

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

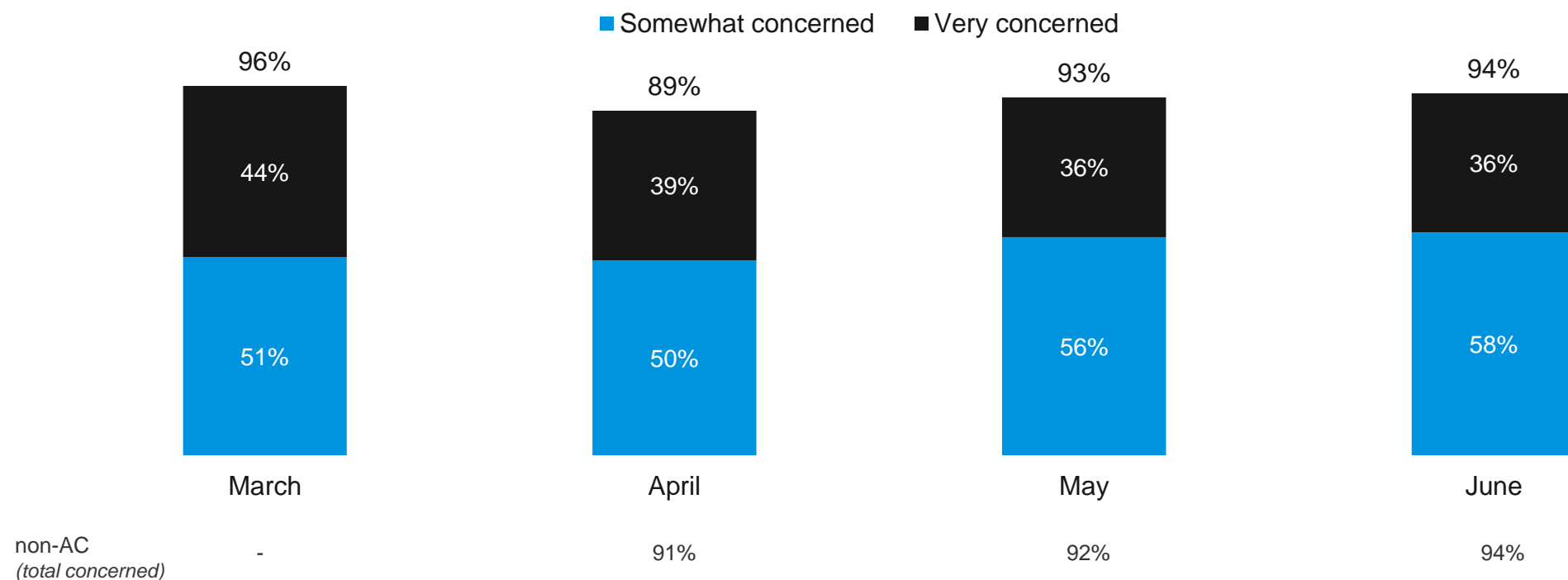
June 2020 (fieldwork period: 25 May – 06 June 2020)



The majority of ACs continues to be concerned about the risk of contracting COVID-19

Concern about the risk of contracting COVID-19

% AC | March – June 20



Notes:

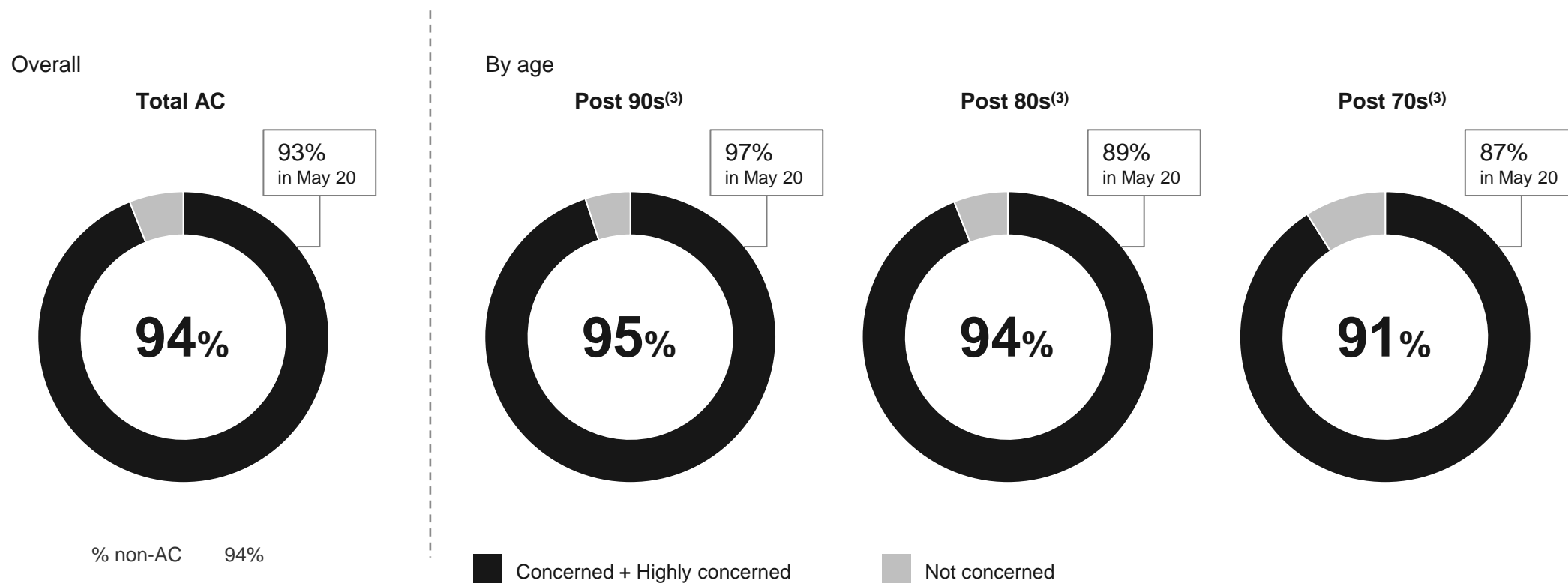
1. Sample: Active Considerers (AC) March n = 300 | April n = 300 | May n = 299 | Jun n = 300
2. non Active Consideres (non-AC) April n = 300 | May n = 300 | Jun n = 300

▲ ▼ significantly higher / lower than May 20

The level of concern about the risk of contracting COVID-19 remains high among ACs of all generation cohorts

Concern about the risk of contracting COVID-19

% AC | June 20



Notes:

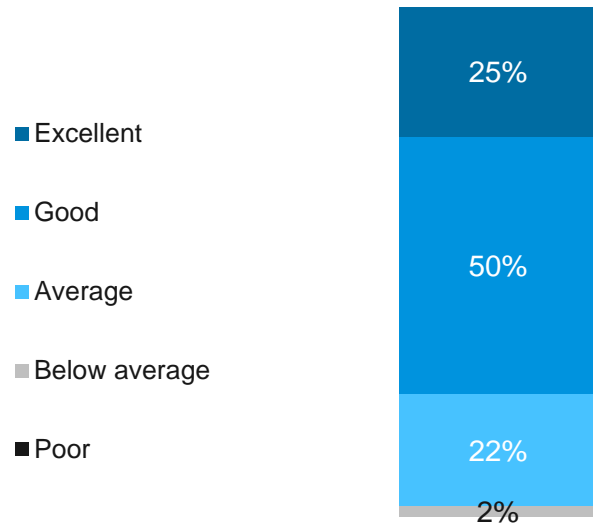
1. Sample: Active Considerers (AC) May n = 410, Jun n = 411 | Posts 90s n = 117 | Posts 80s n = 150 | Posts 70s n = 128
2. Sample: non Active Considerers (non-AC) n = 300
3. Active Considerers born in the 1990s, 1980s and 1970s respectively

▲ ▼ significantly higher / lower than other age segments

Most of ACs rate New Zealand's health response to COVID-19 as good or excellent and this improves perceptions of New Zealand for the majority of ACs

Evaluation of New Zealand's health response

% AC | June 20

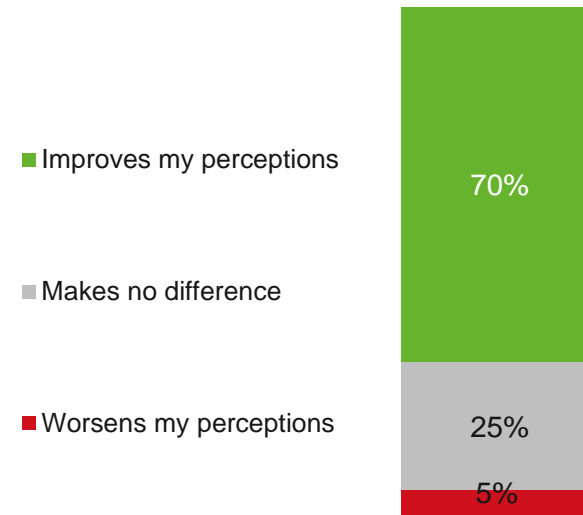


non-AC
(rated Excellent and Good)

59%

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

% AC | June 20



non-AC
(Improves perception)

46%

Notes:

1. Sample: Active Considerers (AC) n = 411 | non Active Considerers (non-AC) n = 300

ACs of older generations are more favourable towards New Zealand's health response, while significantly fewer ACs in the Post 90s cohort rate it positively

Evaluation of New Zealand's health response

% AC | June 20

Rated Excellent and Good

90s

66% ▼



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

% AC | June 20



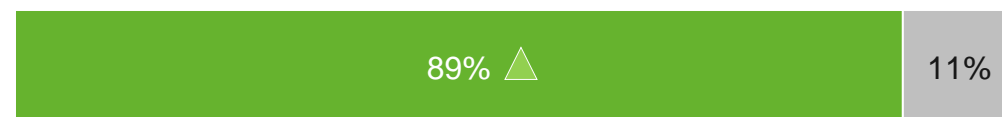
80s

80%



70s

85% ▲



■ Improves my perceptions
 ■ Makes no difference
 ■ Worsens my perceptions

▲ ▼ significantly higher / lower than other age segments

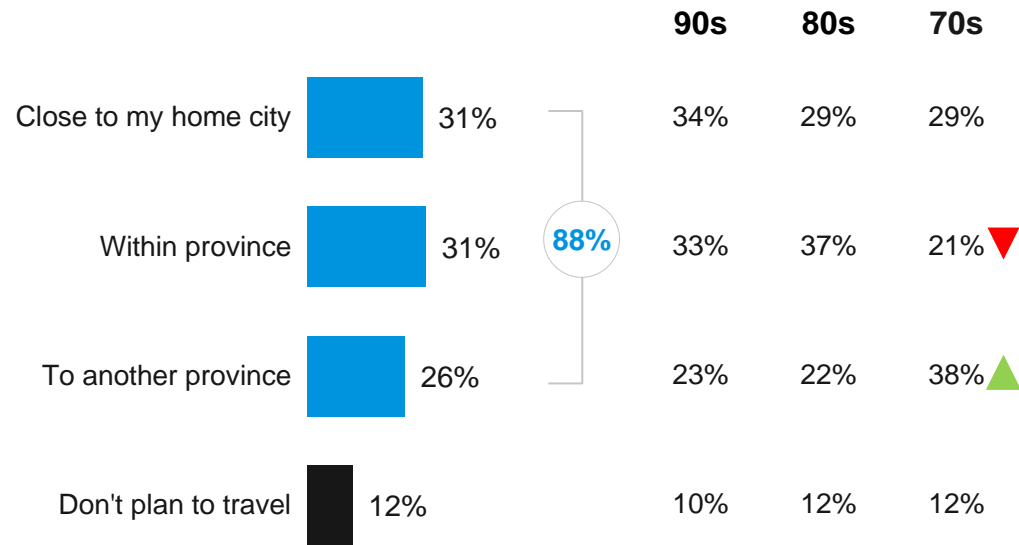
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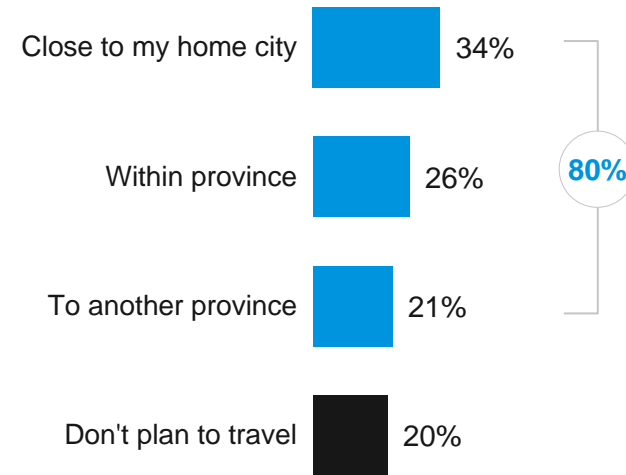
The majority of ACs intend to travel for the summer school holidays

Plan to travel for the summer school holiday period

% AC | June 20



% non-AC | June 20



Notes:

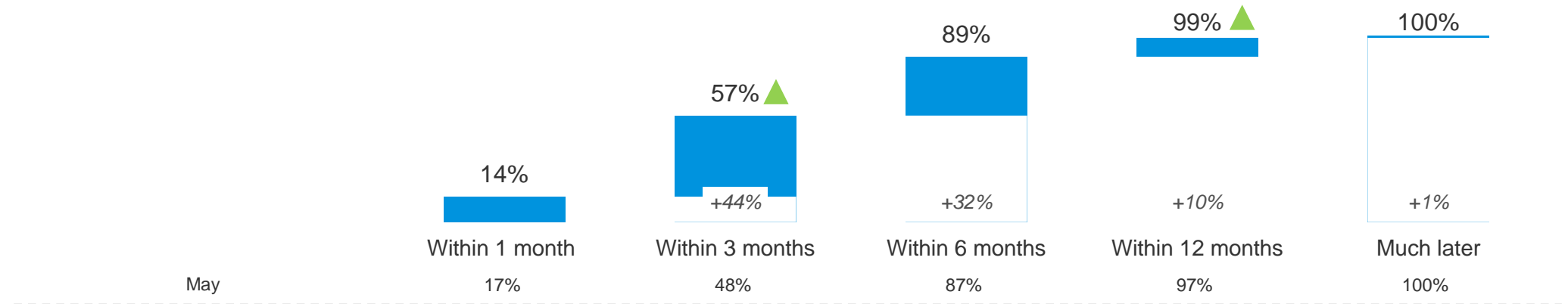
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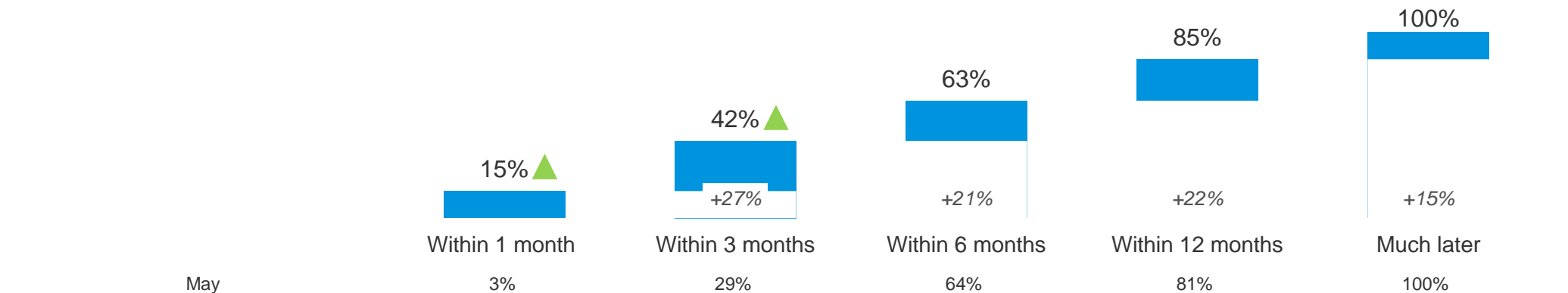
The level of pent up demand for international holiday has increased compared to May, with more ACs ready to travel abroad within three months of restrictions being lifted

Speed of **international holiday** demand recovery after restrictions are lifted

% AC | June vs May 20



% non-AC | June vs May 20



Notes:

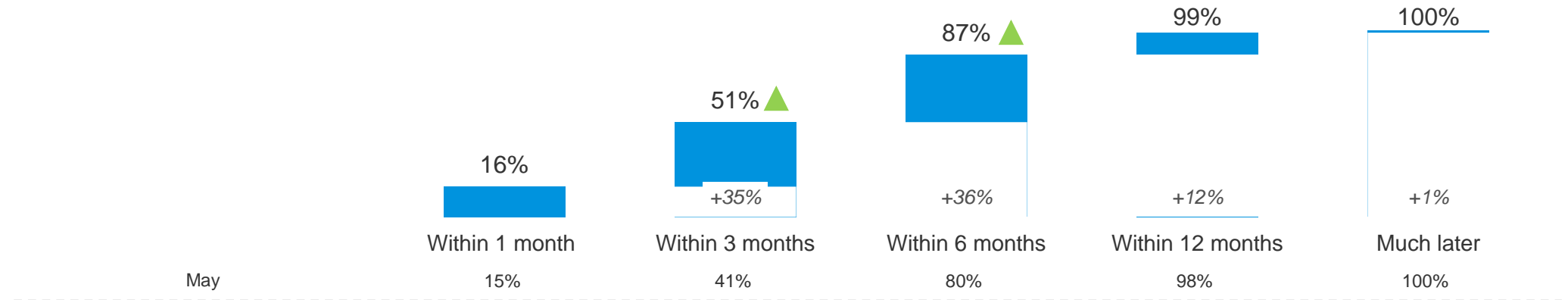
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▲ ▼ significantly higher / lower than May 20

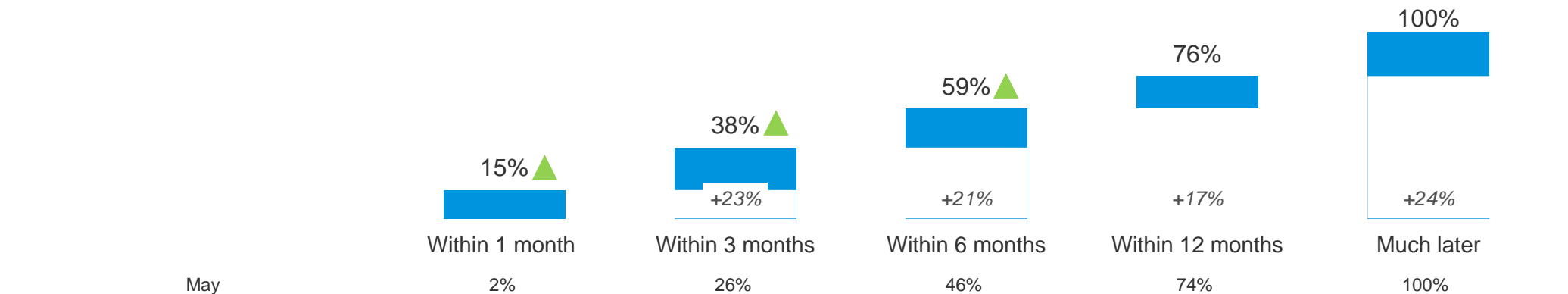
Pent up demand for a New Zealand holiday has increased since May: in June 87% of ACs are ready to travel to New Zealand within six months of restrictions being lifted

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

% AC | June vs May 20



% non-AC | June vs May 20



Notes:

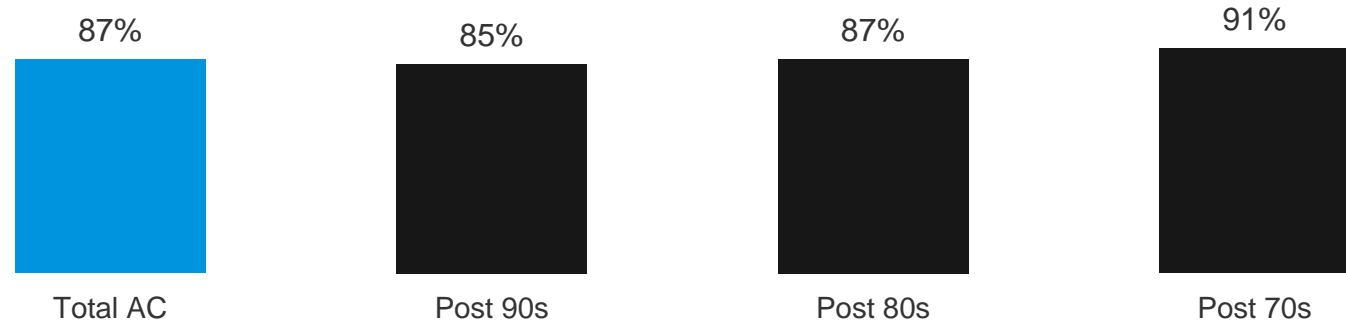
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▲ significantly higher / lower than May 20

The proportions of ACs who would like to travel to New Zealand for a holiday within the first six months after borders are open is consistently high across all three generation cohorts

Level of **New Zealand holiday** demand recovery within 6 months across generations

% AC | June 20





Level of **international holiday** demand recovery within 6 months across generations



Notes:

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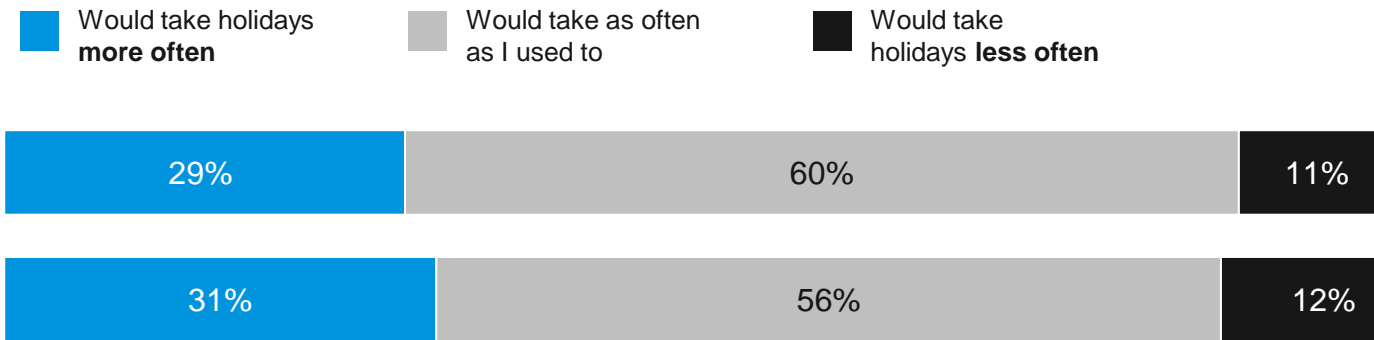
  significantly higher / lower than other age segments

Around a third of ACs are likely to travel to destinations in Asia more often after COVID-19; even slightly higher proportion of ACs are willing to take more frequent holidays outside of Asia

Expected change to holiday travel to destinations in Asia after COVID-19

% AC | June vs May 20

Net%
(more often -
less often)





Expected change to holiday travel to destinations outside Asia after COVID-19

% AC | June vs May 20



Notes:

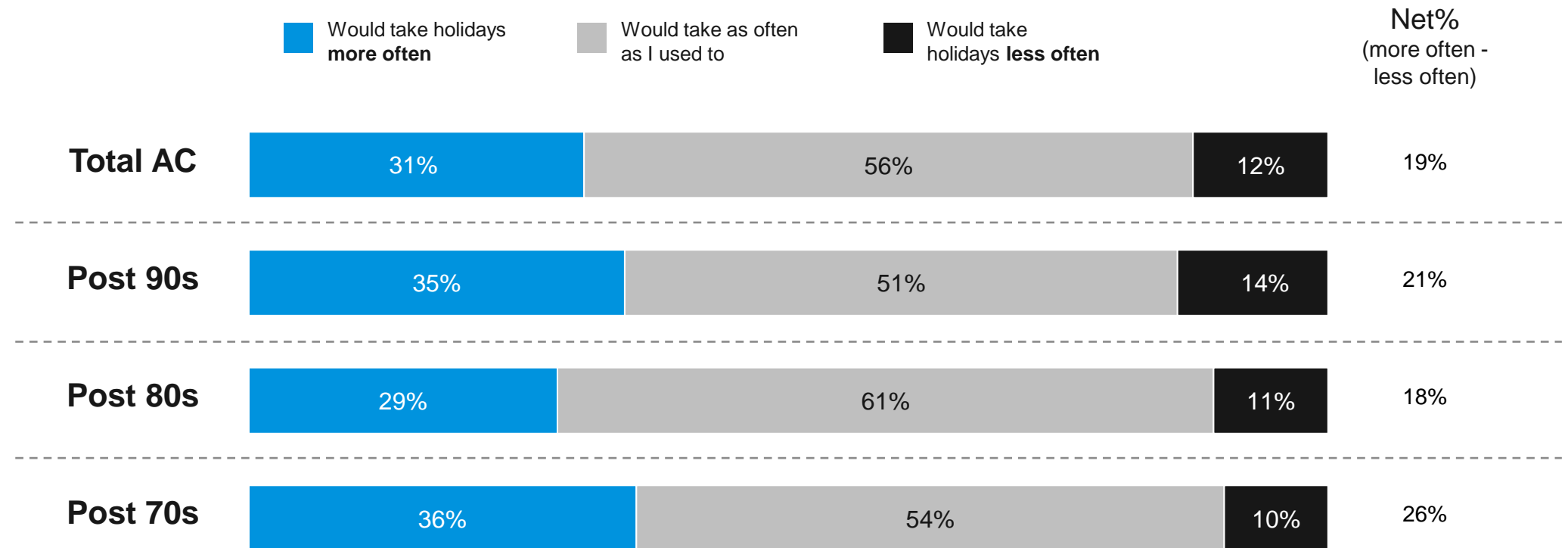
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Around a third of ACs are likely to travel to destinations in Asia more often after the threat of COVID-19 passes and this proportion is largely consistent across all three generation cohorts

Expected change to holiday travel to destinations in Asia after COVID-19

% AC | June 20



Notes:

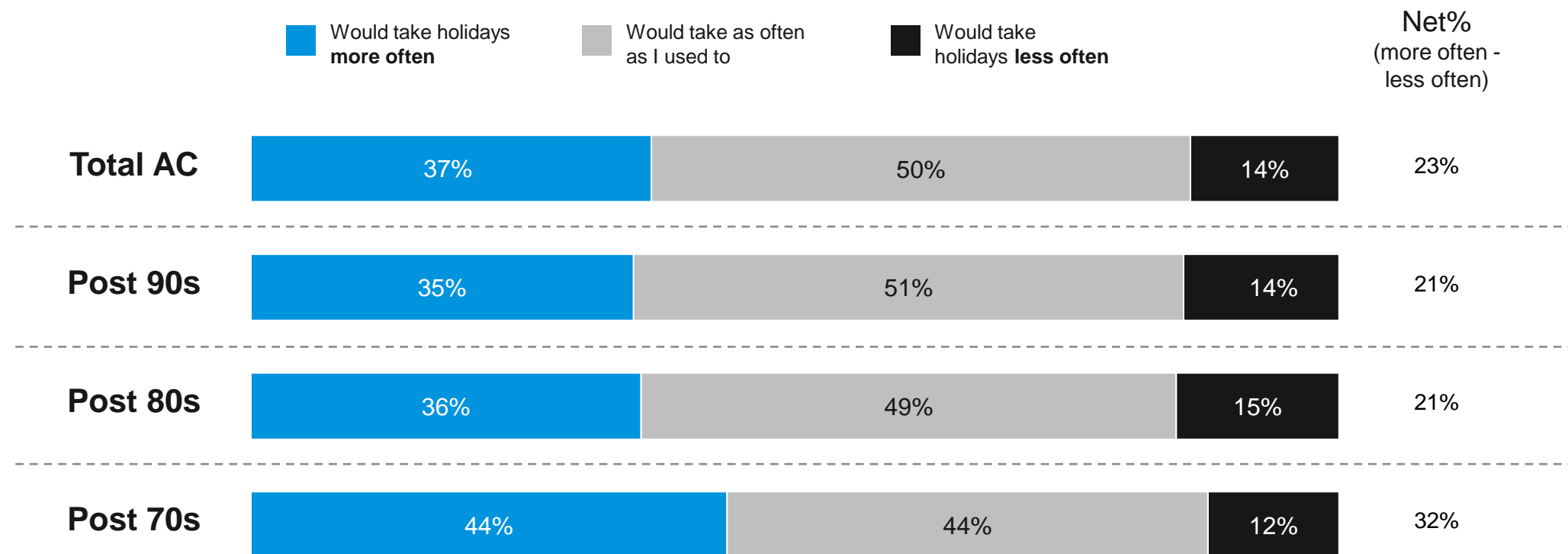
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37% of ACs want to take more frequent holidays outside of Asia after international travel restrictions are lifted and this proportion is indicatively higher among Post 70s



Expected change to holiday travel to destinations outside Asia after COVID-19

% AC | June 20



Notes:

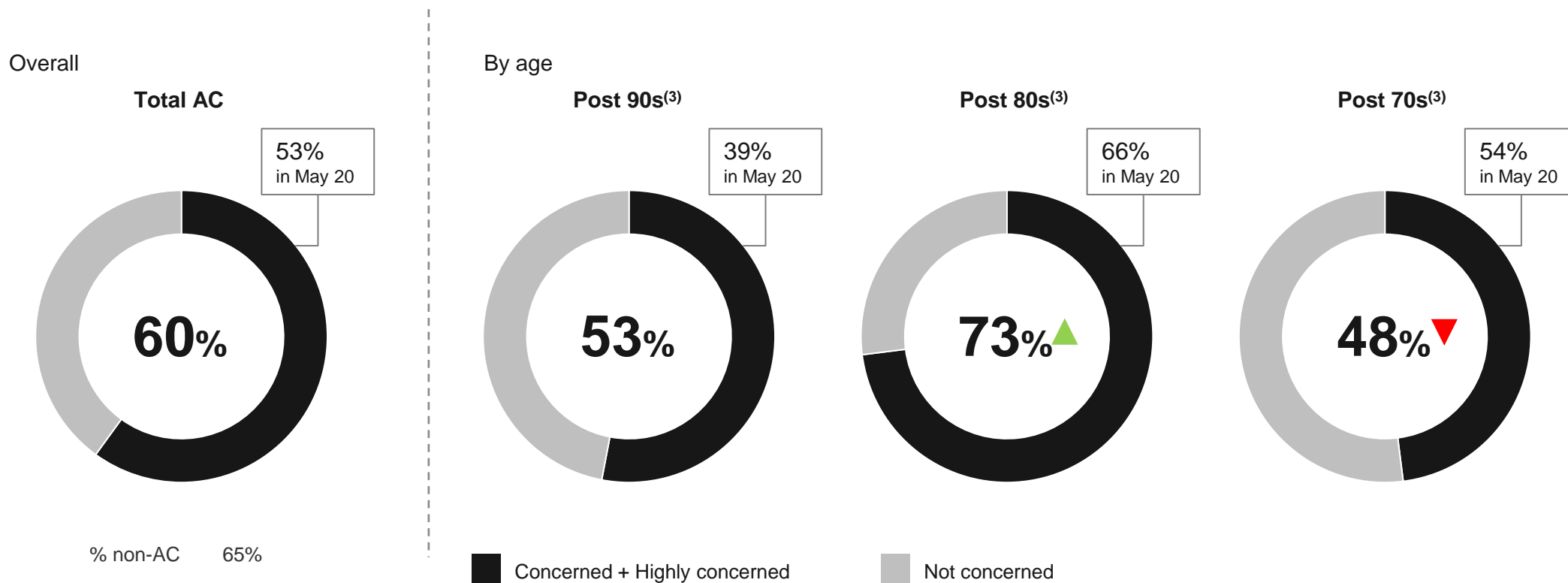
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Over half of ACs say that they have reassessed what they look for in an overseas holiday destination due to COVID-19; this proportion is higher among Post 80s compared to other generations

ACs who say that COVID-19 has changed what they look for in overseas destinations

% AC | June 20



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ACs are likely to choose destinations with a better epidemic control, hygiene and safety procedures and lower population density

Changes in what they look for in overseas destinations as a result of COVID-19

Verbatim – AC & non-AC | June 20

Safer destinations

“I will cut back to certain countries where the epidemic is particularly poorly controlled, such as Europe and the United States”

“Avoid traveling to countries with severe epidemics”

“Should travel to a country like New Zealand, not Europe”

“Will carefully consider the degree of local epidemic control before choosing a destination”

“Choose countries with good epidemic control measures, environmental safety, and social stability”

“How the local government responds to the new crown virus; the self-consciousness of local people – are they responsible for themselves and others?”

“I will go to countries that do well in epidemic prevention and control, and I will not travel to countries that do not do well!”

“I will not travel to South America and North America”

Hygiene, health & safety procedures

Look for more complete sanitation and epidemic prevention measures”

“Various disinfection and epidemic prevention measures”

“Pay more attention to hygiene and safety”

“Will pay more attention to personal hygiene, strengthen the protection of this epidemic, wear personal protective materials, etc.”

“Consider the protective measures for the epidemic”

“Think more about disease prevention and control and your own safety”

“I feel that I am traveling more cautiously now, and I will better take my own protective measures”

“Health and safety are more important”

More nature and less crowds

“More consideration of safety issues, such as whether the destination is densely populated or not”

“Before the outbreak of the new crown epidemic, I might choose to go to some more prosperous urban areas, but after the outbreak, I prefer to go to places with beautiful natural scenery”

“Hope to get close to nature”

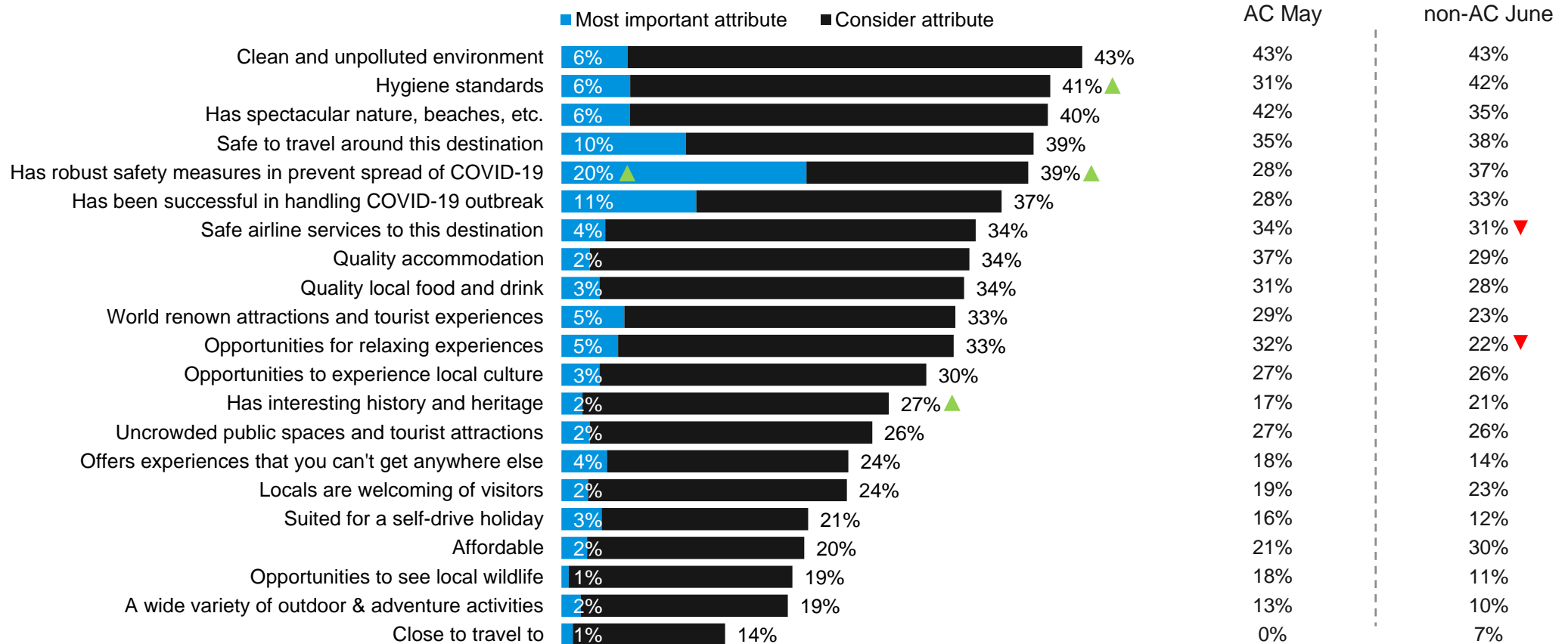
“May reduce visits to places with intensive people traffic, pay more attention to personal hygiene”

“Looking for a cleaner environment”

Safety measures in preventing the virus spread are the most important factors influencing destination choice for ACs in the COVID-19 world

Attributes considered when choosing destination after COVID-19

% AC | June 20



Notes:

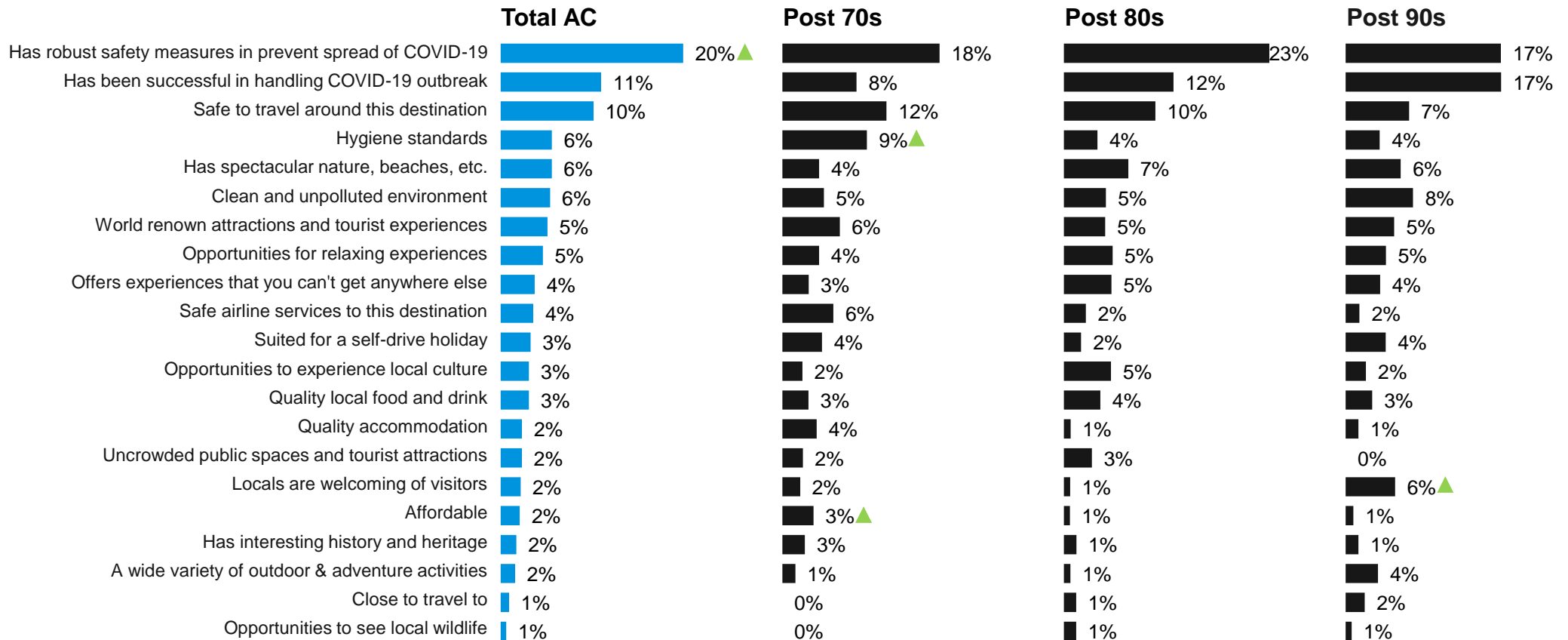
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Across all age cohorts, robust safety measures, well handled COVID19 outbreak and hygiene standards are the most important drivers of destination choice

The most important attribute considered when choosing destination after COVID-19 (top 10)

% AC | June 20



Notes:

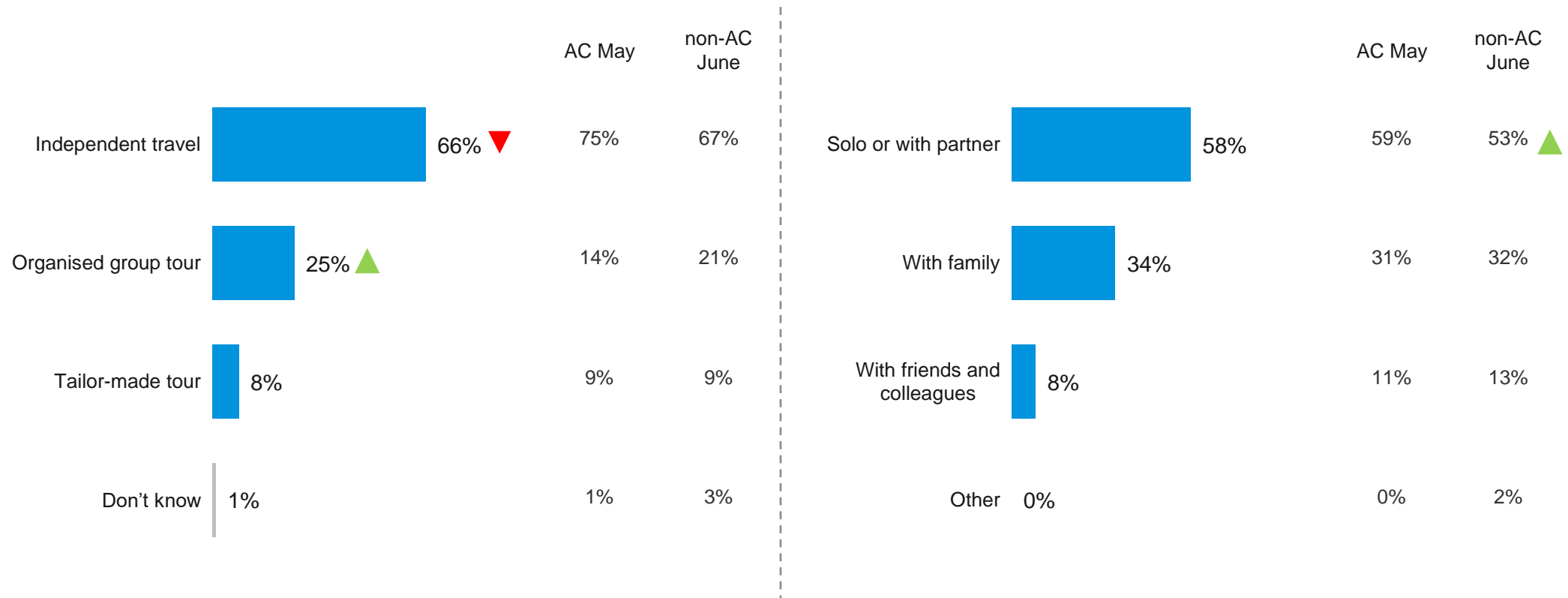
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▲ significantly higher / lower than other age segments

Most ACs plan to travel as an FIT, either solo or with their partner, although interest in group tours among ACs have increased since May

Style of travel for the next overseas holiday trip

% AC | June 20



Notes:

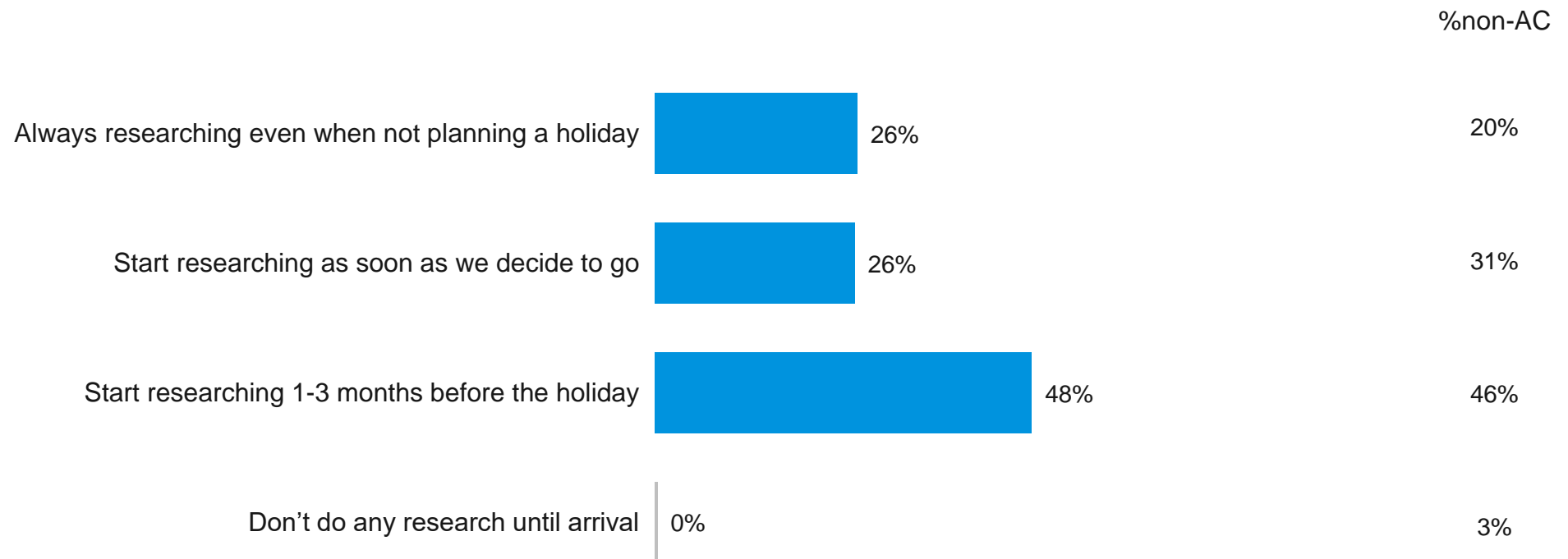
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ACs tend to do research for their holiday trips before they arrive and most often the research commences 1-3 months before the departure

Planning of international holidays

% AC | June 20



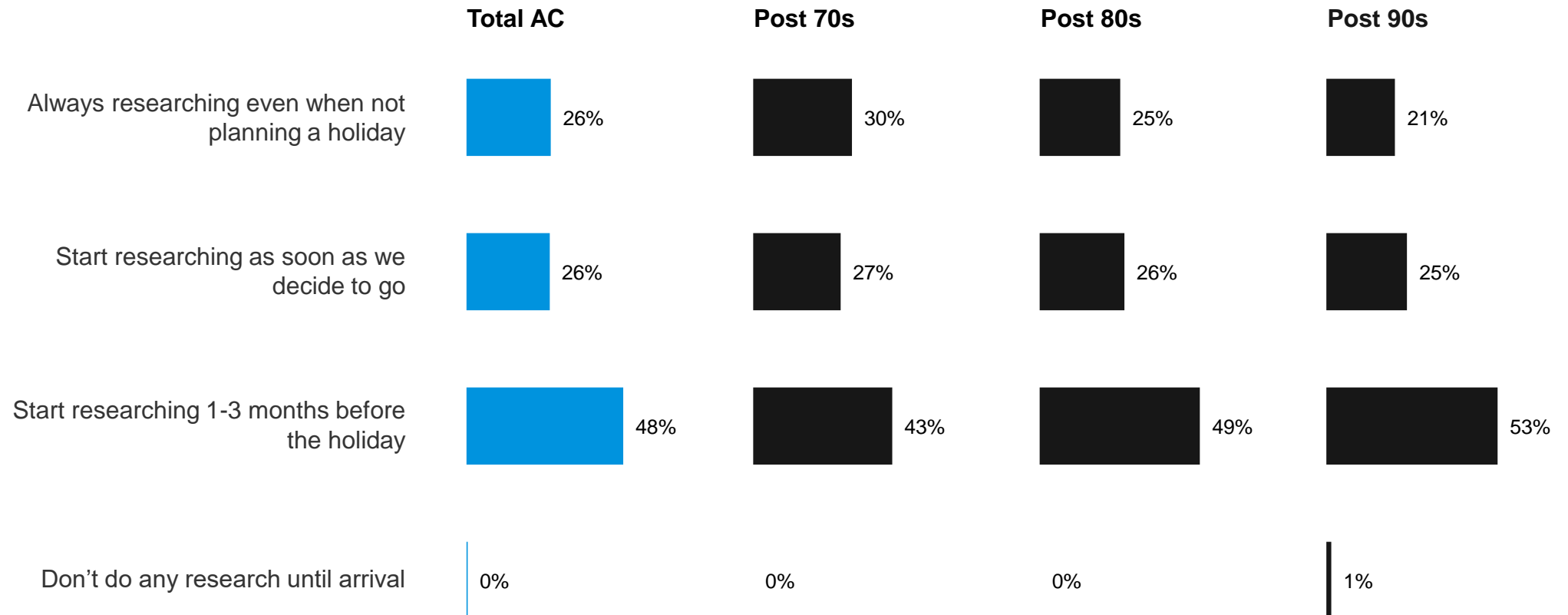
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This approach to planning is consistent across the three generations

Planning of international holidays

% AC | June 20



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