

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

June 2020 (fieldwork period: 25 May – 06 June 2020)

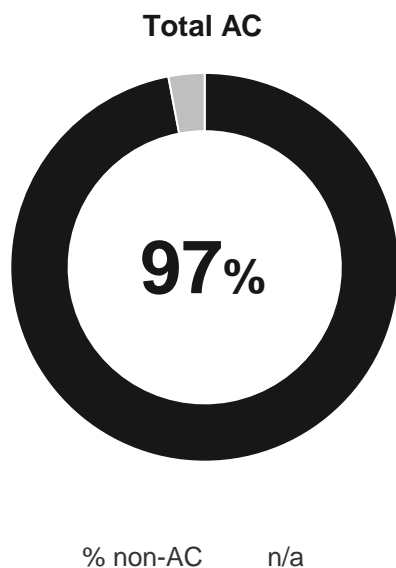


Almost all ACs in Japan remain concerned about the potential risk of contracting COVID-19

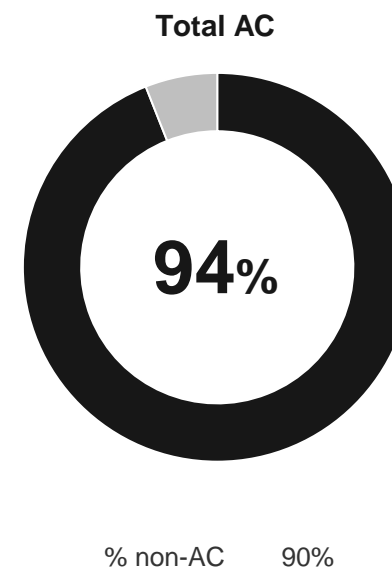
Concern about the risk of contracting COVID-19

% AC | June vs March 20

March 20



June 20



■ Concerned + Highly concerned ■ Not concerned

Notes:

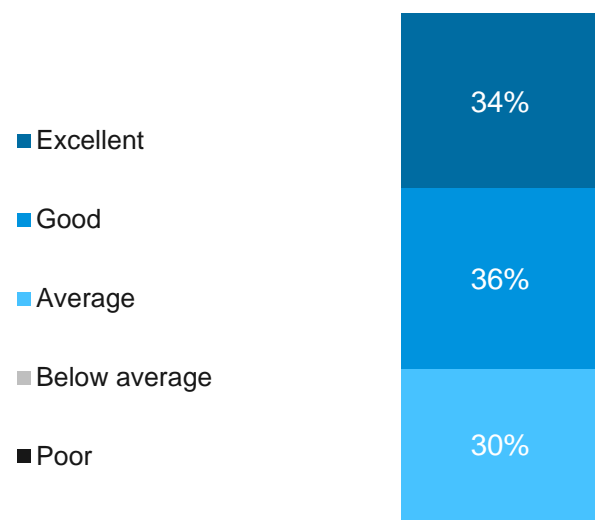
1. Sample: Active Considerers (AC) Mar n = 298 | Jun n = 299 | non Active Consideres (non-AC) Jun n = 296

▲ ▼ significantly higher / lower than March 20

Around two-thirds of ACs rate New Zealand's health response to COVID-19 as good or excellent and this improves perceptions of New Zealand for a similar proportion of ACs

Evaluation of New Zealand's health response

% AC | June 20

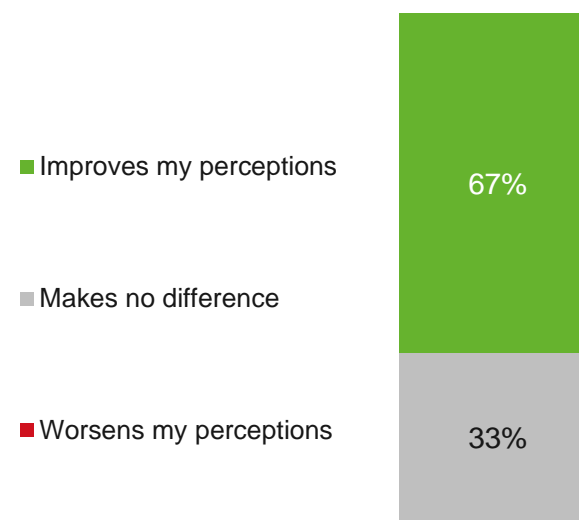


non-AC
(rated Excellent and Good)

40%

Impact of the health response on perceptions of New Zealand as a holiday destination

% AC | June 20



non-AC
(Improves perception)

29%

Notes:

1. Sample: Active Considerers (AC) n = 299 | non Active Considerers (non-AC) n = 296

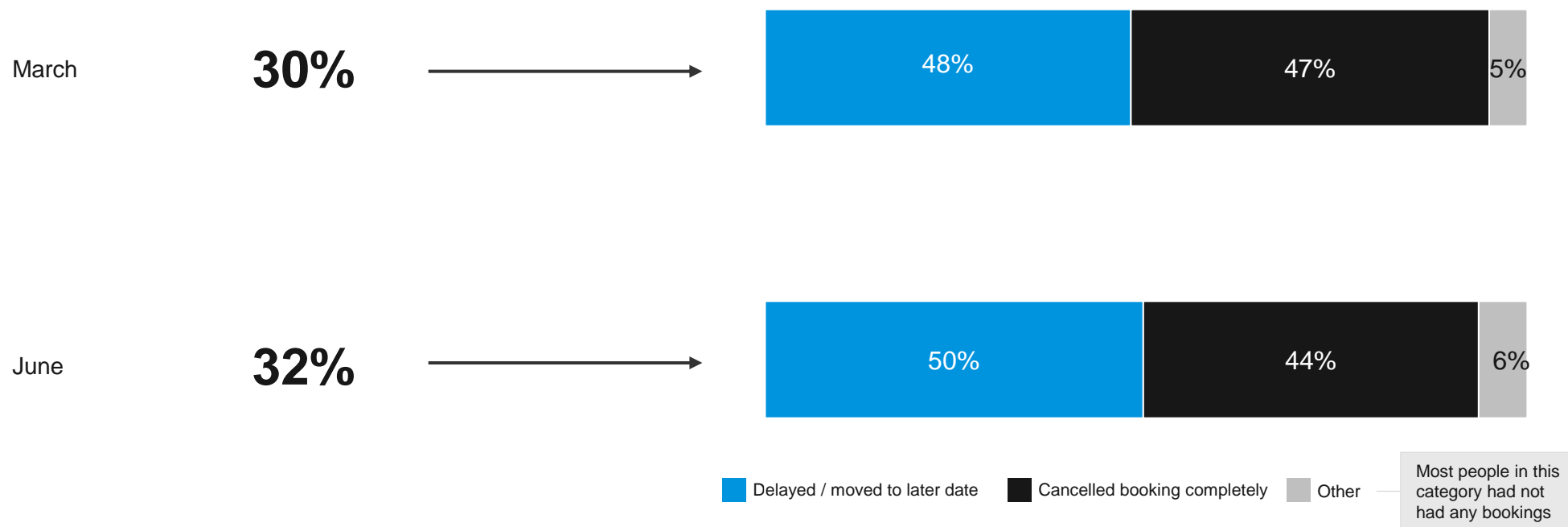
A third of ACs had plans to visit New Zealand prior to COVID-19; half of this group has delayed their trip to a later date and similar proportion has cancelled their bookings

Had plans to visit New Zealand for a holiday prior to COVID-19

% AC | June vs March 20

Have delayed or cancelled the New Zealand holiday due to COVID-19

% AC who had plans to visit New Zealand prior to COVID-19 | June vs March 20



Notes:

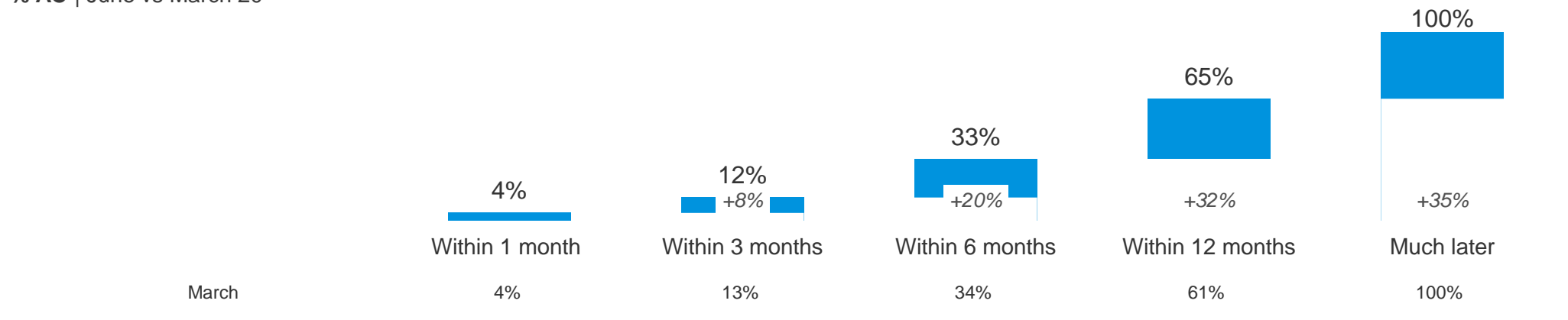
- Sample: Active Considerers (ACs) Mar = 298 | Jun n = 299
- Sample: ACs who had plans to visit New Zealand plans Mar n = 89 | Jun n = 92

▲ ▼ significantly higher / lower than March 20

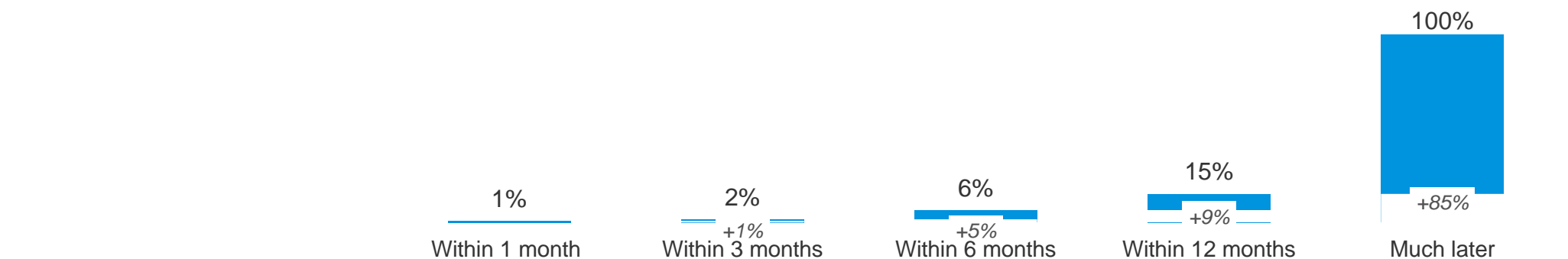
Pent-up demand for New Zealand holidays remains stable since March: around a third of ACs want to come to New Zealand within six months of restriction being lifted

Speed of **New Zealand holiday** demand recovery after restrictions are lifted

% AC | June vs March 20



% non-AC | June 20



Notes:

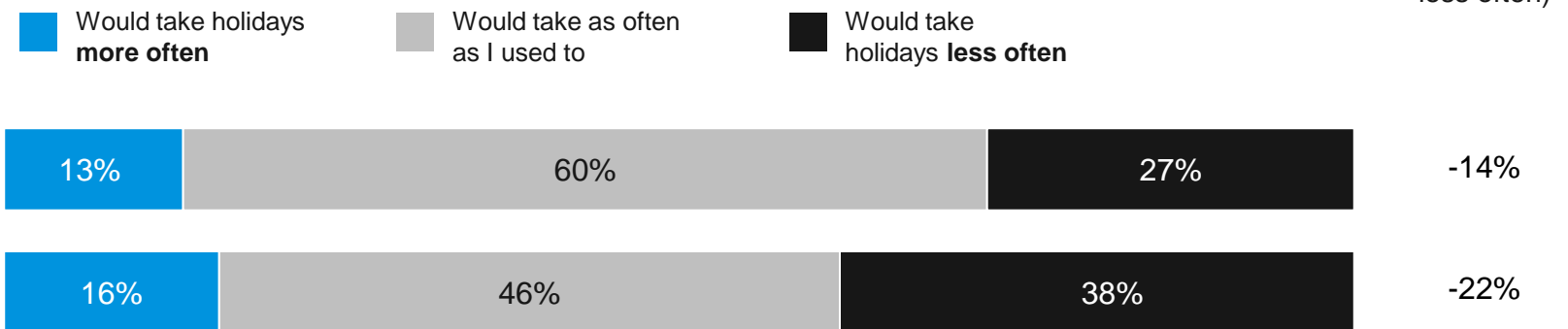
1. Sample: Active Considerers (AC) Mar n = 298 | Jun n = 299 | non Active Consideres (non-AC) Jun n = 296

▲ ▼ significantly higher / lower than March 20

Compared to March, fewer ACs in June say they would take overseas holidays more often after COVID-19; the frequency of domestic holiday travel is not expected to increase either

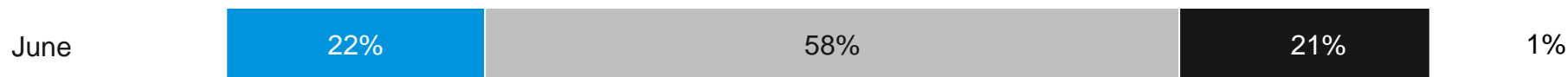
Expected change to **international holiday** travel after COVID-19

% AC | June vs March 20





Expected change to **domestic holiday** travel after COVID-19

% AC | June 20



Notes:

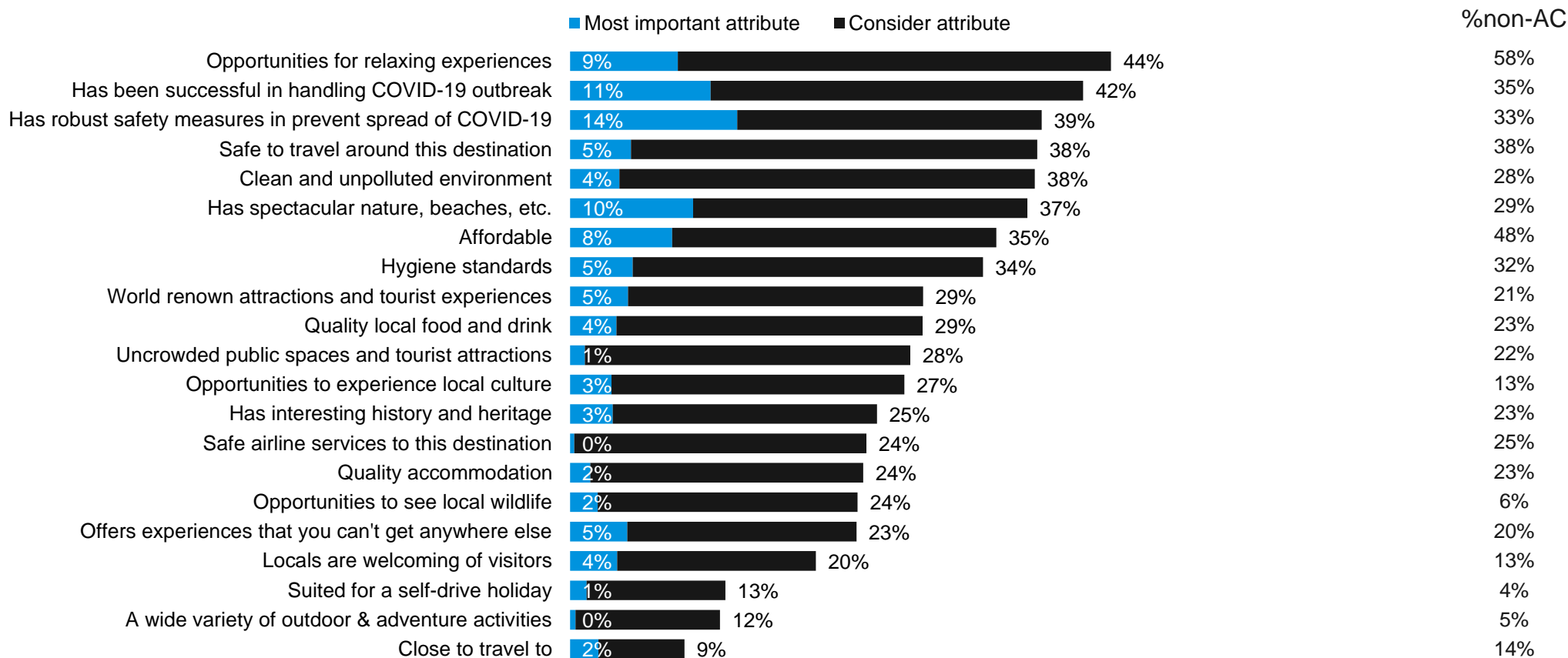
1. Sample: Active Considerers (AC) May n = 299 | Jun n = 300

  significantly higher / lower than May 20

Robust safety measures in preventing the virus spread combined with opportunities to relax and see spectacular nature are the most important factors influencing holiday destination choice for ACs

Attributes considered when choosing destination after COVID-19

% AC | June 20



Notes:

1. Sample: Active Considerers (AC) n = 299 | non Active Consideres (non-AC) n = 296