

Impact of the COVID-19 pandemic on intentions to travel among Japan consumers

June 2022

Fieldwork period: 21st June – 3rd July 2022



The primary drivers for New Zealand as a holiday destination choice are beautiful nature, food & drink options, relaxing experiences, destination affordability and being safe to travel around – in comparison, COVID-19 destination safety factors have less influence

When specifically asked about destination's COVID-19 management, easy access to healthcare and enhanced cleaning and sanitisation in public places are the key measures Active Considerers (ACs) would like to see implemented

The majority of ACs from Japan are likely to arrive in New Zealand after March next year – they are most likely to be here for up to 10 days, be an independent traveller or part of a small group tour, and would prefer to spend more time in fewer places in New Zealand, rather than seeing more in less time across more regions

Concerns with affordability, possibility of catching COVID-19 and the current geo-political landscape are among the key barriers ACs have to booking a holiday



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The primary drivers for a holiday in New Zealand are beautiful nature, food & drink options, relaxing experiences, destination affordability and being safe to travel around, while COVID-19 destination safety factors have less influence

Attributes considered when choosing holiday destination after COVID-19 % AC | Jun 22

Has spectacular nature, beaches, etc.	44%
Quality local food and drink	44%
Affordable	43%
Opportunities for relaxing experiences	41%
Safe to travel around this destination	36%
Safe airline services to this destination	35%
Hygiene standards	35%
Locals are welcoming of visitors	34%
Has robust measures in place in case you contract Covid-19 while at the destination	33%
Has interesting history and heritage	33%
Clean and unpolluted environment	32%
Opportunities to see local wildlife	31%
Quality accommodation	31%
Uncrowded public spaces and tourist attractions	29%
Has robust safety measures in prevent spread of COVID-19	28%
Has easily accessible healthcare or support if I become sick with COVID-19	28%
Has been successful in handling COVID-19 outbreak	28%
Opportunities to experience local culture	27%
A wide variety of outdoor & adventure activities	25%
Offers experiences that you can't get anywhere else	24%
Has a high vaccination rate against COVID-19	22%
World renown attractions and tourist experiences	22%
Country does not require vaccine or PCR testing for entrance	21%
Staff at accommodation/activities are vaccinated	17%
Has a low hospitalization rate from COVID-19/healthcare system	17%
Requires vaccination passport/documentation from travelers	15%
Suited for a self-drive holiday	13%
Close to travel to	8%





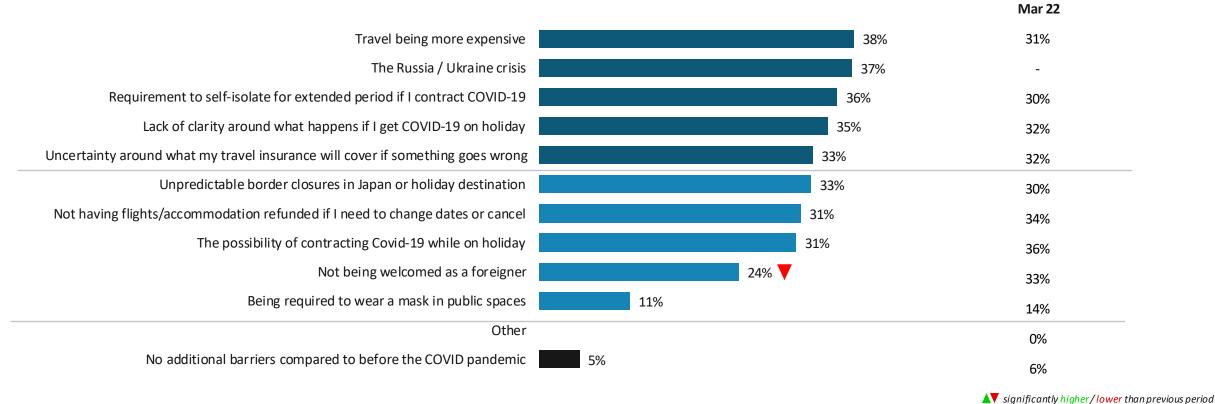
Notes:

Q: "Now that international travel restrictions are easing up, which of these destination attributes will you be looking for when choosing your next overseas holiday destination?"

Concerns with affordability, the unrest in Ukraine/Russia and the possibility of catching COVID-19 are among the key barriers ACs have to booking a holiday

Barriers to booking overseas holiday % AC | Jun 22

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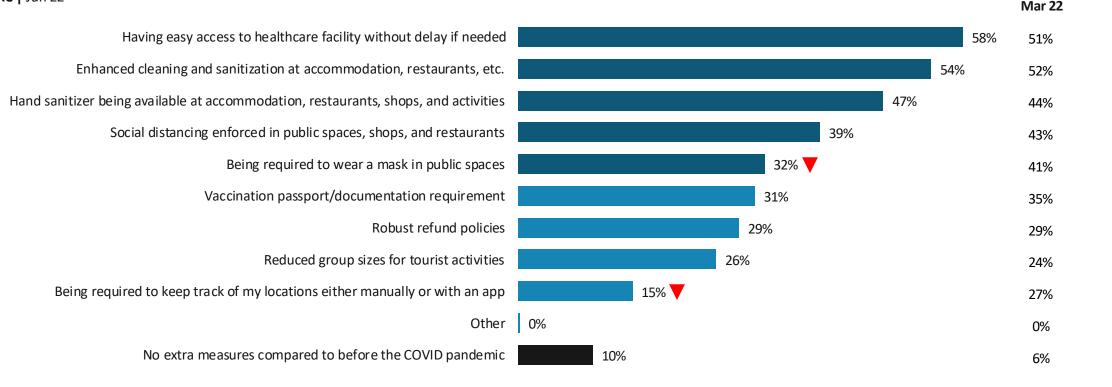


Notes: 1. Sample: Active Considerers (AC) March 22 n = 300 | June 22 n = 300

Q: "Now that, restrictions are easing up and you can take an international holiday, which of the following do you see as the biggest barrier for you to commit to booking a holiday?

Easy access to healthcare along with enhanced cleaning and sanitisation in public places are the key measures ACs would like to see implemented at their chosen holiday destination. Mask wearing requirements have declined as a desired measure since March 22

Measures ACs would like to see implemented at the destination % AC | Jun 22



significantly higher / lower than previous period

5



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

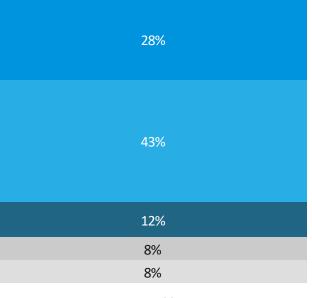
Notes:

Q:" Now that travel restrictions are easing up and you can take an international holiday, which of the following measures you would like to see implemented at the destinations o you could feel safe?"

The majority of ACs are likely to take a relatively short holidays of under 10 days in the next two years

Average duration for next international holiday over the next two years % AC | Jun 22

- Most international holidays will be 1-5 days long
- Most international holidays will be 6-10 days long
- Most international holidays will be longer than 10 days
- I will take a mixture of shorter and longer international holidays
- I'm not sure



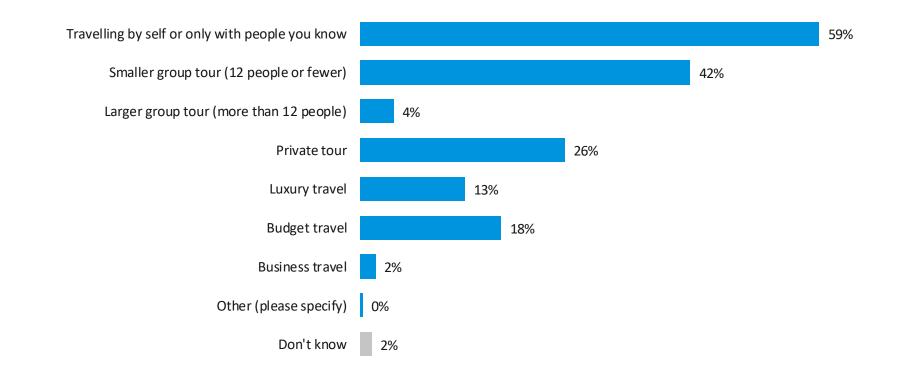
June 22





Most ACs are looking to travel alone or with family / friends or as a small group tour

Travel party for overseas holiday % AC | Jun 22

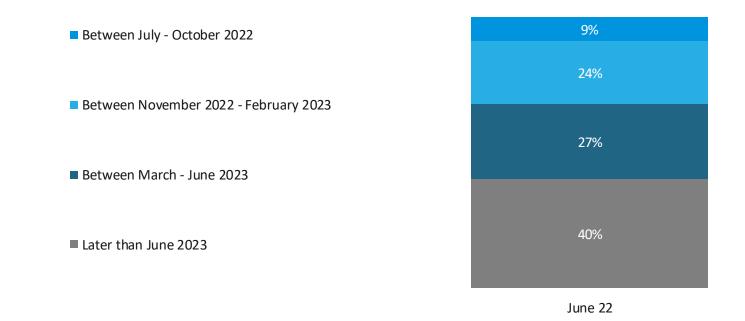




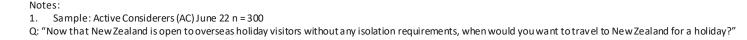


The majority of ACs are likely delay visiting New Zealand until after March next year

How soon ACs are likely to visit New Zealand % AC | Jun 22



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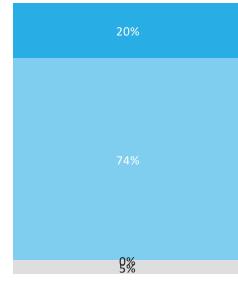


The majority of ACs would prefer to spend more time in fewer places when they visit New Zealand rather than seeing more in less time

Travel style when visiting New Zealand % AC | Jun 22

Fast travel – I would prioritise seeing more cities/places spending less time in each city / place
Slow travel - I would prefer to visit fewer cities and spend more time at each place
Other

I'm not sure



June 22





ACs draw travel knowledge from a broad range of sources with travel guidebooks, travel companies' websites, and TV travel programs having the most influence on their perceptions of international travel destinations

The level of influential media channel has on ACs when they are evaluating an international holiday destination % AC | Jun 22

Don't know 1 - Not influential at all 2 3 4 5 - Highly influential

Travel guidebook			2%	6 29%	Ĺ
Travel companies' website (JTB, HIS, KNT)			5%	6 27%	37
TV travel program			5%	% 27%	35%
Travel magazines/websites (CREA Traveler, Transit, RETRIP)			2%7%	32%	34%
Online portal site (e.g Yahoo Japan, Ameba, Livedoor)			5% 6%	31%	38
Social media platform (e.g LINE, Twitter, Facebook, Instagram, YouTube)			5% 11%	29%	33%
Social influencers' channel on Youtube, Instragram			7% 12%	27%	29%
Gourmet magazines/websites (e.g Orange Page, dancyu, Elle gourmet)		6%	10%	35%	31%
News media (e.g Yomiuri Online, Asahi Digital, Huffpost)		6%	12%	34%	29%
TV variety show		7%	14%	32%	27%
Outdoor magazines/websites (e.g BE-PAL, Tarzan, CAMP HACK)		8%	13%	34%	29%
Fashion & Lifestyle magazines/websites (e.g Hanako, GINZA, GQ)	10%	-	19%	34%	21%



10

22%

17%

12%

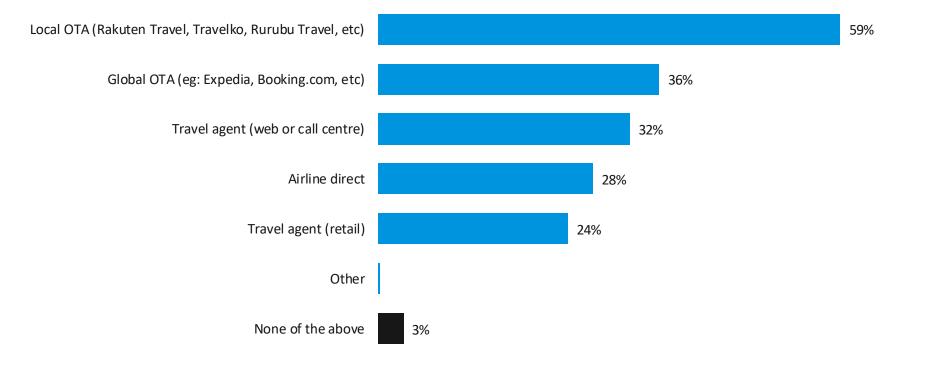
14%

Notes:

1. Sample: Active Considerers (AC) June 22 n = 300 Q: "Using the 1-5 scale below please rate how influential each of the below media channels are to you when you are evaluating an international holiday destination?"

Local Online Travel Agents are the leading channel used by ACs to book international holidays

Channel used for booking international holiday % AC | Jun 22



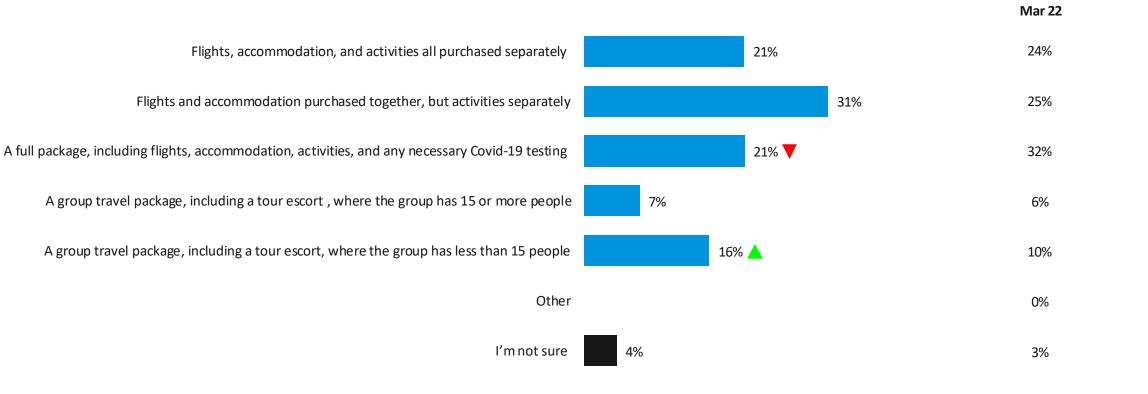




ACs are split in terms of their preference for full travel packages vs. having greater flexibility in their choice

Interest in travel packages % AC | Jun 22

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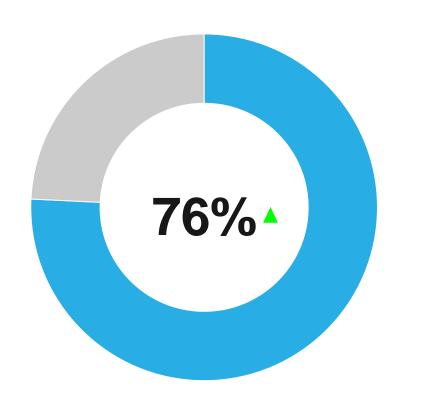
▲▼ significantly higher / lower than previous period





76% of the Japanese ACs have now received their COVID-19 booster vaccination

COVID-19 Booster uptake % AC | Jun 22





▲▼ significantly higher / lower than previous period

14



Notes: 1. Sample: Active Considerers (AC) March 22 n = 300 | June 22 n = 300 Q: "Have you received a booster dose of the COVID-19 vaccine?"



New Zealand's response to COVID-19 positively impacts perceptions of New Zealand as a holiday destination – although it is becoming less relevant

Impact of the health response on perceptions of New Zealand as a holiday destination % AC | Jun 22

