



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

June 2022

Fieldwork period:
21st June – 3rd July 2022



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Key insights

Desire to travel internationally is strong: 87% of UK Active Considerers (ACs) are looking to take overseas holidays as often or more often than pre-COVID-19 and 73% of ACs plan to take a big long-haul overseas holiday by April next year

ACs who are looking to take trips more often than pre-COVID-19, on average, plan to take between 2 and 3 international holidays a year, with a combination of short breaks and long trips

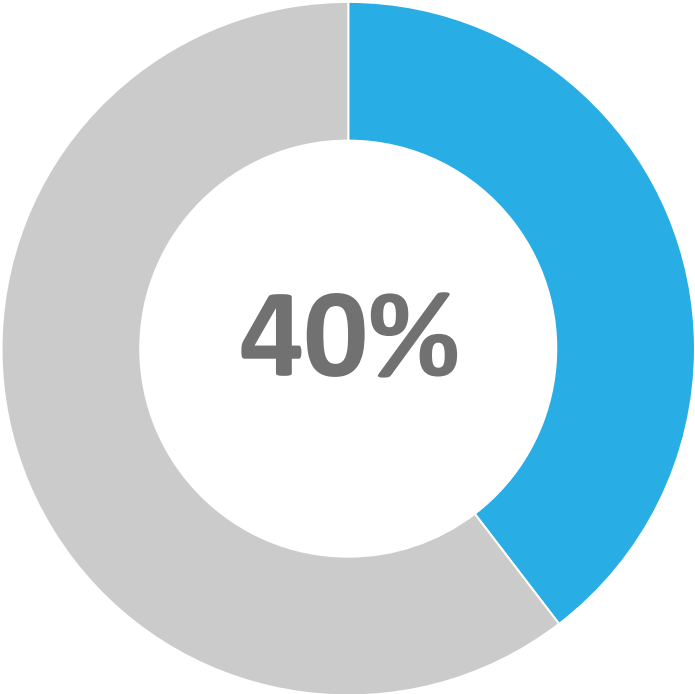
However, more ACs are factoring in affordability when choosing their next holiday destination vs. Mar 22 - affordability has moved up to be the number one criteria for destination choice and cost of travel is one the key barriers to booking a holiday to New Zealand

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

40% of ACs claim to have travelled overseas for a holiday in the last six months

Travelled overseas for a holiday in the last six months

% AC | Jun 22

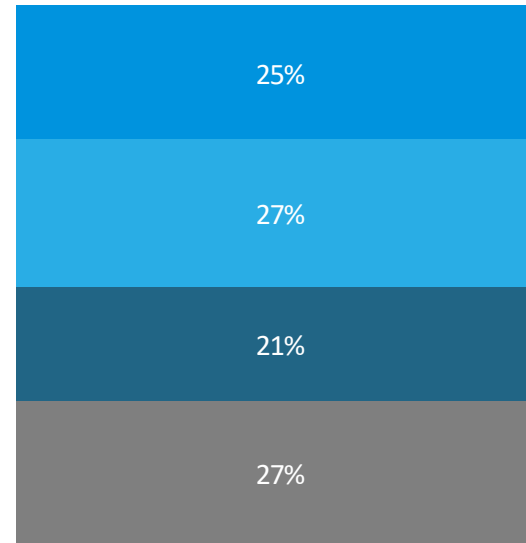


73% of ACs plan to take a big long-haul overseas holiday by April next year

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

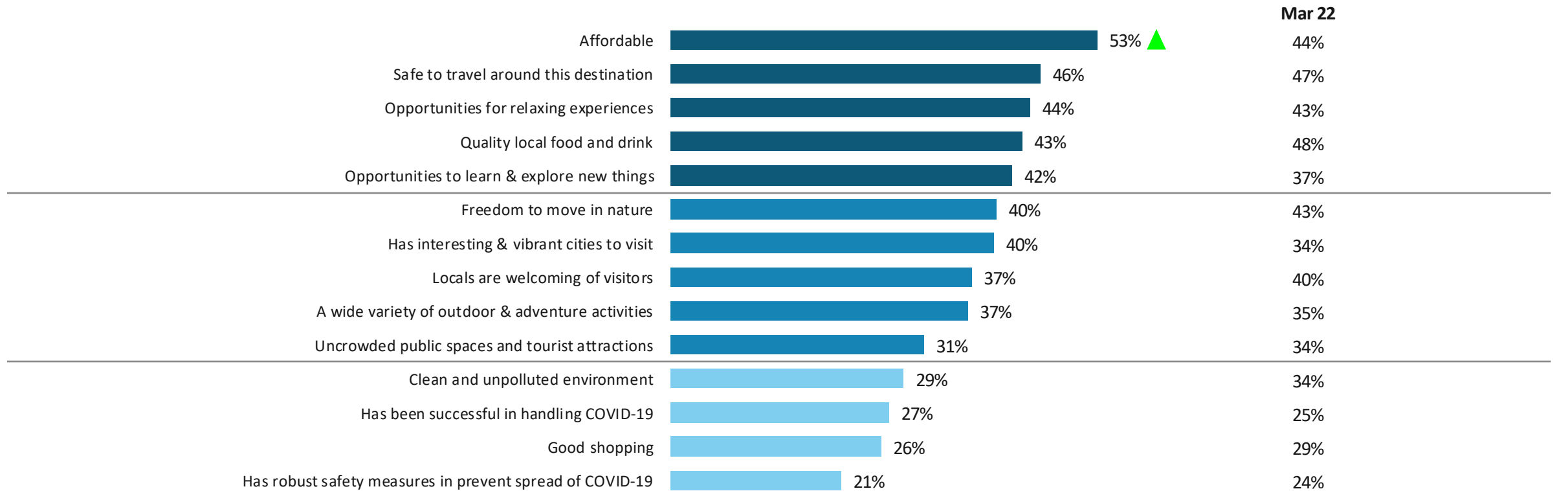


June 22

With more ACs factoring in affordability when choosing their next holiday destination vs. Mar 22, affordability has moved up to be the number one criteria for destination choice

Attributes considered when choosing destination

% AC | Jun 22



▲/▼ significantly higher/lower than previous period

Immersing in a new culture, making memories, escaping the everyday routine are the most common motivators to take an international holiday

Needs, reasons, and motivations to take an international vacation

% AC | Jun 22

To immerse in new culture & taste new food & drinks

"Experiencing different cultures"

*"Good weather Exploring different places
Enjoying the food and culture Sightseeing
Relaxing"*

"I like to travel as I want to see more of the world and experience the customs of local people and appreciate the wonderful nature"

"I need to get away from my daily life and experience something completely different"

"The different areas and the history. Meeting new people and discovering new places, landmarks and to create good memories"

"To experience life in a different country and to meet local people, and sample local food"

Escaping to rest, relax and recharge

"To take a step back from day to day life, refuel energy, discover new places, making new memories"

"To take a complete break from the UK"

"To take a break from work"

"To escape Britain"

"To relax and have a break from reality"

"To relax & unwind from the stress of everyday life"

"To have a break from routine, to pamper myself, to get energised"

"To get away from the crowd and explore other peoples` country and culture"

Making memories with friends and family

"Will be my daughters first holiday and we both are in great need of a huge holiday"

"To take my partner on holiday and propose to her"

"Taking a family break"

"Meeting up with friends and families"

"I want my children to experience other countries Relax as a family and have a unique and unforgettable experience"

"Golden wedding anniversary"

"Experience for me and my children"

Exploring natural wonders of the world

"I enjoy wildlife that I can't see at home, historical sites and experiencing local life and particularly food"

"Interesting sightseeing, good weather and/or beaches"

Escaping the weather at home

"The sunshine"

"The weather, experiencing a different culture, taking time to relax and enjoy life"

"The weather is the main factor. Followed by experiencing different cultures cities and food"

Desire to travel internationally is strong, with 87% of UK ACs looking to take overseas holidays as often or more often than previously

Expected change to overseas holiday travel

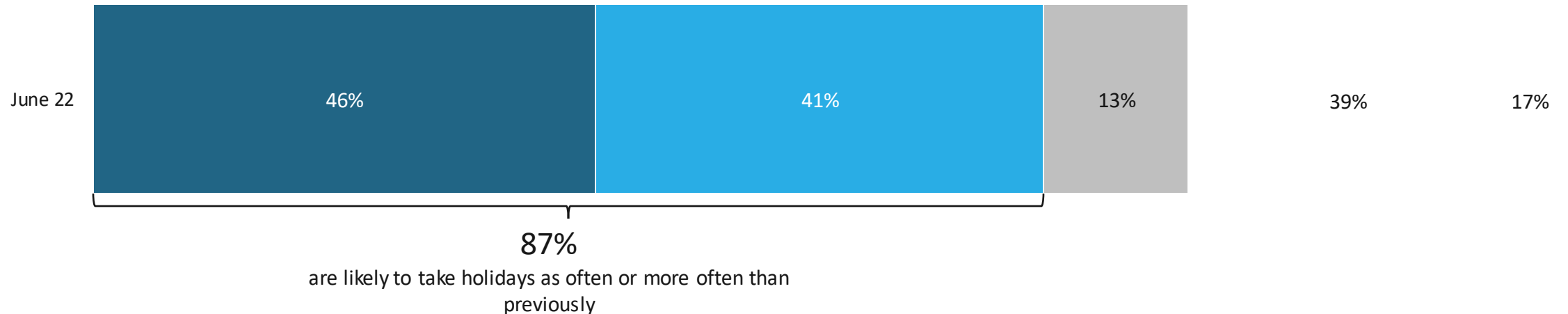
% AC | Jun 22

Mar 22

■ Take overseas holidays more often ■ Take overseas holidays as often as I used to ■ Take overseas holidays less often

More often

Less often



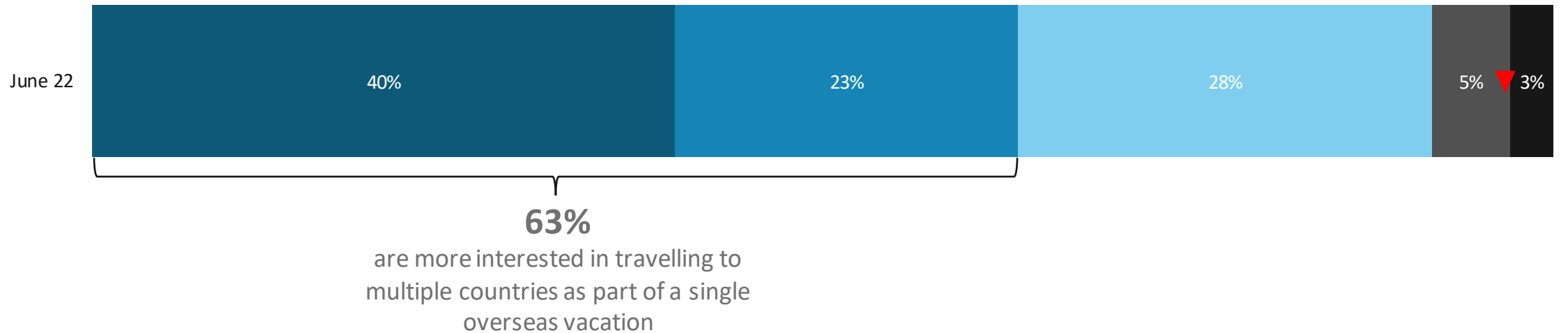
▲▼ significantly higher/lower than previous period

There is now a far greater interest in travelling to multiple countries 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

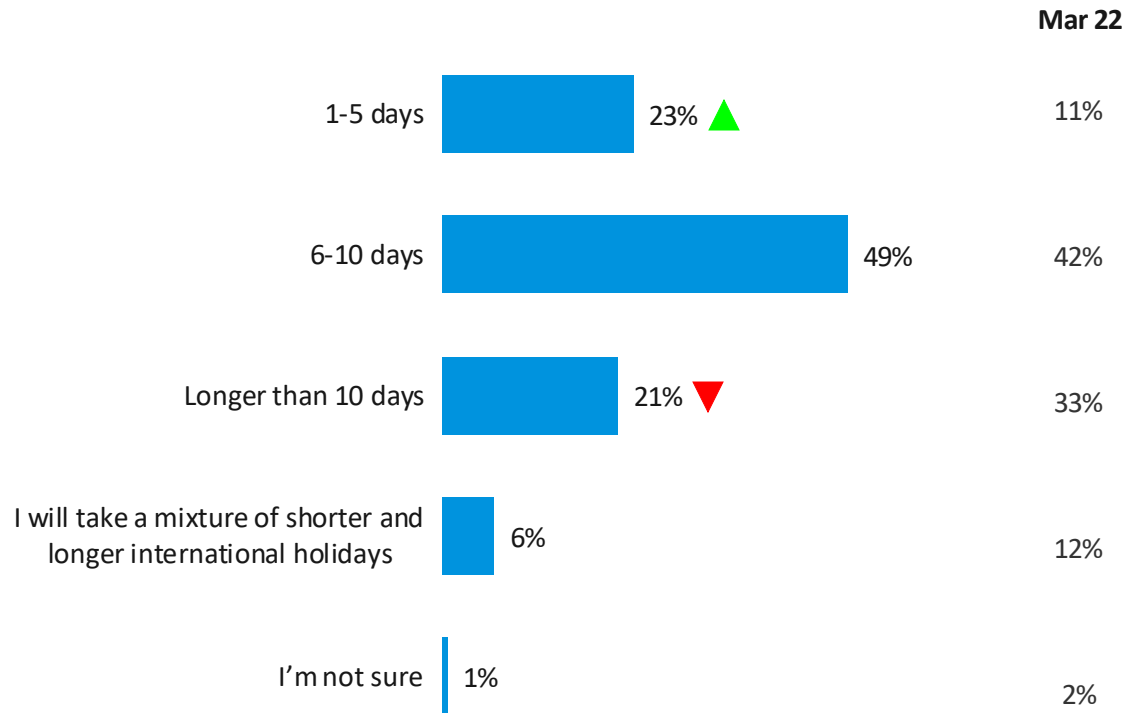


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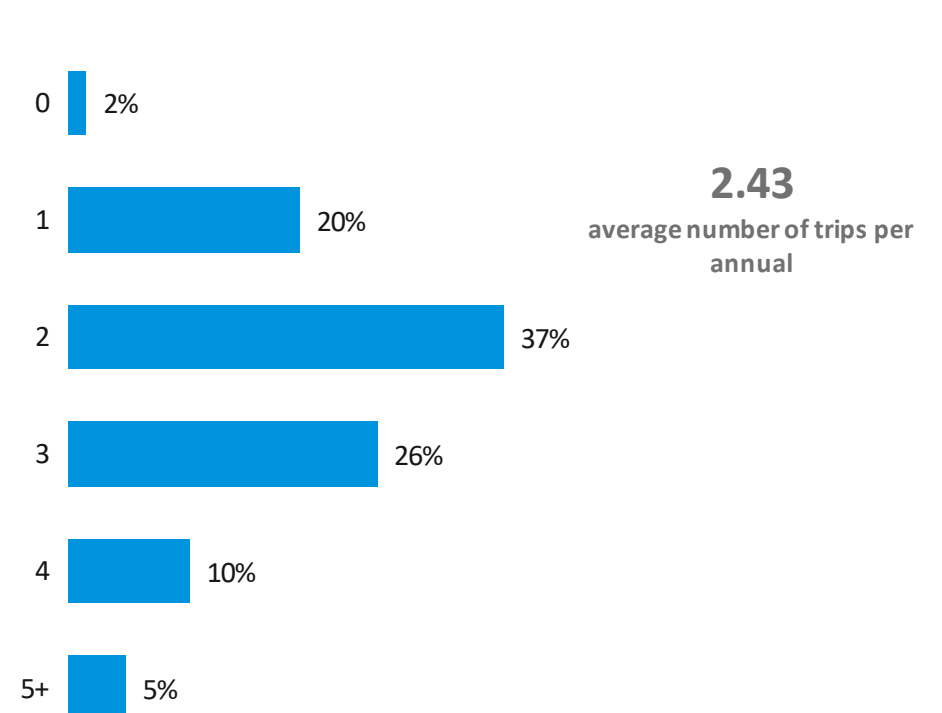
Likely duration of each holiday across the next 2 years

% AC looking to take overseas holidays more often⁽¹⁾ | Jun 22



Average number of international holidays per annual

% AC looking to take overseas holidays more often⁽²⁾ | Jun 22



▲▼ significantly higher/lower than previous period

Notes:

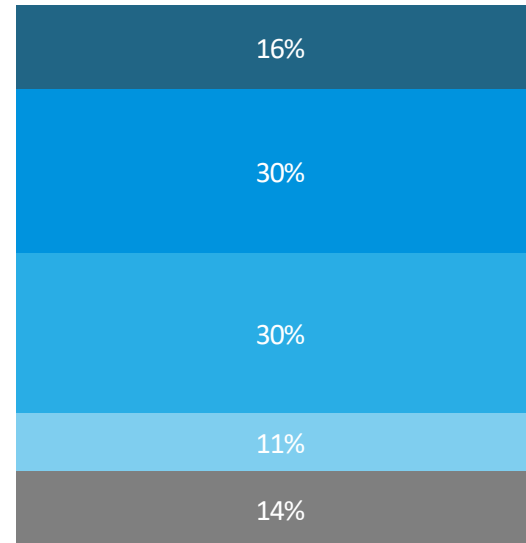
- Sample: Active Considerers (AC); March 22 n = 110 | June 22 n = 121
 - Sample: Active Considerers (AC); Jun22 n = 109 (excluding those who 'don't know')
- Q: "In general, how long (in days) do you think you will spend on most international holidays over the next two years?"
Q: "Over the next two years, how many international holidays do you think you might take in a year?"

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

- Less than 1 month
- 1-2 months
- 3-4 months
- 4-6 months
- 6 + months



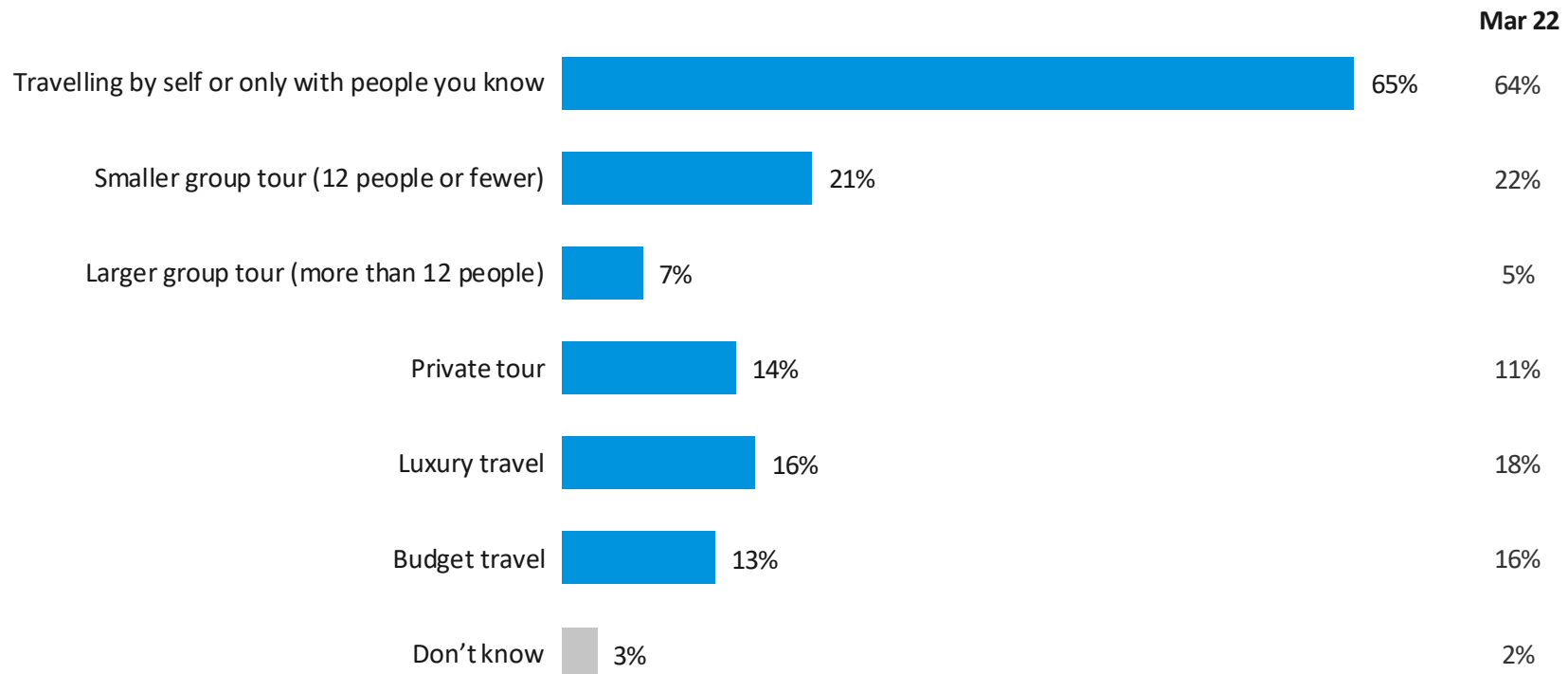
June 22

3 months
average duration of lead time
between identify destination
and booking holiday

UK ACs continue to be most interested in travelling by themselves or with a group of people they know

Interest in type of international holiday

% AC | Jun 22



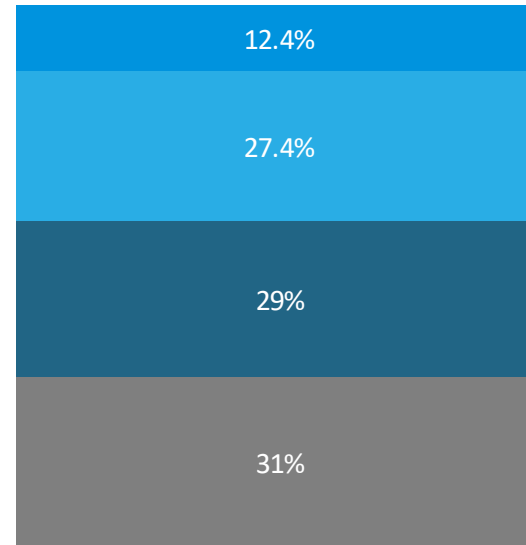
▲/▼ significantly higher/lower than previous period

Visits to New Zealand are likely to be spread out across the next year – with 39% 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

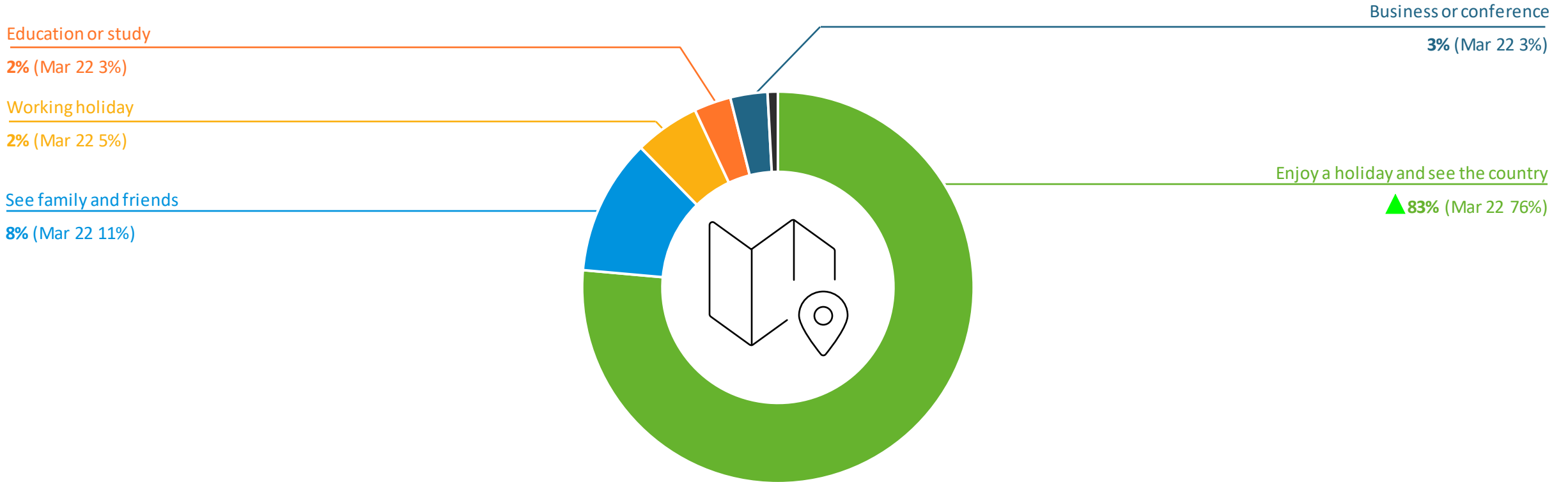


June 22

Holiday is the primary purpose of the New Zealand trip

Key reason to book a trip to New Zealand

% AC | Jun 22

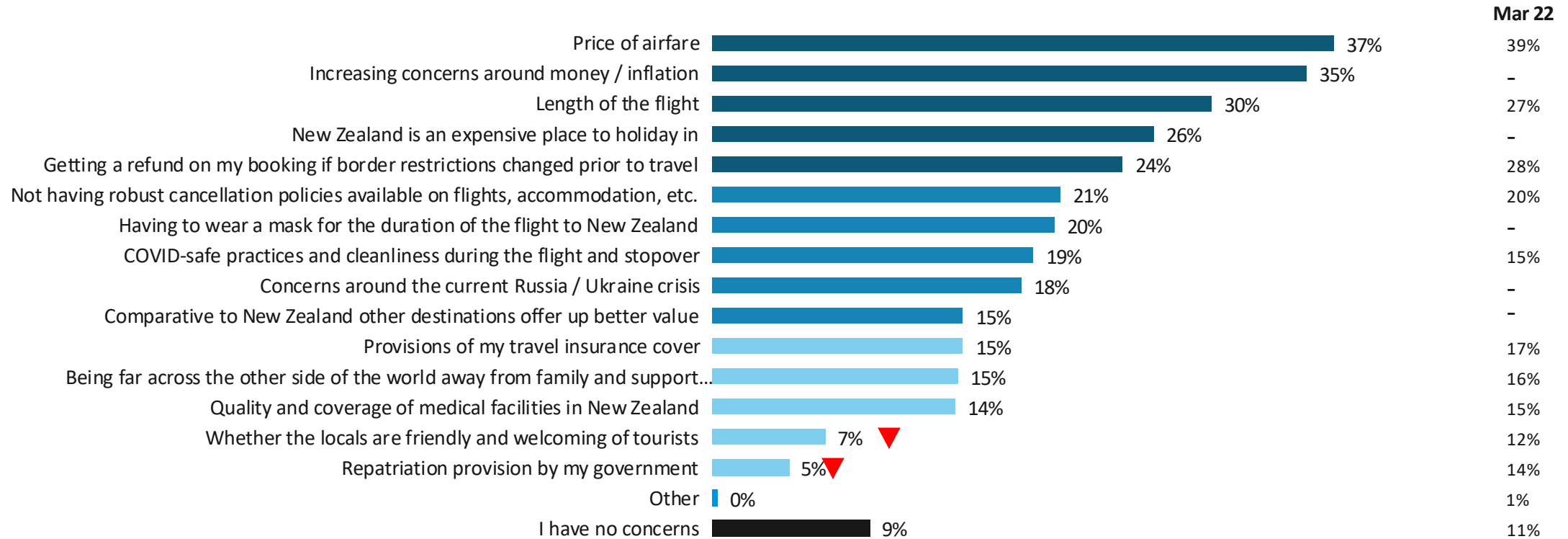


▲▼ significantly higher/lower than previous period

Cost of travel is one the key barriers to booking a holiday to New Zealand

Concerns about booking a holiday in New Zealand

% AC | Jun 22

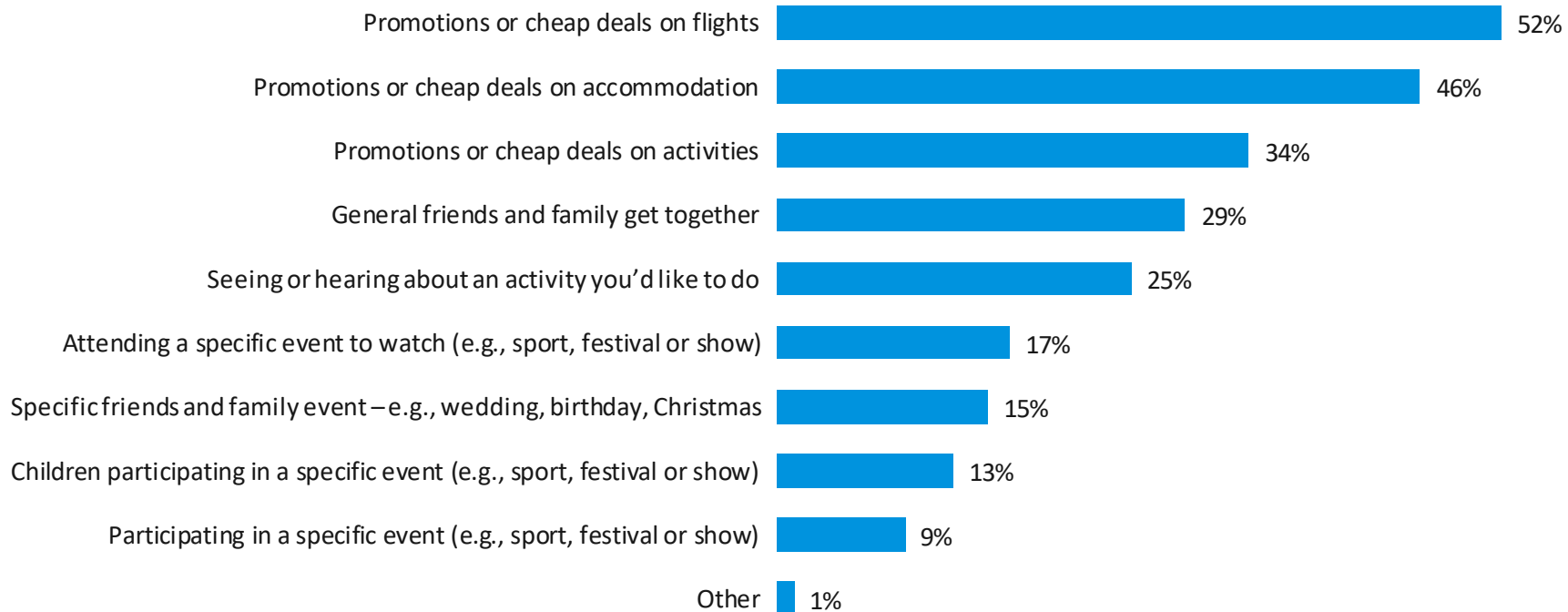


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Price promotions on flights, accommodation and activities are the key triggers that can move ACs from planning their holiday into booking

Trigger moving ACs from planning to booking

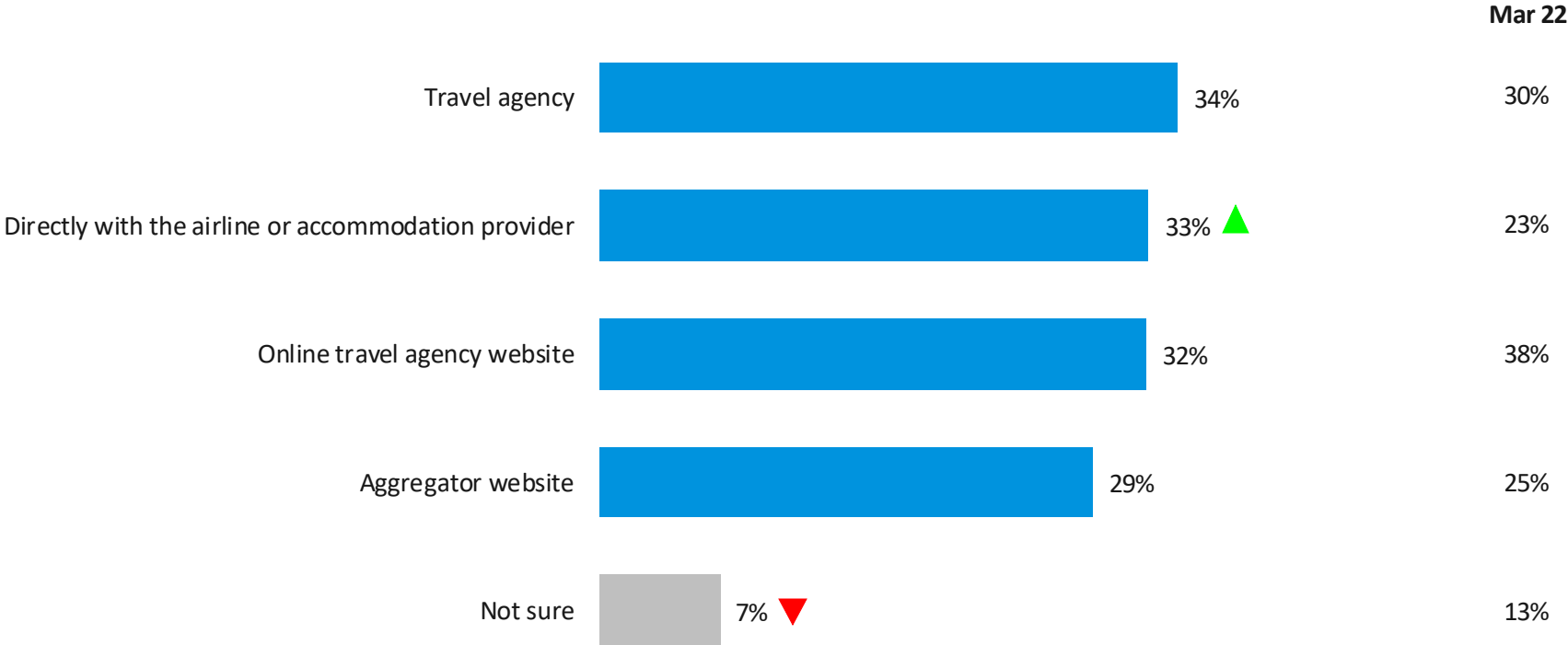
% AC | Jun 22



ACs are split in their preference for how they would like to book their New Zealand travel; more ACs now saying that they would prefer to book with a provider directly vs. Mar 22

Preferred channels to book a New Zealand holiday

% AC | Jun 22



▲/▼ significantly higher/lower than previous period