



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

February 2021

Fieldwork period:
22 February – 08 March 2021



Summary

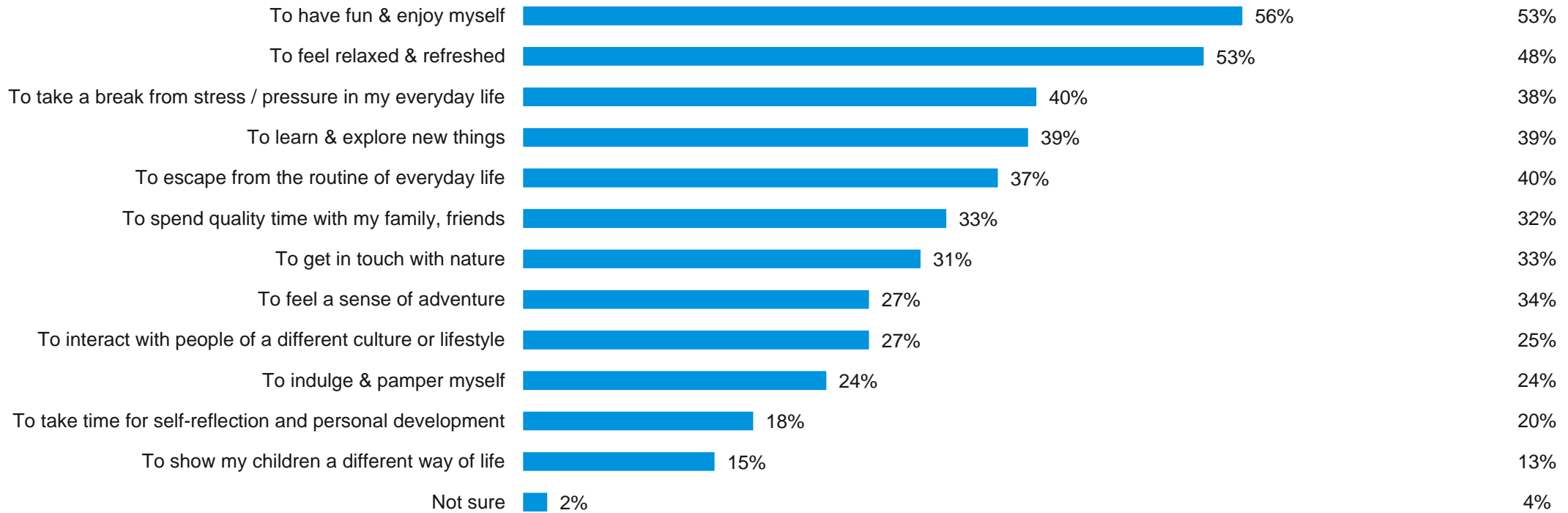
- Many measures are in line with Nov 2020, such as 80% of ACs wanting to travel internationally for the first time for a holiday, and most wanting to travel for fun and relaxation
- Australian Active Considerers (ACs) are focused on cleanliness and sanitization, and hand sanitiser availability as comfort measures when travelling post Covid-19
- Travel within Australia continues to be a strong draw for Australian ACs, as compared to pre-Covid, domestic destinations appear more frequently as a competitor for New Zealand
- 60% of Australian ACs willing to come to New Zealand within six months of border reopening, in line with Nov 2020
- 20% of AC's are both willing to come to New Zealand within six months **and** have New Zealand as their first preference. This gives us an idea of our most engaged ACs. Given the current online population and AC incidence, this equates to about 800K people
- Support for the trans-Tasman bubble remains high with 98% of ACs in favor of it, including 25% who have some concerns.

Enjoyment and relaxation are the key needs that would motivate ACs to travel internationally once COVID-19 passes, and these haven't changed since November 20

Needs/reasons driving the desire to travel internationally for a leisure holiday once COVID-19 passes

% AC | February 21

November 20

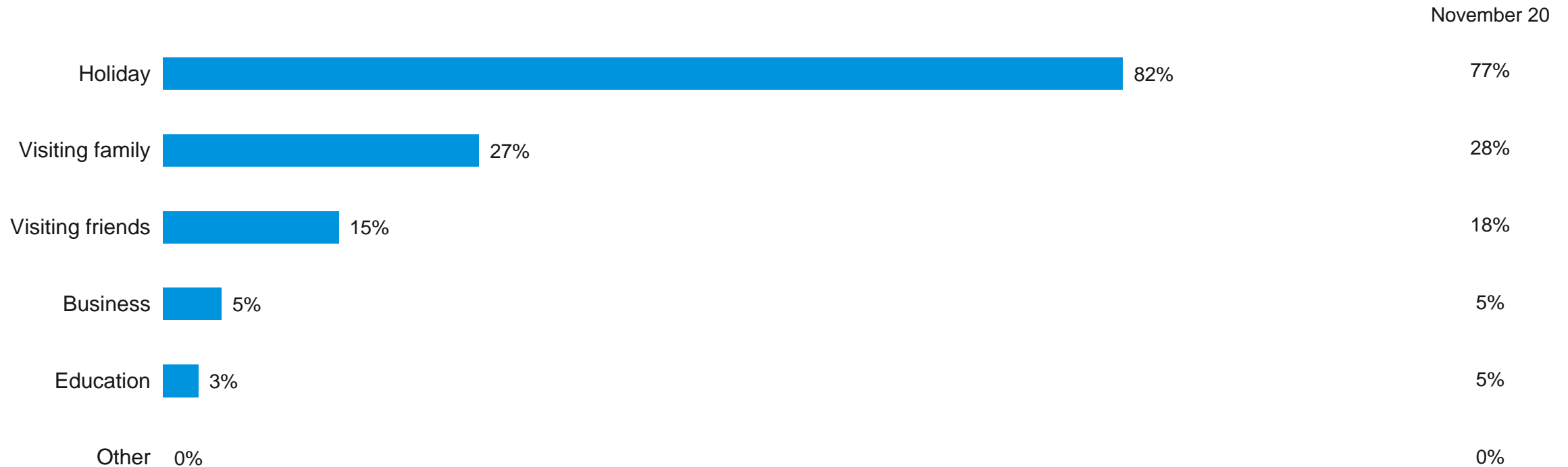


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Holiday remains by far the most common reason for a first overseas trip for ACs

Main reason for your first overseas trip once COVID-19 passes

% AC | February 21

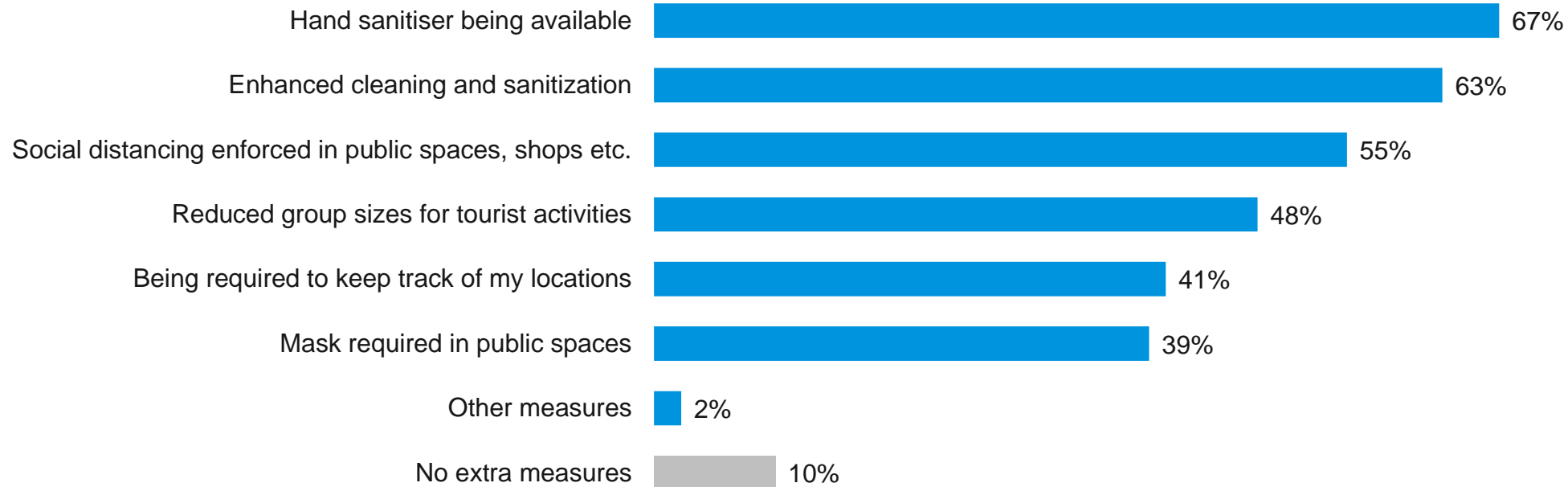


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Hand sanitiser being available, sufficient cleaning and sanitisation, and social distancing enforced in public spaces are top priority measures for ACs

Measures would like to see implemented at the destination

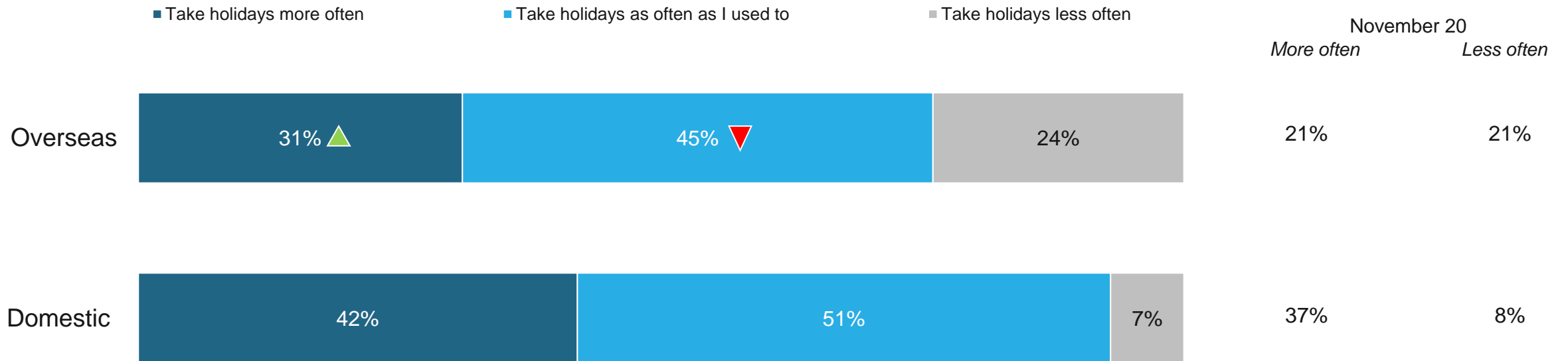
% AC | February 21



More ACs state they plan to take *overseas* holidays more often after Covid-19 than in November 20; however the proportion of ACs looking to increase the frequency of *domestic* holiday trips is still higher

Expected change to holiday travel after COVID-19

% AC | February 21

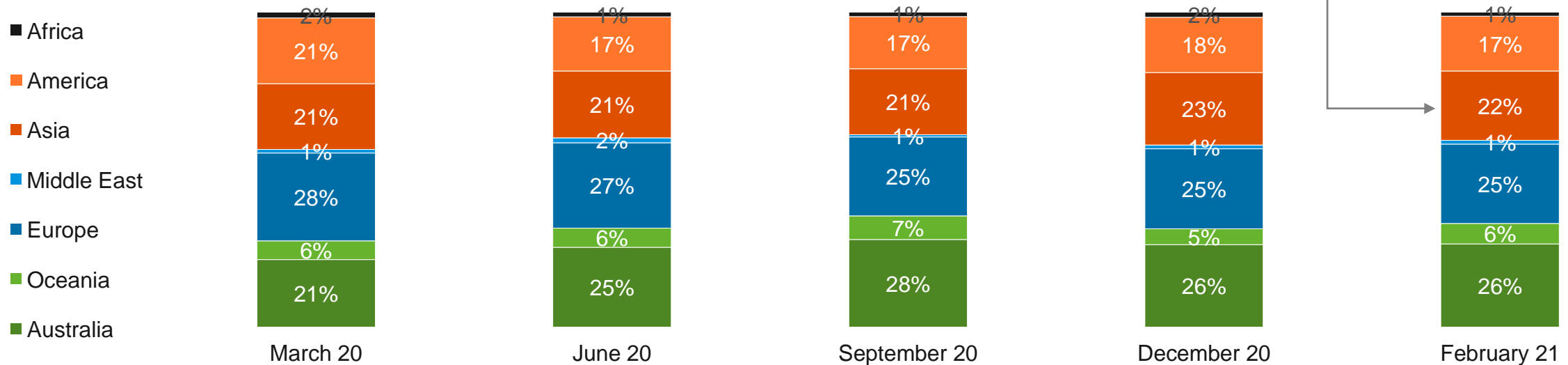


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Compared to pre-COVID, the preference for domestic travel has increased over time, while preference for Americas and Europe has somewhat decreased

Preference for competing destinations by regions

% share of preference | 3MRA up to December 20 | 2MRA up to February 21

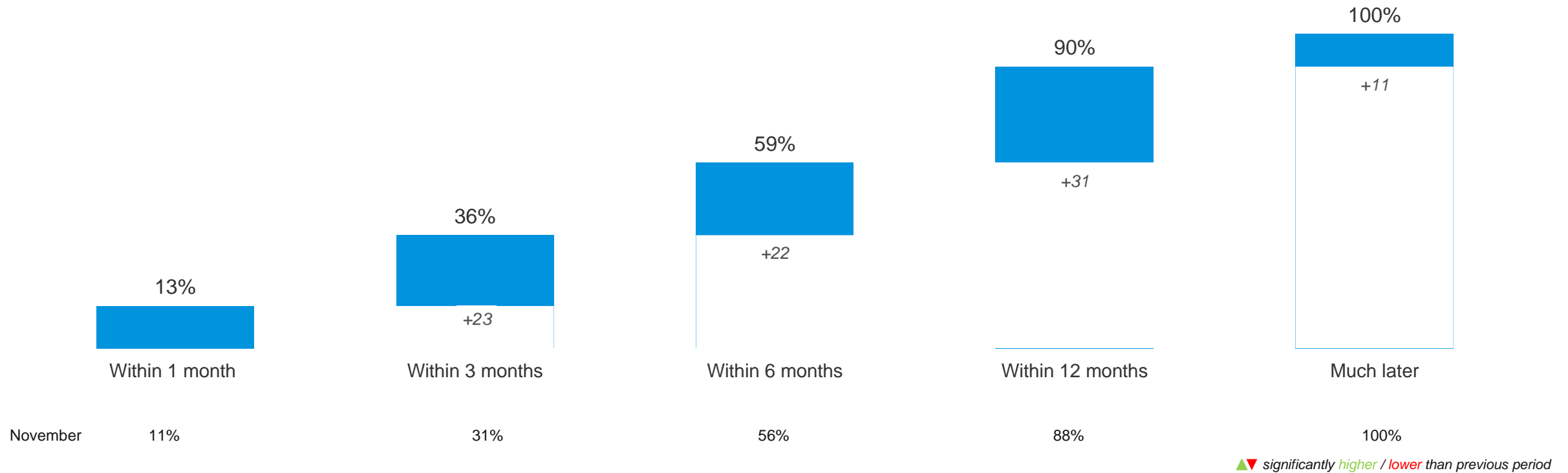


As this analysis has been done among ACs, preference for New Zealand has not been included. Preference for New Zealand is one of the mandatory AC criteria; therefore, its share does not change over time.

Demand for international travel remains high with almost 60% of ACs wanting to travel abroad within the next six months of restrictions being lifted

Speed of international holiday demand recovery after restrictions are lifted

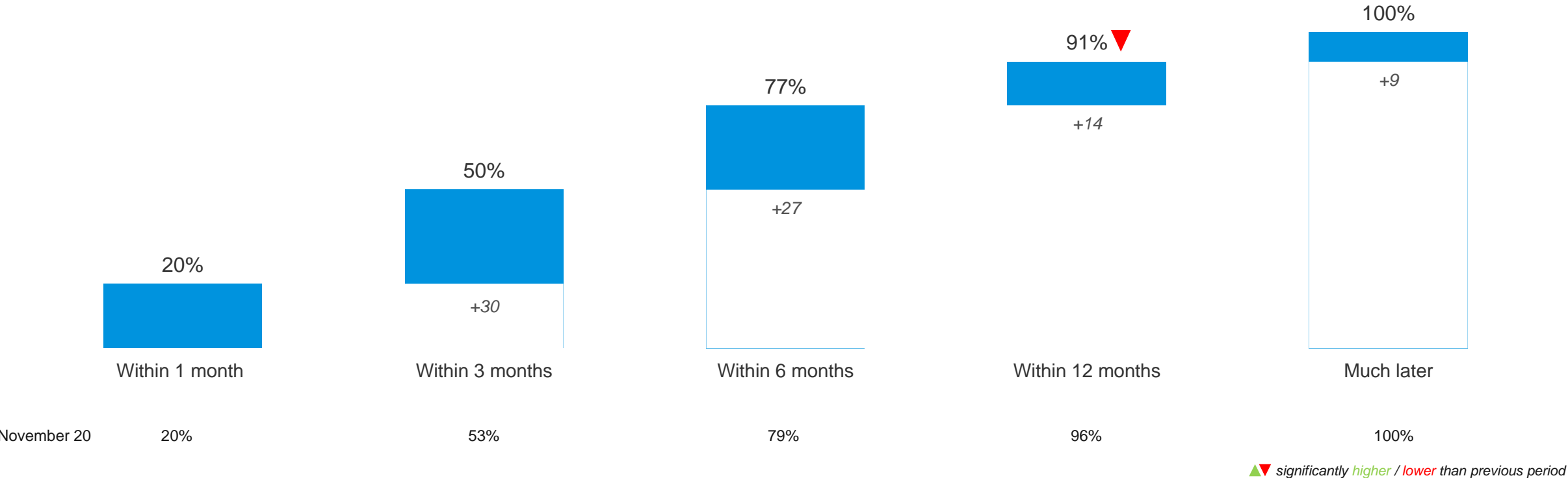
% AC | November 20 vs February 21



91% of ACs intend to take domestic holidays within a year from now – although this figure has decreased compared to November 20

Speed of Australia domestic holiday demand recovery

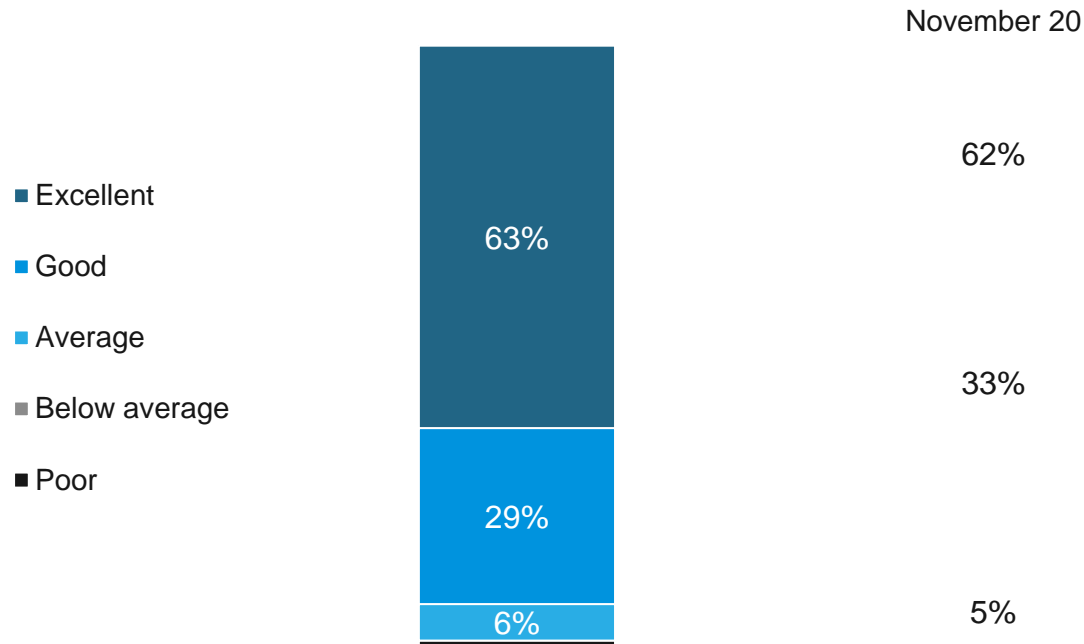
% AC | November 20 vs February 21



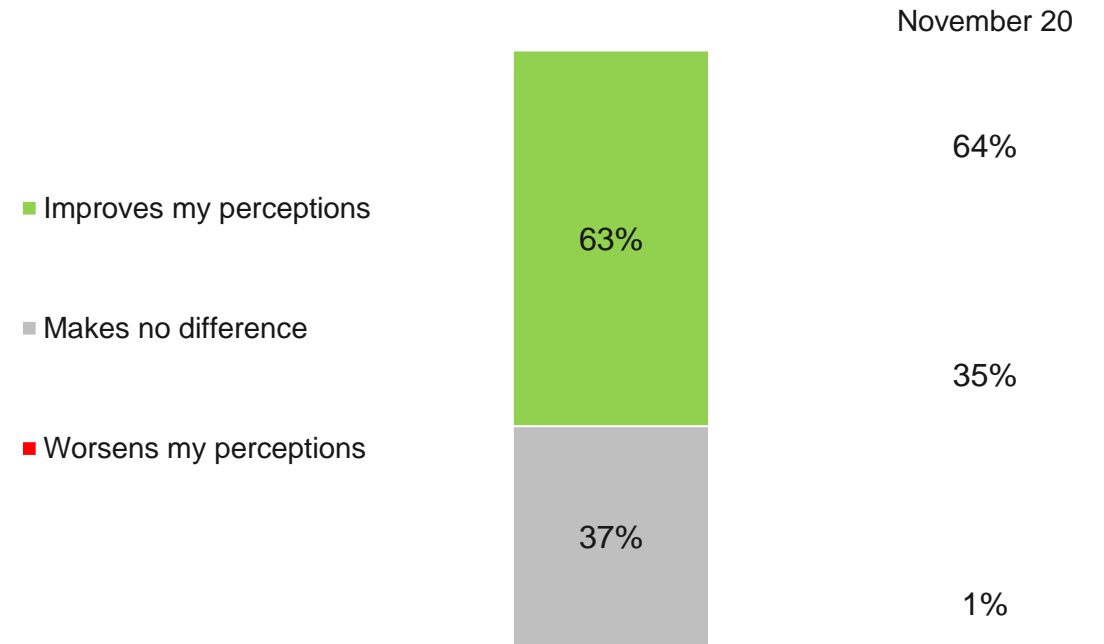
▲▼ significantly higher / lower than previous period

The evaluation of New Zealand's health response has not changed since November 20: it is still seen as excellent or good by the majority of ACs and this improves perceptions of New Zealand for around 60% of ACs

Evaluation of New Zealand's health response
% AC | February 21



Impact of the health response on perceptions of New Zealand as a holiday destination
% AC | February 21

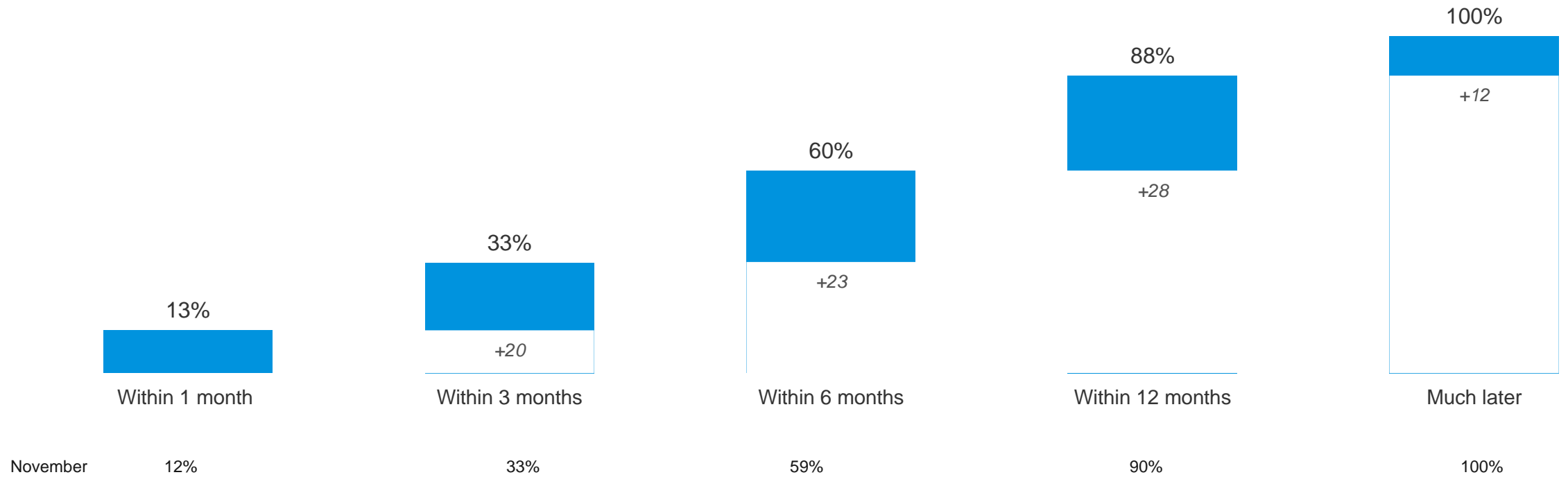


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Compared to November 20, consistent volumes of ACs are wanting to travel to New Zealand once it is possible; six out of ten ACs are open to travel within six months of borders being open

Speed of New Zealand holiday demand recovery after restrictions are lifted

% AC | November 20 vs February 21

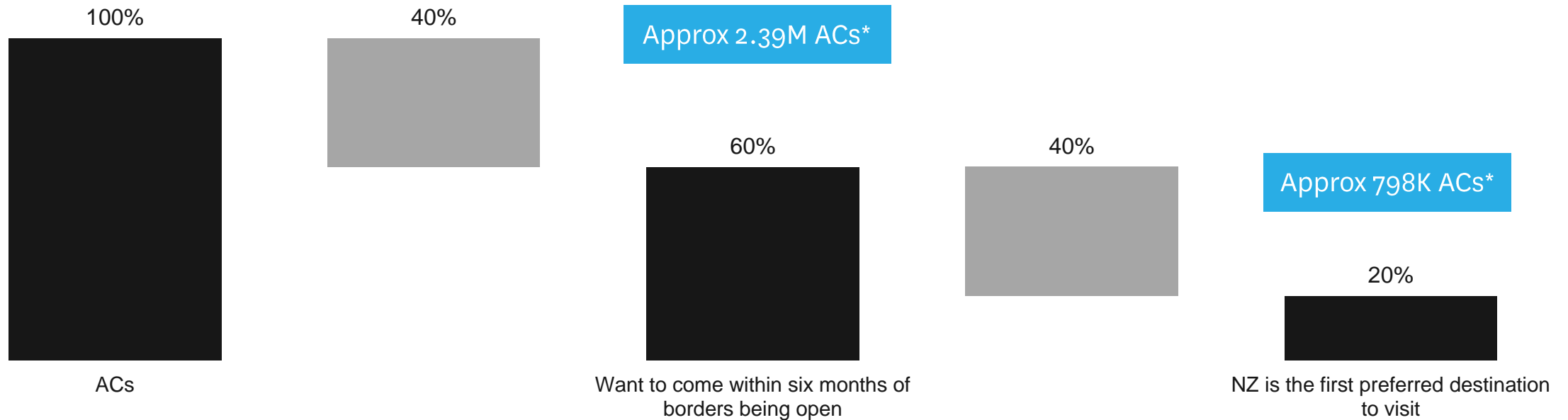


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20% of AC pool would want to come within six months of the borders being opened and rank New Zealand as the first preferred destination

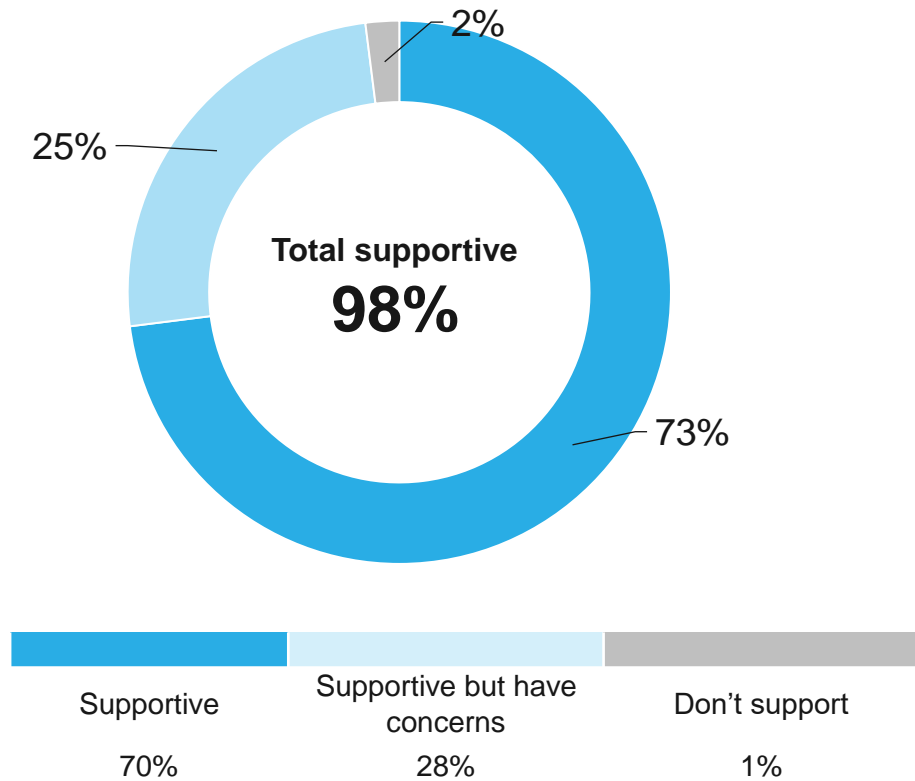
Most likely to come within the six months of restrictions being lifted

% AC | February 21



The trans-Tasman safe travel zone has near total support among ACs with only a handful of people vocalising concerns around an outbreak occurring in either country and the logistical implications of that

Support for creating trans-Tasman travel safe zone
% AC | February 21



▲▼ significantly higher / lower than previous period

Reasons for concerns around the idea of Trans-Tasman safe travel zone (verbatim)

- “A second wave”
- “Airline companies and tourist areas fleecing those trying to go there”
- “All travel concerns me at the moment, and I’m sceptical until I’m protected with a vaccine”
- “Travellers must be consistently quarantining as they arrive for 2 weeks”
- “Possibility of the virus travelling between countries”
- “People having the virus yet showing no signs and giving it to everyone”
- “New Zealand is OK but we need to open our domestic borders first”
- “Just how long it will last? I do not want to see this go on for longer than is really necessary”
- “I think we need to look after Australians first”
- “I would like to see a larger geographical "bubble" emerge”
- “I believe all international flights should be banned until COVID-19 is over, if it will ever be over.”
- “Going into lockdown while overseas”
- “What safety fails will they introduce?”