in conjunction with

International Recovery Research

Wave 1 – January 2021

Fieldwork: 2nd – 16th December 2020

If you need the data in a different format, please contact research@visitbritain.org

Destination Bristol ©Gary Newman

Content

Methodology

Survey specifications

- Markets surveyed: Australia, Canada, China, France, Germany, India, Irish Republic, Italy, Netherlands, Norway, Saudi Arabia, Spain, Sweden, USA
- Target: people having travelled abroad at least once in the past 3 years
- Fieldwork period: 2nd-16th December 2020
- Data collection: online interviews on Access Panel; Quotas on gender, age and regions
- Sample Size: 8245 interviews
- ***Note**: international surveys involve a cultural factor in the way respondents express their opinion. Commonly, Indians and Chinese tend to be very positive in their answers compared to European markets. It is advised to take account of this cultural factors in cross-market analysis, particularly between long-haul and short-haul results.*

General guidance on statistical confidence level:

Sample Size	100	200	300	400	500	700	1000
Margin Error	+/- 8%	+/- 6%	+/- 5%	+/- 4%	+/- 4%	+/- 4%	+/- 3%

Sample Sizes:

	Sample Size
Australia	518
Canada	521
China	1051
India	525
USA	1012
Saudi Arabia	502
Total Long Haul	**4129**
France	521
Germany	500
Italy	517
Netherlands	506
Norway	522
Irish Republic	519
Spain	516
Sweden	515
Total Short Haul	**4116**
Total	**8245**

Survey context and interpretation

Understanding consumer sentiment towards international travel during the Covid-19 pandemic:

- VisitBritain, Visit Wales, VisitScotland and London&Partners commissioned research to understand international consumer sentiment towards international travel, in order to inform their destination planning during the challenging era of the Covid-19 pandemic.
- The research aims at scoping the overall travel sentiment and attitudes, mapping triggers of travel, measuring the competitive position of Britain's destinations in consumers' minds and mapping drivers of a visit to Britain. Data must help stakeholders prioritize marketing efforts in 2021.

Interpreting the survey results in a changing travel context

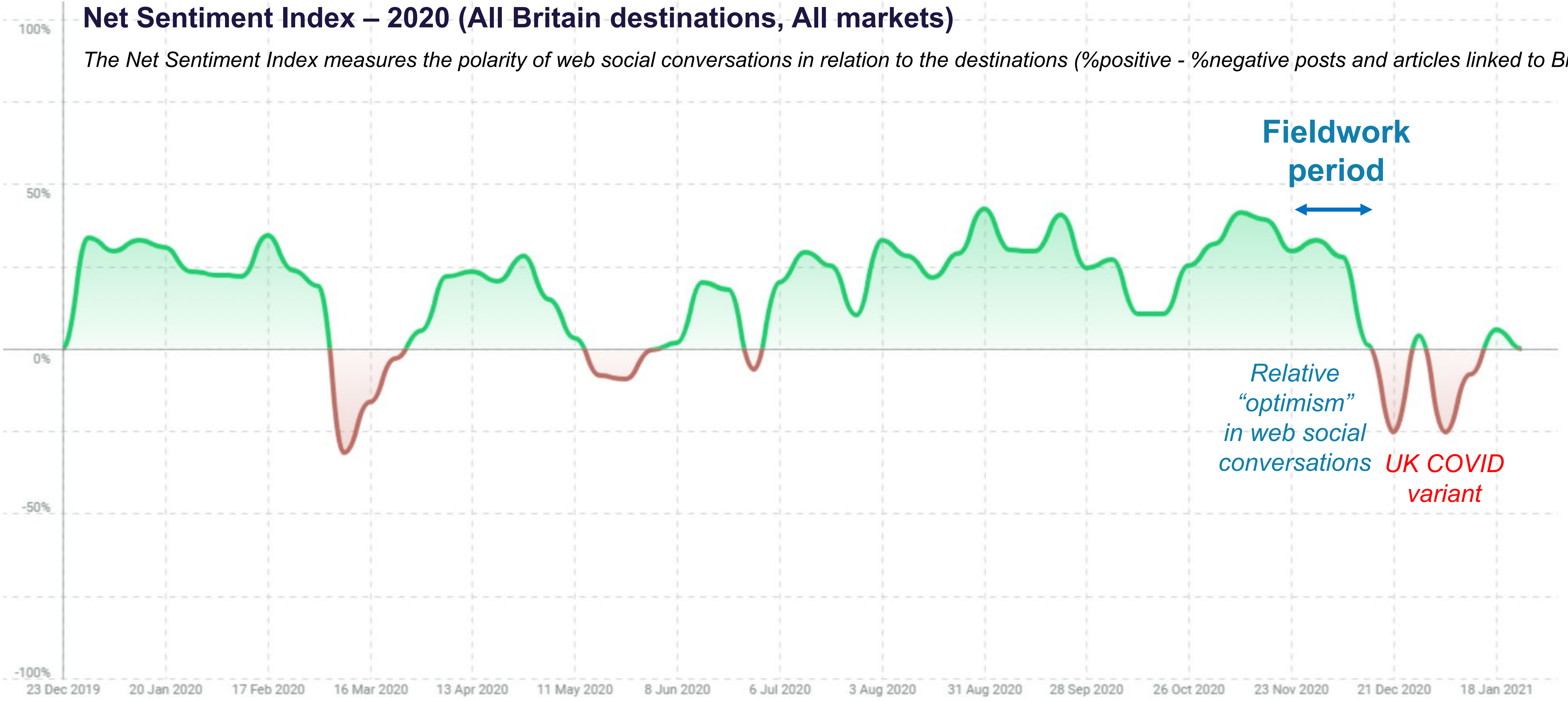
- Consumers' sentiment is in essence subject to the context evolution and particularly the sanitary environment impacting travel restrictions and effective choices of destinations available to consumers, changing almost every week. Travel intent should therefore be interpreted more as travel "desire".
- During the survey period (first half of December 2020), most countries were still facing wave 2 of the pandemic with lock-down and curfews in place, during which it was extremely difficult for consumers to follow fluctuating, complex travel bans, corridors, and restrictions between countries.
- However, at that time, positive prospects for 2021 related to the vaccine and the short-term Christmas bubbles envisaged have generated a positive reputation rebound in December for the travel sector, as measured by TCI Research for UNWTO (*). It is therefore suggested that the overall mindset of respondents was mixed, but probably in a positive dynamic when they completed the survey.
- Since mid-December (post-fieldwork), pessimism in the travel-related conversations have significantly developed while several more "aggressive" variants of the virus were detected, including the "UK-variant" leading to travel bans from/to the UK and negative impact on the destination reputation (*). **This recent shift was not or little present in conversations and medias while respondents took the survey**.

(*) UNWTO Recovery Tracker: https://www.unwto.org/unwto-tourism-recovery-tracker

Britain-related Reputation context during the fieldwork

Net Sentiment Index – 2020 (All Britain destinations, All markets)

The Net Sentiment Index measures the polarity of web social conversations in relation to the destinations (%positive - %negative posts and articles linked to Britain)



Source: Travelsat "sentiment" data measure the state and dynamic of destinations' and travel brands' e-reputation built from global web social conversations "at large", shared by medias, consumers, companies, citizens, brands and officials. Sentiment is not predictive alone of travelers' planning, BUT a positive e-reputation is essential to generate favorability towards destinations and travel brands, particularly in post-crisis management context.

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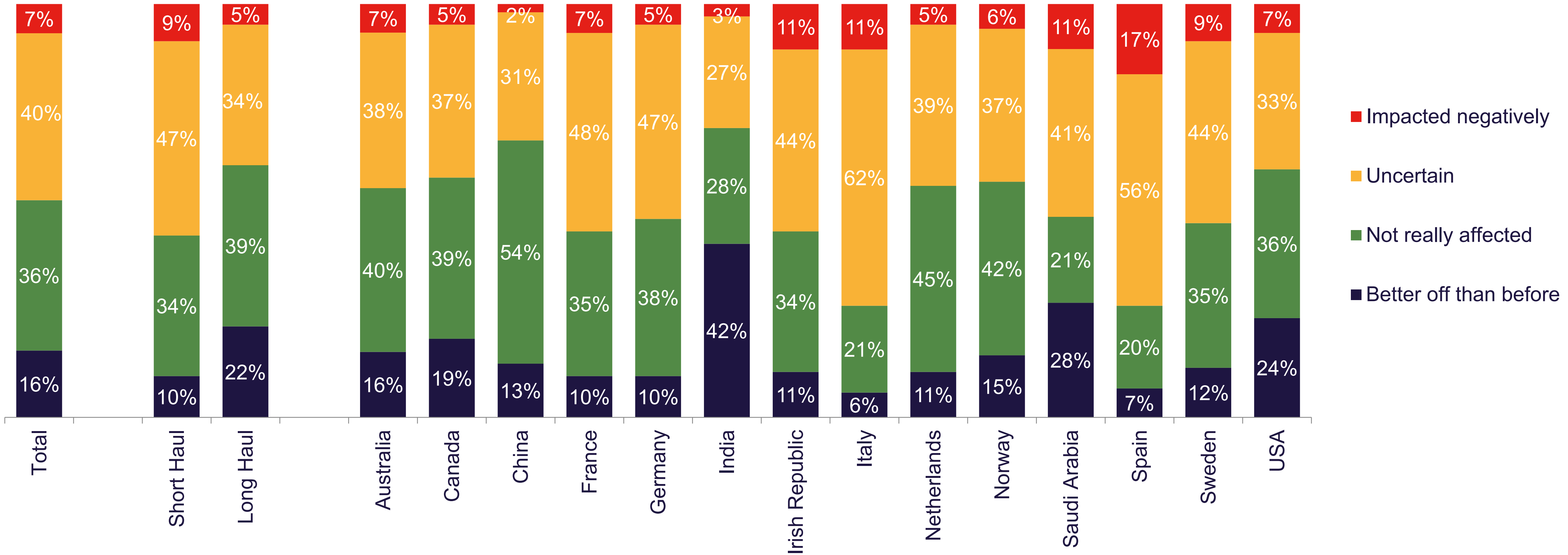
Respondents' financial situation

On average, half of respondents report no impact in their financial situation, but uncertainties remain important. Southern European markets seem to be the most negatively impacted now while 6 in 10 potential travellers from long-haul markets claim their spending power is currently spared.



Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: All respondents (8245 obs.)

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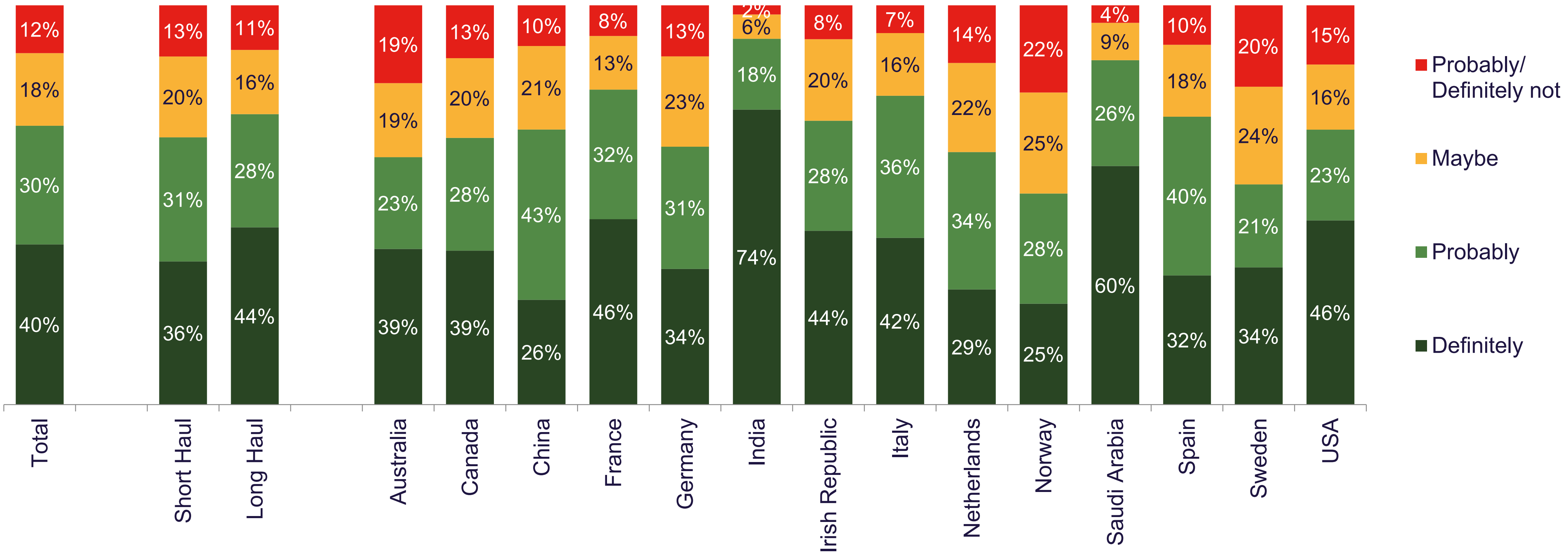
Overall travel intentions

Travel consideration for an international leisure trip

Overall, 7 in 10 respondents would consider an international leisure trip in 2021, showing a resilient desire to travel despite pandemic uncertainties. While Nordic markets express a more reserved attitude, France, Italy, India and Saudi Arabia show the most positive sentiment towards travelling abroad.

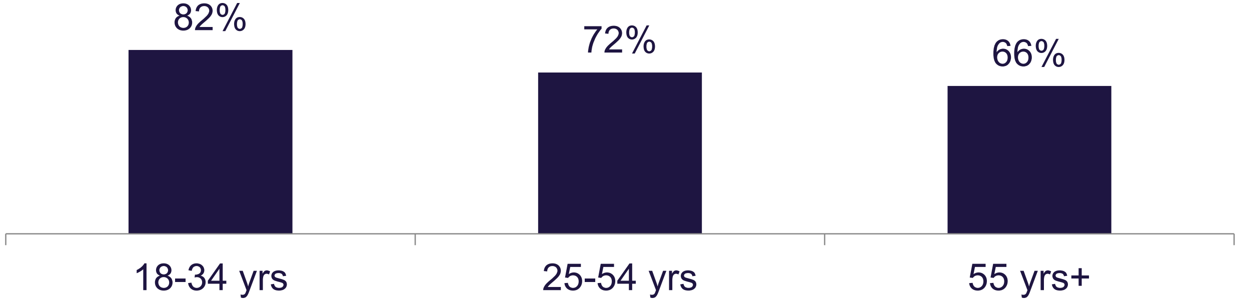


Q5: How likely would you consider an international leisure trip for more than one night in the next 12 months?
Base: All respondents (n = 8245)

Age impact on propensity to travel internationally

The intention to travel internationally is the highest among young respondents (<35 years old) in most markets except in China. Lower propensity to travel among 55+ reflects an overall sentiment of vulnerability towards virus.

Leisure travel intention (% Definitely + Probably)



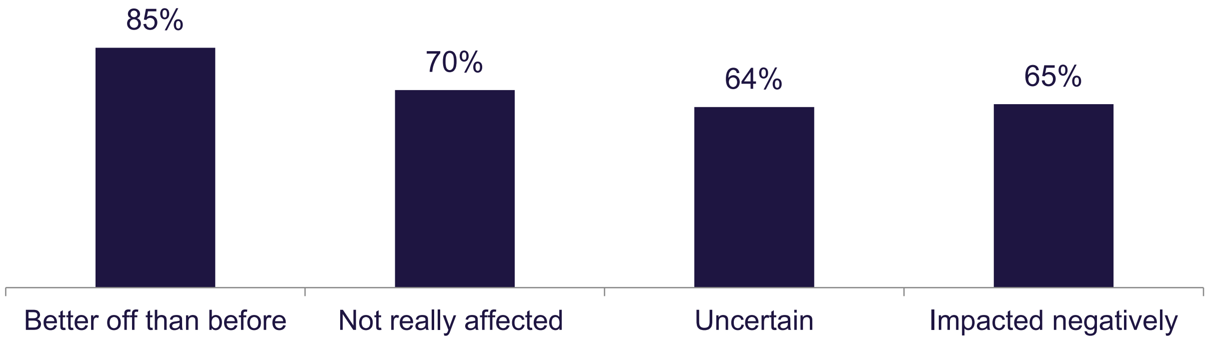
(% Definitely + Probably)	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
18 - 35 y.o.	78%	87%	88%	76%	86%	91%	73%	99%	83%	82%	81%	64%	99%	80%	64%	81%
35 - 54 y.o.	67%	82%	70%	72%	83%	80%	66%	92%	71%	77%	58%	57%	95%	71%	53%	80%
55+ y. o.	62%	70%	44%	62%	93%	74%	65%	91%	58%	75%	52%	58%	77%	74%	55%	59%

Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?
Q3: What is your age ?
Base: Respondents who plan on taking a European leisure trip in 2021 (n = 4759)

Impact of financial situation on propensity to travel

Financial uncertainties obviously act as an obstacle but the trend is less clear. There is opportunity for those who are better off financially. However, for those who are uncertain or have been impacted negatively, there is still a high proportion who would consider travel in 2021 indicating that the financial situation is not hugely detrimental to travel intentions.

Leisure travel intention (% Definitely + Probably)

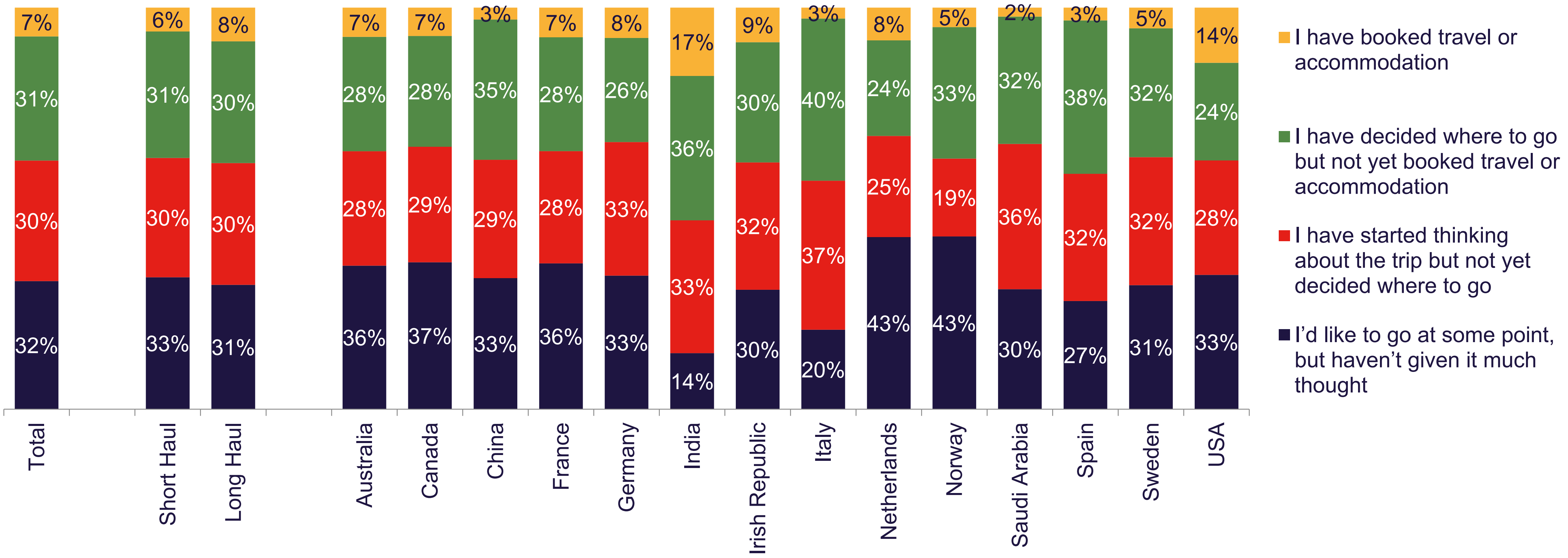


(% Definitely + Probably)	Total	Short Haul	Long Haul	Australia	Canda	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
Positive / Not impacted	75%	75%	78%	68%	68%	75%	82%	70%	95%	95%	87%	66%	56%	91%	76%	64%	76%
Uncertain	64%	64%	64%	55%	63%	56%	77%	58%	84%	84%	76%	59%	48%	84%	72%	48%	57%
Impacted negatively	65%	65%	66%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?
Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: All respondents (n = 8245)

Trip planning stage per market

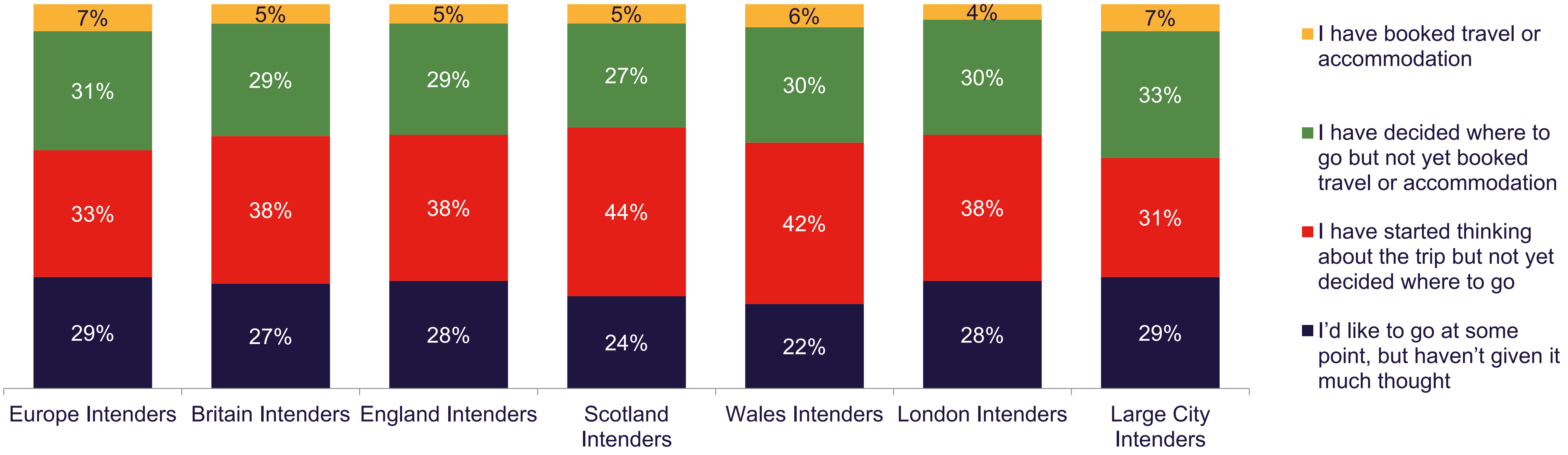
Overall, about 4 in 10 respondents have a clear plan in mind about where they want to go, but only 7% of them have already booked, making the destination choice still open for 2021. Dutch and Norwegians are the least advanced in their trip planning, while Italians, Spanish and Indians have more established plans. The US and Indian markets report the highest level of booking rate.



Q8: Which of the following best describes where you stand with your plans for your next international leisure trip?
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 8078)

Trip planning stage among Intenders to Europe

A majority of leisure travel intenders having UK destinations in mind are still in early stage of their plan. On average, a third of them are very certain about the destination choice, reflecting the overall uncertainties on the market. High travel intentions combined with restricted travel choices will continue fuelling last minute "opportunist" attitudes among consumers.



Q8: Which of the following best describes where you stand with your plans for your next international leisure trip?
Base: Europe Int. (n = 4759) – Britain Int. (n = 1012) – England Int. (n = 869) – Scotland Int. (n = 513) – Wales Int. (n = 290) – London Int. (n = 379) – Large City Int. (n = 3640)

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Travel horizon for next international leisure trip

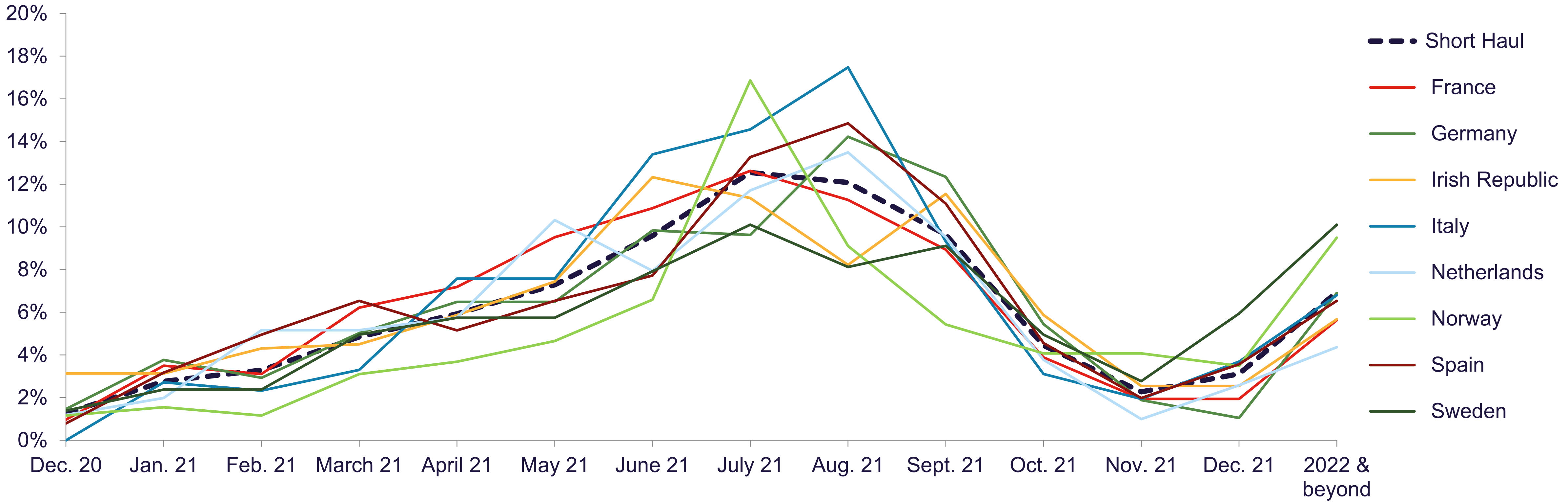
(NB this research was conducted before the new variants were widely reported so reflects intentions in that previous context.)
The travel horizon pattern suggests diverse attitudes with 4 in 10 respondents ready to go by June, 2 in 10 looking at travelling next summer and nearly 3 in 10 after summer 2021 or later in 2022, while 1 in 10 are still undecided. Europeans see July/August 2021 as the next obvious period. The large booking window offers possibilities of “opportunist” / last minute communication. Though not realistic, short-term travel horizon among Long-Haul markets reflects a resilient desire to travel.

	Total	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
Dec-20	2%	1%	3%	2%	2%	2%	1%	1%	11%	3%	0%	1%	1%	3%	1%	1%	3%
Jan-21	4%	3%	6%	2%	2%	4%	3%	4%	11%	3%	3%	2%	2%	12%	3%	2%	6%
Feb-21	5%	3%	6%	4%	3%	6%	3%	3%	9%	4%	2%	5%	1%	11%	5%	2%	6%
Mar-21	7%	5%	8%	5%	7%	10%	6%	5%	13%	5%	3%	5%	3%	10%	7%	5%	6%
Apr-21	7%	6%	8%	4%	3%	13%	7%	6%	8%	6%	8%	6%	4%	9%	5%	6%	6%
May-21	8%	7%	8%	4%	5%	12%	10%	6%	10%	7%	8%	10%	5%	10%	7%	6%	7%
Jun-21	9%	10%	8%	8%	5%	9%	11%	10%	7%	12%	13%	8%	7%	10%	8%	8%	7%
Jul-21	10%	13%	7%	6%	7%	8%	13%	10%	5%	11%	15%	12%	17%	11%	13%	10%	7%
Aug-21	9%	12%	7%	6%	9%	7%	11%	14%	5%	8%	17%	13%	9%	9%	15%	8%	5%
Sep-21	8%	10%	6%	9%	9%	4%	9%	12%	5%	12%	9%	10%	5%	1%	11%	9%	7%
Oct-21	5%	4%	6%	5%	7%	9%	4%	5%	5%	6%	3%	4%	4%	3%	5%	5%	6%
Nov-21	3%	2%	3%	5%	6%	1%	2%	2%	3%	3%	2%	1%	4%	1%	2%	3%	4%
Dec-21	4%	3%	5%	9%	9%	2%	2%	1%	4%	3%	4%	3%	3%	2%	4%	6%	5%
2022/beyond	7%	7%	7%	12%	13%	4%	6%	7%	2%	6%	7%	4%	9%	2%	7%	10%	10%
Don’t know	12%	14%	11%	18%	12%	11%	12%	13%	2%	12%	6%	16%	26%	4%	9%	18%	15%

Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 8078)

Travel horizon for next international leisure trip (SH)

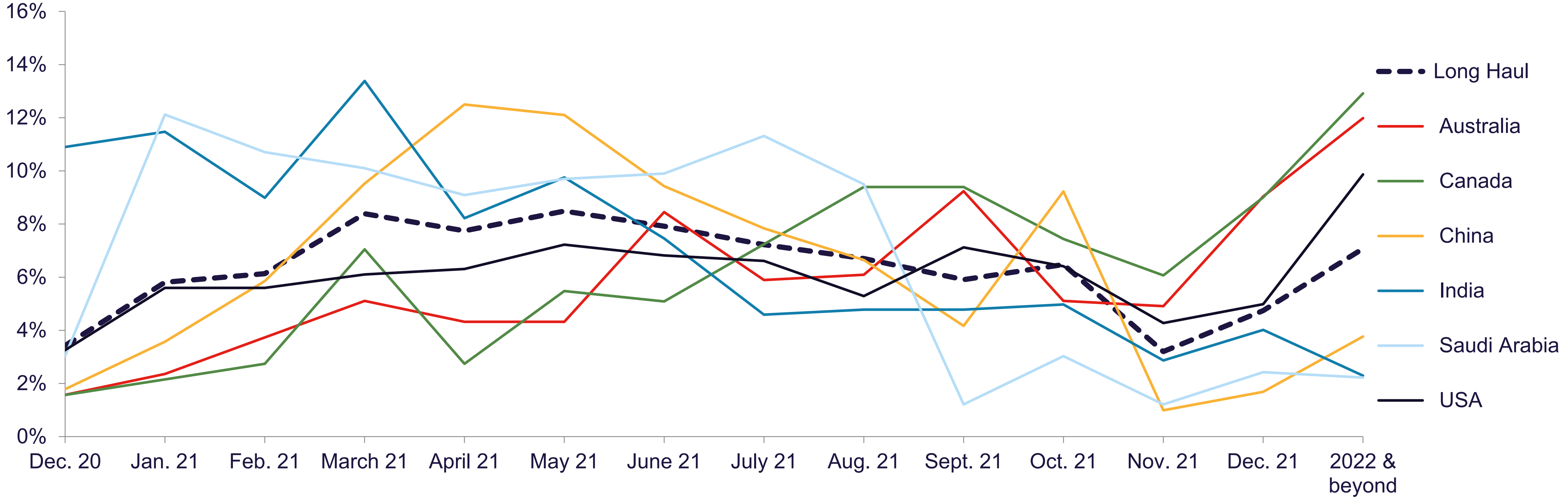
(NB this research was conducted before the new variants were widely reported so reflects intentions in that previous context.)
European markets look at summer at large as a next realistic window for travelling abroad. However, tactical short-term / last minute booking are also considered.



Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 8078)

Travel horizon for next international leisure trip (LH)

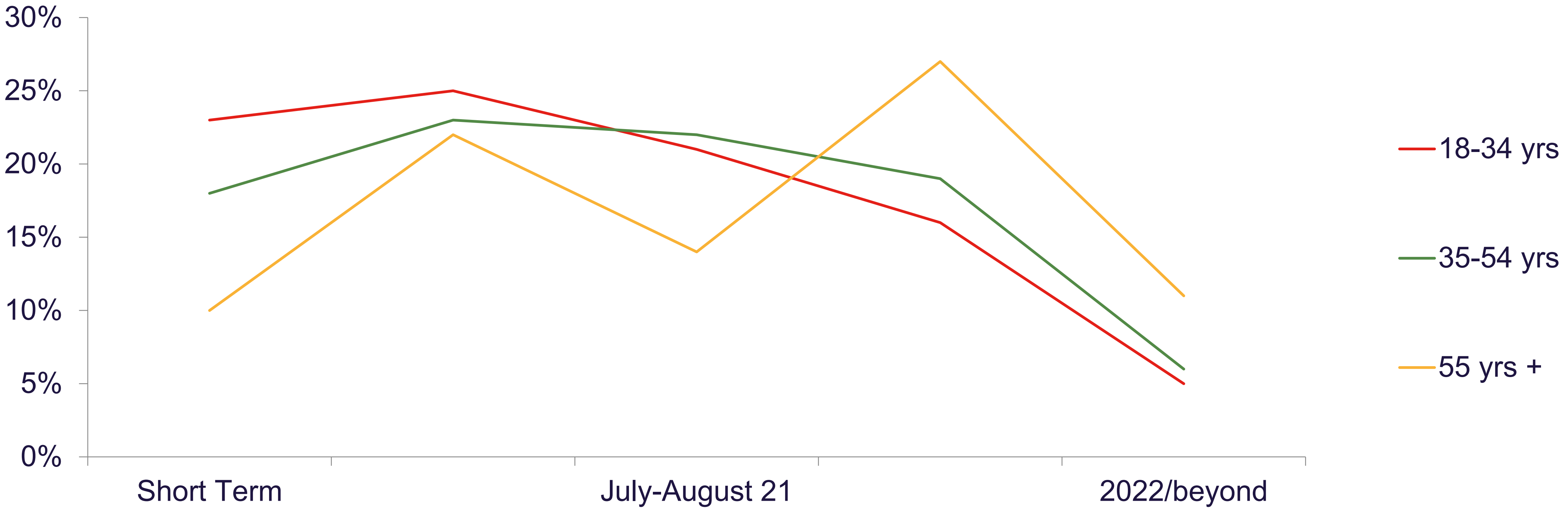
(NB this research was conducted before the new variants were widely reported so reflects intentions in that previous context.)
Long-haul markets intentions are spread over the year and show a willingness to travel abroad as soon as possible.



Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 8078)

Age impact on travel horizon

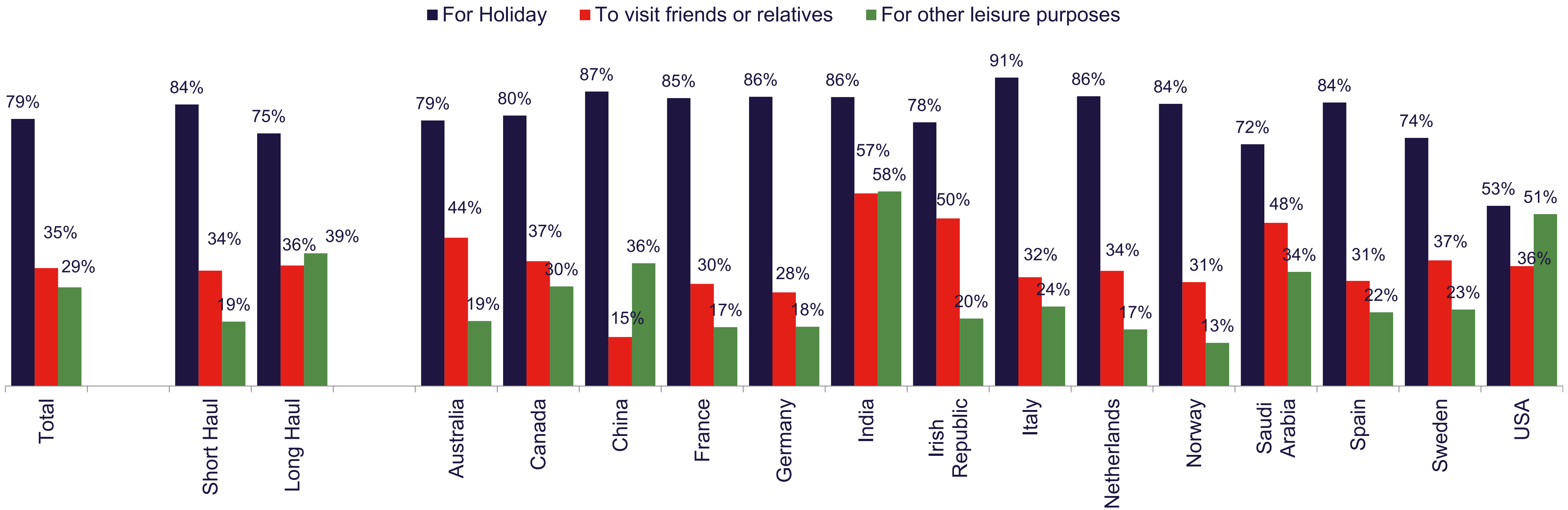
(NB this research was conducted before the new variants were widely reported so reflects intentions in that previous context.)
Propensity to travel as soon as possible is higher among young potential travellers. Older demographics are showing interest in should seasons. Things may evolve with the rollout of the vaccine but we imagine it will take longer to restore trust and confidence in travel amongst older demographics.



Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 8078)

Purpose of leisure travel

Beyond holiday motivations and other personal purposes, the need for reconnection with friends and relatives expressed by a third of respondents offers opportunities for VFR trip extension, particularly among Irish, Indians and Saudis. The expected large VFR segment stresses the importance of keeping residents promoters of their destination providing they often act as a trusted source of information about the reality of the local COVID situation.



Q6: Considering your next international leisure trip, for what purpose(s) would you travel? (Multiple Answers)
Base: All respondents (n = 8245)

Activators for an international leisure trip (1)

Consumers are still ready to travel, but not at any cost! Beyond COVID concerns, they expect more freedom of movement and less risk of losing money if their trip is cancelled and/or their experience limited at the destination. Stability, transparency, and flexibility remain key activators for triggering bookings in all markets, putting pressure on the private sector to offer flexible cancellation policies and on DMOs to deliver accurate and timely information.

	Total	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
The availability of a vaccine/treatment against coronavirus	41%	39%	43%	45%	51%	40%	28%	31%	40%	47%	44%	35%	44%	33%	47%	40%	46%
A significant decrease in coronavirus cases at destination	38%	40%	35%	31%	41%	35%	37%	39%	36%	48%	46%	32%	43%	33%	35%	39%	36%
Money-back guarantee should I wish to cancel my trip	36%	43%	29%	37%	45%	15%	45%	36%	28%	47%	43%	38%	38%	20%	51%	43%	38%
Removal of quarantine policies in destination country	36%	37%	34%	38%	38%	33%	36%	45%	30%	38%	26%	40%	43%	32%	40%	27%	35%
Hygiene & safety protocols in place at destination	34%	31%	36%	32%	33%	38%	28%	30%	49%	40%	41%	24%	23%	26%	45%	21%	36%
Removal of quarantine policies in home country	30%	31%	29%	32%	34%	30%	28%	39%	25%	34%	29%	30%	41%	23%	30%	19%	27%
An attractive offer e.g. discounts on flights or accommodation	27%	26%	28%	24%	24%	26%	27%	20%	32%	29%	33%	20%	20%	39%	34%	25%	29%
Your Government's advice on international travel	26%	26%	26%	38%	31%	23%	15%	18%	36%	35%	16%	30%	48%	17%	15%	34%	22%
Stable political environment in destination country	20%	17%	24%	13%	18%	35%	22%	19%	24%	15%	18%	12%	17%	27%	16%	16%	19%
Mandatory coronavirus testing at some point during the trip	19%	17%	21%	21%	21%	17%	18%	15%	30%	23%	22%	11%	13%	20%	24%	14%	21%
Official national hygiene label in accommodation and attractions in destination	16%	13%	20%	13%	11%	31%	11%	12%	30%	15%	13%	12%	9%	12%	18%	12%	14%
Voucher-back guarantee should I wish to cancel my trip	15%	16%	14%	12%	15%	13%	13%	13%	16%	16%	25%	18%	8%	16%	22%	10%	15%
Assurance that there will be enough things to do	15%	13%	16%	8%	10%	18%	16%	19%	24%	10%	16%	14%	7%	20%	16%	9%	16%
Welcoming locals	14%	13%	14%	13%	10%	13%	21%	13%	20%	10%	12%	16%	10%	20%	9%	14%	13%
Relaxation of visa requirements	6%	N/A	11%	N/A	N/A	14%	N/A	N/A	30%	N/A	N/A	N/A	N/A	30%	N/A	N/A	N/A

Q20: What would make you more likely to travel internationally for leisure in the next 12 months? (Multiple Answers)
Base: All respondents (n = 8245)

Activators for an international leisure trip (2)

Compared to the average, intenders to Scotland, London and Wales attribute more importance to local hygiene and safety protocols and labels. Half of intenders to London mention the vaccine as a driver for travelling in the future, suggesting that concern on the COVID environment is particularly high towards the most exposed UK destination in media conversations.

	Europe Intenders	Britain intenders	England Intenders	Scotland Intenders	Wales Intenders	London Intenders	Large City Intenders	Non Leisure Trip Intenders
The availability of a vaccine/treatment against coronavirus	42%	46%	46%	46%	42%	51%	42%	37%
A significant decrease in coronavirus cases at destination	41%	43%	44%	40%	39%	46%	38%	23%
Money-back guarantee should I wish to cancel my trip	38%	38%	37%	35%	32%	38%	35%	23%
Removal of quarantine policies in destination country	37%	37%	38%	36%	34%	41%	35%	20%
Hygiene & safety protocols in place at destination	35%	37%	37%	40%	42%	38%	36%	23%
Removal of quarantine policies in home country	31%	31%	30%	32%	29%	32%	29%	22%
Your Government's advice on international travel	28%	28%	29%	27%	25%	31%	26%	14%
An attractive offer e.g. discounts on flights or accommodation	27%	30%	30%	28%	27%	31%	30%	11%
Stable political environment in destination country	19%	22%	22%	25%	26%	21%	22%	12%
Mandatory coronavirus testing at some point during the trip	19%	21%	21%	22%	21%	21%	20%	14%
Official national hygiene label in accommodation and attractions in destination	17%	20%	21%	24%	24%	21%	19%	14% 10%
Voucher-back guarantee should I wish to cancel my trip	15%	17%	17%	15%	15%	17%	16%	7%
Assurance that there will be a range of/enough things to do	15%	15%	14%	16%	17%	12%	17%	7%
Welcoming locals	13%	13%	12%	12%	11%	10%	14%	6%

Q20: What would make you more likely to travel internationally for leisure in the next 12 months? (Multiple Answers)
Base: Europe Int. (n = 4759) – Britain Int. (n = 1012) – England Int. (n = 869) – Scotland Int. (n = 513) – Wales Int. (n = 290) – London Int. (n = 379) – Large City Int. (n = 3640)

Attitudes to travel (1)

Perceived risks linked to crowding still currently act as an obstacle to visit iconic sites, generating potential for secondary destinations or attractions. In most markets, the COVID impact on travel attitude in the unpredictable market environment relies on the willingness to leave booking until later/last minute, more than to take fewer but longer holidays.
While domestic tourism is mentioned as an obvious alternative to international travel, the desire to visit new places remains.

(% Completely + Somewhat agree)	Total	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
I will look for less crowded places to visit, even if it means "missing" must-see attractions.	74%	70%	77%	65%	72%	84%	66%	72%	88%	73%	75%	70%	68%	82%	72%	64%	70%
I will leave booking until later/last minute	63%	63%	64%	59%	63%	71%	61%	72%	71%	63%	64%	72%	50%	62%	74%	49%	56%
I will favour local destinations in my home country instead of traveling	60%	54%	65%	69%	60%	66%	54%	51%	75%	54%	49%	49%	51%	66%	68%	58%	60%
I will be intending to take fewer but longer holidays	55%	43%	67%	51%	53%	81%	42%	39%	88%	53%	44%	36%	37%	71%	47%	43%	55%
I would be comfortable using public transport within the destination	51%	41%	61%	53%	39%	82%	46%	42%	74%	49%	34%	42%	42%	55%	39%	36%	50%
I will favour destinations I have been before rather than new places	50%	44%	56%	57%	49%	55%	38%	47%	74%	56%	32%	43%	49%	60%	41%	48%	49%

Q22: Some people have expressed various opinions about the coronavirus outbreak and their travel plans and preferences. To what extent do you agree with the following statements?
Base: All Respondents (n = 8245)

Attitudes to travel (2)

Attitudes to travel among Britain intenders show an opportunity to attract “crowd-escapers” in Scotland and Wales in particular, suggesting affinities for longer trips, touring, family reconnection, road trips, and multi-UK destinations explorers (without crossing intra-European borders which would limit perceived risks in the planning process).

(% Completely + Somewhat agree)	Europe Intenders	Britain Intenders	England Intenders	Scotland Intenders	Wales Intenders	London Intenders	Large City Intenders
I will look for less crowded places to visit, even if it means “missing” must-see attractions.	74%	76%	77%	79%	80%	76%	76%
I will leave booking until later/last minute	66%	66%	67%	69%	72%	65%	66%
I will favour local destinations in my home country instead of traveling	59%	62%	62%	65%	59%	64%	63%
I will be intending to take fewer but longer holidays	53%	58%	60%	65%	73%	56%	62%
I would be comfortable using public transport within the destination	51%	58%	60%	64%	72%	57%	60%
I will favour destinations I have been before rather than new places	50%	48%	50%	47%	49%	50%	54%

Q22: Some people have expressed various opinions about the coronavirus outbreak and their travel plans and preferences. To what extent do you agree with the following statements?
Base: Europe Int. (n = 4759) – Britain Int. (n = 1012) – England Int. (n = 869) – Scotland Int. (n = 513) – Wales Int. (n = 290) – London Int. (n = 379) – Large City Int. (n = 3640)

Overall travel intentions: summary

- Overall, 70% of potential travellers are considering an international leisure trip in 2021, showing a resilient desire to travel.
- Around 4 in 10 (38%) have a clear plan in mind about where they want to go, but only 7% have already booked on average, making the destination choice still open for 2021.
- The travel horizon pattern suggests extremely diverse attitudes: 4 in 10 respondents are ready to go by mid-year, 2 in 10 look at travelling in the summer and nearly 3 in 10 after summer 2021 or later in 2022, while 1 in 10 are still undecided. Europeans see July/August 2021 as a next obvious period. Short-term travel horizon (by March 2021) envisaged by 2 in 10 respondents from long-haul markets reflects a resilient desire to travel (more than realistic plans). *(NB this research was conducted before the new variants were widely reported so reflects intentions in that previous context.)*
- Beyond holiday motivations, the need for reconnection with friends and relatives is expressed by a third of respondents.
- Consumers are still ready to travel, but not at any cost! Beyond hygiene safety, they expect fewer mobility restrictions and limited risk of losing value if their trip is cancelled and/or their experience limited at the destination.
- Compared to the average, intenders to Scotland, London and Wales attribute more importance to local hygiene and safety protocols and labels. Half of intenders to London mention the vaccine as the first driver for travelling in the future.
- Perceived risks linked to crowding still currently act as an obstacle to visit iconic sites, generating interest in secondary destinations. The Covid impacts on the willingness to leave booking until later/last minute more than to take fewer but longer holidays. While domestic tourism is currently mentioned as an alternative to international travel, the desire to visit new places remains.
- Among Britain destinations, Scotland and Wales have stronger affinities among trip planners looking for less-crowded places and fewer but longer holidays.

Destination Planning

Getty Images/ Gordon Edgar Images

Regional destinations for a next international leisure trip

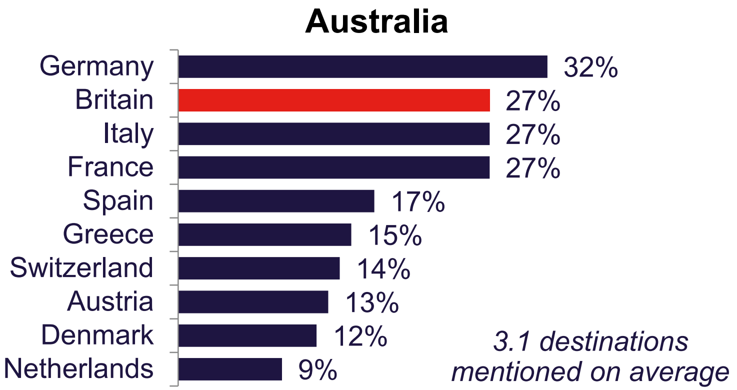
Overall, Europe is the most popular region for travellers' next international leisure trip. Naturally this is much more pronounced in short haul markets, but still stands for the long haul markets. Within long haul markets, Canada, China and the US express a strong preference for Europe. However, it is important to drive consideration for Europe among long haul markets, as the data suggests that many are drawn to stay within their own regions.

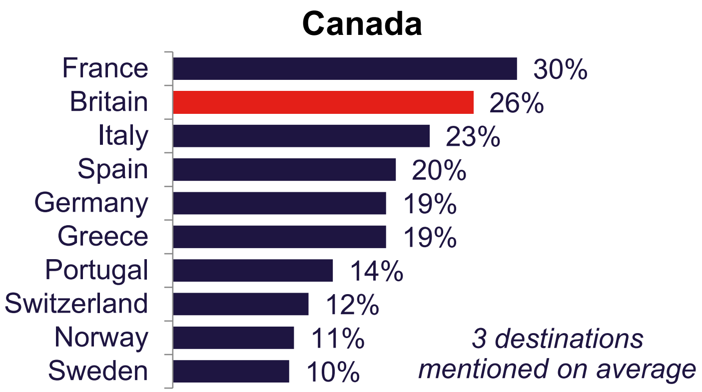
	Total	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
Europe	59%	72%	46%	29%	46%	57%	66%	76%	42%	76%	70%	70%	73%	29%	76%	71%	52%
Asia	22%	12%	33%	40%	19%	53%	10%	17%	50%	9%	12%	11%	13%	22%	9%	15%	13%
North America	18%	13%	24%	14%	29%	26%	12%	11%	36%	17%	20%	11%	9%	8%	13%	11%	24%
Australia/Oceania	14%	5%	22%	33%	9%	35%	3%	6%	35%	5%	7%	4%	4%	3%	3%	7%	13%
South/Central America/Caribbean	10%	7%	13%	4%	27%	7%	7%	9%	9%	5%	8%	9%	5%	2%	11%	6%	23%
Middle East	8%	4%	12%	5%	3%	9%	3%	6%	25%	4%	7%	5%	2%	33%	1%	6%	7%
Africa	7%	6%	9%	3%	5%	5%	12%	6%	13%	5%	6%	6%	3%	27%	5%	4%	6%
I don't know yet	6%	5%	7%	7%	5%	9%	7%	4%	2%	3%	4%	5%	9%	8%	2%	8%	7%

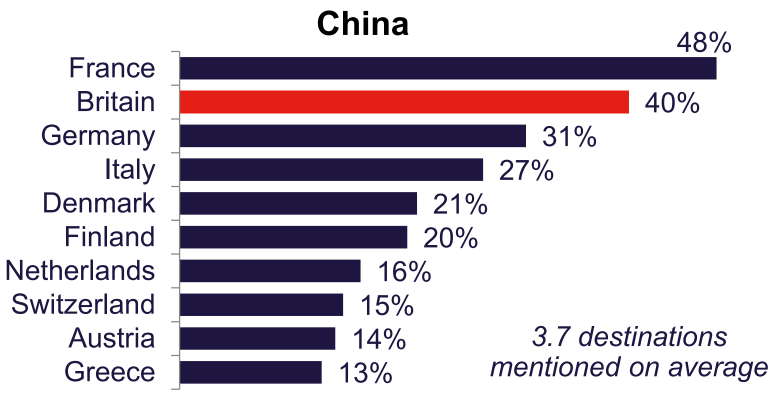
Q9: Where do you plan to travel on your next international leisure trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 8078)

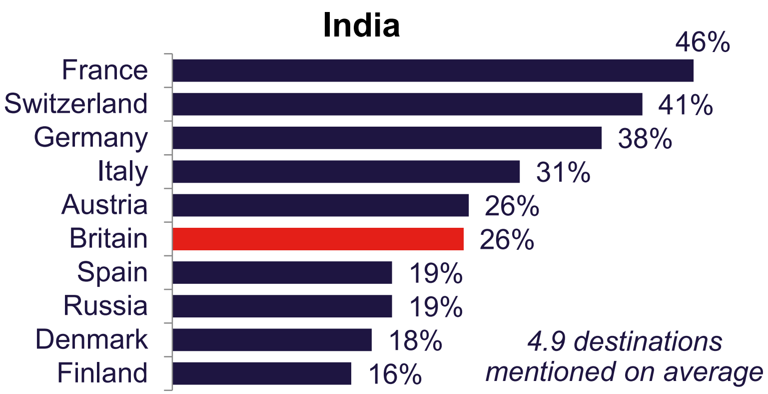
Top European destinations for travelers in long haul markets

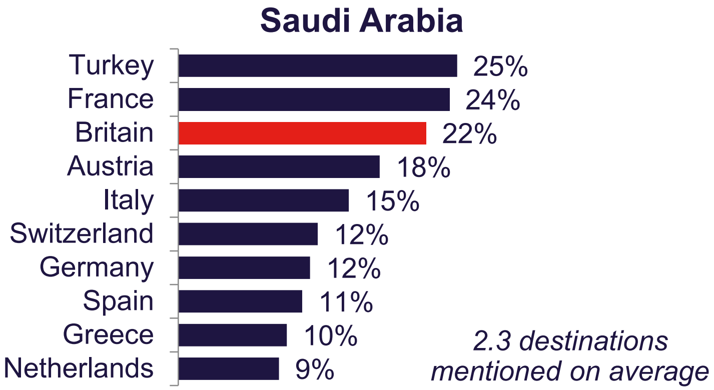
Britain enjoys a solid competitive position among potential travellers from Australia, Canada, China and Saudi Arabia, but is lower ranked than expected among those from India.

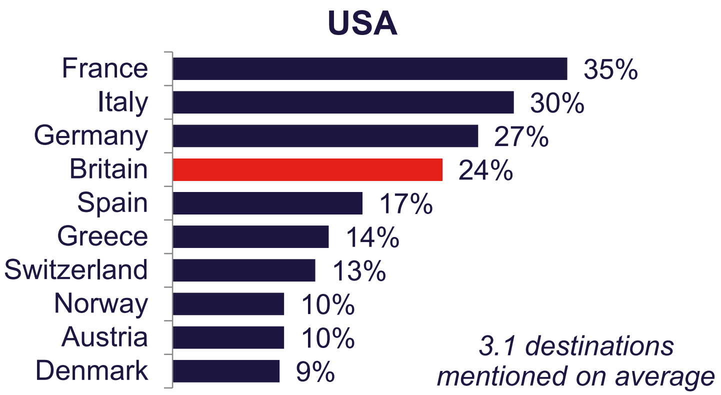








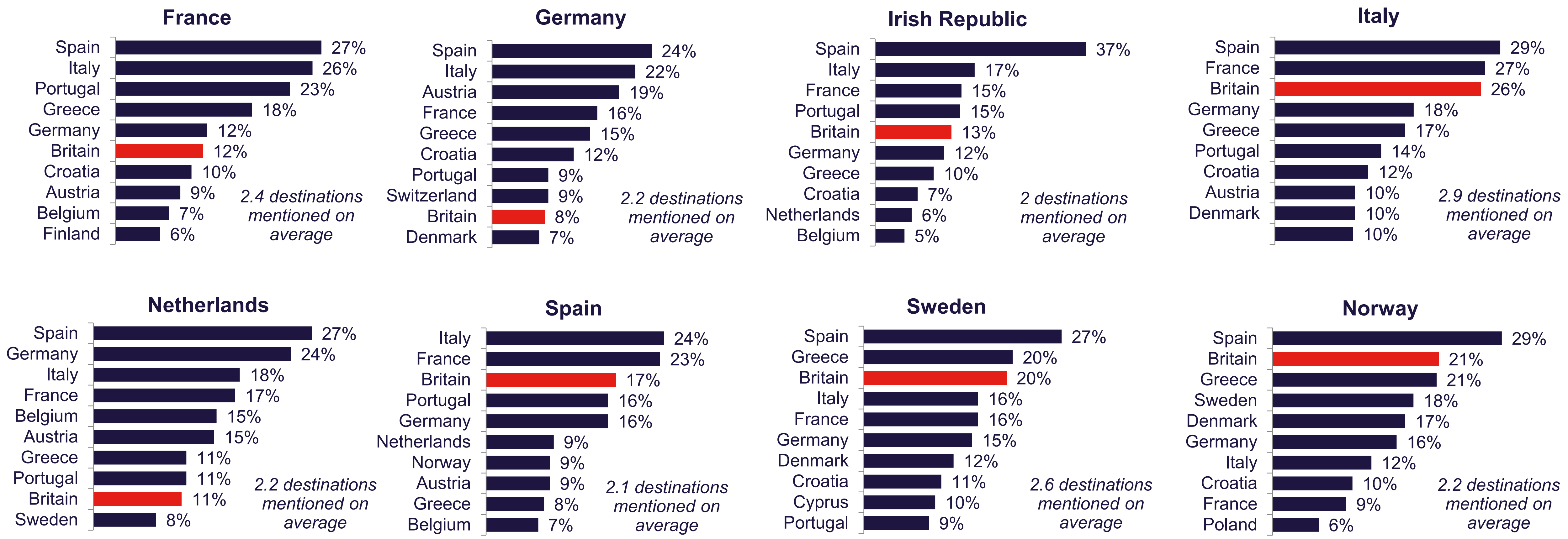




Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking an European leisure trip in 2021 (n=4759)

Top European destinations for travelers in short haul markets

While Britain is very well considered in the Nordic and Southern-European markets surveyed, it seems more at-risk (below its 5th average UNWTO position in pre-COVID arrivals) among core European markets like France, Germany and the Netherlands.



Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking an European leisure trip in 2021 (n=4759)

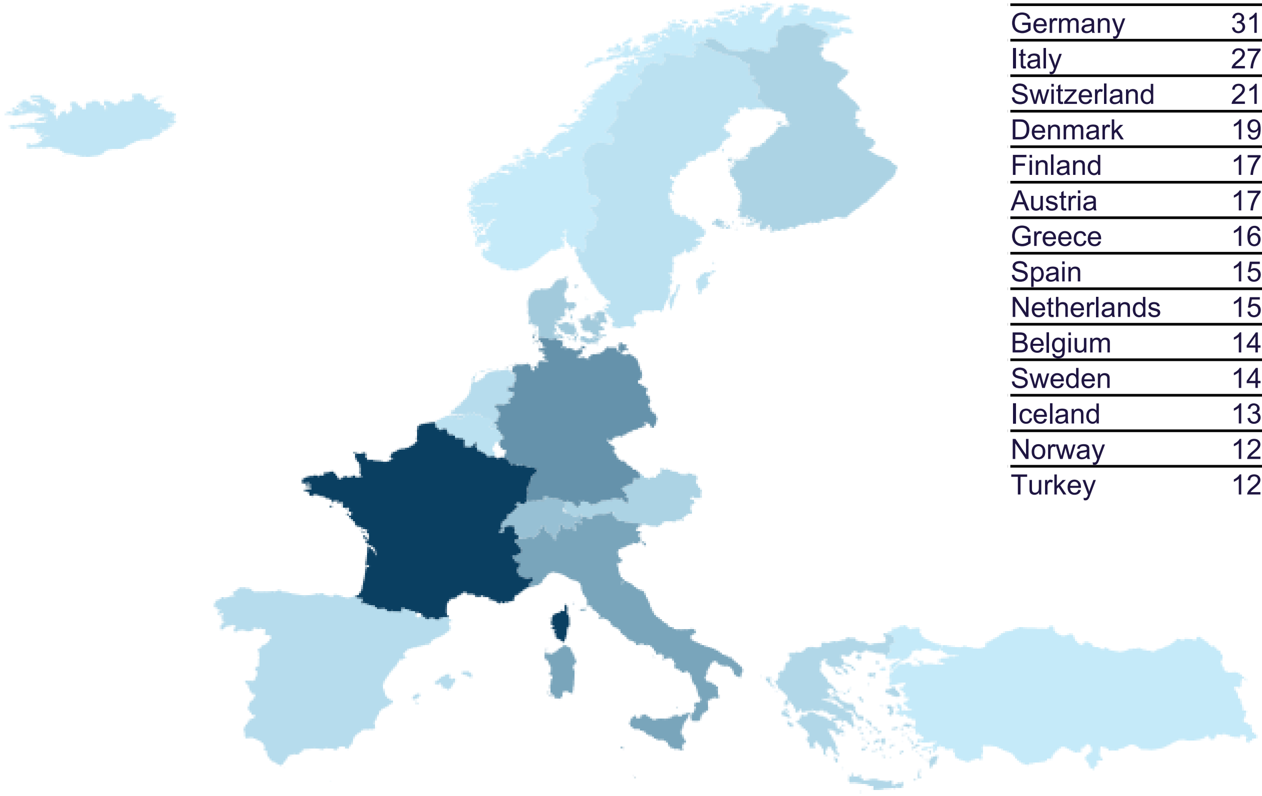
Other destinations considered by Britain intenders

Travellers from short haul markets who intend to come to Britain reveal a broad competitive set, with both markets from Northern Europe (more equivalent to Britain) and Southern European (more known for sun and sand). In contrast, almost half of those intending to come to Britain from long haul markets are also considering France, with sun and sand destinations being less prominent, suggesting a more focussed competitive set.

Short Haul markets

France	23%
Germany	22%
Spain	21%
Italy	21%
Greece	17%
Denmark	16%
Portugal	15%
Sweden	13%
Austria	12%
Croatia	12%
Netherlands	11%
Irish Republic	10%
Norway	10%
Northern Ireland	9%
Belgium	9%

Long Haul markets



France	49%
Germany	31%
Italy	27%
Switzerland	21%
Denmark	19%
Finland	17%
Austria	17%
Greece	16%
Spain	15%
Netherlands	15%
Belgium	14%
Sweden	14%
Iceland	13%
Norway	12%
Turkey	12%

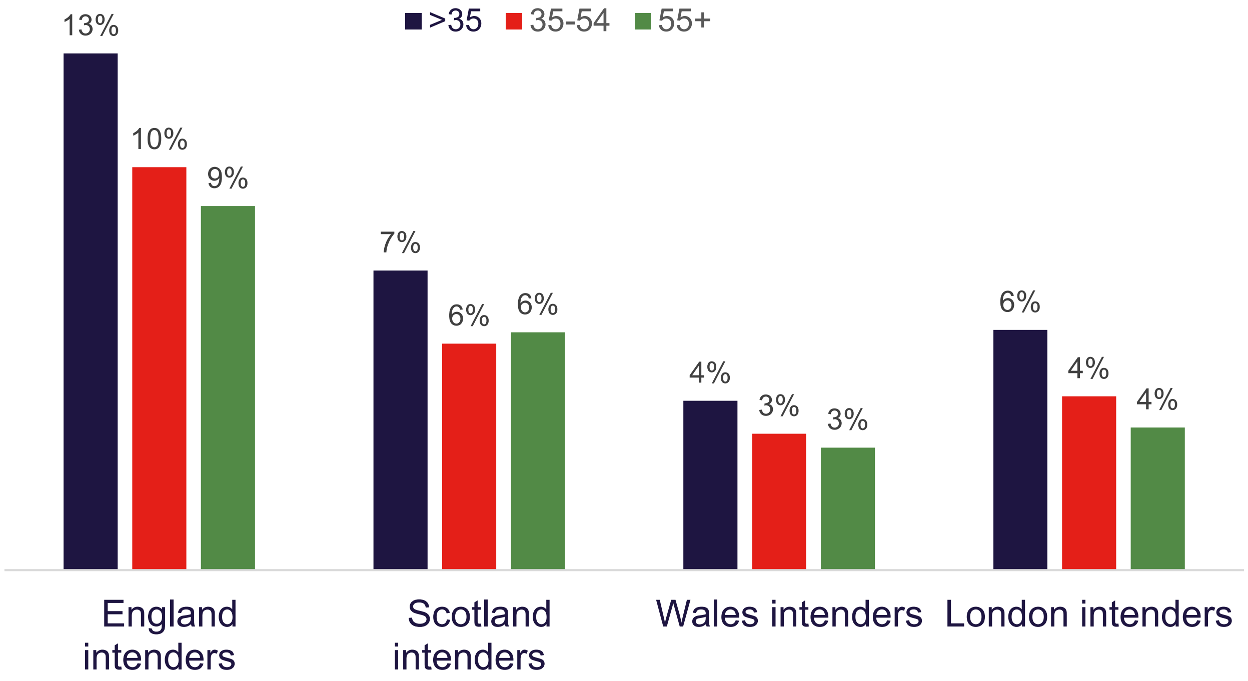
Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1012)

Impact of age and gender on propensity to consider Britain

Age is confirmed to be a significant driver of visiting Britain, particularly for England and London where the share of consideration is nearly twice as high among Millennials vs. Seniors.

Intention to visit Britain (%)

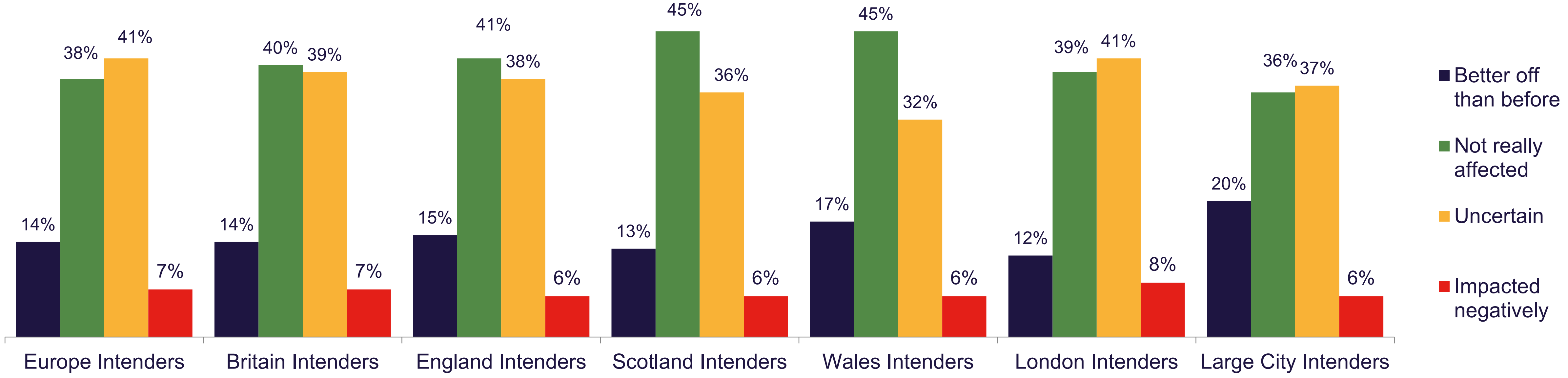
	Gender		Age		
	Male	Female	Less than 35	From 35 to 54	55 and over
Total	12%	13%	14%	11%	11%
Short Haul	11%	11%	13%	11%	9%
Long Haul	12%	15%	15%	12%	13%



Q5: How likely would you consider an international leisure trip for more than one night in the next 12 months?
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 8078)

Impact of financial situation on propensity to consider Britain

British destinations (particularly Scotland and Wales) tend to be considered by potential travellers whose financial situation has been less impacted than average. However, those who are considering travelling to London are slightly more likely to be uncertain about how their financial situation will be impacted.



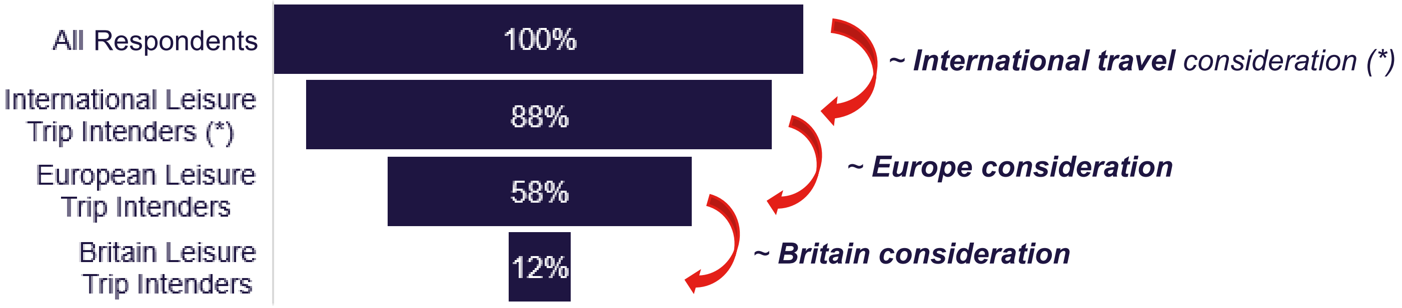
Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: Europe Int. (n = 4759) – Britain Int. (n = 1012) – England Int. (n = 869) – Scotland Int. (n = 513) – Wales Int. (n = 290) – London Int. (n = 379) – Large City Int. (n = 3640)

Conversion Funnel summary

High conversion rate
Medium conversion rate
Low conversion rate

Market: All

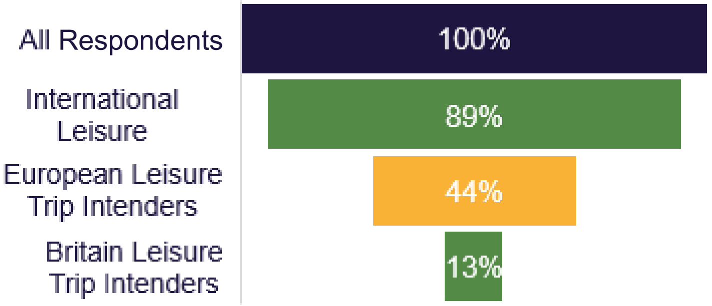
What conversion funnels measure



England: 11% - Scotland: 6% - Wales: 4%

London: 4%

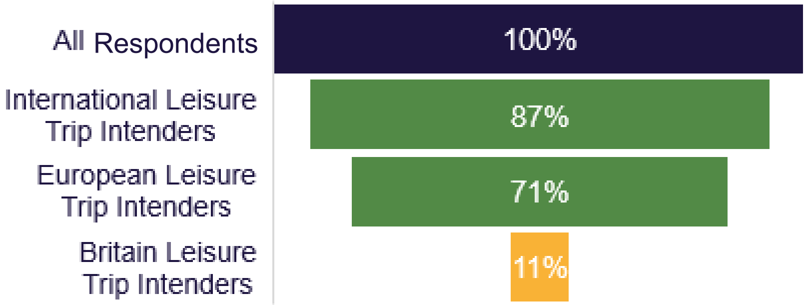
Market: Long Haul



England: 12% - Scotland: 8% - Wales: 5%

London: 5%

Market: Short Haul



England: 9% - Scotland: 4% - Wales: 2%

London: 4%

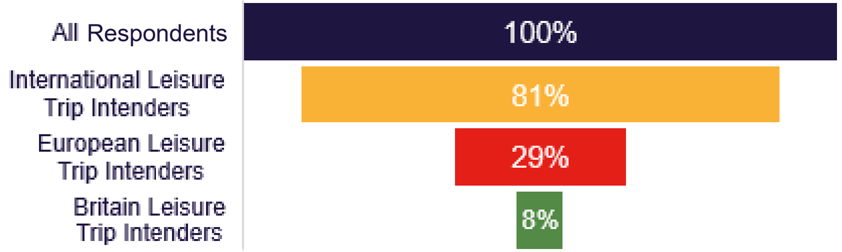
(*) Would definitely, probably or maybe consider an international leisure trip for more than one night in the next 12 months
Base: All Respondents (n = 8245)

Conversion Funnel summary

High conversion rate
Medium conversion rate
Low conversion rate

Long-haul markets

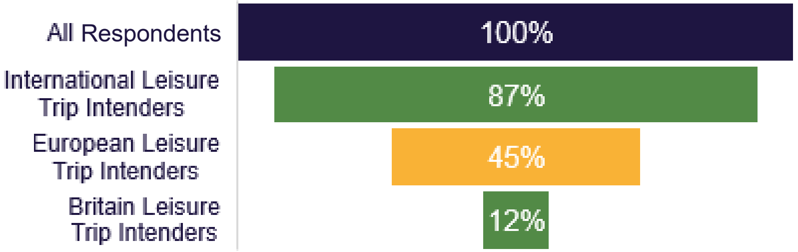
Market: Australia



England: 6% - Scotland: 3% - Wales: 2%

London: 3%

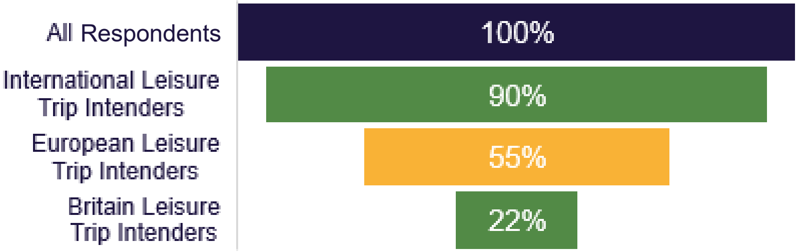
Market: Canada



England: 10% - Scotland: 2% - Wales: 2%

London: 5%

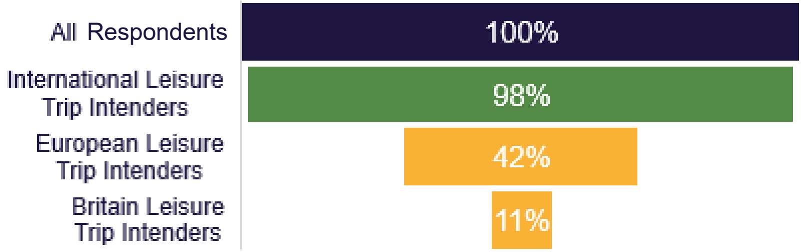
Market: China



England: 20% - Scotland: 17% - Wales: 12%

London: 7%

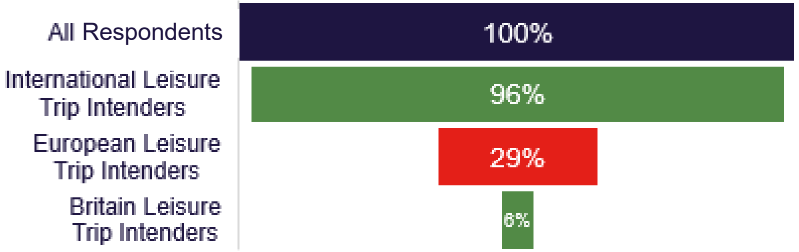
Market: India



England: 11% - Scotland: 7% - Wales: 4%

London: 4%

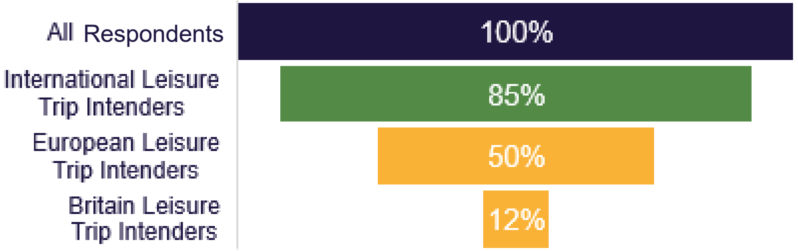
Market: Saudi Arabia



England: 6% - Scotland: 1% - Wales: 1%

London: 2%

Market: USA



England: 11% - Scotland: 6% - Wales: 4%

London: 5%

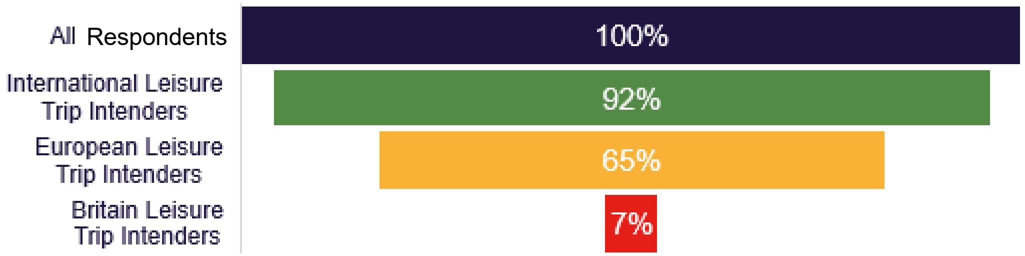
Q: /
Base: All Respondents (n = 8245)

Conversion Funnel summary (2)

High conversion rate
Medium conversion rate
Low conversion rate

Short-haul markets (1)

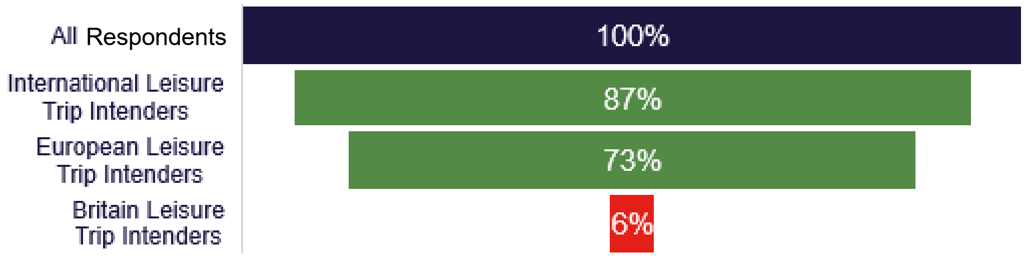
Market: France



England: 5% - Scotland: 3% - Wales: 1%

London: 3%

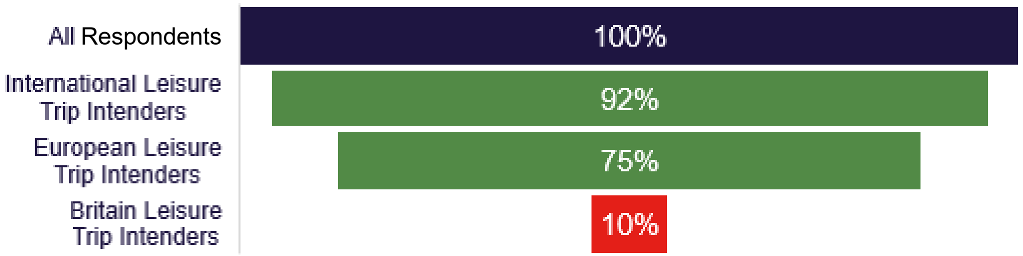
Market: Germany



England: 5% - Scotland: 3% - Wales: 1%

London: 3%

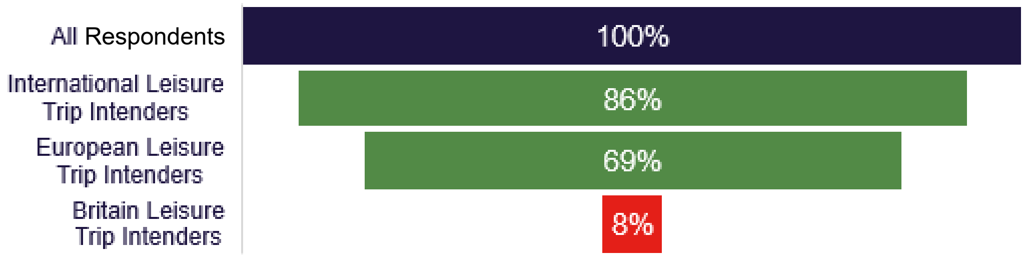
Market: Irish Republic



England: 8% - Scotland: 3% - Wales: 1%

London: 3%

Market: Netherlands



England: 6% - Scotland: 3% - Wales: 1%

London: 3%

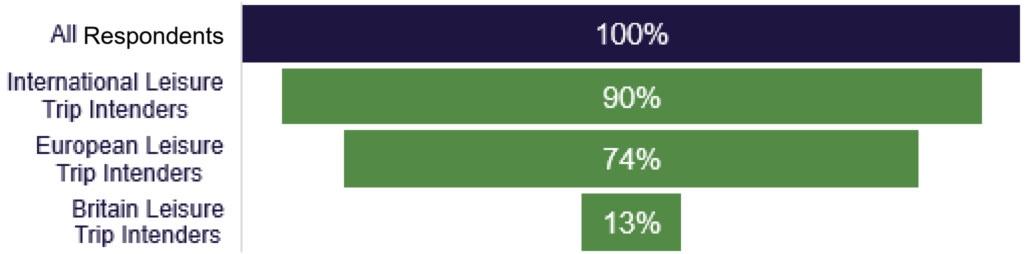
Q: /
Base: All Respondents (n = 8245)

Conversion Funnel summary (3)

High conversion rate
Medium conversion rate
Low conversion rate

Short-haul markets (2)

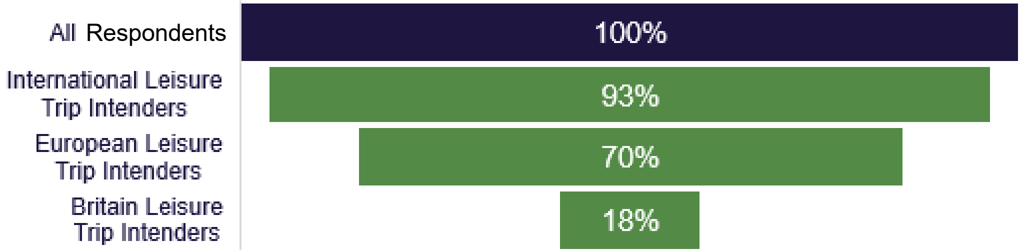
Market: Spain



England: 10% - Scotland: 7% - Wales: 2%

London: 4%

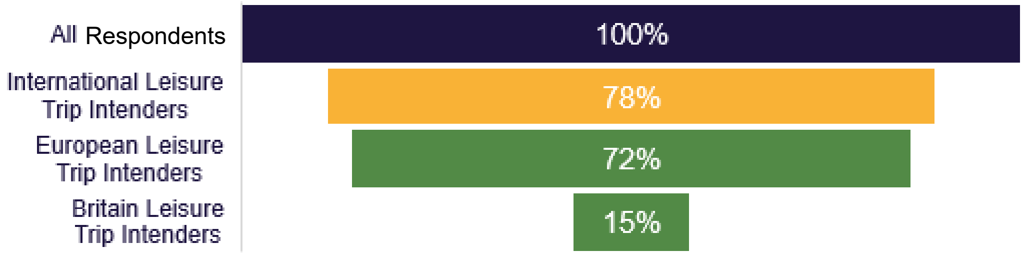
Market: Italy



England: 15% - Scotland: 6% - Wales: 3%

London: 8%

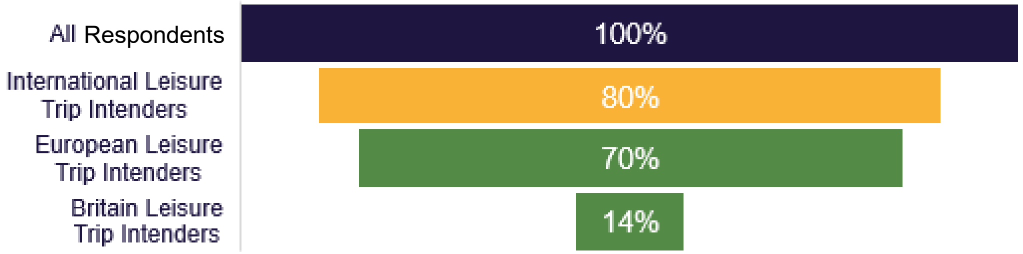
Market: Norway



England: 13% - Scotland: 5% - Wales: 2%

London: 6%

Market: Sweden



England: 12% - Scotland: 5% - Wales: 3%

London: 6%

Q: /
Base: All Respondents (n = 8245)

Destinations in Britain considered for a leisure trip

England is the most popular nation, considered by 8 in 10 intenders to Britain, but Scotland and Wales are also considered for respectively 5 and 3 in 10 respondents planning a trip to Britain. London is considered by nearly half of intenders to England. Long-haul markets are open to visiting multiple destinations across Britain, beyond iconic places.

	Total	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
England	86%	82%	90%	80%	82%	91%	72%	83%	100%	85%	83%	79%	85%	88%	75%	87%	88%
Scotland	51%	38%	62%	45%	52%	77%	38%	52%	63%	29%	35%	34%	35%	22%	51%	37%	51%
Wales	29%	16%	39%	28%	15%	55%	15%	24%	39%	13%	16%	13%	13%	9%	18%	21%	33%
Base (n =)	1,012	469	543	40⚠	62⚠	231	39 ⚠	29⚠	57 ⚠	52 ⚠	95	38 ⚠	79	32⚠	67⚠	70	121

⚠ = Low base

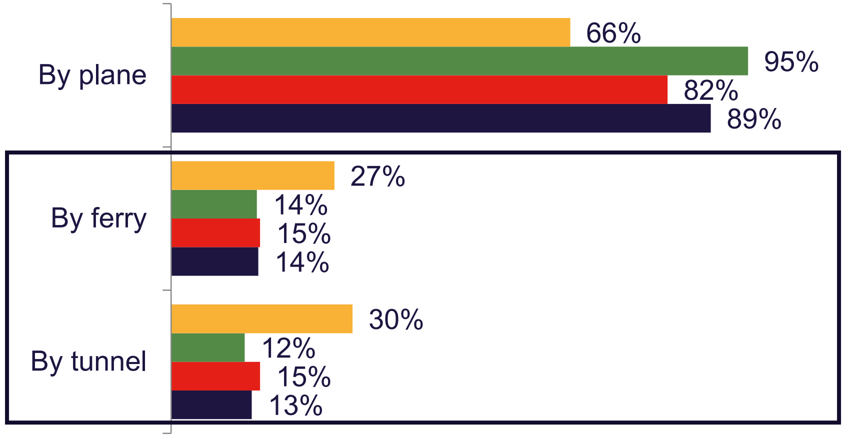
	Short Haul	Long Haul	Total
London	48%	44%	46%
South East (e.g. Brighton, Oxford, Kent, Windsor)	37%	39%	38%
North West (e.g. Manchester, Liverpool, Lake District)	26%	37%	31%
East of England (e.g. Cambridge, Norwich, Essex)	21%	34%	27%
South West (e.g. Bristol, Bath, Devon, Cornwall)	22%	25%	23%
West Midlands (e.g. Birmingham, Stratford Upon Avon, Coventry)	15%	25%	19%
East Midlands (e.g. Leicester, Derby, Peak District)	15%	24%	19%
Yorkshire and the Humber (e.g. Leeds, York, Yorkshire Dales)	15%	21%	18%
North East (e.g. Newcastle, Durham)	13%	15%	14%

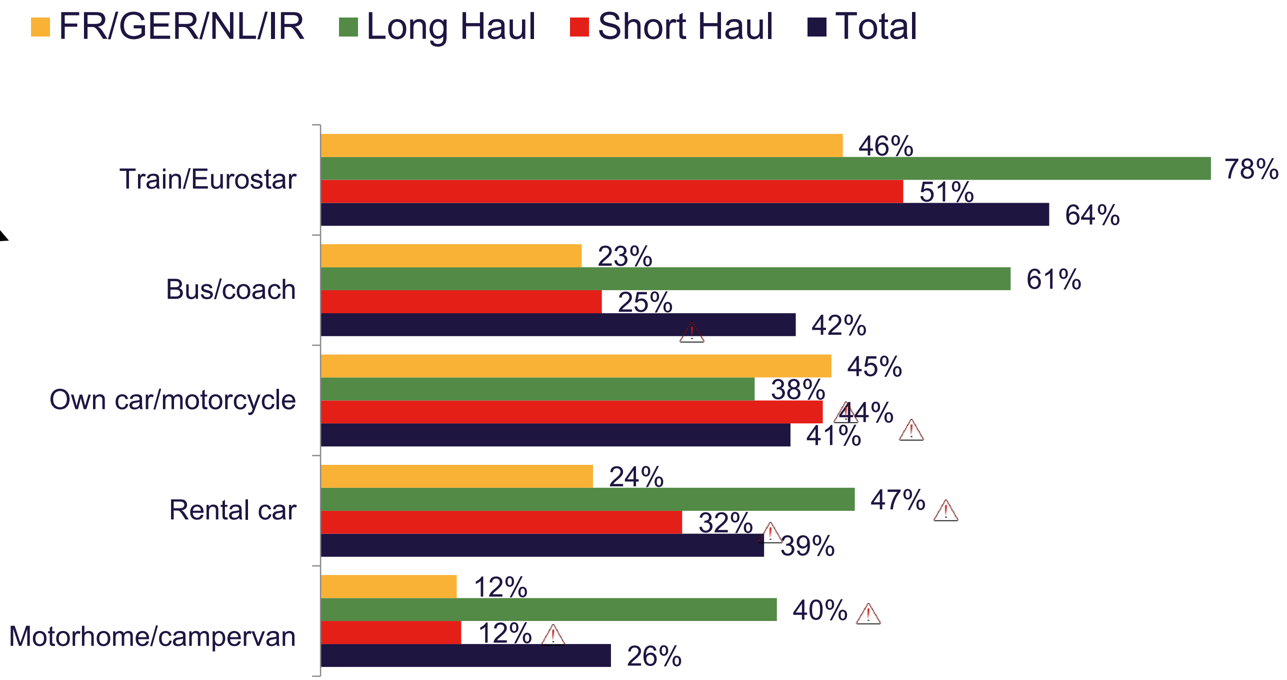
Q11: Which destination(s) in Britain? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1012)

Q12: Which destination(s) in England? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in England in 2021 (n = 658 without China)

Planned transport mode to Britain

Flight remains the preferred transport option for 9 in 10 potential visitors to Britain on average, while ferry and tunnel are equally considered as alternative means, with higher usage intent among geographically close markets. Train/Eurostar is preferred among those not planning to fly (particularly in long-haul markets) but independent options including motorhomes are also popular.





= Low base (n< 70)

Q13: Considering how you would travel to Britain, would you travel… (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1012)

Q14: Considering how you would travel to Britain, would you travel… (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 and on travelling by Tunnel or Ferry (n = 215)

Planned booking channel for an international trip

Due to the relatively even spread of consideration across booking types, it seems that travellers are open to using a variety of channels to plan their next trip. Travel agents/tour operators online are the most popular channel; the use of expert intermediaries may be reassuring in the current uncertain travel scenario. Official destination websites play a significant role in the booking process across most markets, again emphasising the importance of reassurance and trust.

	Total	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
Through a travel agent/tour operator online	35%	31%	38%	28%	29%	58%	24%	41%	45%	21%	25%	35%	37%	25%	33%	37%	30%
A travel comparison website	34%	34%	33%	32%	35%	27%	35%	28%	50%	27%	50%	19%	29%	31%	46%	40%	31%
Direct with airline/train/ferry operator	31%	31%	32%	35%	37%	21%	19%	20%	38%	48%	24%	26%	44%	33%	32%	36%	35%
Direct with accommodation provider	29%	29%	29%	38%	33%	20%	27%	37%	34%	37%	24%	36%	20%	15%	29%	25%	36%
Direct from the official website of the destination	29%	25%	32%	29%	28%	34%	22%	20%	40%	33%	24%	28%	18%	28%	32%	21%	33%
Through a travel agent/tour operator at a storefront	24%	20%	28%	23%	20%	38%	21%	26%	40%	14%	25%	21%	10%	19%	24%	20%	22%

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 8078)

Planned booking channel for a trip to Britain

Intermediaries (TOs/OTAs) are considered for half of travellers from long-haul markets wishing to travel to Britain, while travel comparison websites are also popular across markets. The role of a DMO's website is important in the booking process as mentioned by 3 in 10 intenders vs. 1 in 10 in reality (*).The diversity of booking channels mentioned and possible use of several in the same booking process (including personal contacts in the UK) should encourage destinations to provide consistent promotional and informative content throughout all channels, particularly as travellers look for trusted sources to activate their trip in safe conditions.

	Total	Short Haul	Long Haul
Through a travel agent/tour operator online	41%	31%	50%
A travel comparison website	40%	43%	36%
Direct with airline/train/ferry operator	39%	40%	38%
Direct with accommodation provider	34%	32%	35%
Direct from the official website of the destination	33%	26%	40%
Through a travel agent/tour operator at a storefront	29%	19%	38%
Through friends and family in the UK	16%	13%	18%

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1012)
(*) Travelsat – Europe 2019

Planned booking channel for a trip to Britain by age

Online TA/TOs are still very popular options among young travel intenders, as well as travel comparison websites in short-haul markets in particular, while the older generation are more likely to to book directly through transport operators.

Short-haul markets

	Less than 35	From 35 to 54	55 and over
A travel comparison website	52%	46%	26%
Direct with airline/train/ferry operator	34%	45%	43%
Direct with accommodation provider	31%	36%	26%
Through a travel agent/tour operator online	33%	28%	33%
Direct from the official website of the destination	28%	27%	21%
Through a travel agent/tour operator at a storefront	21%	19%	15%
Through friends and family in the UK	16%	12%	8%

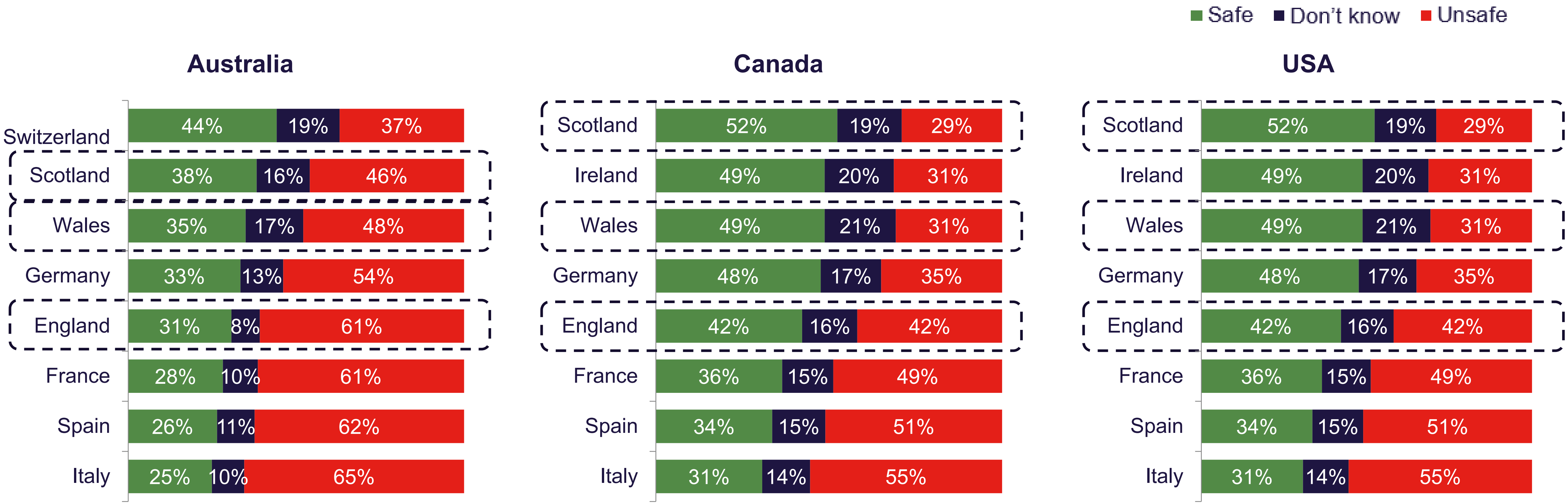
Long-haul markets

	Less than 35	From 35 to 54	55 and over
Through a travel agent/tour operator online	56%	55%	35%
Direct from the official website of the destination	44%	39%	34%
Direct with airline/train/ferry operator	42%	30%	45%
Through a travel agent/tour operator at a storefront	40%	40%	32%
A travel comparison website	40%	42%	23%
Direct with accommodation provider	36%	30%	40%
Through friends and family in the UK	23%	16%	14%

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1012)

COVID safety perception (1)

Scotland and Wales tend to have a slightly safer image vs. England among North Americans and Australians (the latter seem very concerned in general with COVID safety). British destinations overall generate a safer image than other large competitive destinations in Europe such as France, Italy or Spain.

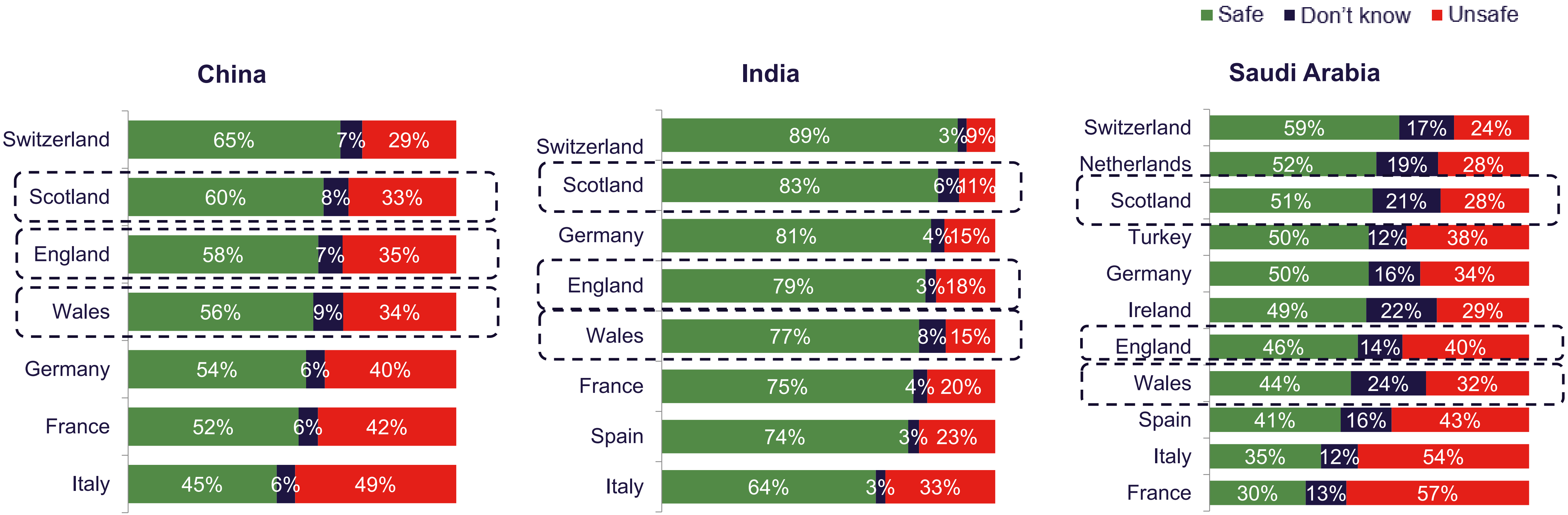


Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All Respondents (n = 8245)

TCI Research Travel Competitive Intelligence | LONDON & PARTNERS | Llywodraeth Cymru Welsh Government | Visit Scotland | Alba | VisitBritain

COVID safety perception (2)

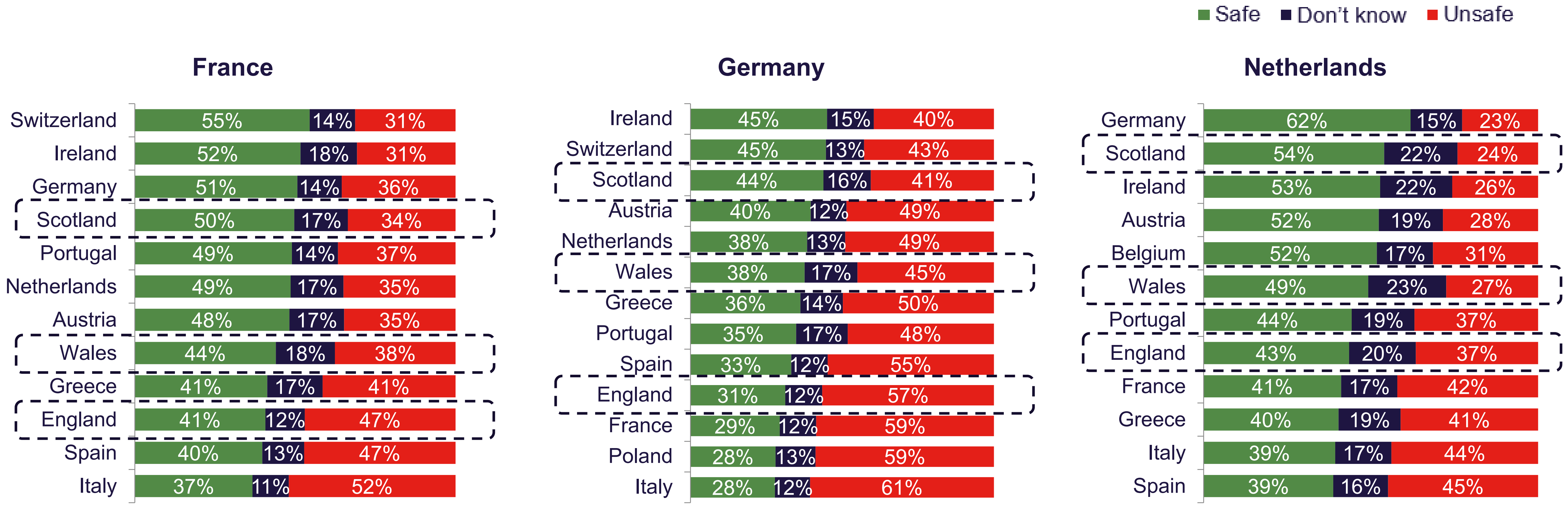
Safety perceptions in other long-haul markets confirm that Britain benefits from a better image compared to major competitors Italy and France, with Scotland being usually the safest perceived in Britain. However, Switzerland and Germany (in India and KSA) also generate a relative competitive image of safety.



Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All Respondents (n = 8245)

COVID safety perception (3)

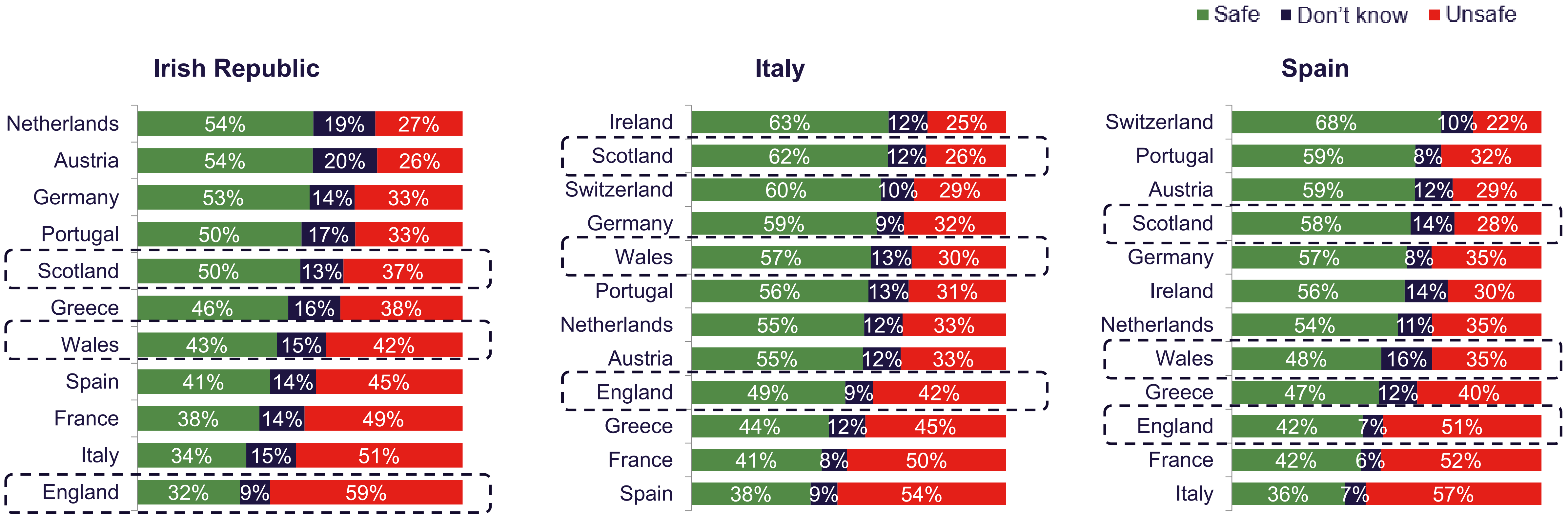
In European markets, the perception gap between England and the other destinations in Britain is marked, and other destinations such as Germany, Ireland, Austria or Switzerland benefit from a competitive image. Scotland is confirmed to be the destination in Britain with the highest safety brand equity. Among European markets surveyed, Germans are the most concerned with COVID-safety overall (1 in 2 German respondents rate all destinations as unsafe).



Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All Respondents (n = 8245)

COVID safety perception (4)

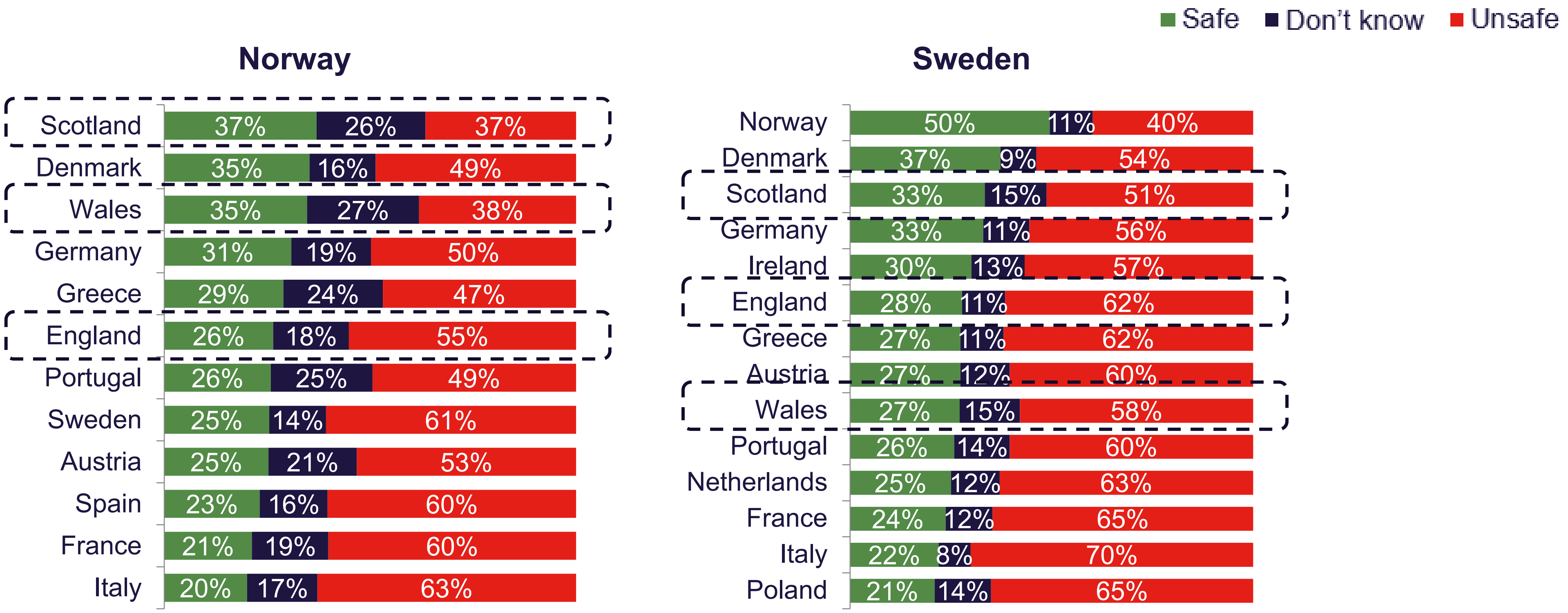
The COVID-safety perception of England is particularly low in the Irish Republic. In Spain and Italy, Scotland is rated as COVID-safe by 6 in 10 respondents. For all markets, Wales reaches a medium position as a safe country to visit in the context of the coronavirus; however, 15% to 20% of respondents do not have an established/informed opinion.



Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All Respondents (n = 8245)

COVID safety perception (5)

Nordic markets, while generally less positive when it comes to rating European destinations' COVID safety, have a better image of Northern European countries. England remains slightly less well rated compared to other British destinations, but the overall image of Britain destinations (particularly Scotland), gives a competitive advantage vs. France, Italy or Spain.



Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All Respondents (n = 8245)

Destination planning: summary

- Europe is the most popular international destination choice for 7 in 10 Europeans, but intentions to travel outside Europe remain significant. Long-haul markets are usually harder to attract, yet Europe is still a top choice for them.
- Among markets in Europe, Britain ranks well for consideration in Nordic and Southern-European markets surveyed but is more at-risk in France, Germany and the Netherlands. Britain enjoys a solid competitive position in all long-haul markets except in the US and India.
- England is the most considered destination within Britain; preferred among 8 in 10 intenders. However, Scotland and Wales are also in mind for respectively 5 and 3 in 10 respondents planning a trip to Britain. London is considered by nearly half of intenders to England.
- Flight remains the preferred transport option planned for 9 in 10 potential visitors to Britain on average, while ferry and tunnel gain similar shares to each other when it comes to alternative modes. Train/Eurostar is preferred among those not intending to fly (particularly in long-haul markets) but independent mobility options including motorhome are also popular in the COVID context.
- When it comes to booking channels, booking intermediaries (TOs/OTAs) are planned for half of long-haul intenders to Britain, while travel comparison websites are also popular across markets and for the younger generation. Official destination websites are also mentioned frequently; likely seen as trusted source of information. Booking channels are very diverse overall. In short-haul markets, TO/OTAs are particularly considered among Germans while French, Italians and Spanish are drawn to travel comparison websites. Propensity to book directly with transport providers is higher among the Irish and Nordics. In long-haul markets, storefront agencies are more popular in Asia.
- Long-haul markets have a more favourable safety perception of Britain in the context of COVID-19 vs. short-haul markets. At the time respondents were surveyed, Britain enjoyed a more competitive COVID safety image than the top 3 competitors in Europe (France, Italy, Spain) in most markets. Scotland is the destination in Britain with the highest safety brand equity on average.

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Travel Preferences

Main destination types for an international leisure trip

Visiting large cities and coastal areas are often top of mind, but intentions widely differ from one market to another: for example, many Germans will resume travel with beach experiences first, while Italians and Spanish are more open to planning city breaks than average.

	Total	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
Large city	45%	40%	50%	43%	40%	61%	33%	25%	61%	40%	56%	30%	40%	44%	56%	42%	44%
Coastline	38%	38%	38%	29%	33%	48%	33%	53%	42%	41%	35%	34%	42%	42%	27%	35%	32%
I will roam around, visiting many types of places	33%	28%	38%	34%	32%	44%	29%	23%	50%	24%	53%	30%	24%	33%	22%	21%	34%
Small/mid-sized city/town	25%	23%	27%	23%	20%	33%	21%	20%	35%	24%	24%	19%	22%	19%	31%	25%	25%
Mountains or hills	21%	15%	26%	23%	16%	21%	11%	20%	59%	12%	16%	24%	8%	19%	18%	14%	23%
Countryside or village	20%	14%	26%	24%	21%	28%	14%	16%	37%	16%	12%	18%	10%	27%	10%	19%	23%
I'm not sure	6%	6%	6%	9%	11%	1%	7%	7%	3%	5%	2%	6%	10%	3%	4%	8%	9%

Q15: Which of the following best describes the main types of destination where you are likely to stay during your next international leisure trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 8078)

Main destination types for a leisure trip in Europe

Those who intend to visit Britain over-index the most on large cities. Scotland and Wales intenders are much more likely to say that they want to roam around.

	Europe Intenders	Britain intenders	England Intenders	Scotland Intenders	Wales Intenders	London Intenders
Large city	48%	65%	70%	62%	64%	78%
Coastline	39%	38%	41%	49%	61%	37%
I will roam around, visiting many types of places	34%	46%	46%	59%	61%	42%
Small/mid-sized city/town	28%	36%	37%	45%	49%	32%
Countryside or village	22%	31%	31%	43%	50%	30%
Mountains or hills	22%	26%	27%	36%	46%	24%
I'm not sure	5%	4%	3%	2%	3%	4%

Q15: Which of the following best describes the main types of destination where you are likely to stay during your next international leisure trip? (Multiple Answers)
Base: Europe Int. (n = 4759) – Britain Int. (n = 1012) – England Int. (n = 869) – Scotland Int. (n = 513) – Wales Int. (n = 290) – London Int. (n = 379) – Large City Int. (n = 3640)

Travel party for an international leisure trip

Couples (with or without children) will strongly drive trip recovery in 2021 in a context where many couples and parents are looking for family reconnection after long lock-down periods. Solo and friends' trips are more likely to be considered in Nordic markets compared to the average. Family trips with children are more likely from India and Saudi Arabia.

	Total	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths	Norway	Saudi Arabia	Spain	Sweden	USA
With your spouse/partner	70%	69%	72%	64%	76%	79%	67%	64%	66%	69%	74%	69%	66%	69%	74%	67%	70%
With children (under 18)	29%	26%	31%	27%	23%	24%	24%	27%	48%	26%	25%	29%	24%	43%	29%	27%	28%
With friends	21%	23%	18%	13%	14%	20%	15%	16%	25%	17%	23%	22%	35%	12%	23%	35%	18%
With adult family members	20%	21%	20%	14%	14%	25%	13%	13%	30%	18%	12%	23%	32%	19%	20%	32%	16%
Alone	18%	19%	17%	21%	16%	10%	14%	19%	21%	19%	13%	20%	22%	18%	16%	30%	19%
As part of a tour group	3%	3%	4%	3%	2%	8%	2%	1%	4%	1%	1%	3%	4%	2%	2%	5%	4%

Q18: Would you envisage traveling… (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 8078)

Travel party for a leisure trip in Europe/Britain

There are not major differences in expected travel party when we look at those who intend to visit each destination. For each, spouse/partner is by far the most popular. Wales intenders show slightly higher affinities to families, and London intenders slightly higher for solo trips.

	Europe Intenders	Britain intenders	England Intenders	Scotland Intenders	Wales Intenders	London Intenders	Large City Intenders
With your spouse/partner	71%	70%	71%	75%	73%	69%	71%
With children (under 18)	28%	28%	29%	29%	34%	28%	31%
With friends	23%	28%	29%	28%	31%	32%	22%
With adult family members	21%	23%	23%	25%	27%	26%	21%
Alone	18%	20%	20%	17%	17%	24%	20%
As part of a tour group	3%	4%	4%	4%	7%	3%	3%

Q18: Would you envisage traveling… (Multiple Answers)
Base: Europe Int. (n = 4759) – Britain Int. (n = 1012) – England Int. (n = 869) – Scotland Int. (n = 513) – Wales Int. (n = 290) – London Int. (n = 379) – Large City Int. (n = 3640)

Accommodation types for an international leisure trip

Hotel chains are mentioned by most as a preferred choice for a next leisure trip abroad, potentially suggesting a higher level of trust in COVID protocols implemented in well known brands. High interest in self-catered accommodation also indicates a desire to limit interactions with other guests in a COVID context. A large segment consider B&B and private rentals, confirming a desire from visitors to engage with locals in a COVID safe yet immersive experience.

	Total	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
Hotel chain	58%	60%	55%	62%	63%	45%	40%	60%	53%	63%	65%	62%	65%	48%	62%	66%	62%
Boutique hotel	32%	26%	39%	39%	37%	55%	30%	27%	35%	33%	23%	19%	16%	22%	41%	17%	34%
Bed and breakfast	31%	31%	31%	37%	33%	29%	23%	24%	39%	32%	54%	32%	31%	14%	13%	34%	32%
Self catered property (rented house, cottage, chalet, apartment)	30%	35%	25%	31%	27%	23%	20%	41%	32%	42%	34%	43%	33%	23%	28%	40%	21%
Friend's/family house as a free guest	26%	28%	24%	34%	30%	6%	18%	25%	37%	38%	20%	25%	31%	20%	29%	35%	29%
Private rental such as Airbnb, Couchsurfing, FlipKey	26%	26%	25%	28%	32%	13%	28%	22%	42%	33%	33%	20%	23%	10%	29%	22%	29%
Holiday village/centre (e.g. Center Parcs)	23%	20%	26%	21%	16%	43%	17%	22%	39%	21%	23%	31%	22%	16%	12%	15%	15%
Historic house/castle	22%	19%	25%	22%	23%	30%	8%	18%	29%	17%	19%	18%	22%	12%	22%	25%	26%
Cruise	17%	15%	19%	19%	18%	6%	6%	18%	24%	14%	14%	11%	21%	24%	15%	19%	29%
Friend's/family house as a paying guest	15%	15%	15%	16%	15%	5%	10%	17%	33%	17%	14%	17%	9%	14%	14%	23%	15%
Campsite	12%	12%	11%	11%	10%	8%	10%	16%	20%	11%	7%	22%	12%	15%	8%	12%	9%
Own second home/timeshare	12%	11%	12%	10%	9%	10%	4%	14%	18%	13%	10%	12%	11%	13%	5%	24%	13%
Hostel/university/school	11%	9%	14%	10%	9%	10%	6%	6%	27%	7%	9%	6%	6%	18%	14%	13%	13%
Caravan/motorhome	10%	10%	10%	12%	7%	8%	4%	13%	21%	11%	7%	16%	10%	7%	11%	11%	9%

Q17: For your next international leisure trip, would you be comfortable staying in a … (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 8078)

Accommodation types for a leisure trip in Europe

Britain intenders are considering a range of accommodation experiences, including hotel chains and boutique properties, but also B&Bs, historic houses and private rentals. London intenders are particularly drawn to hotel chains. Scotland and Wales intenders over-index on holiday villages/centres and historic houses/castles.

	Europe Intenders	Britain intenders	England Intenders	Scotland Intenders	Wales Intenders	London Intenders	Large City Intenders
Hotel chain	59%	65%	67%	62%	62%	75%	62%
Boutique hotel	33%	39%	40%	43%	46%	45%	39%
Bed and breakfast	32%	42%	41%	45%	44%	42%	33%
Self catered property (rented house, cottage, chalet, apartment)	33%	37%	36%	41%	44%	40%	29%
Private rental such as Airbnb, Couchsurfing, FlipKey	27%	33%	33%	35%	33%	38%	29%
Holiday village/centre (e.g. Center Parcs)	24%	30%	31%	38%	43%	32%	26%
Historic house/castle	24%	34%	34%	40%	44%	35%	23%
Friend's/family house as a free guest	25%	28%	28%	25%	26%	28%	28%
Cruise	16%	16%	17%	17%	19%	17%	18%
Friend's/family house as a paying guest	14%	15%	14%	15%	16%	14%	16%
Campsite	11%	12%	13%	13%	16%	14%	11%
Own second home/timeshare	12%	13%	13%	16%	18%	13%	13%
Hostel/university/school	11%	16%	16%	19%	20%	14%	14%
Caravan/motorhome	11%	12%	13%	15%	18%	12%	10%

Q17: For your next international leisure trip, would you be comfortable staying in a … (Multiple Answers)
Base: Europe Int. (n = 4759) – Britain Int. (n = 1012) – England Int. (n = 869) – Scotland Int. (n = 513) – Wales Int. (n = 290) – London Int. (n = 379) – Large City Int. (n = 3640)

Level of interest in activities

These results suggest a desire amongst some to return to many pre-pandemic behaviours when on holiday, with dining out (just) leading, and interest in iconic tourist attractions closely following. Large events are currently not on top of the list, however, but could regain interest in the future as COVID conditions improve. Outdoor nature activities also rank highly.

(% very interested)	Total	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
Dining in restaurants/bars, cafes or pubs	44%	44%	44%	41%	45%	30%	45%	45%	58%	46%	43%	42%	48%	53%	39%	47%	46%
Visiting famous/iconic tourist attractions	43%	36%	51%	41%	44%	50%	37%	31%	65%	42%	51%	31%	23%	51%	40%	29%	52%
Outdoor nature activities	43%	38%	48%	38%	45%	46%	45%	33%	66%	38%	52%	43%	23%	53%	42%	32%	43%
Exploring history and heritage	43%	38%	47%	40%	45%	44%	40%	33%	59%	35%	55%	34%	24%	43%	58%	29%	50%
Visiting cultural attractions	39%	34%	45%	29%	39%	43%	31%	30%	64%	32%	53%	33%	20%	43%	41%	31%	49%
Experiencing local lifestyle, socialising with locals	37%	33%	41%	36%	35%	41%	38%	30%	58%	31%	42%	34%	24%	38%	41%	27%	39%
Outdoor activ.(hiking, cycling..)	35%	31%	38%	24%	37%	36%	30%	32%	56%	25%	42%	43%	19%	46%	34%	22%	36%
Shopping	32%	26%	38%	29%	22%	34%	27%	31%	62%	28%	26%	28%	22%	51%	25%	24%	34%
Self-driving tours	30%	28%	31%	24%	31%	30%	48%	22%	50%	19%	21%	42%	24%	31%	19%	32%	28%
Guided tours/day-excursions	30%	25%	35%	26%	27%	28%	29%	19%	57%	23%	37%	29%	11%	34%	35%	16%	38%
Spa/wellness activities	26%	21%	32%	19%	18%	36%	24%	24%	50%	21%	25%	17%	18%	44%	23%	17%	25%
Culinary activities	25%	20%	30%	23%	21%	31%	21%	26%	47%	16%	26%	16%	15%	29%	22%	21%	30%
Attending cultural events	25%	20%	31%	22%	20%	30%	18%	20%	51%	22%	27%	18%	12%	32%	25%	14%	31%
Experiencing destination’s nightlife	24%	18%	30%	21%	19%	30%	20%	17%	57%	23%	23%	15%	12%	N/A	23%	14%	27%
Learning new skills	20%	14%	27%	17%	12%	27%	16%	14%	47%	11%	22%	11%	7%	36%	19%	12%	24%
Attending sport events	19%	13%	25%	15%	16%	27%	16%	14%	45%	14%	13%	12%	10%	29%	13%	11%	21%
Playing sports	18%	12%	24%	13%	14%	27%	14%	15%	45%	11%	12%	12%	9%	25%	12%	10%	21%

Q16: Thinking about your level of confidence related to sanitary safety, how interested would you be in the following activities during your next international trip ?
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 8078)

Level of interest in activities in Europe/Britain

Britain intenders show a strong appetite for exploring iconic, cultural and natural attractions/activities during their next trip.

(% very interested)	Europe Intenders	Britain intenders	England Intenders	Scotland Intenders	Wales Intenders	London Intenders	Large City Intenders
Dining in restaurants/bars, cafes or pubs	45%	45%	46%	45%	49%	52%	48%
Exploring history and heritage	45%	54%	53%	59%	53%	57%	47%
Visiting famous/iconic tourist attractions	42%	50%	52%	55%	59%	56%	50%
Outdoor nature activities	41%	44%	44%	49%	50%	46%	45%
Visiting cultural attractions	41%	51%	51%	55%	58%	56%	47%
Experiencing local lifestyle, socialising with locals	37%	43%	43%	48%	50%	47%	41%
Outdoor activities (hiking, cycling…)	34%	35%	36%	41%	46%	37%	36%
Self-driving tours	31%	33%	34%	37%	44%	35%	32%
Shopping	30%	37%	39%	39%	43%	41%	40%
Guided tours/day-excursions	29%	32%	33%	36%	41%	34%	34%
Culinary activities	25%	30%	31%	38%	43%	28%	30%
Spa/wellness activities	25%	28%	29%	35%	45%	30%	31%
Attending cultural events	25%	29%	30%	32%	35%	31%	32%
Experiencing destination's nightlife	23%	27%	29%	32%	39%	31%	29%
Learning new skills	19%	24%	26%	30%	33%	25%	26%
Attending sport events	19%	25%	26%	29%	36%	26%	25%
Playing sports	17%	20%	21%	26%	32%	20%	23%

Q16: Thinking about your level of confidence related to sanitary safety, how interested would you be in the following activities during your next international trip ?
Base: Europe Int. (n = 4759) – Britain Int. (n = 1012) – England Int. (n = 869) – Scotland Int. (n = 513) – Wales Int. (n = 290) – London Int. (n = 379) – Large City Int. (n = 3640)

Travel preferences: summary

- Visiting large cities and coastal areas are often top of mind, but intentions widely differ from one market to another: for example, many Germans will resume travel with beach experiences first, while Italians and Spanish are more open to planning city breaks than average.
- Those who intend to visit Britain over-index the most on large cities. Scotland and Wales intenders are much more likely to say they want to roam around.
- Couples (with or without children) will strongly drive trip recovery in a context where many couples and parents are looking for family reconnection after long lock-down periods. Solo and friends' trips are more likely to be considered in Nordic markets compared to the average. Family trips with children are more likely from India and Saudi Arabia.
- Hotel chains are mentioned by most as a preferred choice for a next leisure trip abroad, potentially suggesting a higher level of trust in COVID protocols implemented in well known brands. High interest in self-catered accommodation also indicates a desire to limit interactions with other guests in a COVID context. A large segment consider B&B and private rentals, confirming a desire from visitors to engage with locals in a COVID safe yet immersive experience.
- Britain intenders are considering a range of accommodation experiences, including hotel chains and boutique properties, but also B&Bs, historic houses and private rentals. London intenders are particularly drawn to hotel chains. Scotland and Wales intenders over-index on holiday villages/centres and historic houses/castles.
- When it comes to planned activities, results suggest a desire amongst some to return to many pre-pandemic behaviours when on holiday, with dining out (just) leading and interest in iconic tourist attractions closely following. Large events are currently not on top of the list, however, but could regain interest in the future as COVID conditions improve. Outdoor nature activities also rank highly.
- Britain intenders show a strong appetite for exploring iconic, cultural and natural attractions/activities during their next trip.

Key Takeaways

Key Takeaways (1)

Overall travel sentiment drivers

- **Desire to travel internationally remains strong** in all markets, despite COVID concerns, unclear/restricted travel possibilities, and uncertainties around personal financial situation. The travel sentiment is not expressed as a vague concept but a short-term *ASAP* plan.
- The international travel sentiment is activated by four factors:
  - **Health:** (vaccine, COVID cases, hygiene protocols…) → While *informing* officially on COVID safety at destination through stakeholders is a must for fueling trust, too much promotion selling COVID safety conditions at destination can also *kill the dream* while concerns around not being able to live the full experience are growing;
  - **Money:** Consumers are ready to travel again but value financial risks as well as health risks. The attitude is moving from *is it safe travelling now?* to *is it safe and worth travelling now?.* Obstacles are primarily related to booking cancellation policy but also to the projected value for money at destination (risk of paying the full price for a limited experience) → Beyond flexibility in case of travel cancellation, reassurance about the full experience at destination is valuable to secure bookings.
  - **Freedom of movement:** As travel rules/restrictions can change regularly, many will prefer waiting until getting a stable and clear view on possible mobility restriction → The concept of multi-country itineraries involving many borders to cross may not be attractive in the short term, providing instead an opportunity for keeping international visitors longer inside the same country.
  - **Reputation:** Beyond COVID reputation, consumers express expectations around political stability, transparency on what is open or not at destination, hotels and attraction quality in COVID times, and residents' hospitality → Close monitoring and timely information provided on availability and quality of tourism players in COVID times is necessary.
- Early international travel interest is stronger amongst **younger travellers** (below 40 years old, feeling less vulnerable to COVID), including **couples and parents in search of strengthening family ties**. It is likely that vaccines among older generations will accelerate propensity to travel internationally, but it may take time before trust is fully recovered. **VFR** will also act as a significant driver.
- The financial situation impacts on travel sentiment, but **many cautious consumers still are open to trip deal opportunities.**

Key Takeaways (2)

Consumers' attitude towards travel

- **Consumers are currently adapting to the abnormal market environment** (very limited choices, fears of crowding…), but it does not mean they are fundamentally changing expectations in the long-term. **The survey confirms high interest in resuming full travel experiences whenever possible**, including pre-COVID basic travel motivations (dining out, sun & sea, city breaks, socialising, visiting iconic places etc.) → Promoting the classic destination DNAs and icons along with hidden-gems and secondary places is therefore important.

- Reflecting a **"catching-up" sentiment** following a long period of restriction, **experiences envisaged at destination include a very large diversity of sensorial activities**: food and cultural experiences, picturesque and natural sites, socialising opportunities… only large events, nightlife and shopping (seen more at risk with COVID) are currently less on the bucket list while nature reconnection and outdoor experiences are more top of mind. Interest for must-see attractions is still high if not overcrowded → If visitors are well oriented and informed pre-visit and at destination, it is possible to convert the catching-up sentiment into more (unplanned) spending.

- **Last-minute booking** is a new normal and high travel desire with restricted choice leads to opportunist booking. Travel horizons expressed show large promotional windows for long-haul markets over the year, while 2021 summer at large (including shoulder seasons) is the next realistic horizon for Europeans, dependent on travel restrictions and the COVID context.

- Both hotels and private rentals or B&Bs are well considered in the context **that accommodation can act as an centre of the visitor experience.** While contacts with other guests have become a significant factor in consumer mind, they are tempted to book self-catered options or reputable hotel chains applying strict sanitary standard. Yet, high consideration for B&Bs confirm the willingness to live a full experience including socialising opportunities with locals → All types of accommodation have a role in raising attractiveness of the destination. Standard official COVID labels or certification can help secure interest for independent hotels, while reviews/comparison websites have a strong influence in consumer choices.

- The long-term impact of the crisis on travellers' behaviours is too early to define… though a consolidation is expected around more **sustainable** experiences and growing curiosity for **secondary destinations** (regionally, domestically, internationally). **Booking flexibility and last-minute booking** will also become mainstream expectations among consumers.

Key Takeaways (3)

Britain position in its competitive environment

- **The competition game around destinations' choice for 2021 is extremely open.** Consumer choices constantly change and only 4 in 10 travellers have a precise idea of where they plan to go. Several destinations are usually considered for this year.
- **Europe is still top of mind** including in long-haul markets → Being part of Europe tourism-wise is a positive driver for Britain.
- Providing per market pre-COVID visits volumes, consideration rates and COVID image, the competitive position of Britain is summarised as follows:
  - **6 markets in favourable competitive position:** Sweden and Norway (very COVID safety sensitive), Italy and Spain (budget sensitive markets with more uncertain financial situations), China and Canada (Europe-oriented and having Britain high in mind)
  - **4 markets in average competitive position:** the US (Europe-oriented but UK not top of mind), Australia (very COVID safety sensitive), India (strong international travel sentiment but UK not top of mind) and Saudi Arabia (Europe lower in mind, Regional / Asian competition)
  - **4 markets in at-risk competitive position:** France, Germany, Netherlands and Irish Republic, all nearby core markets showing lower consideration rates and COVID-safety sensitiveness.

Insights on the complex question of countries' COVID sanitary reputation

- COVID reputation is extremely volatile and not always dependent on DMOs and stakeholders as it is driven mostly by external factors (politics, societal…)
- Too much communication by DMOs on hygiene protocols could hurt the destination as consumers look for maximising their future experience.
- More than COVID-related official statements, the reality of the visitor sentiment in hotels and attractions matter. An evaluation of visitor experience in 2020 is recommended as the average UK Sanitary Safety Score of operators are rated below EU average (*).
- The recent massive web social conversations around "UK COVID variant" (not present as respondents competed the survey) is expected to lower the UK reputation as a COVID-safe destination in the short term, but reputation can recover fast as measured in the past.

(*) TCI/Travelsat Pulse 2020 – Based on reviews and ratings consolidated from 25+ rating websites

Key Takeaways (4)

Specific segments and experiences that are showing promise for Britain

- **Couples / Parents / Family reconnection trips**
- Secondary destinations explorers / **Crowd-escapers / Coastal itineraries** (equivalent of the Atlantic and Grand Ocean Roads)
- **Cross-UK “no borders” Families Tourers** / Van / Motorhome trips offering **Slow / Micro adventure**
- **City breaks deals** (London, Edinburgh…) – **Friendship reconnection** in an urban lively environment / “socialising bubbles”
- **Nature/outdoor active** deals
- **Foodies** and hybrid experiences including gastronomy
- **Sensorial trip experiences** (Arts in gardens, panoramic views etc).
- **Affluent visitors** (targeting the “lucky ones”)
- **Historic houses’ lovers** for long week-ends / mid-weeks
- **VFR** combined/extended trips
- **Bleisure** visitors (business trip with a leisure experience)
- … and other **niche / passion-based tourism** known as very efficient in boosting destination’ reputation in COVID times:
  - Film locations (Netflix and other streaming platforms influence and usage massively growing since COVID)
  - Wineries/Breweries/whiskey producers tours
  - Fine Arts lovers offered exclusive museum visit at night
  - UK Football and other Sport Clubs Fan tours
  - Memorial sites…

Key Takeaways (5)

Main implications related to planning, booking and influencing channels

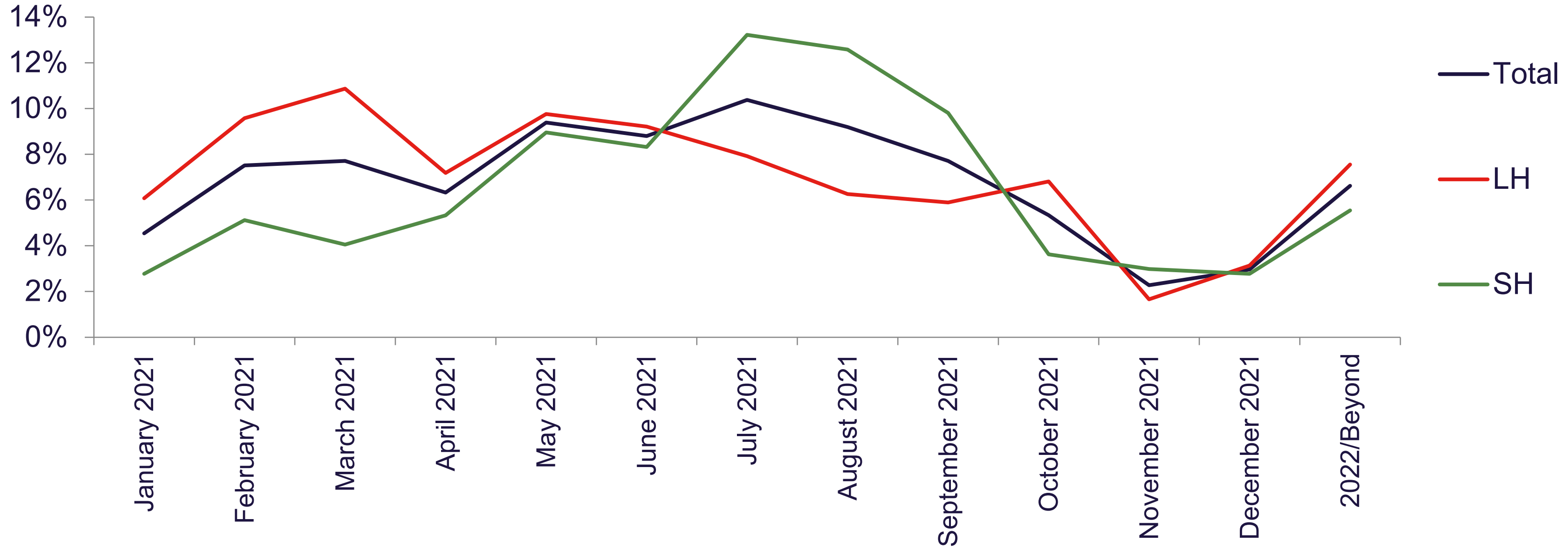
- **OTAs/TOs** well considered across all short-haul markets and among younger generations too.
- **Social media and digital marketing** can generate high ROI as Millennials are showing interest in resuming international travel sooner.
- **Transport operators** are expected to continue offering the most flexible cancellation policies possible. This also applies to Travel Packages.
- **Travel comparison websites** have a massive influence in sort-haul markets, as consumers are trying to best inform their decision.
- **Official destination websites are very influential** in the trip planning process as trusted source on both COVID-safety (simplified) information and guidance on the "full experience" promotion. Promoting best performers (hotels, attractions) in terms of Sanitary Safety Rating is recommended, as well as a timely inventory of what is open and not at destination.
- **Visitor pre-trip information consistency and timeliness** required to both **end-consumers** and **the Trade** (particularly in long-haul markets).
- **Selling Britain under the Europe brand** among Long-Haul markets is a driver as Europe is still on consumers' top of mind.
- **Corridors last-minute deals:** readiness to push deals as soon as one corridor reopens
- **The large diversity of transport options for travelling to/in the UK** (flight, train, ferries, tunnel, bus, cars…) is usually an advantage but can also be an obstacle for some trip planners in the current context where transportation verticals are still generating concerns (last minute flight/train cancellations ruining trip plans, exposure/contacts with other international passengers…). It is suggested to **clarify and simplify the transport-related information** for potential travellers, particularly those envisaging multiple transport combined.

Appendix

Britain Intenders – Travel Horizons

Trip horizon patterns among intenders to Britain are not significantly different vs overall trips. Among Europeans, the horizon significantly rises from May, July and August being most frequently mentioned. However, a segment of short-term planners exists and will probably re-schedule as soon as travel restrictions are relaxed. Horizon for long-haul intenders to Britain is more spread over the year, with a significant share of short-term planners showing a willingness to visit as soon as possible. *(NB this research was conducted before the new variants were widely reported so reflects intentions in that previous context.)*

Britain Intenders	Short Haul (n = 469)	Long Haul (n = 543)	Total (n = 1012)
Dec 2020-March 2021	13%	28%	21%
Later in 2021	68%	58%	62%
Later in 2022 and beyond	6%	8%	7%

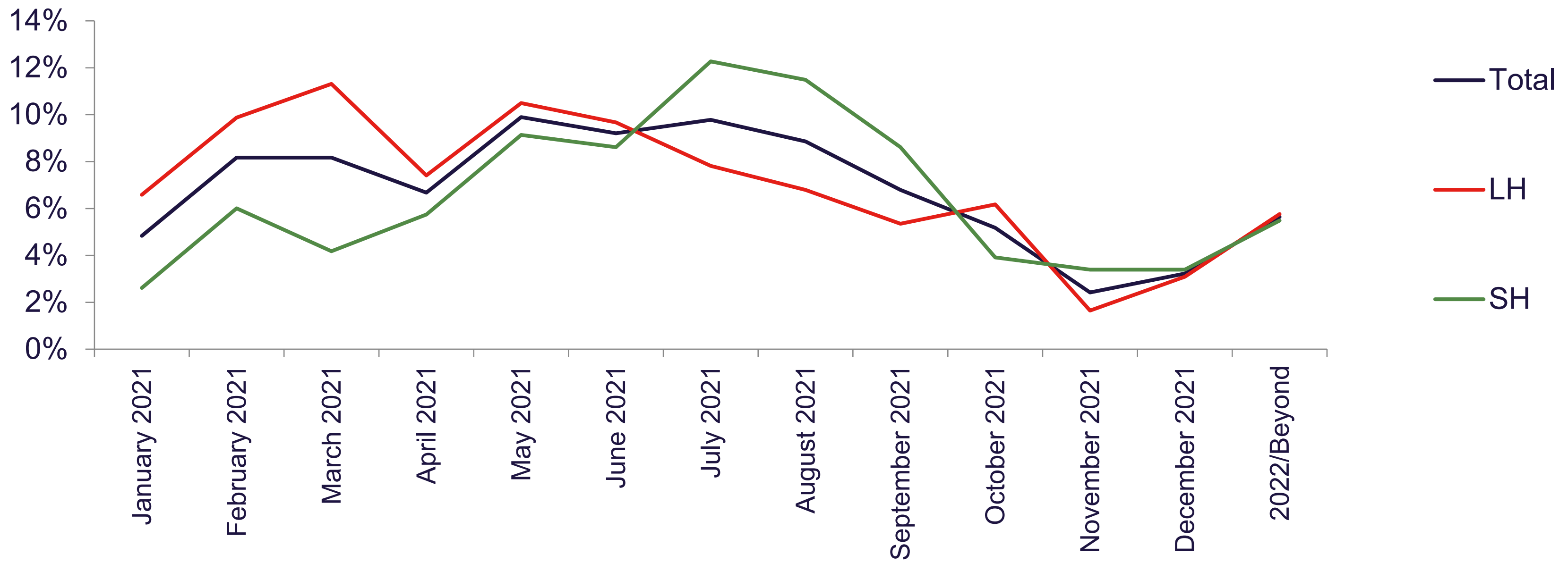


Base: Respondents who plan on taking a leisure trip in Britain (n = 1012)

England Intenders – Travel Horizons

Intenders to England confirm a focus on "summer at large" as a next realistic horizon, though other periods are also considered particularly among long-haul markets who express a desire to visit the region in a shorter term. *(NB this research was conducted before the new variants were widely reported so reflects intentions in that previous context.)*

England Intenders	Short Haul (n = 383)	Long Haul (n = 486)	Total (n = 869)
Dec 2020-March 2021	14%	29%	23%
Later in 2021	67%	58%	62%
Later in 2022 and beyond	5%	6%	6%

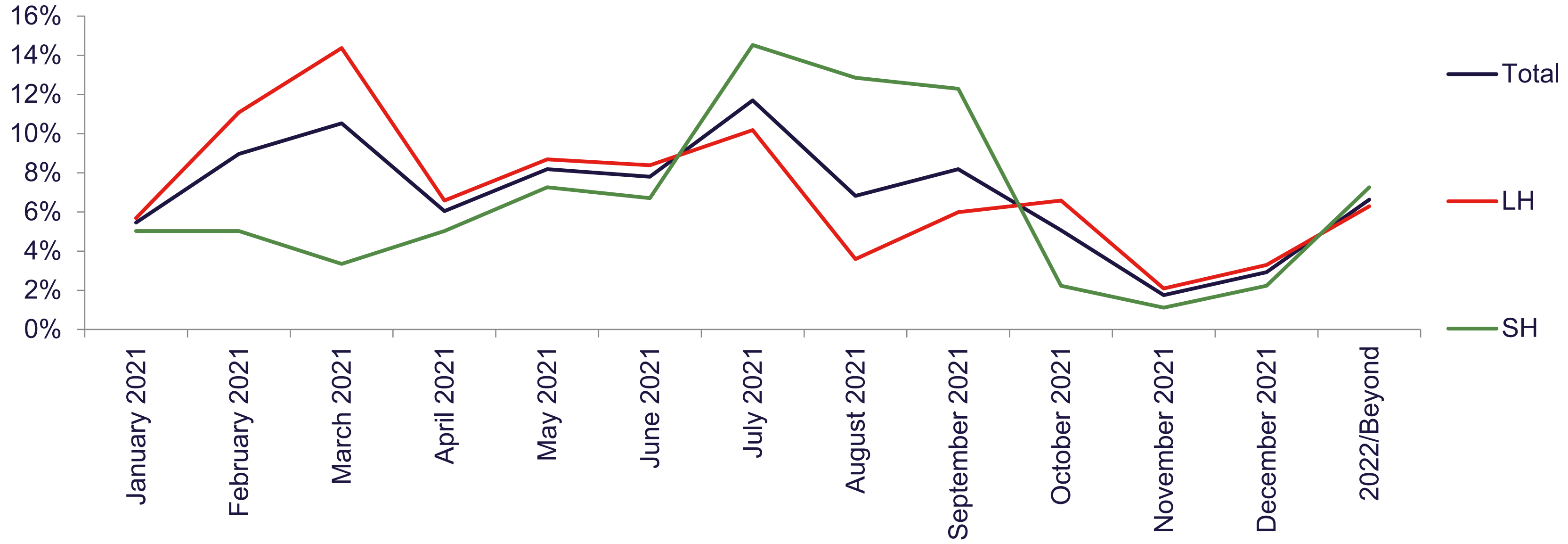


Base: Respondents who plan on taking a leisure trip in England (n = 869)

Scotland Intenders – Travel Horizons

Summer at large (including shoulder season June/September) is the most anticipated window for a trip to Scotland for European markets, while interesting opportunities to promote the destination at any season exist for attracting long-haul markets, including in the short term when travel conditions are possible again. *(NB this research was conducted before the new variants were widely reported so reflects intentions in that previous context.)*

Scotland Intenders	Short Haul (n = 179)	Long Haul (n = 334)	Total (n = 513)
Dec 2020-March 2021	14%	33%	26%
Later in 2021	64%	55%	58%
Later in 2022 and beyond	7%	6%	7%

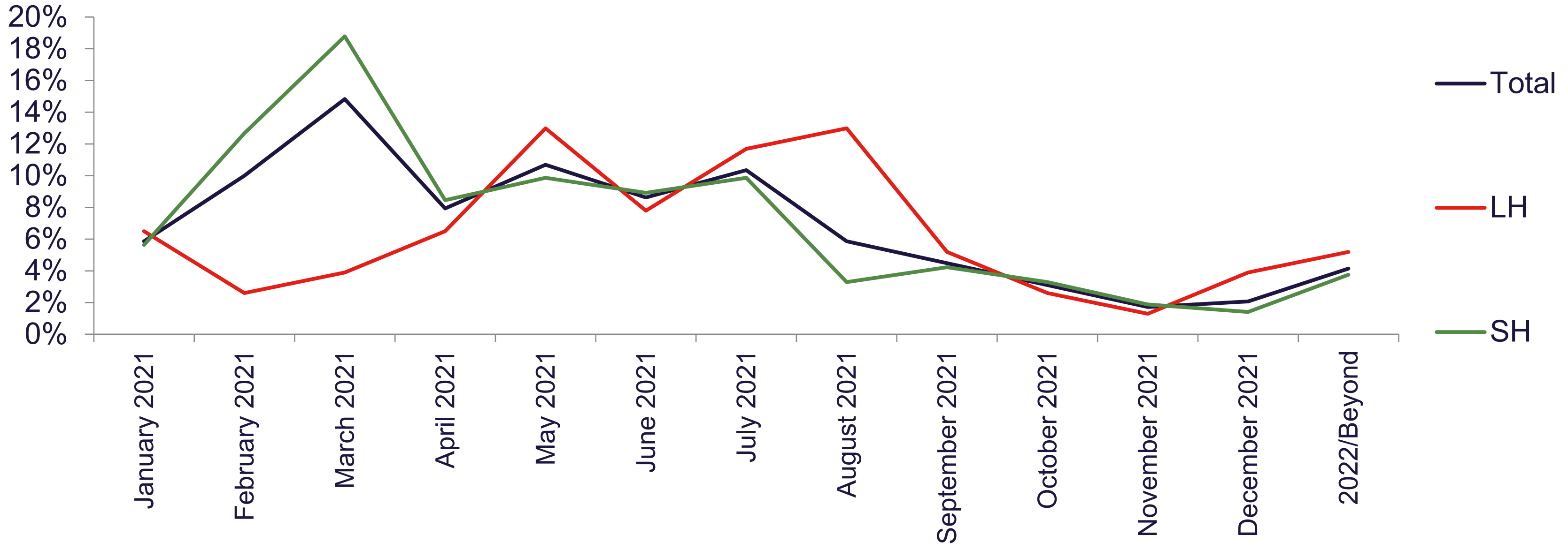


Base: Respondents who plan on taking a leisure trip in Scotland (n = 513)

Wales Intenders – Travel Horizons

Trip horizon among intenders to Wales mirrors the pattern observed in other destination in Britain, with a peak of interest for summer at large for European markets and more spread over the first part of the year among long-haul markets. *(NB this research was conducted before the new variants were widely reported so reflects intentions in that previous context.)*

Wales Intenders	Short Haul (n = 77)	Long Haul (n = 213)	Total (n = 290)
Dec 2020-March 2021	13%	39%	32%
Later in 2021	65%	51%	55%
Later in 2022 and beyond	5%	4%	4%

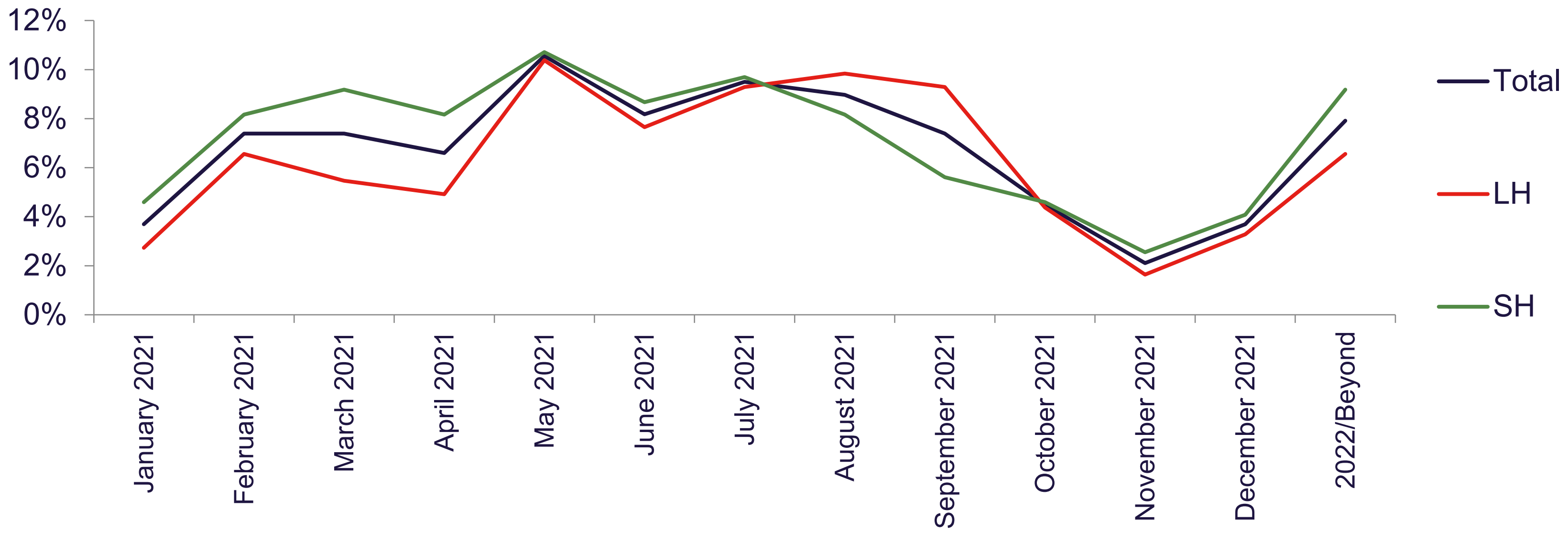


Base: Respondents who plan on taking a leisure trip in Wales (n = 290)

London Intenders – Travel Horizons

Half of intenders to London from Europe would envisage a trip between May and September 2021. The planning window for a visit to the iconic world city from long-haul market spans over the year, and suggests also a strong desire to travel whenever possible before summer. *(NB this research was conducted before the new variants were widely reported so reflects intentions in that previous context.)*

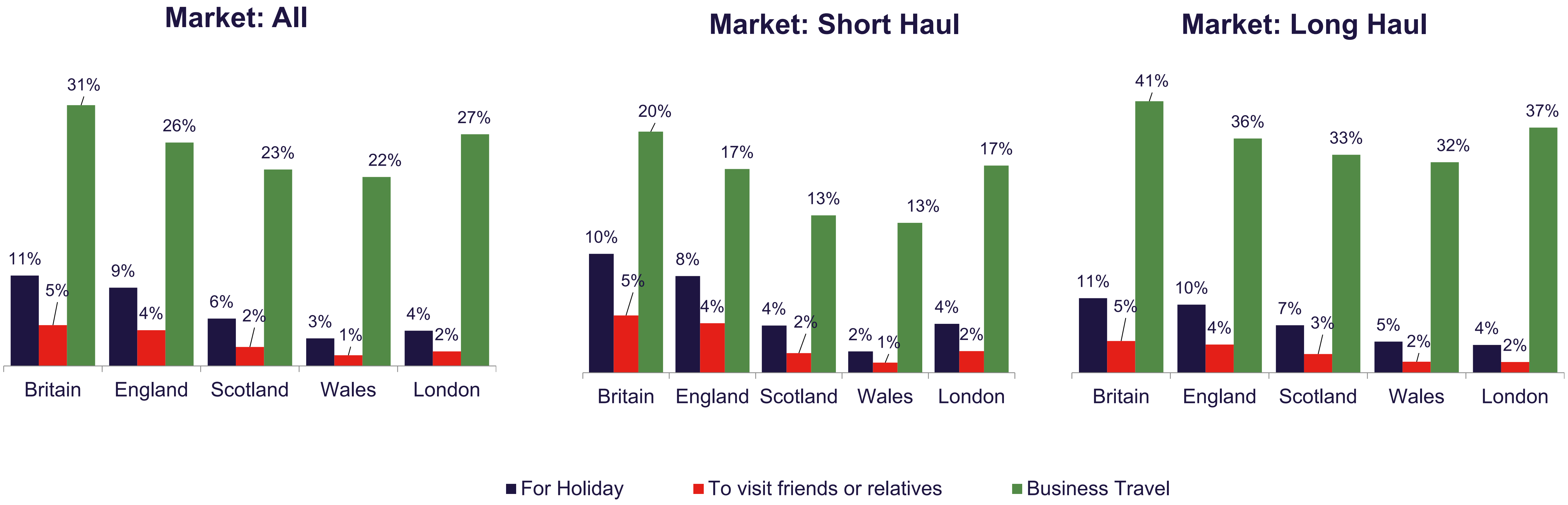
London Intenders	Short Haul (n = 183)	Long Haul (n = 196)	Total (n = 379)
Dec 2020-March 2021	16%	22%	20%
Later in 2021	61%	62%	61%
Later in 2022 and beyond	7%	9%	8%



Base: Respondents who plan on taking a leisure trip in London (n = 379)

Incidence of travel segments – Summary (1)

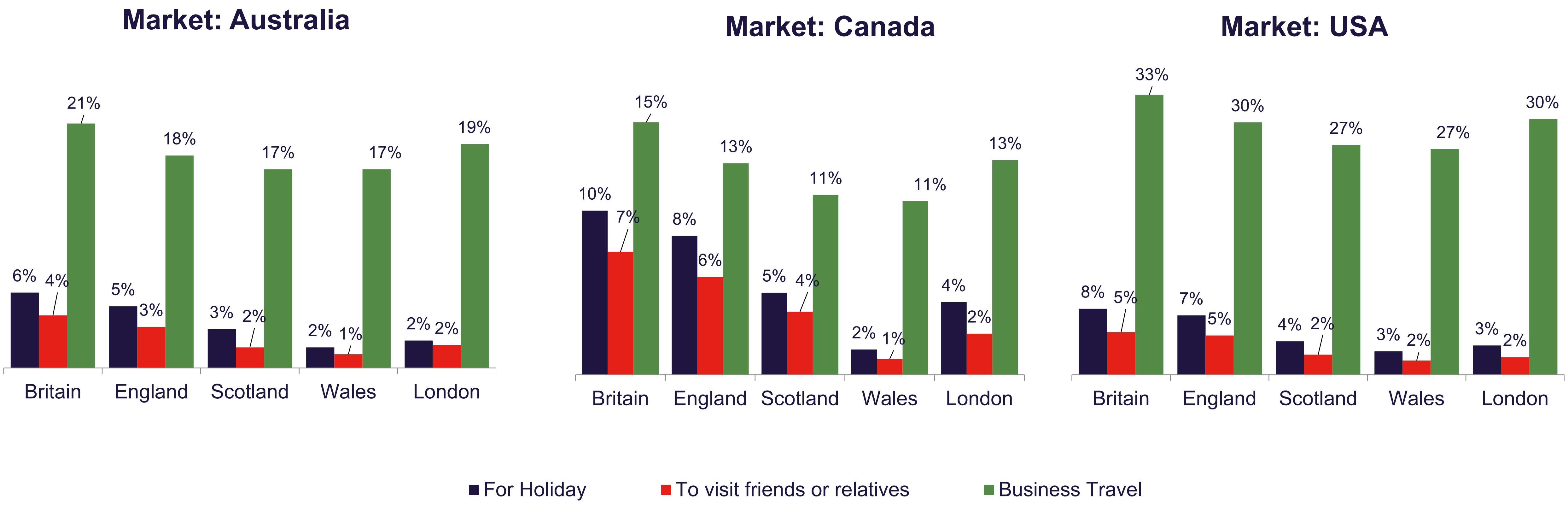
Reading guidance: *the following percentages report consideration levels for each destination associated to a specific trip purpose:*
% of total respondents considering destination X (Britain, England, Scotland, Wales, London) for a trip motivation Y (Holiday, VFR, Business).



Q6: /
Base: All respondents (8245 obs.)

Incidence of travel segments – Summary (2)

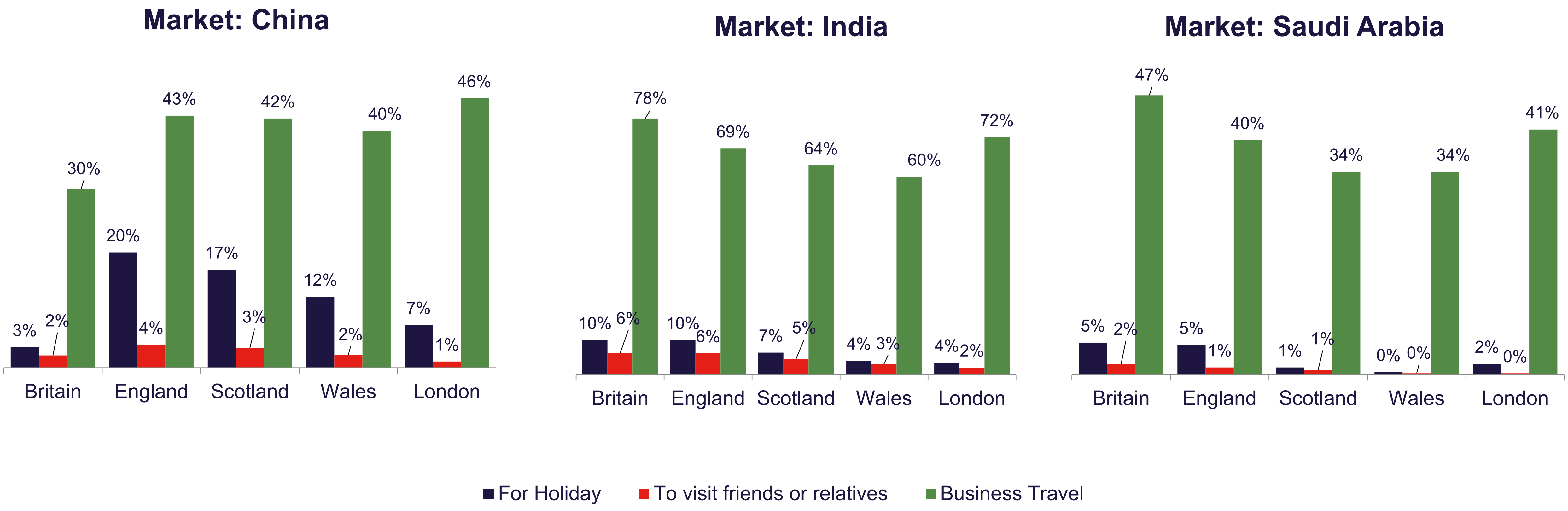
Reading guidance: *the following percentages report consideration levels for each destination associated to a specific trip purpose:*
% of total respondents considering destination X (Britain, England, Scotland, Wales, London) for a trip motivation Y (Holiday, VFR, Business).



Q6: /
Base: All respondents (8245 obs.)

Incidence of travel segments – Summary (3)

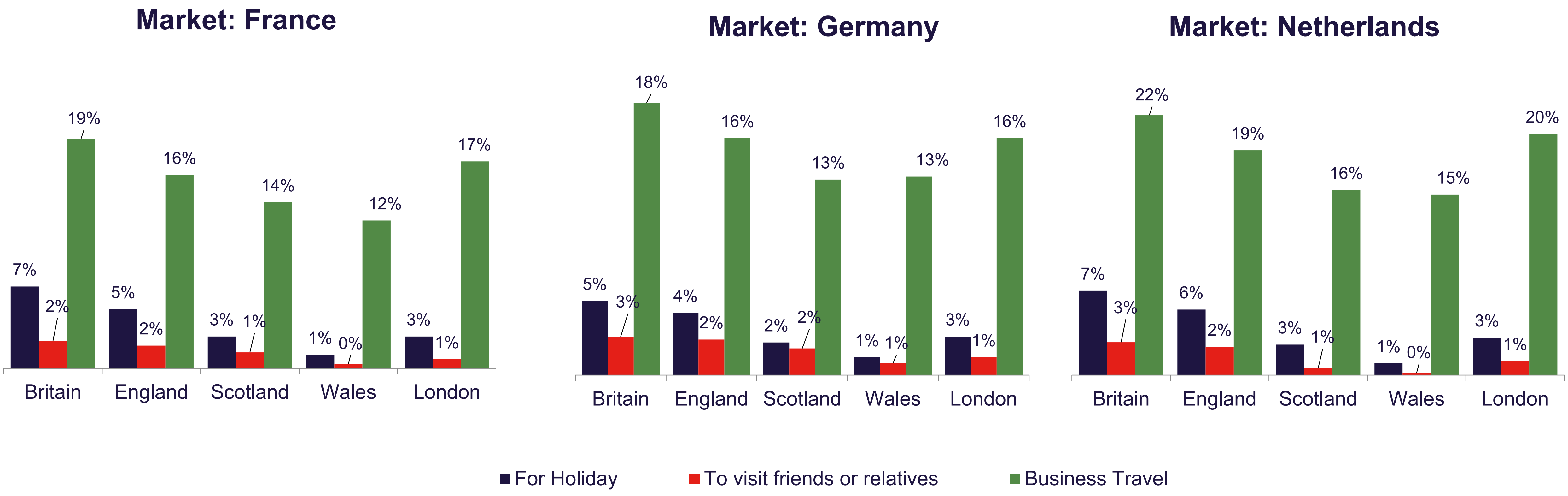
Reading guidance: *the following percentages report consideration levels for each destination associated to a specific trip purpose:*
% of total respondents considering destination X (Britain, England, Scotland, Wales, London) for a trip motivation Y (Holiday, VFR, Business).



Q6: /
Base: All respondents (8245 obs.)

Incidence of travel segments – Summary (4)

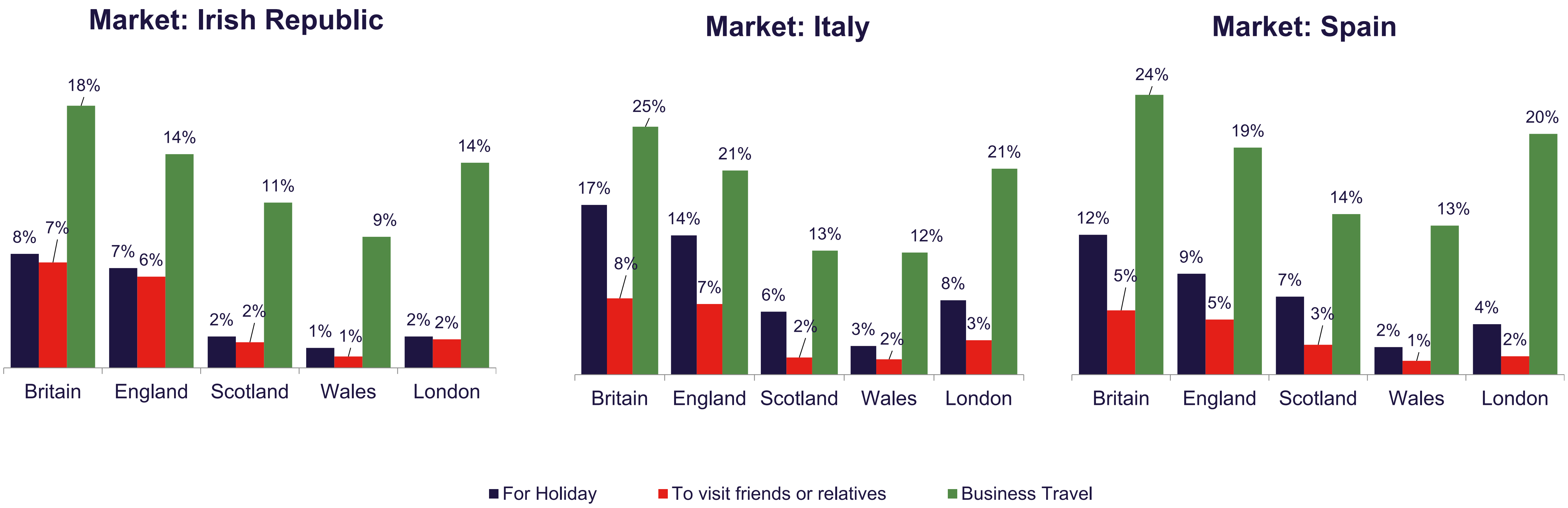
Reading guidance: *the following percentages report consideration levels for each destination associated to a specific trip purpose:*
% of total respondents considering destination X (Britain, England, Scotland, Wales, London) for a trip motivation Y (Holiday, VFR, Business).



Q6: /
Base: All respondents (8245 obs.)

Incidence of travel segments – Summary (5)

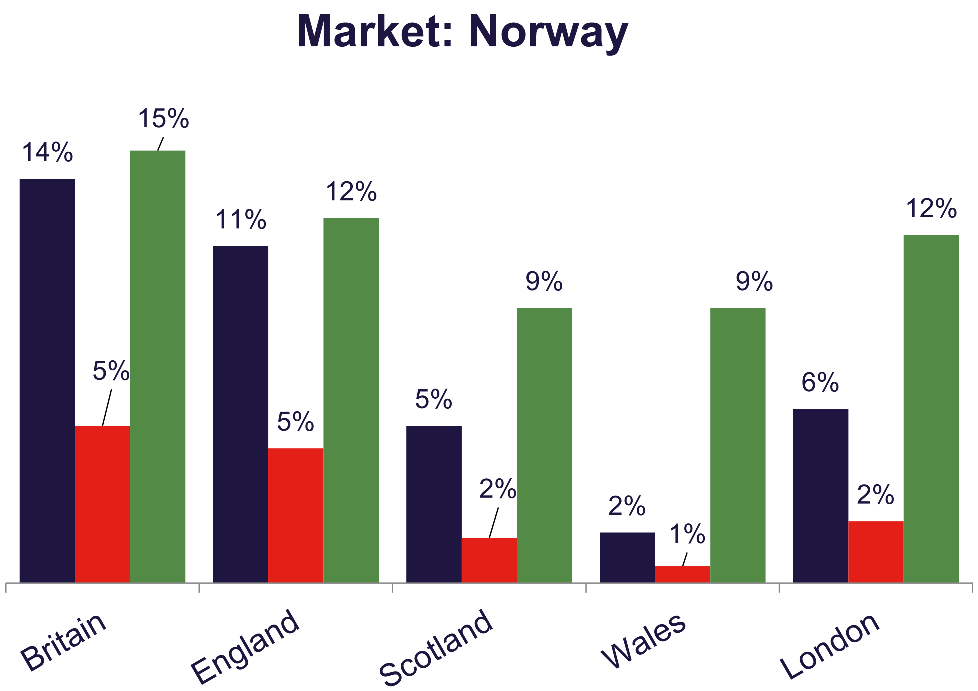
Reading guidance: *the following percentages report consideration levels for each destination associated to a specific trip purpose:*
% of total respondents considering destination X (Britain, England, Scotland, Wales, London) for a trip motivation Y (Holiday, VFR, Business).

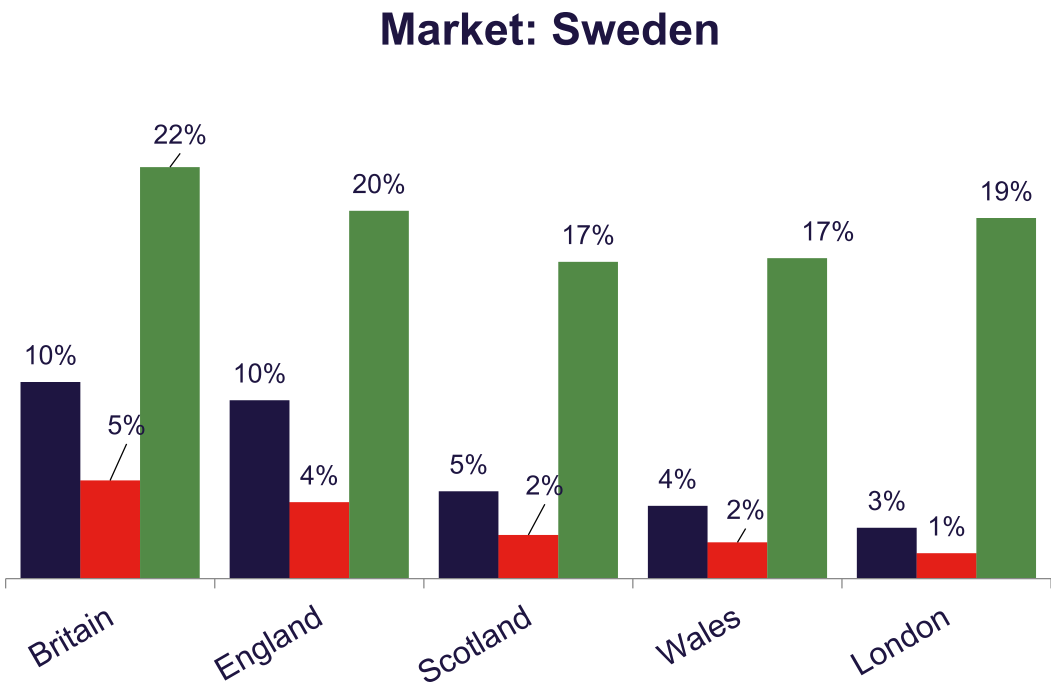


Q6: /
Base: All respondents (8245 obs.)

Incidence of travel segments – Summary (6)

***Reading guidance:** the following percentages report consideration levels for each destination associated to a specific trip purpose:*
% of total respondents considering destination X (Britain, England, Scotland, Wales, London) for a trip motivation Y (Holiday, VFR, Business).





For Holiday | To visit friends or relatives | Business Travel

Q6: /
Base: All respondents (8245 obs.)

Sample description

	TOTAL	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
Male	50%	50%	50%	48%	50%	50%	50%	49%	52%	50%	50%	49%	50%	55%	50%	49%	50%
Female	50%	50%	49%	52%	50%	50%	50%	50%	48%	50%	50%	51%	50%	45%	50%	51%	49%

	TOTAL	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
Less than 35	34%	33%	36%	29%	29%	40%	34%	33%	44%	37%	35%	34%	28%	41%	34%	27%	33%
From 35 to 54	38%	39%	38%	34%	35%	40%	39%	39%	37%	38%	41%	35%	38%	52%	45%	34%	32%
55 and over	27%	29%	26%	37%	36%	20%	27%	28%	19%	25%	24%	31%	34%	7%	21%	39%	35%

	TOTAL	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
Working full-time	64%	58%	71%	48%	65%	94%	68%	60%	83%	55%	63%	51%	44%	71%	70%	50%	55%
Working part-time	10%	12%	8%	16%	8%	2%	5%	12%	8%	15%	11%	19%	12%	14%	9%	12%	9%
Unemployed	4%	6%	2%	3%	3%	0%	5%	3%	1%	9%	7%	6%	5%	2%	5%	7%	4%
Homemaker	4%	4%	3%	6%	3%	0%	2%	5%	2%	7%	5%	4%	7%	6%	3%	2%	3%
Retired	14%	15%	13%	24%	18%	3%	17%	15%	2%	12%	8%	15%	22%	4%	6%	23%	26%
Student	4%	5%	2%	2%	2%	1%	3%	5%	4%	3%	7%	4%	10%	2%	6%	4%	2%
I don't know	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	1%	1%	0%	1%	0%

	TOTAL	Short Haul	Long Haul	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
Not impacted	53%	44%	61%	55%	58%	67%	45%	48%	70%	46%	27%	56%	57%	49%	27%	47%	60%
Uncertain	40%	47%	34%	38%	37%	31%	48%	47%	27%	44%	62%	39%	37%	41%	56%	44%	33%
Impacted negatively	6%	9%	5%	7%	5%	2%	7%	5%	3%	11%	11%	5%	6%	11%	17%	9%	7%

Base: All Respondents (n = 8245)

in conjunction with

International Recovery Research

Wave 1 – January 2021

Fieldwork: 2nd – 16th December 2020

If you need the data in a different format, please contact research@visitbritain.org

Destination Bristol ©Gary Newman