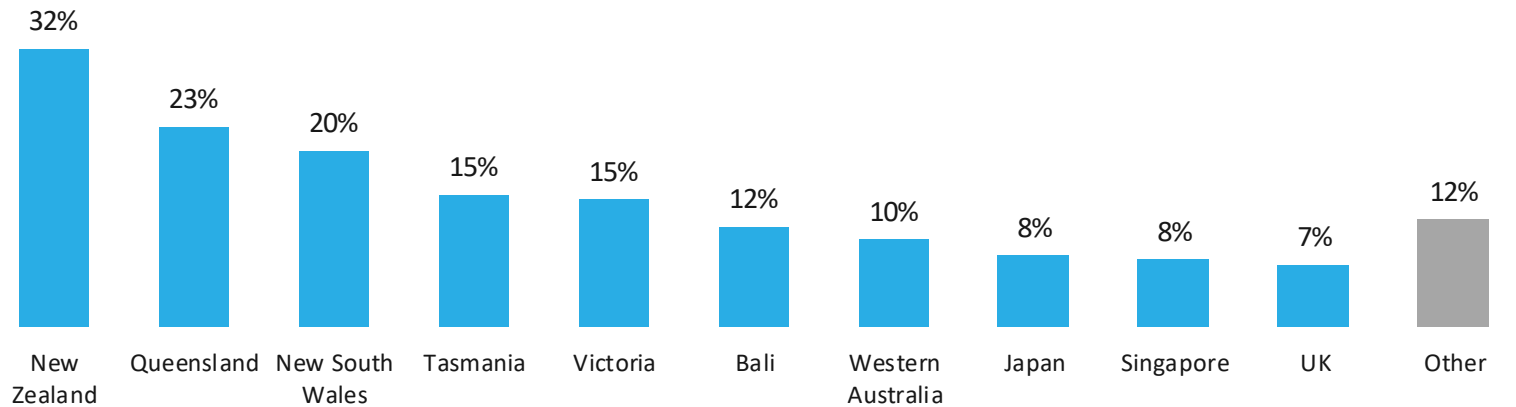
Holiday planned within next 12 months

% AC | Jun 22



Top 10 destinations ACs have planned to visit within next 12 months

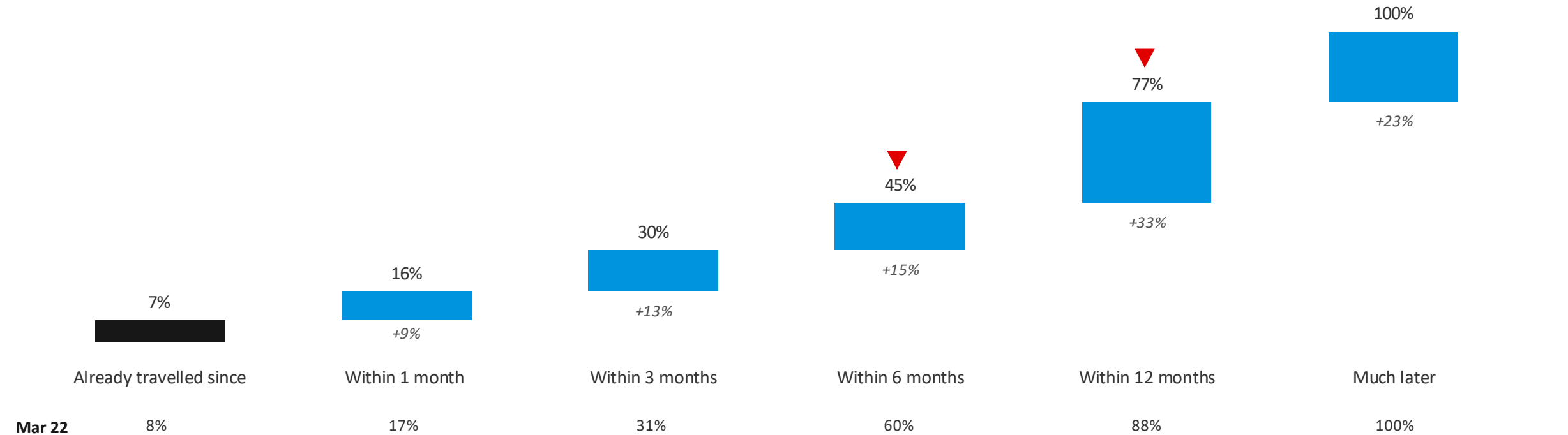
% AC who stated they are intending to holiday | Jun 22



While ACs are keen to travel overseas in the next 12 months, they are now more likely to do this later within that period than they intended back in Mar 22

Speed of overseas holiday demand recovery

% AC | Jun 22



▲/▼ significantly higher/lower than previous period

Notes:

1. Sample: Active Considerers (AC) March 22 n = 300 | June 22 n = 300

Q: "Now that many international restrictions have lifted and you can travel without having to quarantine, how soon would you want to take an overseas holiday?"

Question wording is regularly amended to reflect the travel restriction status at time of data collection. See Appendix for detailed wording.

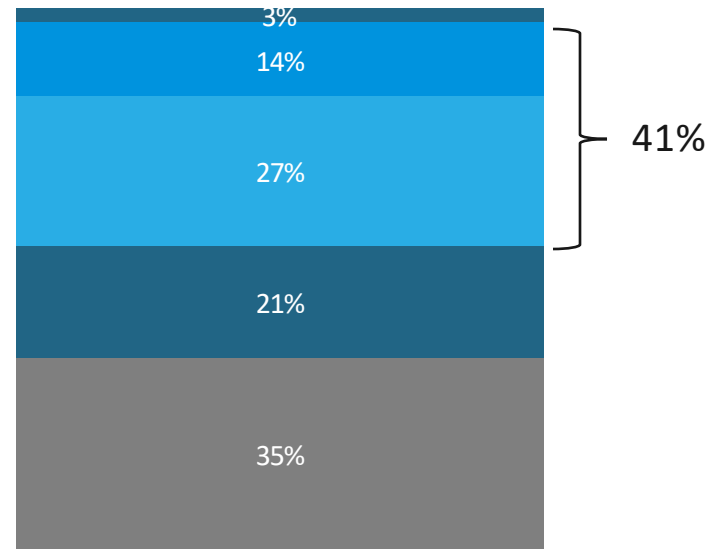


41% of ACs are looking to visit New Zealand by the Summer of 2023

Likely dates to travel to New Zealand

% AC | Jun 22

- I have already travelled to New Zealand since opened
- Between June - October 2022
- Between November 2022 - February 2023
- Between March - June 2023
- Later than June 2023

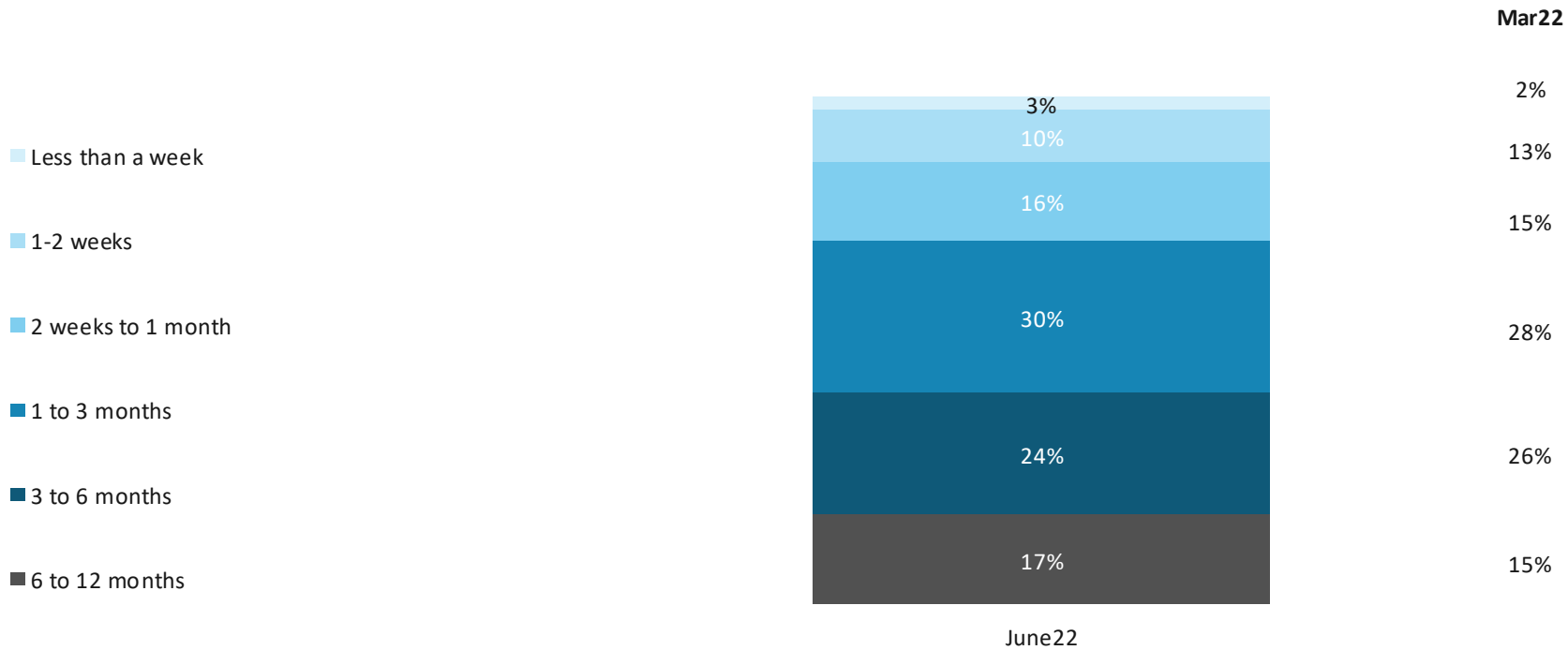


June 22

The most common lead time to book a holiday to New Zealand is 3 months

Booking lead time for trip to New Zealand

% AC | Jun 22

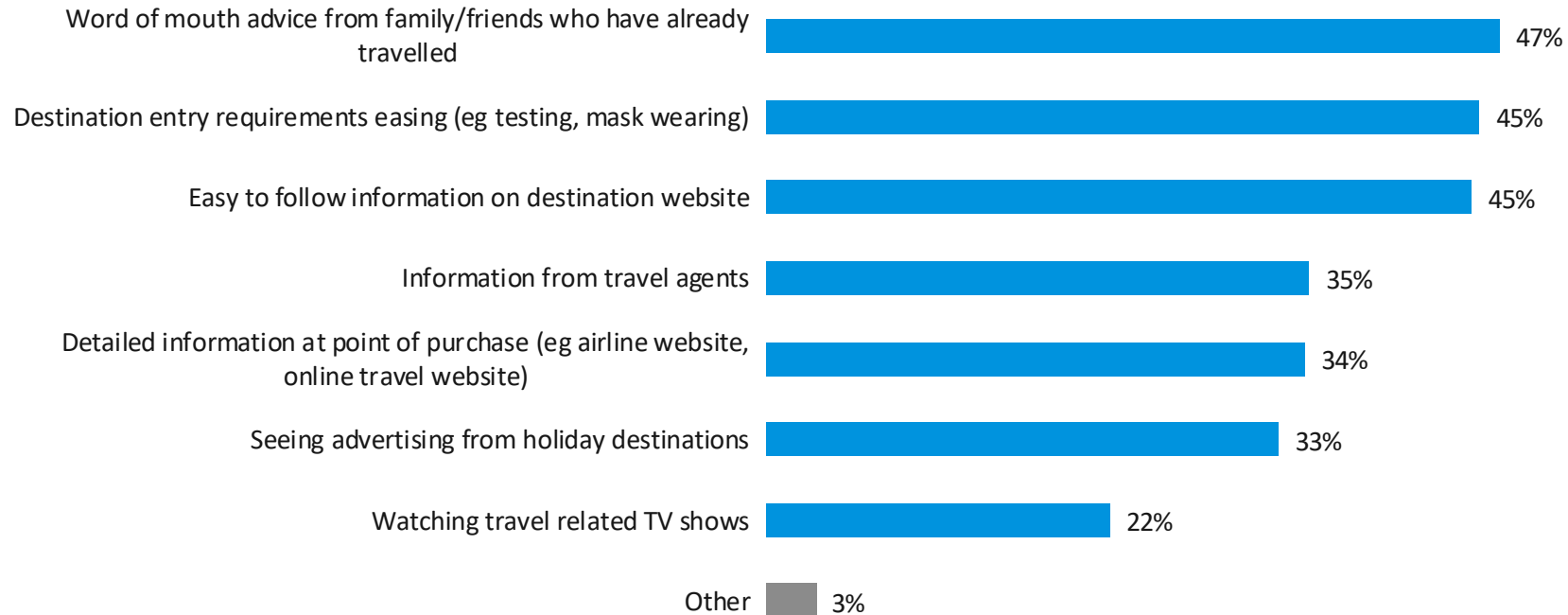


▲/▼ significantly higher/lower than previous period

Hearing about safe travel experiences of their friends and family, and seeing destinations easing off their COVID-19 travel requirements put most ACs at ease with international travel

Channels and content sources that ACs use to build confidence in international travel

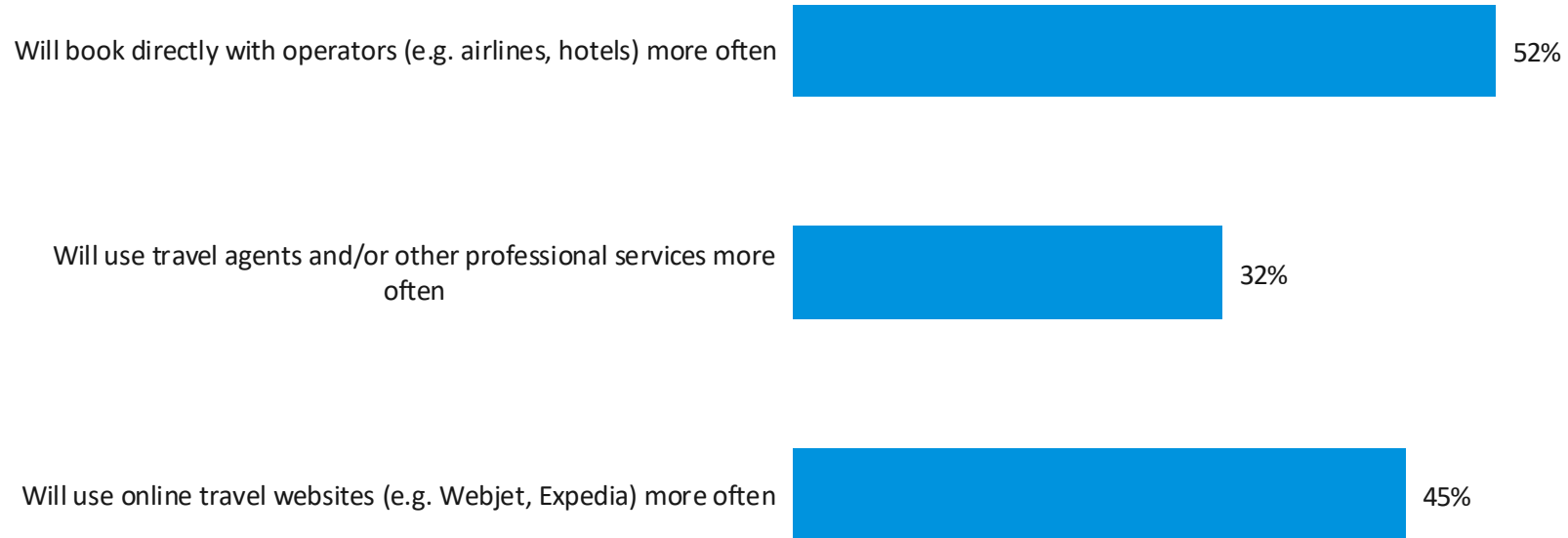
% AC who stated they have not been on overseas holiday since restrictions lifting | Jun 22



Most ACs are likely to book their New Zealand holiday either directly with operators or via OTAs

Preferred method of booking trip to New Zealand

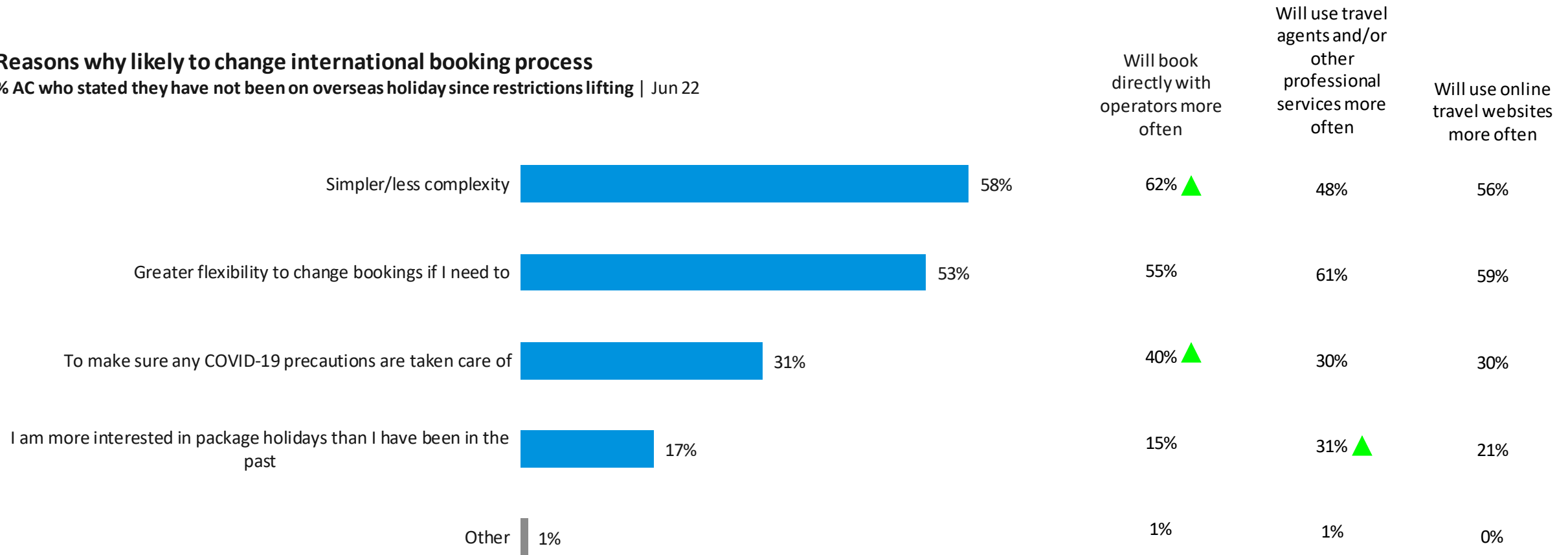
% AC who stated they have not been on overseas holiday since restrictions lifting | Jun 22



Perceived simplicity and flexibility are the key reasons ACs choose a specific booking method

Reasons why likely to change international booking process

% AC who stated they have not been on overseas holiday since restrictions lifting | Jun 22



▲/▼ significantly higher/lower than other method

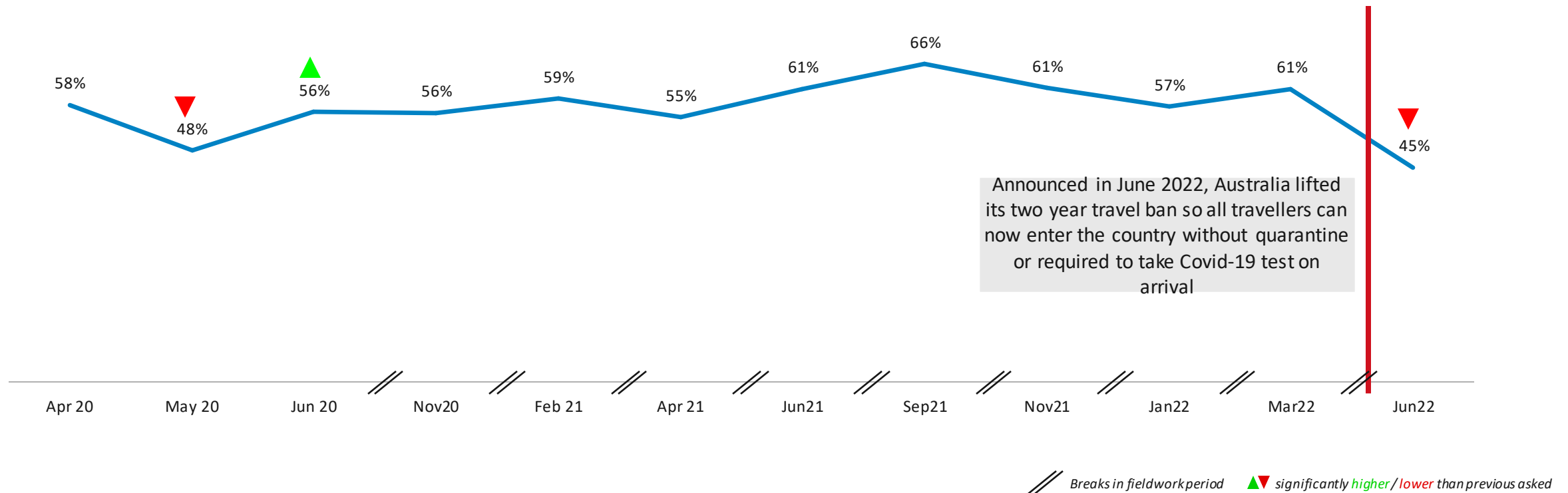
Appendix question wording overtime

	Desire to travel <u>overseas</u> for holiday	Desire to travel to <u>New Zealand</u> for holiday
Mar20		After international travel restrictions are lifted and flights are available again, how soon would you want to take a New Zealand holiday?
Apr20	After international travel restrictions are lifted and flights are available again, how soon would you want to take an overseas holiday?	No change in question wording since Mar20
May20	No change in question wording since Mar20	No change in question wording since Mar20
Jun20	No change in question wording since Mar20	No change in question wording since Mar20
Nov20	No change in question wording since Mar20	No change in question wording since Mar20
Feb21	No change in question wording since Mar20	No change in question wording since Mar20
Apr21	No change in question wording since Mar20	No change in question wording since Mar20
Jun21	After international restrictions are lifted and you can travel without having to quarantine, how soon would you want to take an overseas holiday?	After international travel restrictions are lifted, and you can travel without having to quarantine, how soon would you want to travel to New Zealand for a holiday?
Jul21		For Non-NSW residents= Now that travel restrictions have been lifted and you can travel without having to quarantine, how soon do you want to travel to New Zealand for a holiday?, For NSW residents = Currently there is a pause on the trans-Tasman bubble between New Zealand and a number of Australian states, including New South Wales and Queensland. After these restrictions are lifted, how soon would you want to travel to New Zealand for a holiday?
Sep21	No change in question wording since Jun21	After international travel restrictions are lifted, and you can travel without having to quarantine, how soon would you want to travel to New Zealand for a holiday
Nov21	No change in question wording since Jun21	No change in question wording since Sep21
Jan22	Australian international borders are now open which means that you can travel from Australia and back if you have proof of vaccination or that you cannot be vaccinated, and if you can provide negative Covid tests and/or self-isolate depending on the requirements of your state. With this in mind, how soon would you want to take an overseas holiday?	Currently, New Zealand borders are closed to tourists. Once these are lifted, and you can travel without having to quarantine, how soon would you want to travel to New Zealand for a holiday?
Mar22	Now that many international restrictions have lifted and you can travel without having to quarantine, how soon would you want to take an overseas holiday?	No change in question wording since Jan22
Jun22	No change in question wording since Mar22	Discontinued

Methodological changes in question-wording, from a future state intention (once travel restrictions ease) to the current state (as quarantine-free travel is now possible); therefore, personal finance and commitments could have influence practicalities of short term travel

Desire to travel overseas for holiday within the next six months⁽¹⁾⁽²⁾

% AC | Apr 20 – Jun 22



Notes:

1. Question wording is regularly amended to reflect the travel restriction status at time of data collection. See Appendix for detailed wording.
2. Sample size from Apr20 to Jun22, respectively n = 300, 299, 300, 302, 302, 300, 300, 450, 300, 300, 300, 300