

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

June 2022

Fieldwork period: 21<sup>st</sup> June – 3<sup>rd</sup> July 2022



#### **Key insights**

There is a strong appetite for travel: half of the Active Considerers (ACs) have already travelled internationally in the last six months, the majority (82%) are planning a big long-haul overseas holiday by April 2023, and 44% of ACs would like to take overseas holidaysmore often in the next two years

ACs who are looking to take trips more often, on average, plan to take between 3 and 4 international holidays a year, with a combination of short breaks and long trips

ACs are most commonly looking for destinations that offer; the ability to freely move around in nature, opportunities to explore and learn new things, and feel safe to travel around

Visits to New Zealand are likely to be spread out across the next year – with 37% of ACs wanting to visit by the summer of 22/23

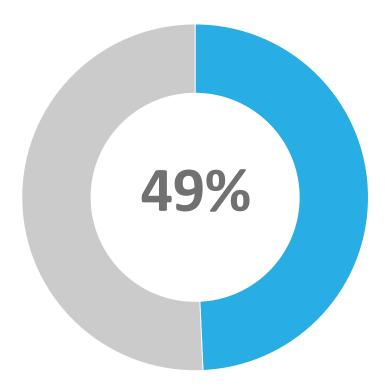
With COVID-19 related factors are becoming less relevant, price of airfare and flight length are top concerns when booking a holiday to New Zealand – travel promotions, especially through travel agents (both physical and online), can motivate ACs to move from planning their holiday into booking



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#### Half of ACs have travelled overseas for a holiday in the last six months

Travelled overseas for a holiday in the last six months % AC | Jun 22





Notes: 1. Sample: Active Considerers (AC) June 22 n = 300 Q: "Have you travelled overseas on holiday in the last 6 months?"



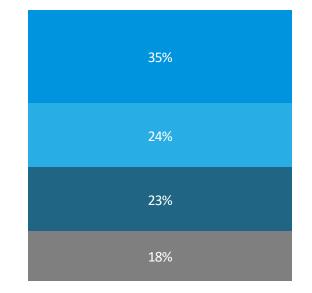
### 82% of ACs plan to take a big long-haul overseas holiday by April next year

Likely dates to take next big trip (long-haul) overseas holiday % AC | Jun 22

Between July 2022 and October 2022

Between November 2022 and February 2023
Between March 2023 and April 2023

Later than May 2023



June 22





Freedom to move in nature, opportunities to explore and learn new things, and feeling safe when travelling around are the key attributes when choosing a holiday destination

## Attributes considered when choosing destination % AC | Jun 22

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		Mar 22
Freedom to move in nature		56% 57%
Opportunities to learn & explore new things		55% 🔺 44%
Safe to travel around this destination	51%	47%
Opportunities for relaxing experiences	45%	46%
Clean and unpolluted environment	43%	41%
Has interesting & vibrant cities to visit	39%	34%
Affordable	32%	33%
Quality local food and drink	32%	35%
Locals are welcoming of visitors	30%	35%
A wide variety of outdoor & adventure activities	30%	36%
Has robust safety measures in prevent spread of COVID-19	27%	23%
Uncrowded public spaces and tourist attractions	24%	43%
Good shopping	20%	13%
Has been successful in handling COVID-19	17%	20%

▲▼ significantly higher / lower than previous period



# Discovering and experiencing new cultures combined with the longing for travel are most common motivators to take an international holiday

## Needs, reasons, and motivations to take an international holiday % AC | Jun 22

To discover & experience new cultures	Longing for travel	To relax	Re-connecting with family
Wants to get to know other countries	I haven't been on vacation in a long time,	Relaxation and getting to know new	Going there with my daughter because she
Get to know a lot of new things	would like to get to know a new country and relax with my son and myself	landscapes and people and their traditions and preferences	lived there for 1 year
	relax with my son and myself		Traveling to Paris with my girlfriend to see
Spend different moments getting to know another culture and people from another	I would love to see the world and travel to my favourite country again to feel fulfilled	Recreation adventure cultural education	the Eiffel Tower
culture		Relaxation, explore new things, spend time	I want to experience something nice with my
To get to know and enjoy new cultures and the	I haven't been on vacation for at least 3 years and now I want to experience	with family	girlfriend, far away from home.
vastness of the world better	something.	Relaxation, gain new impressions, get to know something new!	Escape the winter and visit friends
Improve language and see something new	After a long time with the corona virus, I	know something new.	Visiting friends in Spain, motorcycle tour of
Curiosity, broadening of horizons, relaxation	would like to see something completely new and beautiful again. And New Zealand is one	Relaxation, the urge for something new, distant cultures, foods and countries	Europe without booking
Explore new landscapes and cities, relax, enjoy nature	of the most beautiful countries in my opinion.	Relaxation and new adventures	
See and experience something different. curiosity	I want to get out again after 5 years without a vacation		

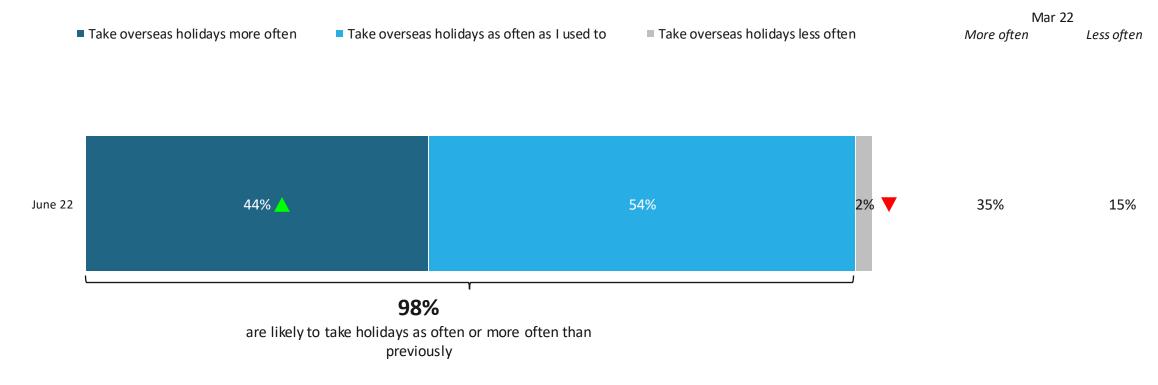




# 44% of ACs would like to take overseas holidays more often in the next two years – this has increased from 35% in Mar 22

### Expected change to <u>overseas</u> holiday travel % AC | Jun 22

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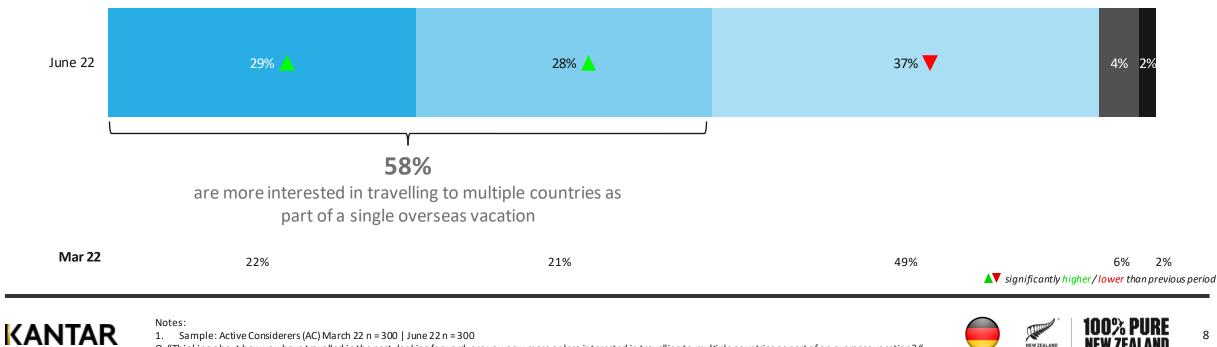
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# There is growing interest in travelling to multiple overseas destinations as a part of a single overseas trip

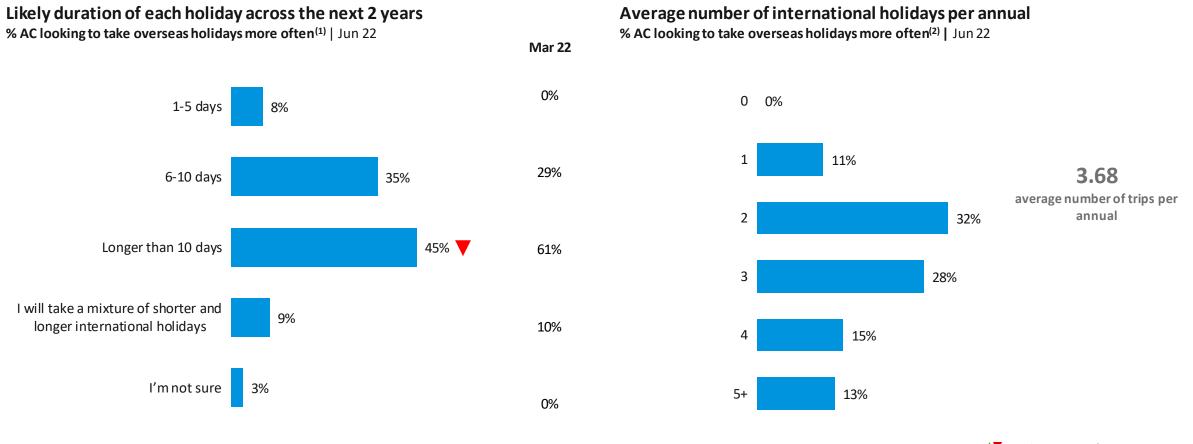
### Interest in multiple countries while travelling overseas % AC | Jun 22

I am now much more interested I am now slightly more interested My interest in multiple destination international travel is the same I am now slightly less interested I am now much less interested



9: "Thinking about how you have travelled in the past, looking forward, are you now more or less interested in travelling to multiple countries as part of an overseas vacation?"

ACs who are looking to take trips more often, on average, plan to take between 3 and 4 international holidays a year, with a combination of short breaks and long trips



#### Notes:

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1. Sample: Active Considerers (AC); March 22 n = 101 | June 22 n = 142

2. Sample: Active Considerers (AC): Jun22 n = 119 (excluding those who 'don't know')

Q: "In general, how long (in days) do you think you will spend on most international holidays over the next two years?" Q: "Over the next two years, how many international holidays do you think you might take in a year?" ▲▼ significantly higher / lower than previous period

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# On average, ACs are likely to take three months from once they had a destination in mind to book a holiday

Lead time between identifying destination and booking holiday % AC | June 22





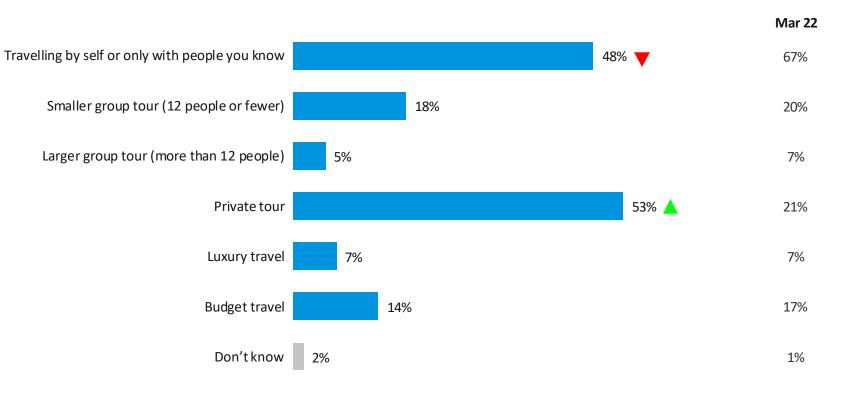




### Preference for a private tour has increased considerably since Mar 22

#### Interest in type of international holiday % AC | Jun 22

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Notes: 1. Sample: Active Considerers (AC) June 22 n = 300 Q: "When you take your next overseas holiday, which of the following types of holidays would you be interested in booking?"

# Visits to New Zealand are likely to be spread out across the next year – with 37% of ACs wanting to visit by the summer of 22/23

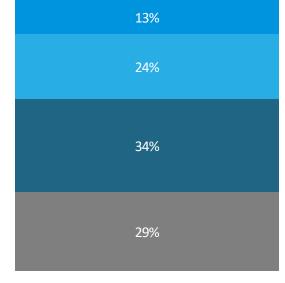
Likely dates to travel to New Zealand % AC | Jun 22

Between June 2022 and October 2022

Between November 2022 and February 2023

Between March 2023 and June 2023

Later than June 2023



June 22





#### Holidays and being able to explore New Zealand are key reasons ACs book a trip to New Zealand

### Key reason to book a trip to New Zealand % AC | Jun 22 **Business or conference** Education or study 1% (Mar 22 2%) 1% (Mar 22 2%) Working holiday 2% (Mar 22 5%) Enjoy a holiday and see the country See family and friends 91% (Mar 22 81%) **4% (Mar 22 10%)**

▲▼ significantly higher / lower than previous period





# Price of airfare and flight length are top concerns when booking a holiday to New Zealand – COVID-19 related factors are becoming less relevant

## Concerns about booking a holiday in New Zealand % AC | Jun 22

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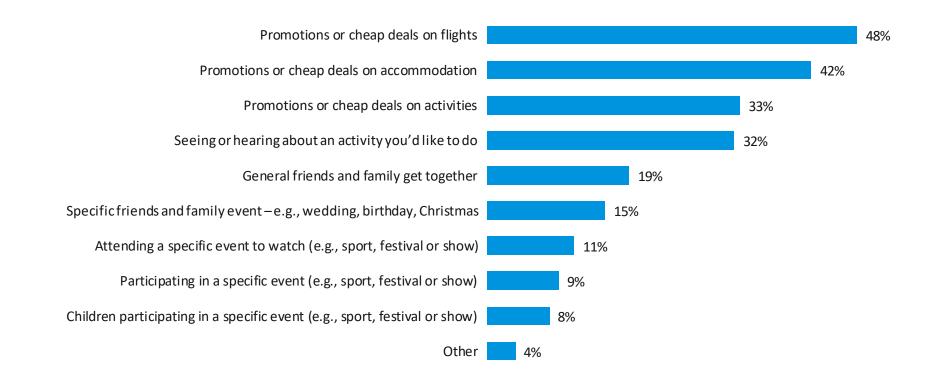
			Mar 22
Price of airfare		31%	35%
Length of the flight		30%	34%
Increasing concerns around money / inflation		30%	-
Getting a refund on my booking if border restrictions changed prior to travel	24%		26%
Concerns around the current Russia / Ukraine crisis	22%		_
New Zealand is an expensive place to holiday in	21%		-
Having to wear a mask for the duration of the flight to New Zealand	21%		-
COVID-safe practices and cleanliness during the flight, stopover, and facilities in New	21%		-
Not having robust cancellation policies available on flights, accommodation or activities	13%		26%
Comparative to New Zealand other destinations offer up better value in terms of pricing 📃	12%		-
Whether the locals are friendly and welcoming of tourists	10%		10%
Provisions of my travel insurance cover	10%		7%
Being far across the other side of the world away from family and support systems	9% 🗸		15%
Quality and coverage of medical facilities in New Zealand	9%		10%
Repatriation provision by my government	8% 🔽		15%
Other			0%
I have no concerns	16%		10%

▲▼ significantly higher / lower than previous period



# Price promotions on flights, accommodation and activities are the key triggers that can move ACs from planning their holiday into booking

## Trigger moving ACs from planning to booking % AC | Jun 22





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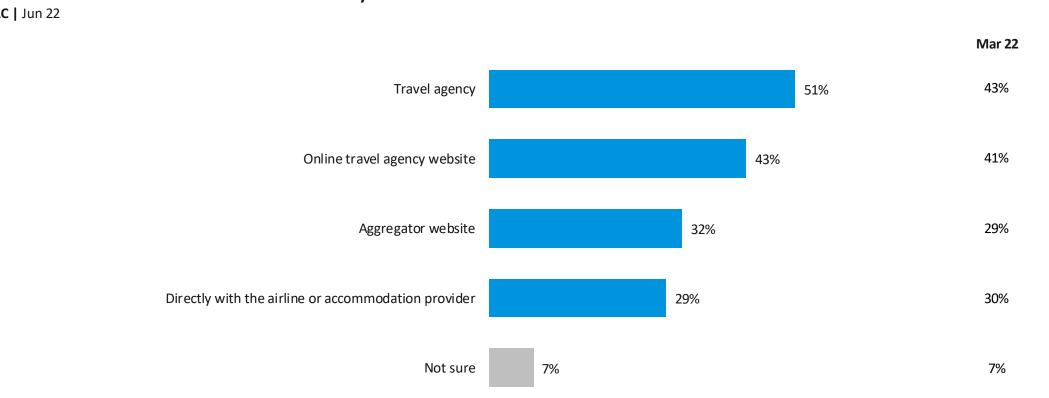
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1. Sample: Active Considerers (AC) June 22 n = 300

Notes:

Q: "Thinking about that "lets bookit" moment, that happens after you have spent some time thinking or researching an international destination. What are your top triggers (select up to three) that move from the planning stage to actually booking leisure travel in?"

ACs are split in their preference for how they would like to book their New Zealand travel – travel agents in either physical or online remain popular option for German ACs



#### Preferred channels to book a New Zealand holiday % AC | Jun 22

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Notes: 1. Sample: Active Considerers (AC) March 22 n = 300 | June 22 n = 300 Q: "Which of the following would you mainly use to book a New Zealand holiday?"