



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

June 2022

Fieldwork period:
21st June – 3rd July 2022



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Key insights

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

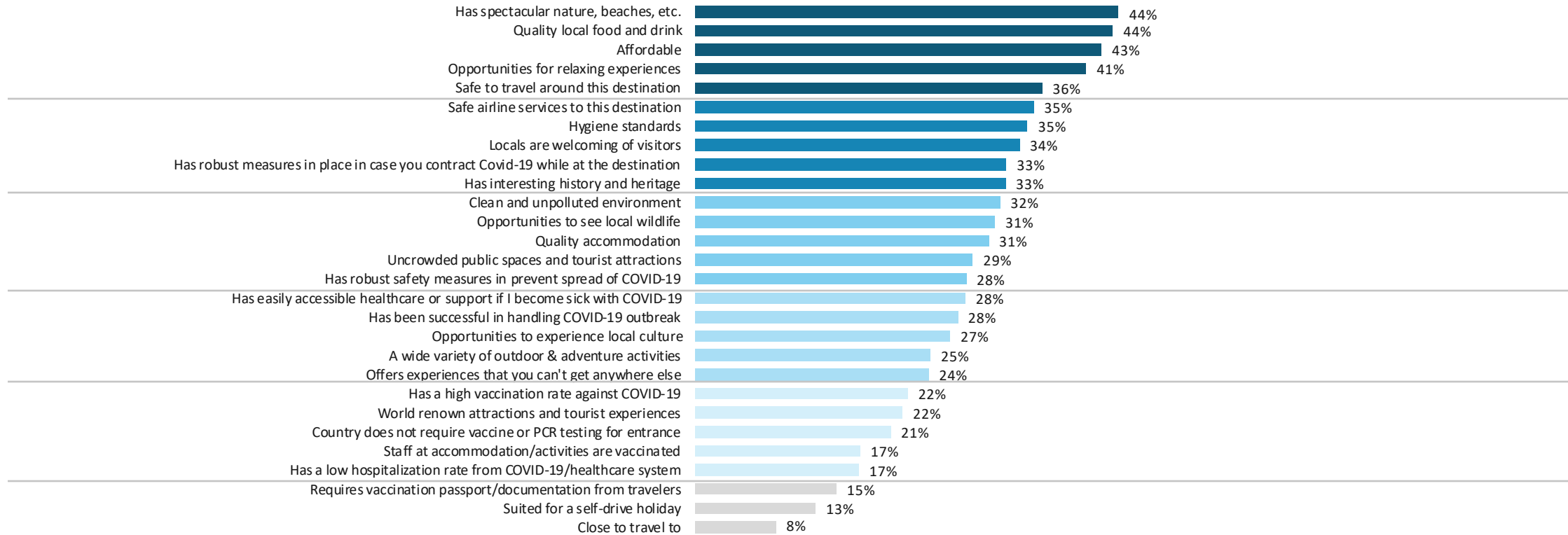
The majority of ACs from Japan are likely to arrive in New Zealand after March next year – they are most likely to be here for up to 10 days, be an independent traveller or part of a small group tour, and would prefer to spend more time in fewer places in New Zealand, rather than seeing more in less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

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



Notes:

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

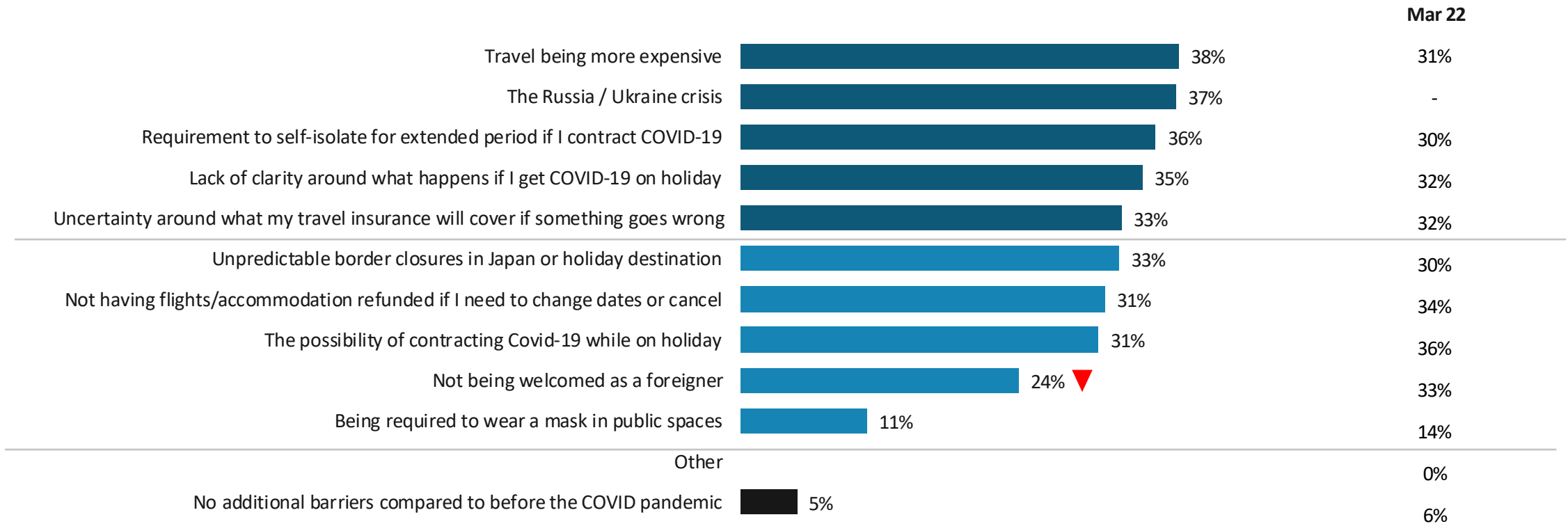
Q: "Now that international travel restrictions are easing up, which of these destination attributes will you be looking for when choosing your next overseas holiday destination?"



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

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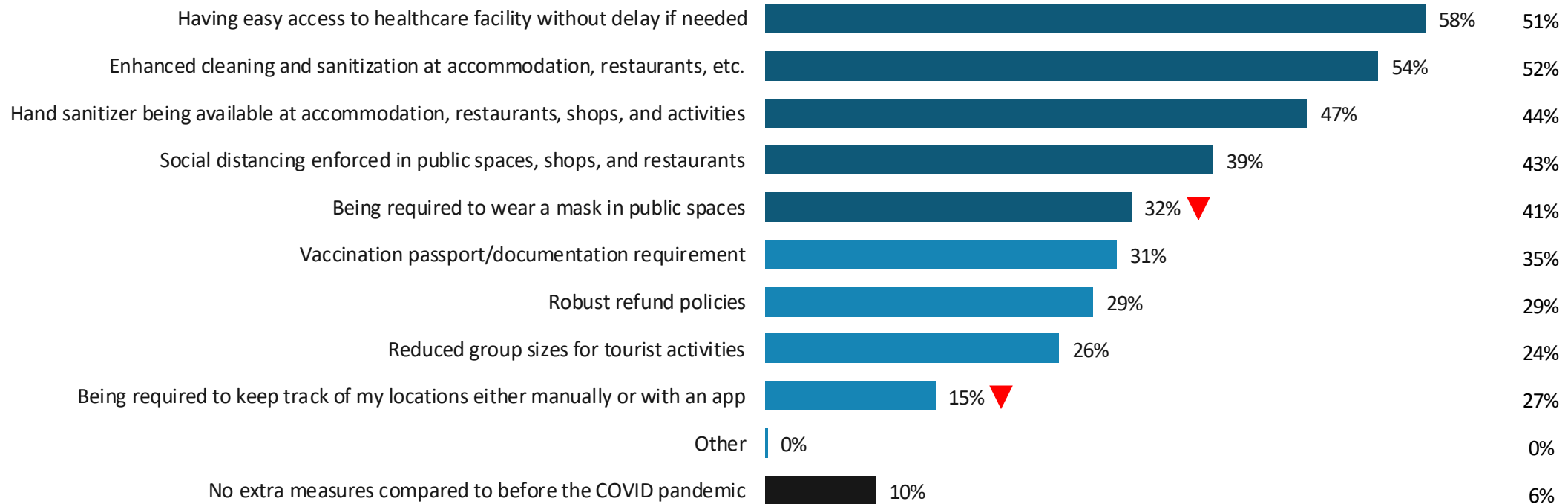
▲/▼ significantly higher/lower than previous period

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

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Mar 22



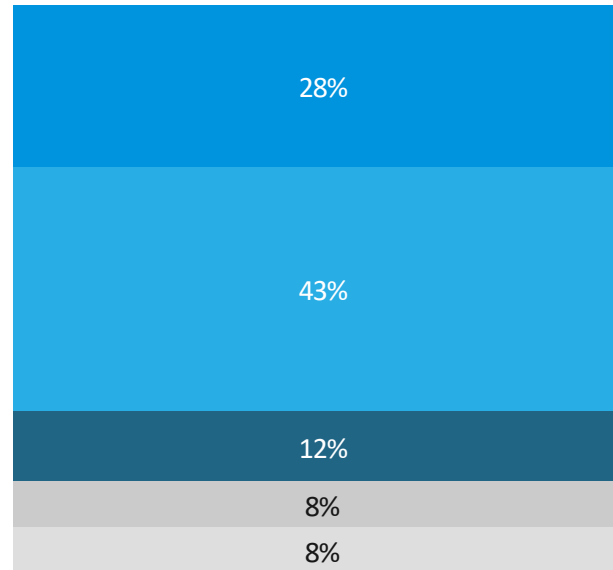
▲▼ significantly higher/lower than previous period

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

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- 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

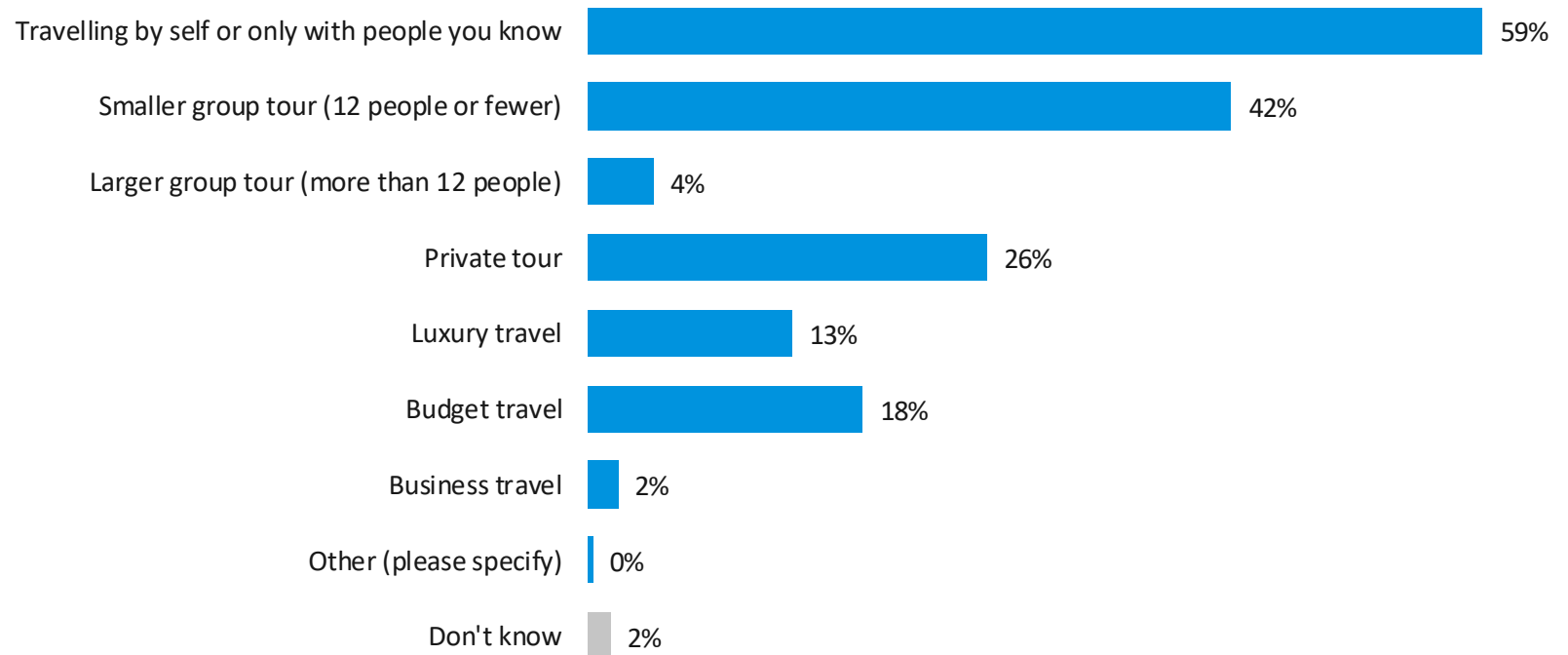


June 22

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

Travel party for overseas holiday

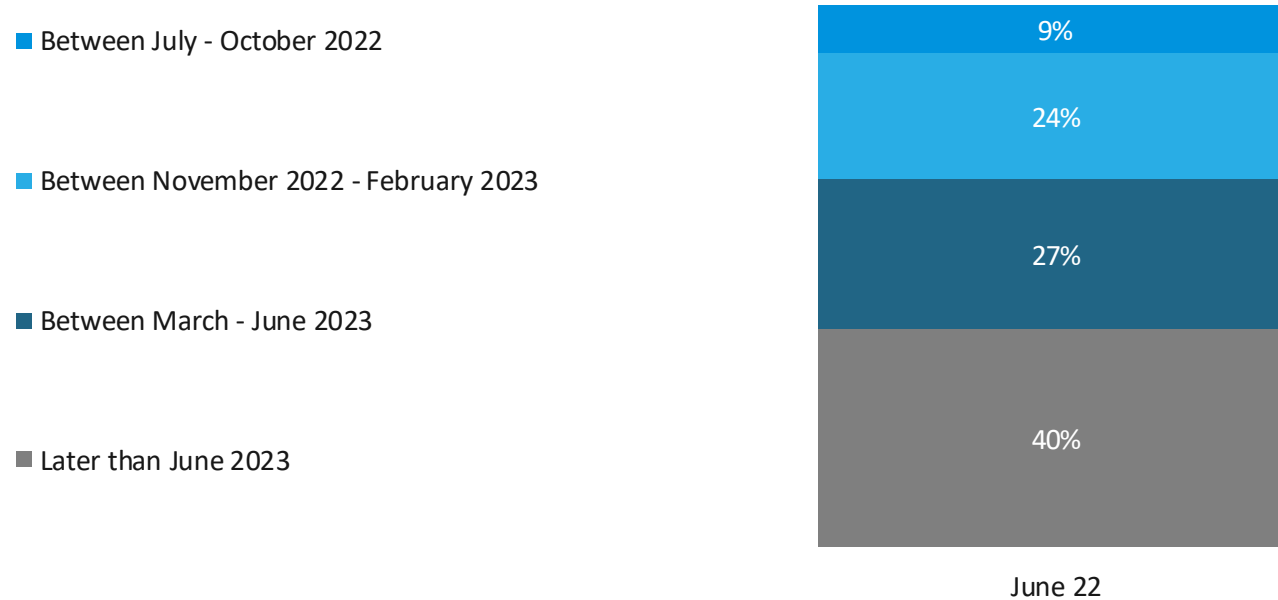
% AC | Jun 22



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

How soon ACs are likely to visit New Zealand

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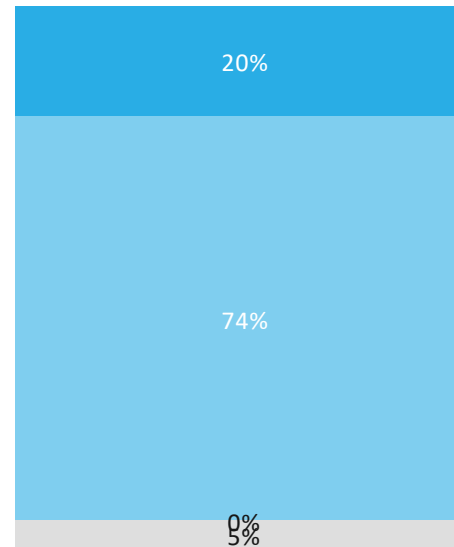


The majority of ACs would prefer to spend more time in fewer places when they visit New Zealand rather than seeing more in less time

Travel style when visiting New Zealand

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- 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

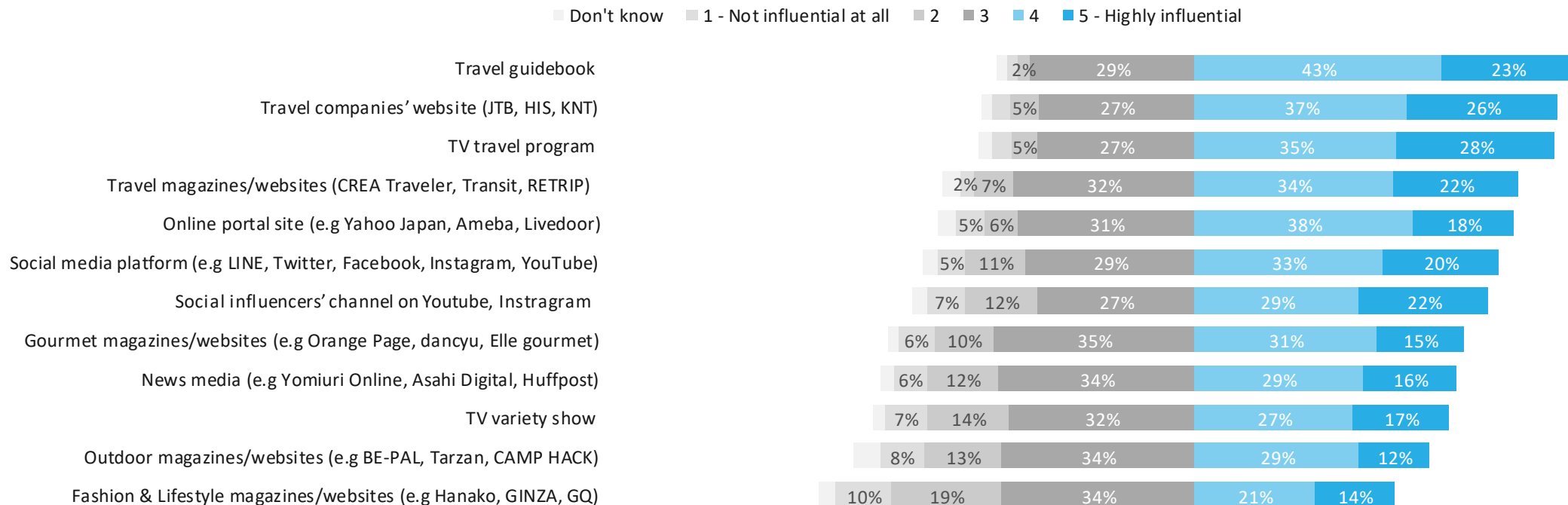


June 22

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

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Notes:

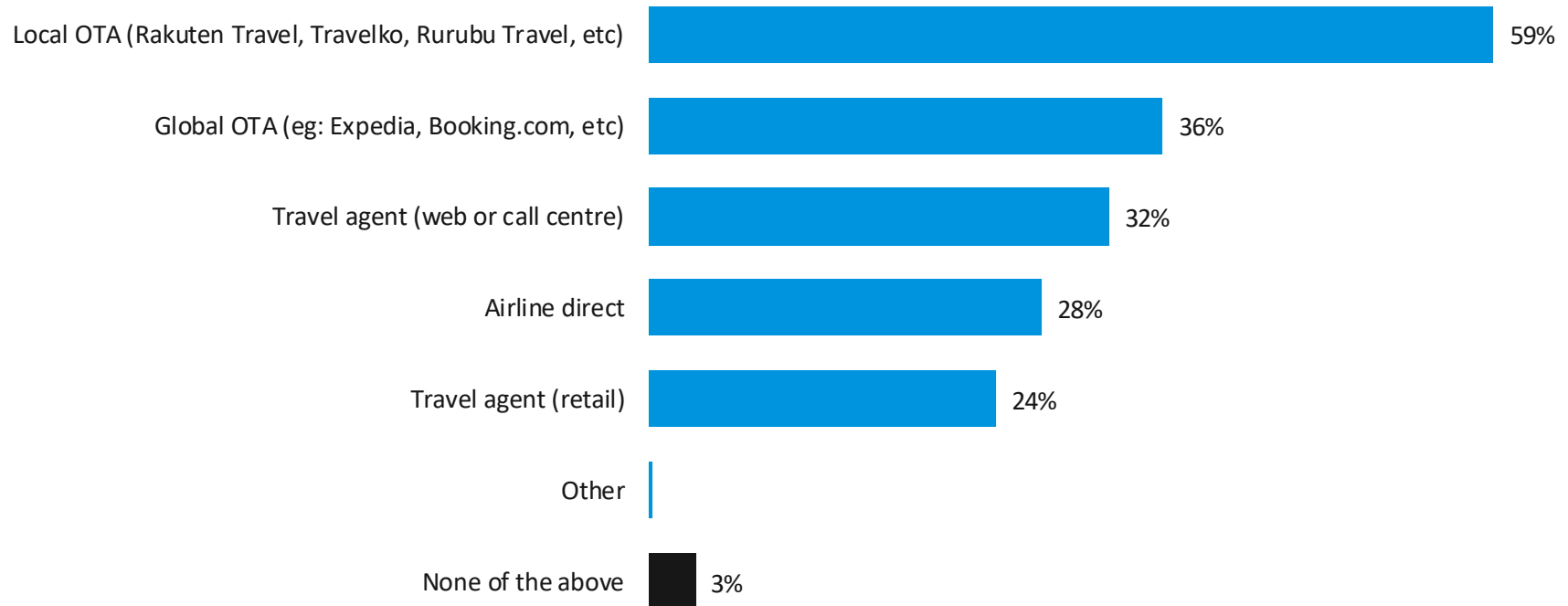
1. Sample: Active Considerers (AC) June 22 n = 300

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

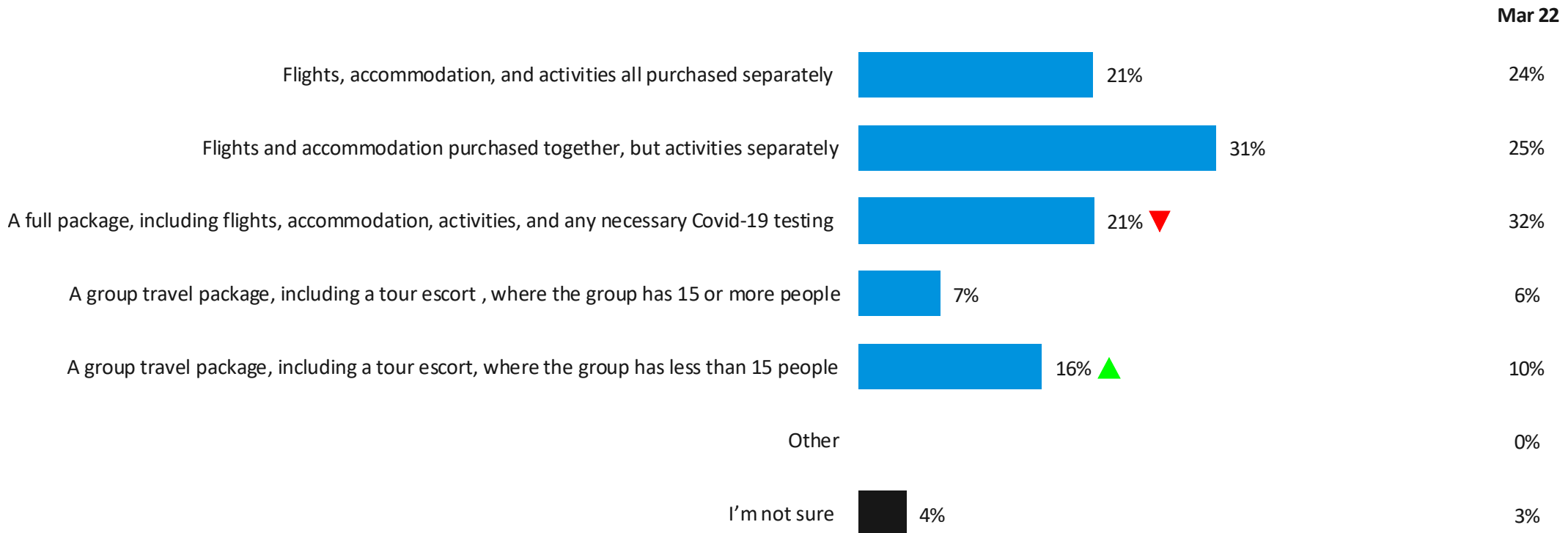
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ACs are split in terms of their preference for full travel packages vs. having greater flexibility in their choice

Interest in travel packages

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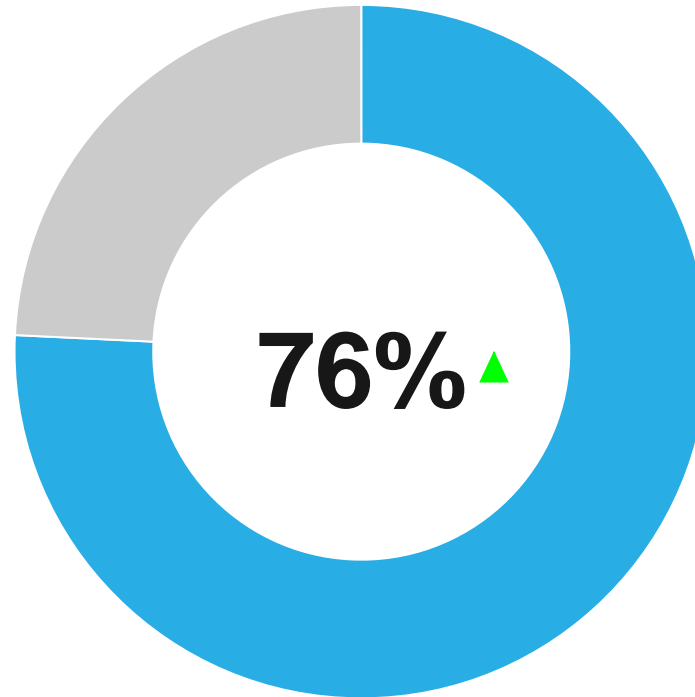
▲▼ significantly higher/lower than previous period

Appendix

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

COVID-19 Booster uptake

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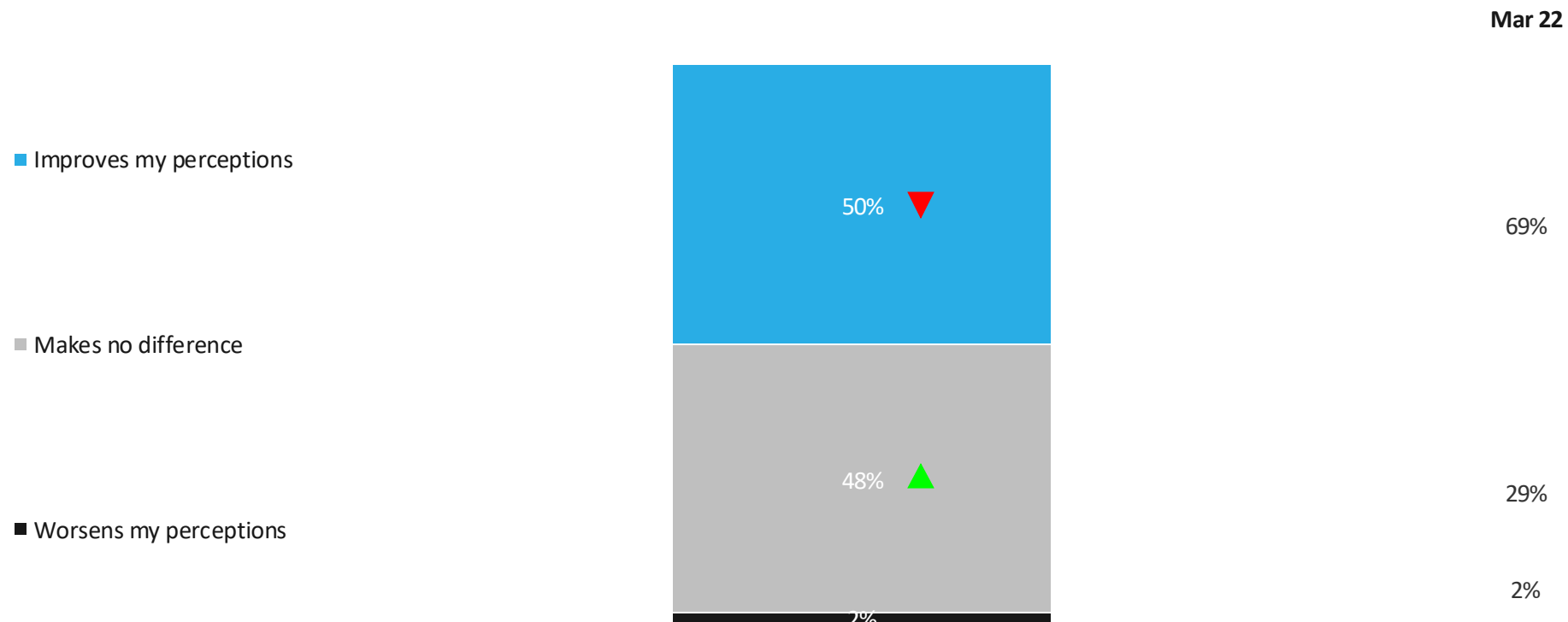
68%
Mar 22

▲▼ significantly higher/lower than previous period

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

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▲▼ significantly higher/lower than previous period