VisitScotland | Alba
LONDON & PARTNERS
Llywodraeth Cymru Welsh Government
VisitBritain

in conjunction with TCI Research – Travel Competitive Intelligence

Inbound COVID-19 Sentiment Tracker

Wave 2 – April 2021

Fieldwork: 24th March – 5th April 2021

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

Bristol Balloon Fiesta: Destination Bristol ©Gary Newman

Content

Methodology

Survey specifications

- **Markets surveyed:** Australia, Brazil*, Canada, China, Denmark*, France, Germany, India, Irish Republic, Italy, Japan*, Netherlands, Norway, Russia*, Saudi Arabia, South Korea*, Spain, Sweden, UAE*, USA
- **Target:** people who have travelled abroad at least once in the past 3 years
- **Fieldwork period (Wave 2): 24th March – 5th April**
- **Data collection:** online interviews on Access Panel; Quotas on gender, age and regions, same questionnaire basis as for wave 1 with some additional questions
- **Sample Size:** 11,000 interviews. Trended data is calculated at a constant perimeter (based on the 14 markets surveyed in Wave 1 – click here to access the Wave 1 report)
- ***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	1,000
Margin Error	+/- 8%	+/- 6%	+/- 5%	+/- 4%	+/- 4%	+/- 4%	+/- 3%

Sample Sizes:

	Sample Size
Australia	500
Brazil*	500
Canada	500
China	1,000
India	500
Japan*	500
Saudi Arabia	500
South Korea*	500
UAE*	500
USA	1,000
Total long-haul	**6,000**
Denmark*	500
France	500
Germany	500
Irish Republic	500
Italy	500
Netherlands	500
Norway	500
Russia*	500
Spain	500
Sweden	500
Total short-haul	**5,000**
Total	**11,000**

**Markets added in Wave 2*

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.
- This report shows results of the second wave, which took place **from 24th March to 5th April 2021**. It includes trended data vs wave 1 conducted from 4th to 15th December 2020.

Interpreting the survey results in a changing travel context

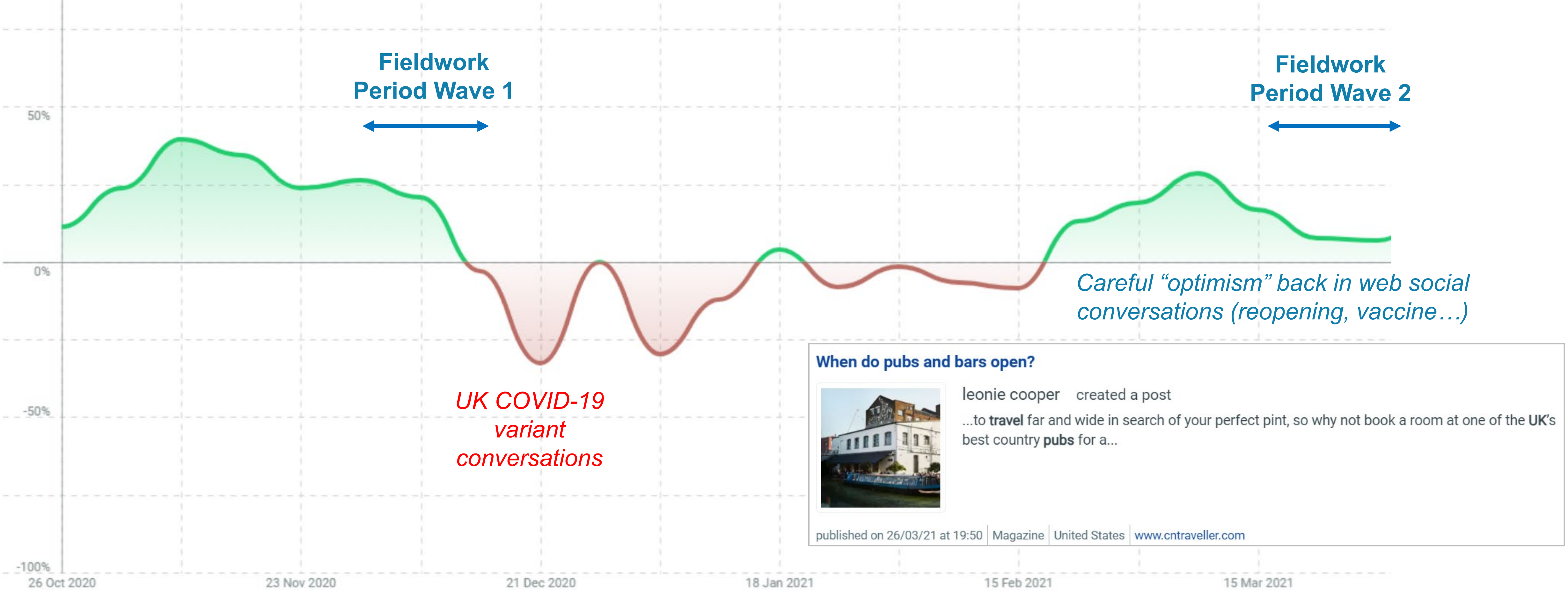
- Consumers’ sentiment is in essence subject to the context evolution and particularly the sanitary environment impacting travel restrictions and effective choices of destinations available to consumers, changing almost every week. Travel intent should therefore be interpreted more as travel “desire” and not actual booking behaviors. This is a study about people’s perception, travel intention and reassurances needed for future, rather than what they can do now or at the time they were surveyed.
- During the survey period, most countries were still in lock-down or curfews, and under very strict international travel restrictions imposed both by their own country and destination countries. In India, the survey was taken before the country was hit by the latest pandemic wave.
- Based on the TCI-Travelsat Sentiment Tracker monitoring e-reputation of travel and destinations(*) and after a negative sequence driven by negative publicity from the “UK variant”, it is suggested the reputation of Britain in social conversations was more positive when respondents took the survey, pushed (among other drivers) by the prospects of some “back to normal” life and successful vaccination campaign. Please see next slide to see this illustrated.

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

Britain-related Reputation context during the fieldwork

Net Sentiment Index – 2020/2021 (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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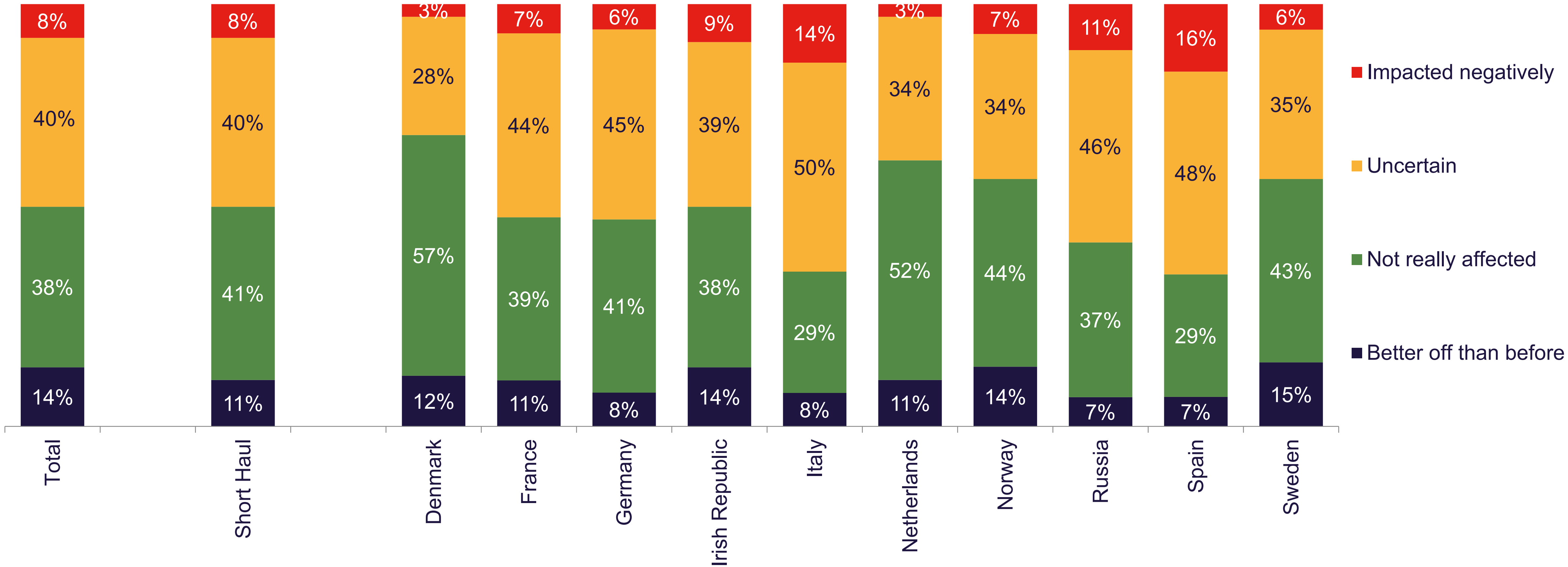
Respondents' financial situation (Short-haul)

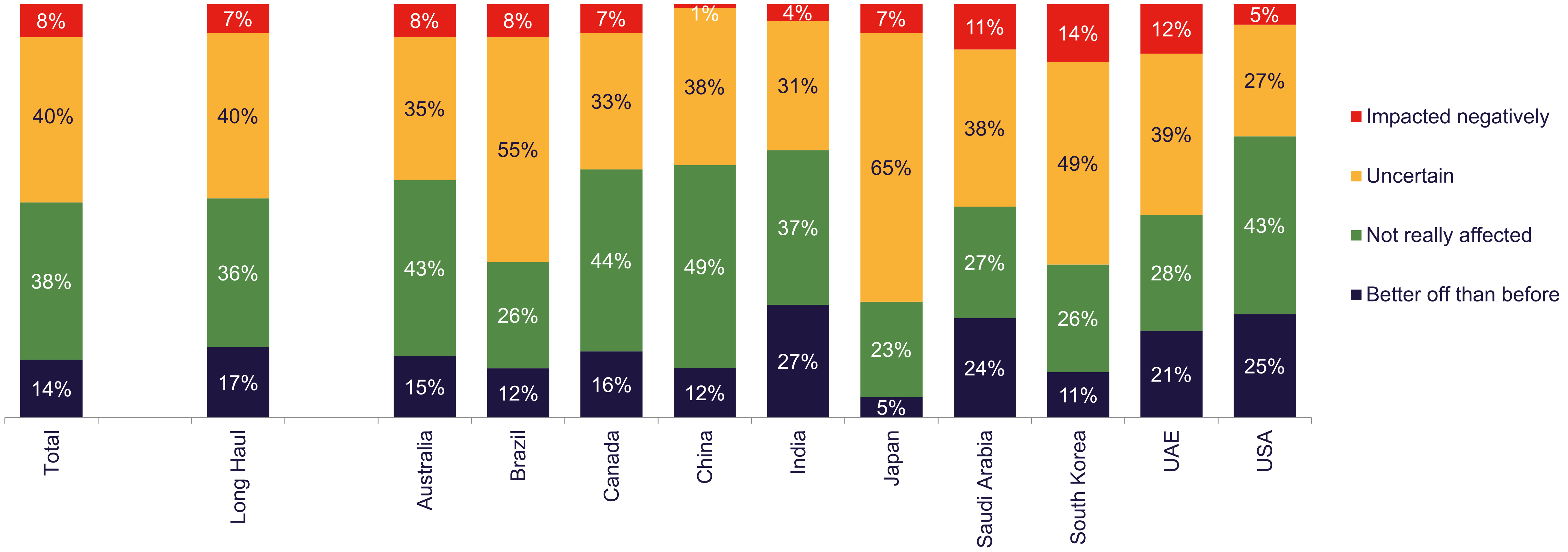
Despite the continuation of the crisis, 4 in 10 respondents from SH markets on average report their financial situation has not been really affected, whilst 1 in 10 claim it is better than before. Uncertainties remain important however, particularly for Southern European markets surveyed and Russia. Nordic markets seem more optimistic about their financial situation so far.



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 = 11,000)

Respondents' financial situation (Long-haul)

In LH markets, Japan, Brazil and South Korea express higher financial uncertainties, while the majority of North Americans, Australians, Chinese and Indian say they are not really affected or even better off than before.



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 = 11,000)

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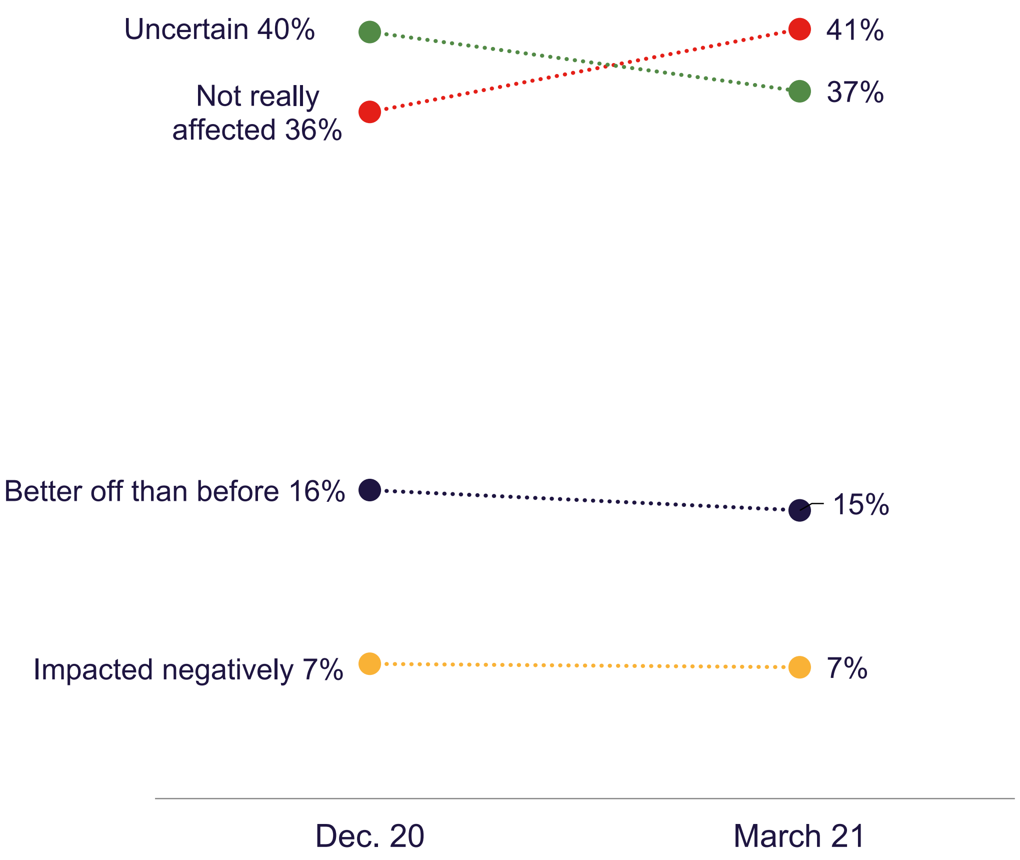
Respondents' financial situation (Trends)

Trended data indicates a small movement **from "Cautious to Alright" attitudes** in relation to consumers' spending power.

Q25. How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?



Trend calculated at constant perimeter (14 markets consolidated)

River Thames/Tower Bridge: ©VisitBritain/Luca Micheli

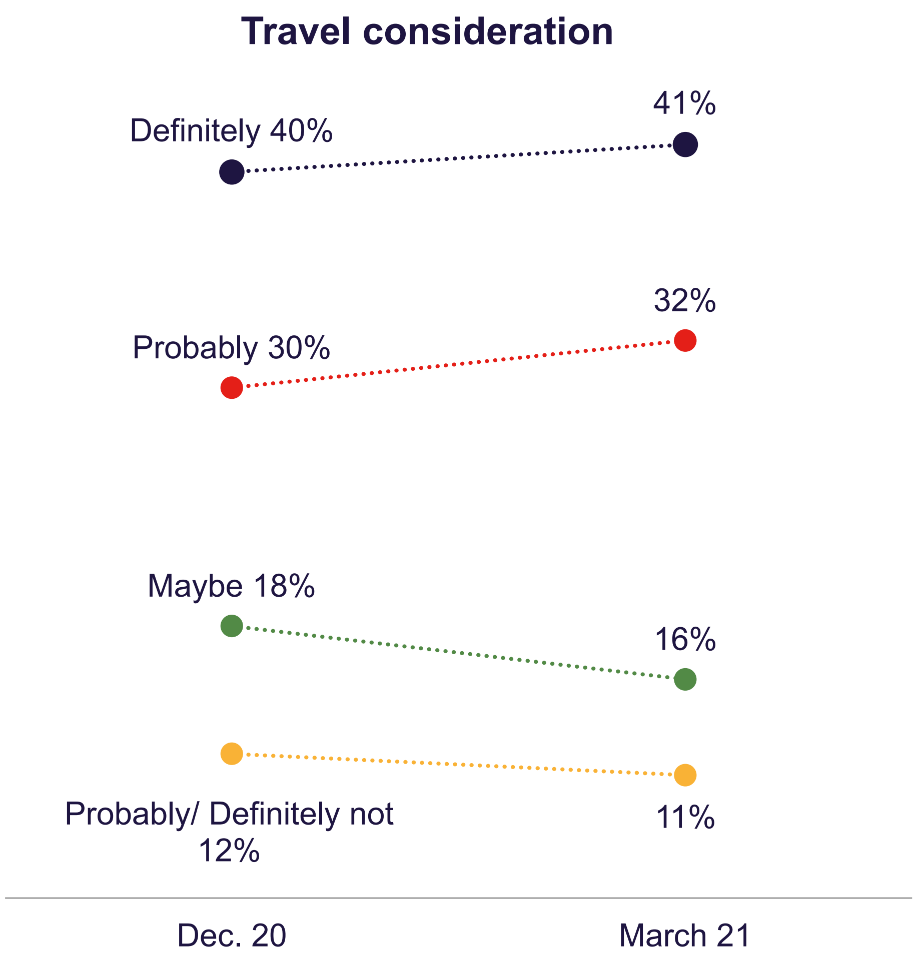
Overall travel intentions

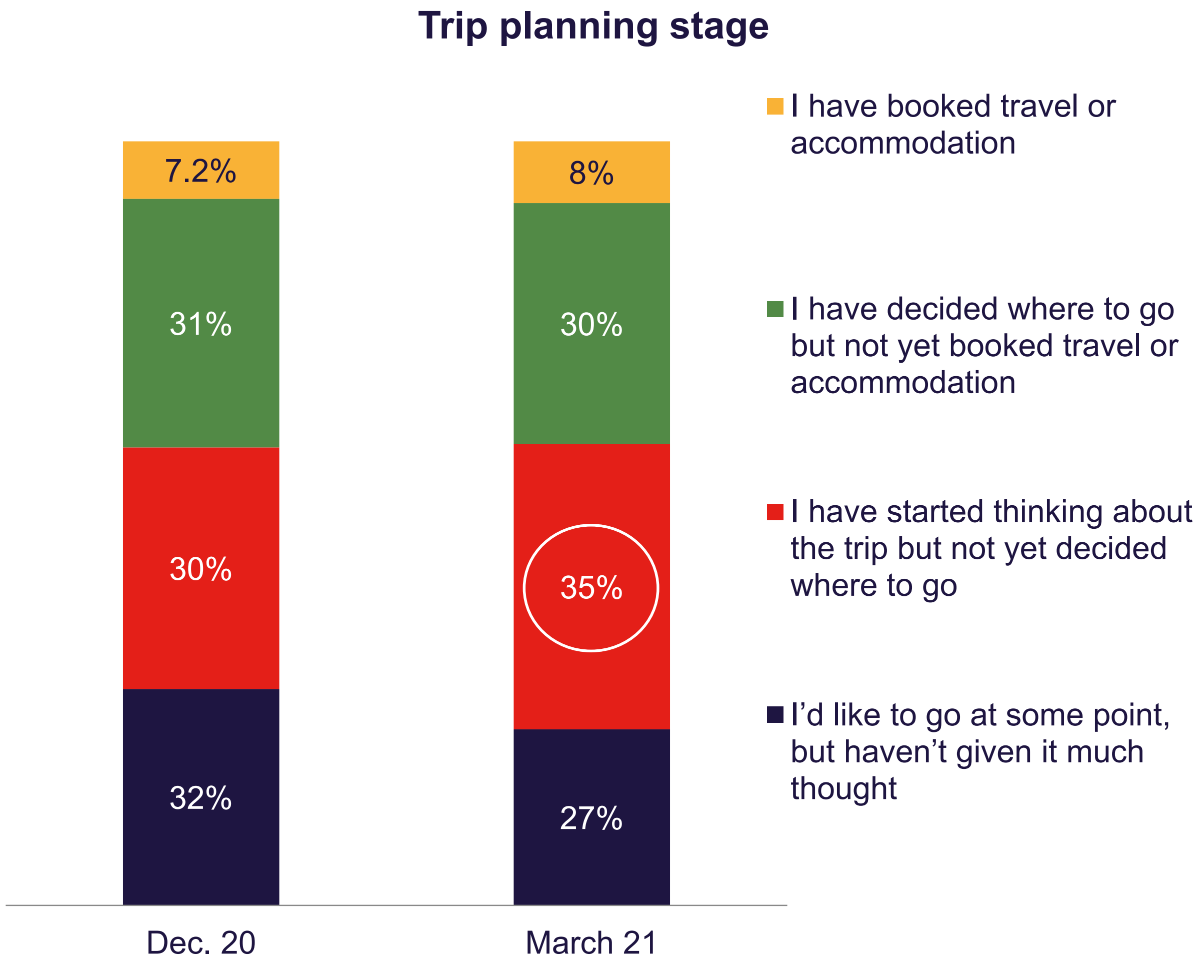
Overall travel intentions: summary

- International travel demand remains strong and has even increased vs March 2020 while past hesitant travellers are now thinking of planning a trip. A minority have booked yet (logically) and destination choice is still very open.
- Motivation for holidays as a purpose has increased with summer approaching, while visiting friends or relatives remains a strong expectation for a third of respondents.
- Summer at large (including September) is now a clear "not-to-be-missed" window for many trip planners, however a third of respondents still have either no idea on when they would travel or look at 2022 and beyond. Travel planning still spans over a larger window among LH travellers.
- The younger generation still shows the highest propension to travel internationally across most markets, however vaccination increases willingness to travel across all segments including older generations.
- Receiving a vaccination is the primary trigger of travel and greatly boosts short-term demand for summer and 2021, however vaccination alone is not enough: the COVID-19-safety context, quarantine policies and the "money-back" issue also influence.
- A high proportion of vaccinated people at destination and the concept of a vaccine passport fuel trust, but the effective number of COVID-19 cases remain the most tangible criteria for assessing the health context at destination.
- Travellers are getting more responsible and willing to discover new / less crowded places in a safer and more sustainable way. The role of travel agents is valued in the uncertainty context, while leaving booking until last minute remains obviously dominant in the current market conditions.
- Attitudes to travel among Britain intenders are generally more positive and confirms an opportunity to attract post-vaccine "crowd-escapers". The sensitiveness towards sustainability is also stronger among potential planners to Britain destinations.

Trends: December 2020 vs March 2021

Those potential travellers who were the most hesitant end of 2020 seem now more decided to travel. The choice of the destination remains however very open.

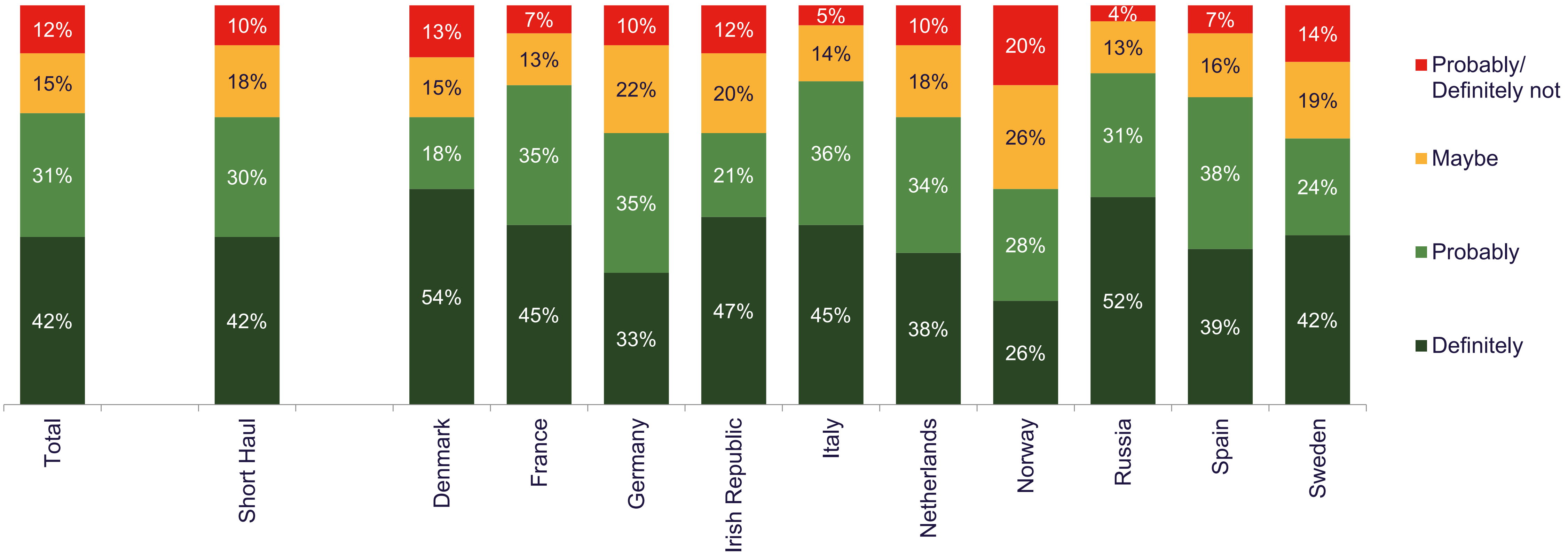




Trend calculated at constant perimeter (14 markets consolidated)

Travel consideration for an international leisure trip (Short-haul)

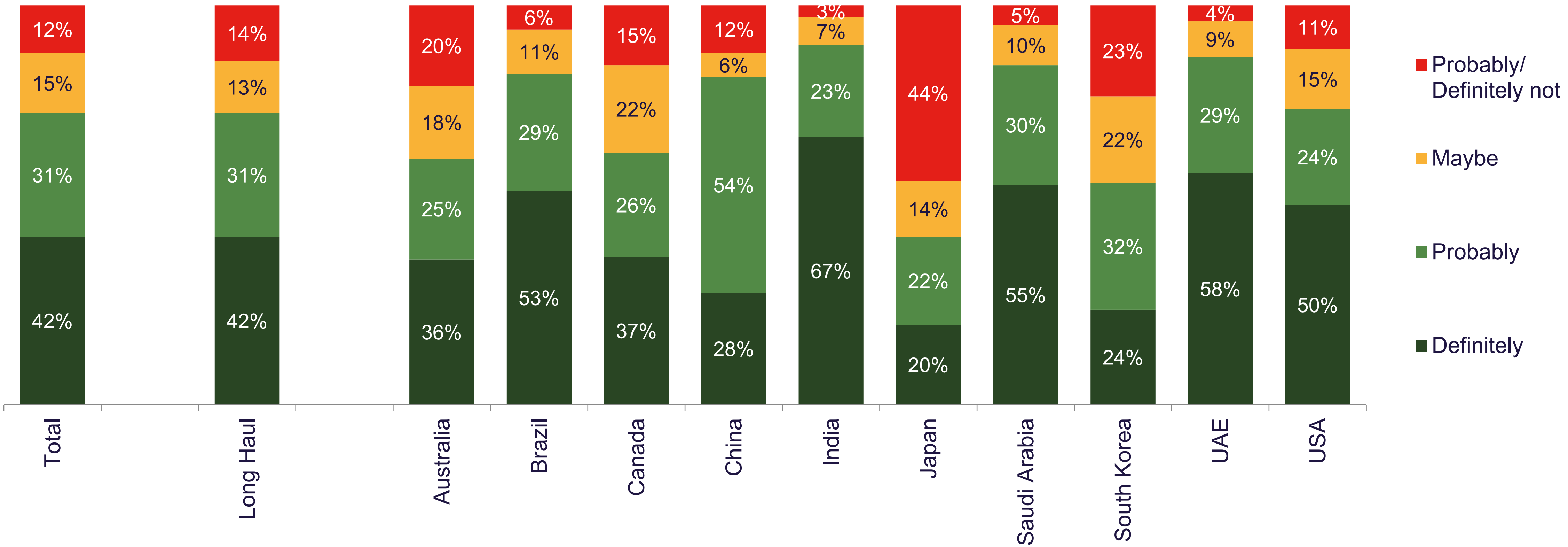
Overall, 7 in 10 respondents would consider an international leisure trip in the next 12 months, confirming a steady and more established desire to travel despite pandemic prolonged uncertainties. While Norway show a more reserved attitude (unlike their Danish neighbours), France, Italy, Russia and Spain 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 = 11,000)

Travel consideration for an international leisure trip (Long-haul)

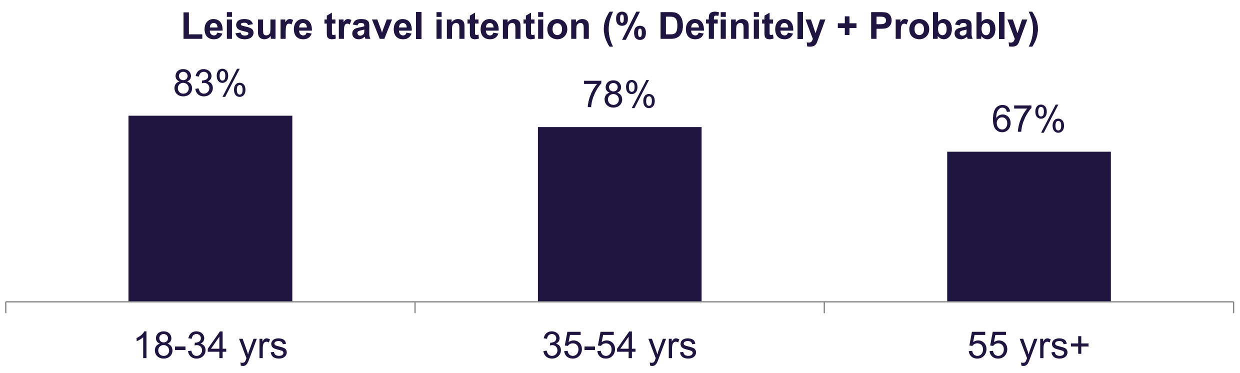
In LH markets, Japan and (to lesser extent) South Korea and Australia are the most reticent markets. The US, India, Brazil and Gulf countries express a strong willingness to travel.



Q5: How likely would you consider an international leisure trip for more than one night in the next 12 months?
Base: All respondents (n = 11,000)

Age impact on propensity to travel internationally (Short-haul)

The younger generation still shows the highest propension to travel internationally across most LH and SH markets, however with vaccination rolling-out fast (among seniors in particular), sentiment towards travel grows in older generations from countries like Spain, Denmark, Norway, the Netherlands and Russia.

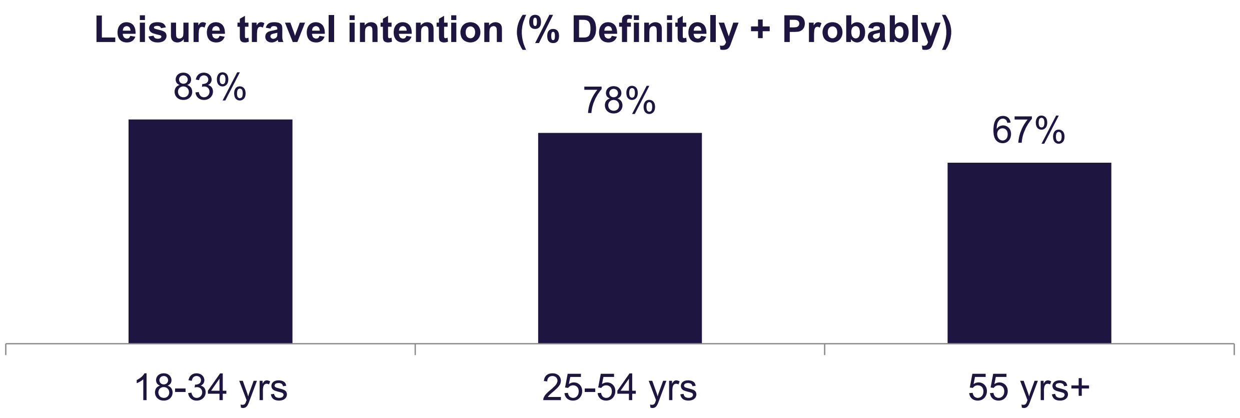


(% Definitely + Probably)	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
18 - 35 y.o.	79%	77%	89%	71%	76%	88%	87%	60%	84%	86%	68%
35 - 54 y.o.	72%	70%	78%	74%	69%	85%	65%	54%	87%	73%	71%
55+ y. o.	70%	76%	77%	63%	61%	75%	69%	59%	85%	74%	67%

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 = 6,255)

Age impact on propensity to travel internationally (Long-haul)

Younger generations also tend to report higher intentions to travel in long-haul markets in overall, however the age is not (or less) determining in China and the UAE.

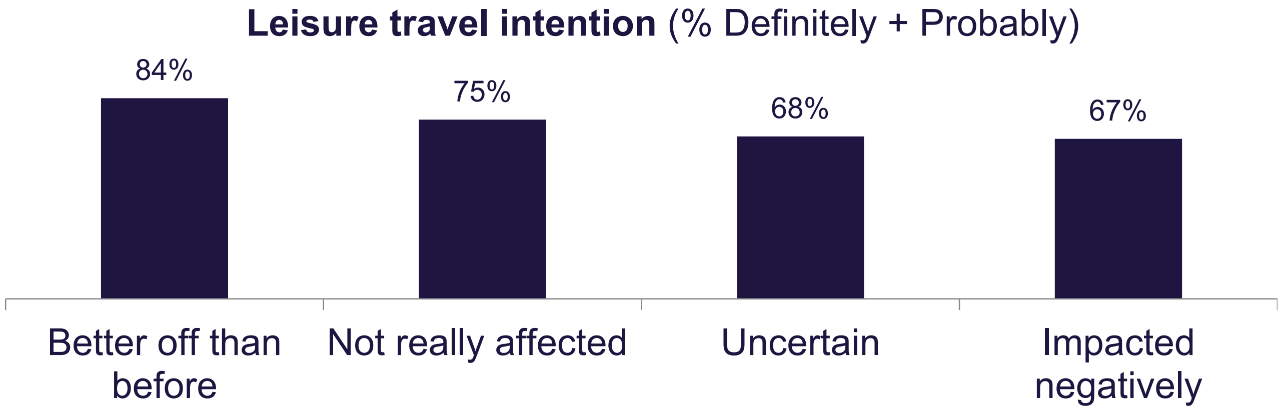


(% Definitely + Probably)	Long-haul		Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
18 - 35 y.o.	87%		79%	89%	80%	94%	95%	57%	91%	65%	88%	87%
35 - 54 y.o.	85%		72%	88%	65%	97%	95%	56%	95%	69%	90%	78%
55+ y. o.	62%		42%	80%	54%	96%	84%	26%	60%	55%	100%	58%

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 = 6,255)

Impact of financial situation on propensity to travel (Short-haul)

Opportunity to travel for those who are better off (or not impacted) financially remains high, while financial situation uncertainty is not hugely detrimental to travel intentions. The financial factor seems less important in Nordic markets also.

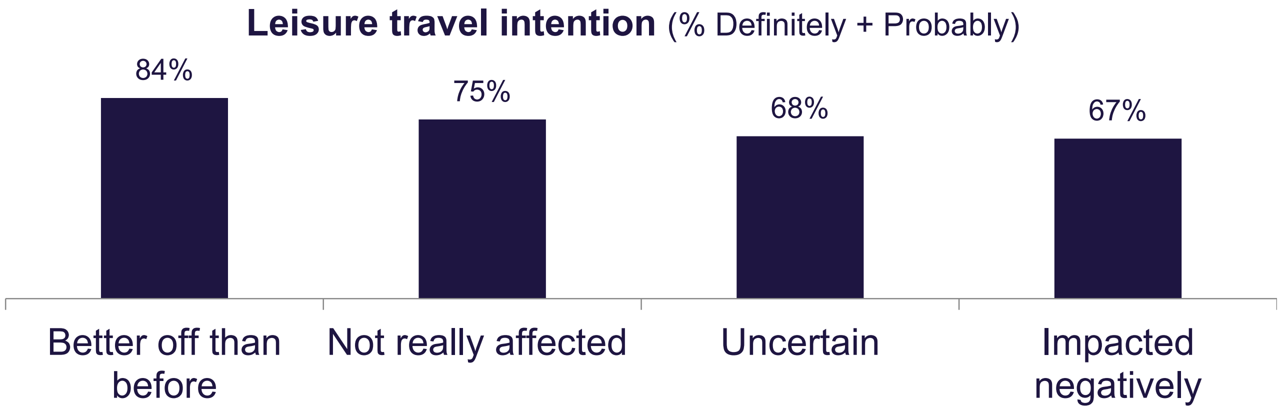


(% Definitely + Probably)	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Positive / Not impacted	75%	76%	87%	73%	73%	89%	74%	57%	85%	84%	67%
Uncertain	68%	67%	72%	60%	60%	76%	67%	50%	81%	73%	67%
Impacted negatively	71%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

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 = 11,000)

Impact of financial situation on propensity to travel (Long-haul)

Financial uncertainties act more as an obstacle among markets showing more risk-averse attitude to travel internationally (Japan, South Korea, Australia).



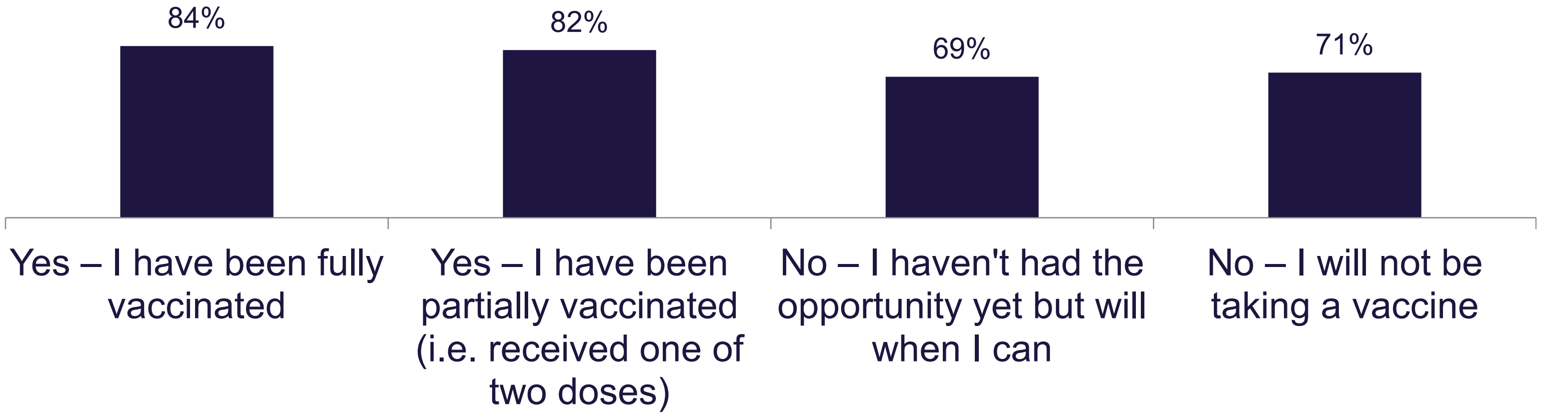
(% Definitely + Probably)	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Positive / Not impacted	79%	67%	88%	66%	83%	92%	54%	90%	72%	90%	76%
Uncertain	67%	53%	81%	60%	81%	87%	36%	81%	46%	85%	70%
Impacted negatively	62%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

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 = 11,000)

Impact of vaccination on propensity to travel

Vaccination is confirmed to be a significant trigger of travel, particularly among long-haul markets where the average gap of intention between vaccinated and non-vaccinated respondents reaches nearly 20 percentage points. In Short Haul markets the gap is around 10 percentage points.

Leisure travel intention (% Definitely + Probably)

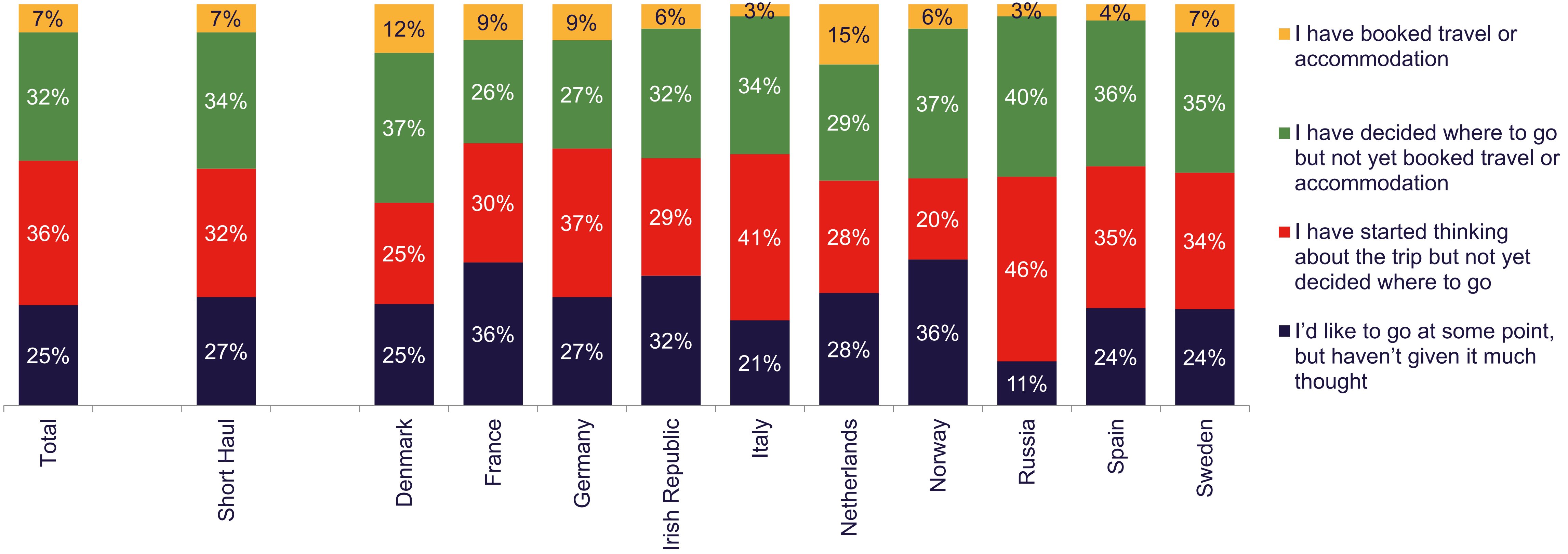


Intention to travel internationally (% Definitely + Probably)	Short-haul	Long-haul
Yes – I have been fully vaccinated	83%	84%
Yes – I have been partially vaccinated	76%	84%
No – I haven't had the opportunity yet but will when I can	71%	67%
No – I will not be taking a vaccine	74%	65%

Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?
Q26: Have you had a COVID-19 vaccination?
Base: All respondents (n = 11,000)

Trip planning stage per market (Short-haul)

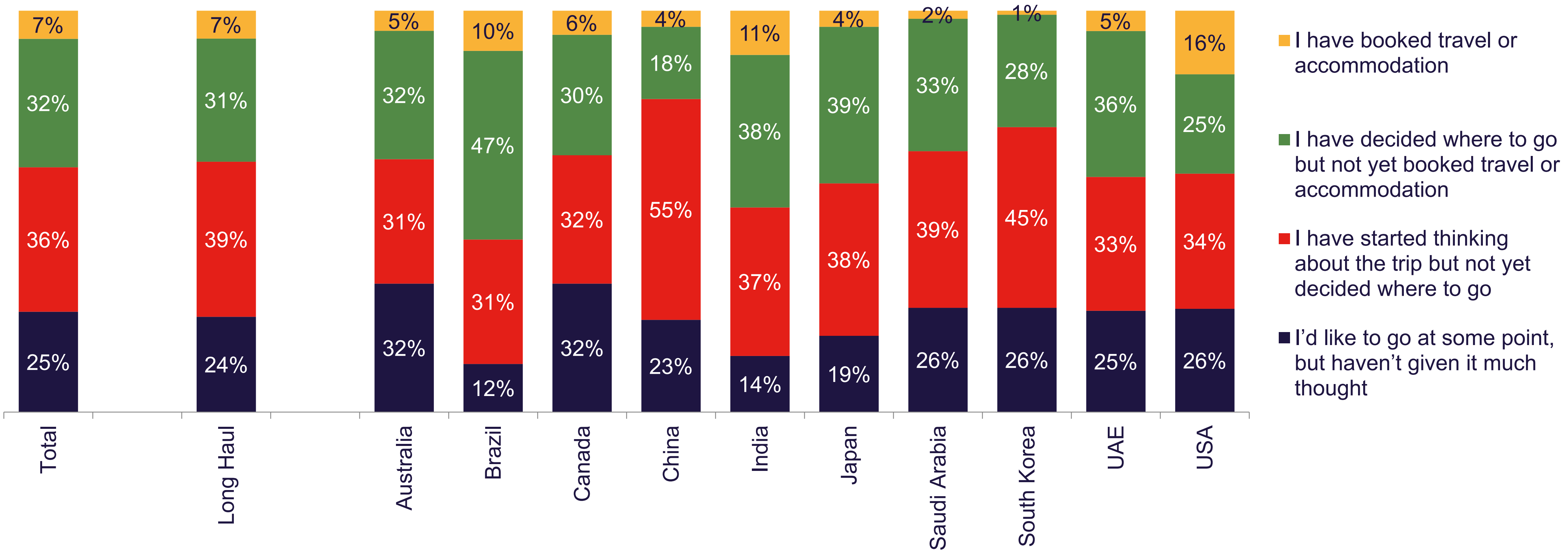
Despite a stronger travel sentiment compared to December 2020, only a small minority have booked while a majority have yet to decide where to go - especially in France, Germany, Irish Republic and Italy.



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 = 10,804)

Trip planning stage per market (Long-haul)

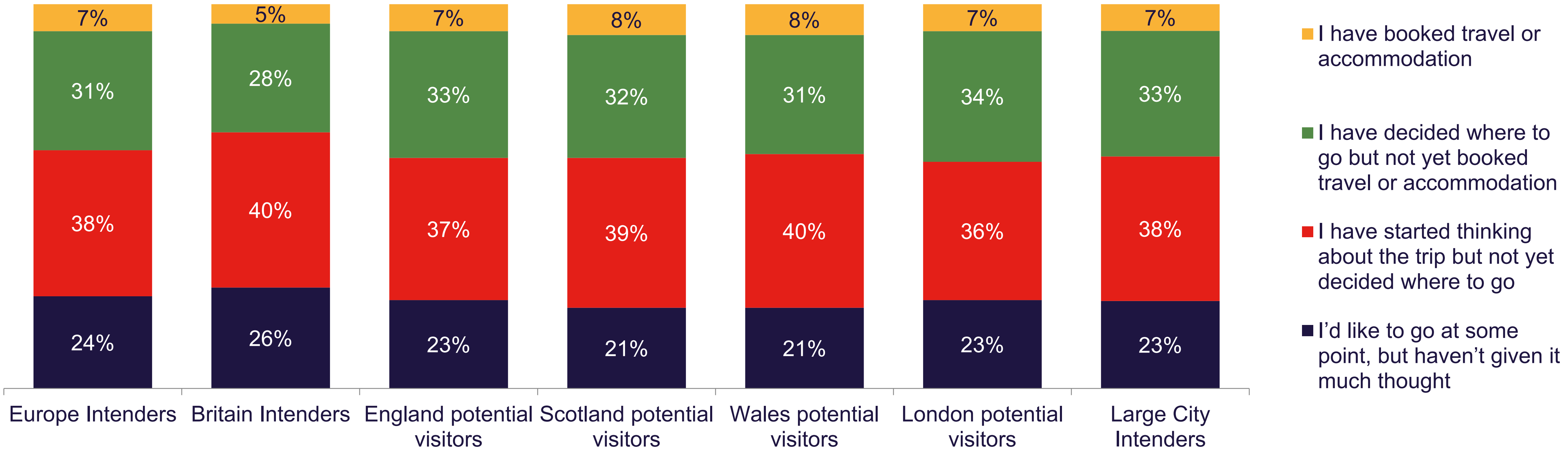
An increasing number of consumers in LH markets have started thinking more about their trip but their choice of the destination remains very open. The US has the highest level of booking rate among markets surveyed.



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 = 10,804)

Trip planning stage among Intenders to Europe

Among leisure travel intenders considering Britain, only a very small minority have booked and most are actually waiting to see and considering a wider set of destinations.



Q8: Which of the following best describes where you stand with your plans for your next international leisure trip?
Base: Europe Int. (n = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552) – Large City Int. (n = 5,230)

Travel horizon for next international leisure trip (Short-haul)

Summer 2021 has now become a clear "not-to-be-missed" prospect for most SH markets, with travel intentions spanning over July, August and September. The concept of a late summer experience in September seems to be forming in travellers' mind. Moreover, over of third of respondents still have either no idea on when they would travel or look at 2022 and beyond.

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
April 2021	2%	1%	1%	2%	1%	1%	1%	1%	1%	2%	1%	2%
May 2021	4%	3%	6%	1%	2%	2%	2%	2%	1%	7%	2%	2%
June 2021	6%	5%	4%	7%	6%	4%	4%	6%	4%	6%	5%	6%
July 2021	9%	11%	11%	13%	8%	8%	13%	14%	8%	12%	10%	11%
August 2021	11%	13%	11%	17%	15%	7%	16%	16%	6%	20%	15%	10%
September 2021	10%	14%	13%	14%	16%	12%	15%	16%	10%	18%	15%	10%
October 2021	9%	7%	8%	7%	8%	8%	7%	7%	7%	8%	8%	6%
November 2021	5%	4%	1%	3%	5%	5%	4%	4%	3%	4%	3%	3%
December 2021	7%	5%	5%	6%	3%	7%	9%	4%	5%	2%	7%	4%
Jan-March 2022	8%	5%	8%	6%	3%	7%	5%	3%	6%	4%	5%	6%
Apr-June 2022	7%	7%	6%	5%	9%	14%	6%	6%	6%	4%	7%	6%
Jul-Sept 2022	7%	9%	9%	6%	8%	11%	9%	6%	14%	6%	12%	10%
Oct-Dec 2022	3%	2%	1%	1%	1%	3%	1%	2%	3%	1%	2%	3%
2023/beyond	3%	2%	2%	1%	1%	2%	1%	1%	2%	1%	2%	4%
Don't know yet	11%	12%	13%	10%	14%	11%	6%	13%	23%	6%	7%	17%

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 = 10,804)

Travel horizon for next international leisure trip (Long-haul)

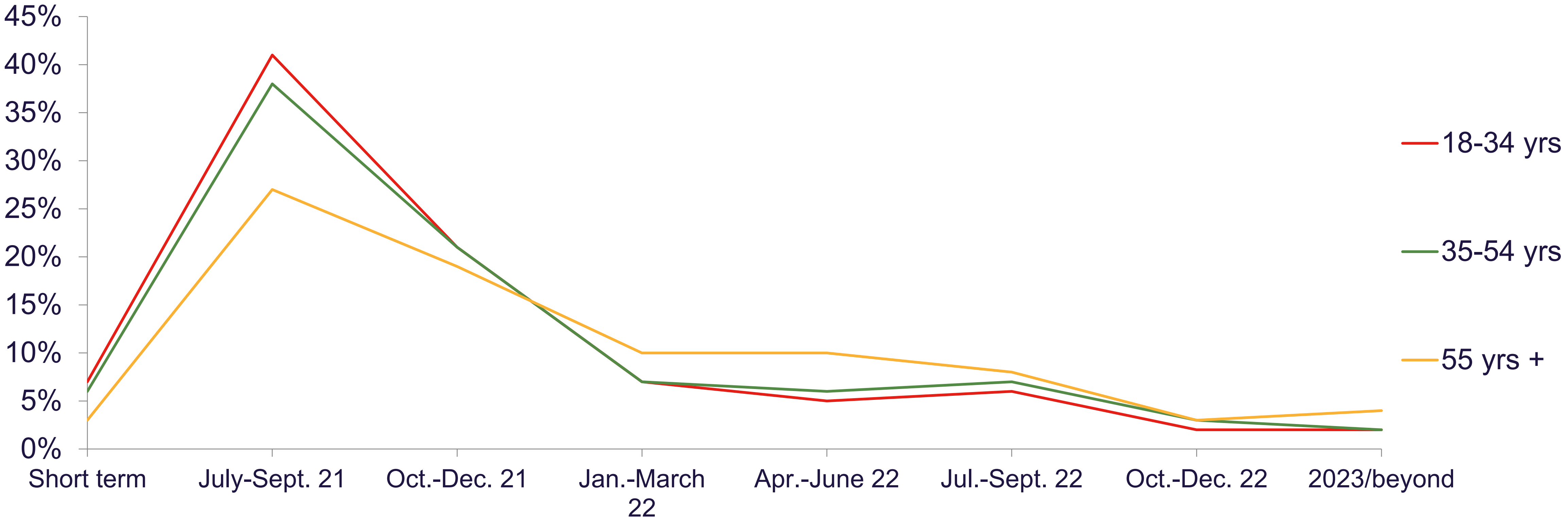
Travel planning spans over a larger window among LH travellers. Traditional local triggers of travel (China Golden Week, post-Ramadan in Arabic markets) may offer opportunities to celebrate a "back to normal" life during a trip.

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
April 2021	2%	2%	2%	0%	1%	1%	7%	2%	3%	2%	2%	3%
May 2021	4%	4%	1%	4%	1%	6%	7%	1%	6%	2%	8%	4%
June 2021	6%	6%	2%	6%	4%	7%	10%	1%	12%	2%	9%	5%
July 2021	9%	8%	2%	6%	3%	7%	8%	3%	14%	3%	23%	7%
August 2021	11%	9%	2%	4%	5%	10%	8%	6%	16%	6%	17%	10%
September 2021	10%	8%	6%	8%	9%	12%	9%	3%	9%	3%	8%	6%
October 2021	9%	10%	6%	5%	6%	26%	12%	4%	9%	7%	8%	6%
November 2021	5%	6%	7%	9%	6%	10%	9%	3%	6%	2%	4%	6%
December 2021	7%	8%	10%	16%	9%	4%	9%	7%	7%	10%	9%	5%
Jan-March 2022	8%	10%	14%	18%	15%	4%	9%	11%	4%	14%	4%	9%
Apr-June 2022	7%	7%	11%	8%	9%	1%	5%	7%	2%	10%	2%	10%
Jul-Sept 2022	7%	5%	7%	7%	8%	2%	1%	6%	2%	11%	2%	7%
Oct-Dec 2022	3%	4%	6%	4%	4%	1%	3%	4%	1%	9%	1%	4%
2023/beyond	3%	3%	8%	3%	5%	1%	1%	8%	1%	8%	0%	3%
Don't know yet	11%	10%	14%	2%	14%	6%	2%	35%	9%	10%	3%	13%

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 = 10,804)

Age impact on travel horizon

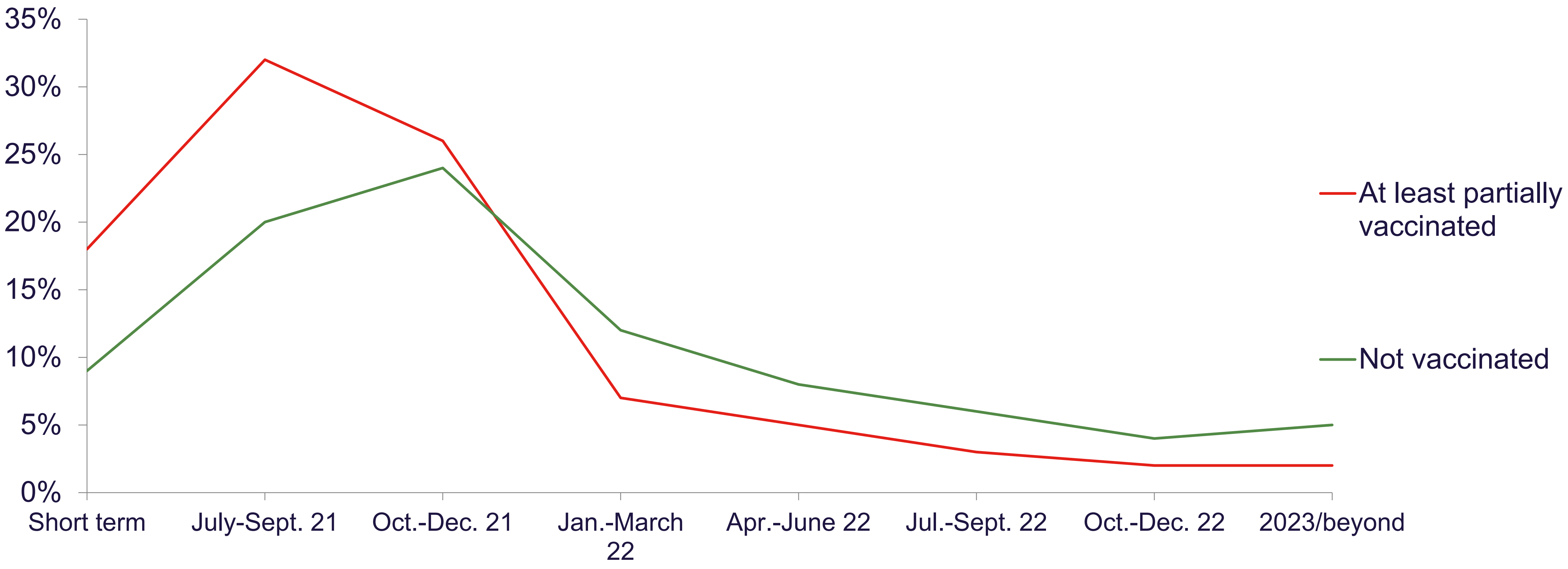
Propensity to travel as soon as possible remains higher among young potential travellers, yet older demographics are showing interest in holidaying this summer as they are probably becoming less concerned as they are getting vaccinated.



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 = 10,804)

Vaccination impact on travel horizon

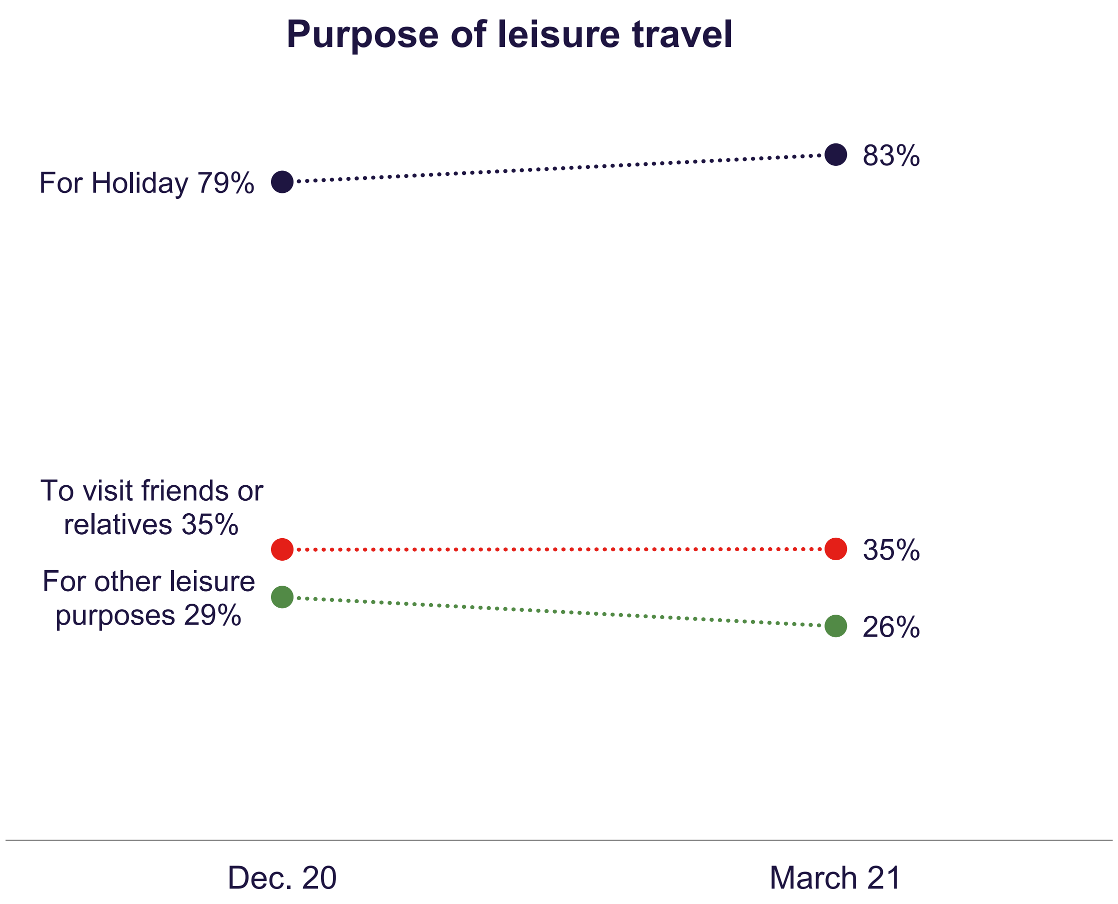
As expected, vaccination greatly accelerates motivations for travelling in the short term. As the vaccinations are rolled out, we expect this to extend to the rest of 2021.

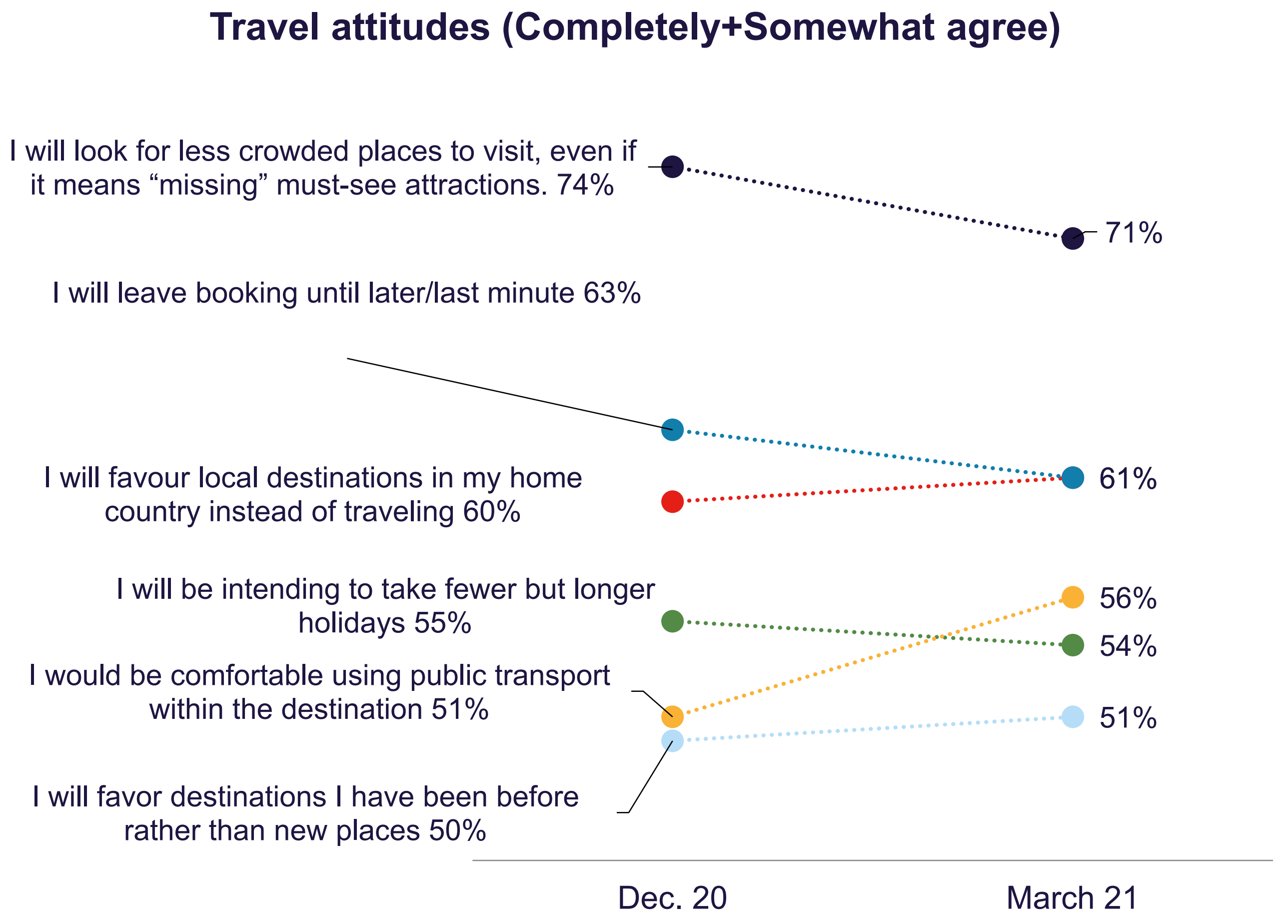


Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)

Trends: December 2020 vs March 2021

With summer approaching, motivations for holiday travel is increasing while intentions to visit friends or relatives remains high and stable. Concerns about visiting crowded places are declining while trust in using public transport increases suggesting a slight shift to pre-pandemic attitudes.

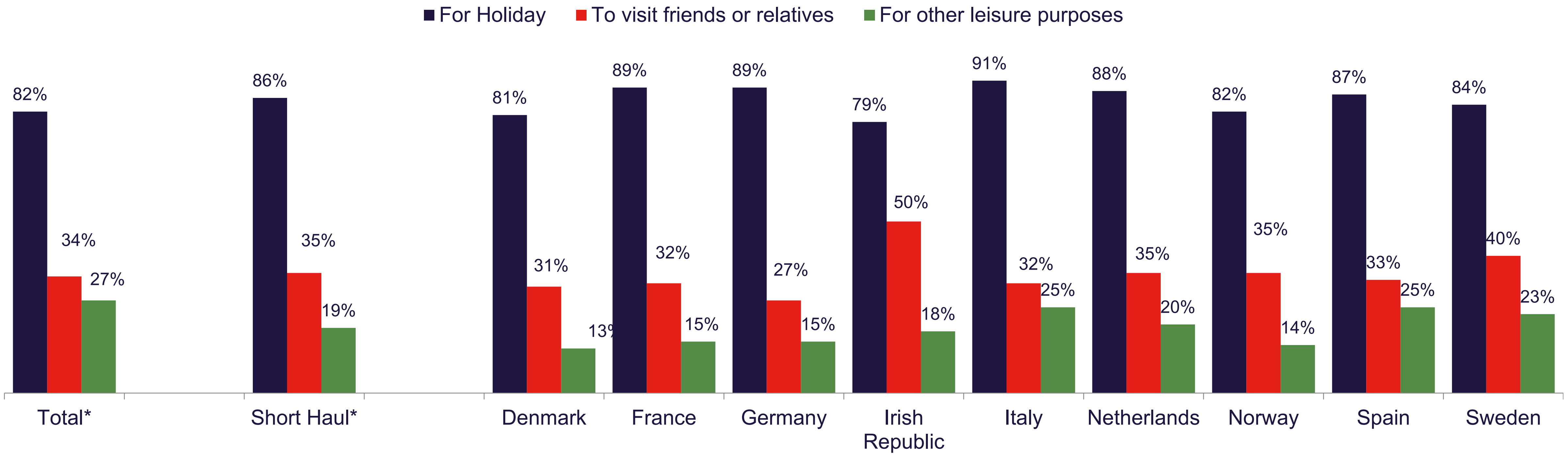




Trend calculated at constant perimeter (14 markets consolidated)

Purpose of leisure travel (Short-haul)

With summer approaching, holiday motivations dominate but the need for reconnection with friends and relatives expressed by a third of respondents remains high – this is highest in the Irish Republic (50%) and Sweden (40%). VFR trips tends to be envisaged sooner than holidays, however both motivations are not exclusive.

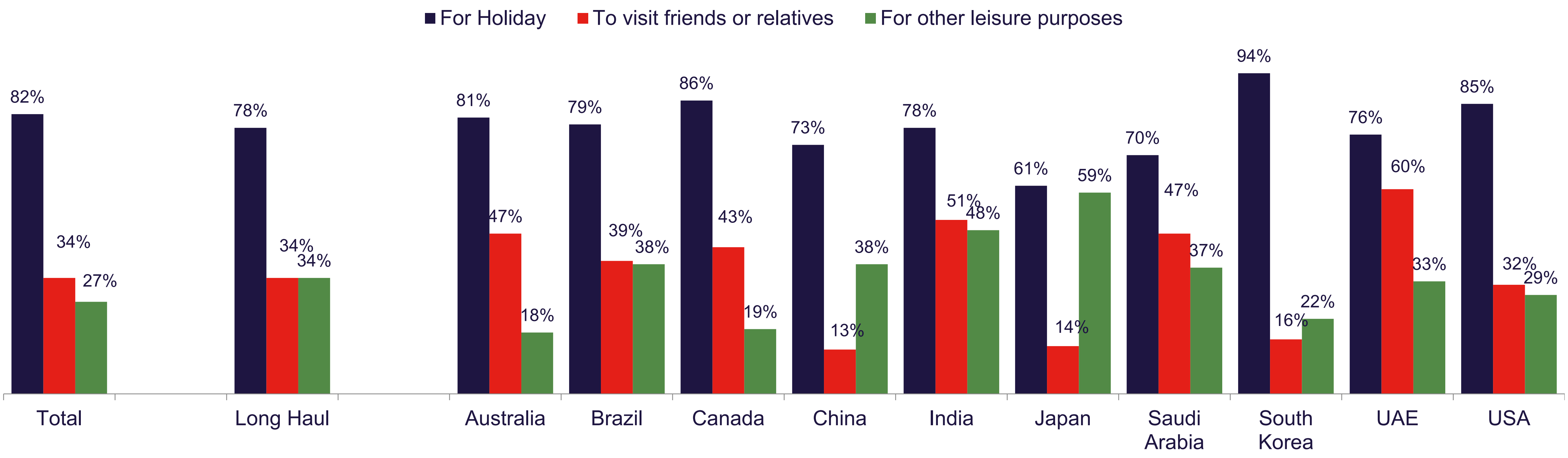


* Russia is not included due to limited data comparability, however the VFR motivation reaches 20,4% in this market.

Q6: Considering your next international leisure trip, for what purpose(s) would you travel? (Multiple Answers)
Base: All respondents (n = 11,000)

Purpose of leisure travel (Long-haul)

Willingness to visit relatives remains a core purpose of next travel among Gulf markets, but also in India, Australia and Canada. Demand for a holiday trip has increased in most markets.



Q6: Considering your next international leisure trip, for what purpose(s) would you travel? (Multiple Answers)
Base: All respondents (n = 11,000)

Activators for an international leisure trip (Short-haul)

Receiving a vaccination is the primary trigger of travel, however other activators remain very influential in relation to the COVID-19 safety context at destination, the removal of quarantine policies and the booking cancellation flexibility. A high proportion of vaccinated people at destination as well as the introduction of a vaccine passport fuel trust for a quarter of respondents, but the effective number of COVID-19 cases remain the most tangible criteria for assessing the health context at destination.

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Receiving a COVID-19 vaccination	43%	44%	59%	32%	43%	56%	48%	43%	43%	18%	41%	60%
A significant decrease in coronavirus cases at destination	34%	32%	36%	31%	35%	35%	31%	26%	34%	29%	36%	33%
Money-back guarantee should I wish to cancel my trip	34%	40%	45%	45%	37%	42%	40%	36%	34%	35%	40%	45%
Removal of quarantine policies in destination country	32%	37%	43%	34%	43%	34%	26%	41%	40%	50%	34%	27%
Removal of quarantine policies in home country	28%	32%	37%	29%	36%	33%	23%	32%	40%	43%	28%	19%
Hygiene & safety protocols in place at destination	27%	23%	11%	24%	27%	31%	37%	19%	22%	13%	37%	13%
A high proportion of the population being vaccinated in the destination country	26%	26%	34%	21%	24%	32%	23%	23%	29%	13%	26%	32%
An attractive offer e.g. discounts on flights or accommodation	24%	23%	13%	20%	17%	17%	29%	17%	21%	43%	26%	24%
The introduction of a vaccine passport	22%	25%	35%	21%	24%	30%	29%	23%	28%	6%	22%	30%
Your Government's advice on international travel	21%	21%	28%	10%	9%	29%	14%	31%	41%	8%	15%	28%
Stable political environment in destination country	19%	17%	13%	17%	21%	12%	15%	15%	12%	28%	16%	16%
Welcoming locals in destination country	16%	13%	8%	17%	15%	9%	12%	12%	16%	19%	12%	13%
Mandatory coronavirus testing at some point during the trip	15%	14%	9%	16%	14%	14%	25%	11%	11%	7%	19%	11%
Assurance that there will be a range of/enough things to do	14%	13%	11%	18%	18%	9%	12%	14%	6%	17%	15%	8%
Voucher-back guarantee should I wish to cancel my trip	13%	14%	14%	14%	11%	14%	20%	15%	7%	9%	19%	12%
Official national hygiene label in accommodation and attractions in destination	13%	9%	5%	10%	10%	12%	9%	5%	7%	8%	12%	9%
Relaxation of visa requirements	8%	4%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	43%	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 = 11,000)

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Activators for an international leisure trip (Long-haul)

While vaccination and strict hygiene protocols increase LH markets' intentions to travel, some local sentiment drivers emerge, such as Chinese expectations for locals' welcome, while Gulf countries would scrutinize more deals and attractive offers. The high rate of vaccinated people at destination – a current competitive advantage for Britain- may find a particular resonance in North America, South Korea and Brazil.

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Receiving a COVID-19 vaccination	43%	42%	52%	60%	54%	28%	41%	48%	27%	60%	27%	41%
A significant decrease in coronavirus cases at destination	34%	36%	34%	40%	37%	27%	34%	54%	34%	45%	34%	34%
Money-back guarantee should I wish to cancel my trip	34%	28%	38%	36%	38%	17%	27%	24%	23%	22%	21%	38%
Removal of quarantine policies in destination country	32%	28%	34%	24%	35%	25%	26%	35%	18%	28%	25%	30%
Removal of quarantine policies in home country	28%	24%	32%	16%	32%	21%	21%	36%	20%	26%	22%	22%
Hygiene & safety protocols in place at destination	27%	31%	26%	33%	25%	28%	47%	25%	25%	35%	27%	35%
A high proportion of the population being vaccinated in the destination country	26%	27%	26%	34%	33%	20%	26%	20%	18%	38%	21%	34%
An attractive offer e.g. discounts on flights or accommodation	24%	25%	22%	30%	24%	22%	23%	19%	34%	23%	34%	26%
The introduction of a vaccine passport	22%	19%	28%	20%	23%	13%	19%	14%	15%	28%	13%	24%
Your Government's advice on international travel	21%	20%	33%	14%	21%	19%	27%	22%	17%	16%	17%	19%
Stable political environment in destination country	19%	21%	12%	19%	15%	29%	20%	28%	21%	19%	24%	18%
Welcoming locals in destination country	16%	18%	10%	20%	11%	25%	24%	13%	18%	12%	20%	17%
Mandatory coronavirus testing at some point during the trip	15%	16%	17%	16%	14%	14%	25%	15%	16%	13%	19%	14%
Assurance that there will be a range of/enough things to do	14%	15%	8%	21%	9%	20%	18%	14%	14%	12%	15%	14%
Voucher-back guarantee should I wish to cancel my trip	13%	13%	12%	16%	10%	14%	16%	10%	15%	6%	18%	15%
Official national hygiene label in accommodation and attractions in destination	13%	16%	9%	24%	11%	25%	25%	17%	14%	13%	13%	11%
Relaxation of visa requirements	8%	10%	N/A	N/A	N/A	18%	25%	N/A	31%	N/A	32%	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 = 11,000)

Activators for an international leisure trip among intenders to Europe

Britain intenders mention more often than average the positive influence of the proportion of vaccinated people at destination, suggesting the successful vaccination campaign in the UK has a positive influence in seeing Britain as a safer place to visit in the future (confirmed by the COVID-19 safety perception analysed later in this report).

	Europe Intenders	Britain Intenders	England pot. visitors	Scotland pot. visitors	Wales pot. visitors	London pot. visitors	City Intenders	Non Leisure Trip Intenders
Receiving a COVID-19 vaccination	44%	44%	44%	45%	43%	47%	45%	33%
Money-back guarantee should I wish to cancel my trip	35%	33%	33%	35%	32%	36%	33%	21%
A significant decrease in coronavirus cases at destination	34%	37%	35%	36%	35%	37%	35%	30%
Removal of quarantine policies in destination country	34%	32%	32%	34%	34%	34%	31%	22%
Removal of quarantine policies in home country	28%	25%	27%	28%	27%	29%	28%	19%
Hygiene & safety protocols in place at destination	28%	31%	29%	30%	31%	28%	29%	17%
A high proportion of the population being vaccinated in the destination country	27%	31%	27%	28%	27%	28%	27%	27%
An attractive offer e.g. discounts on flights or accommodation	23%	21%	26%	25%	26%	27%	26%	16%
The introduction of a vaccine passport	23%	21%	22%	23%	22%	21%	22%	14%
Your Government's advice on international travel	22%	24%	21%	21%	22%	21%	21%	16%
Stable political environment in destination country	19%	20%	19%	21%	22%	19%	20%	19%
Welcoming locals in destination country	16%	17%	17%	17%	19%	17%	17%	9%
Assurance that there will be a range of/enough things to do	15%	17%	15%	15%	17%	16%	15%	10%
Mandatory coronavirus testing at some point during the trip	15%	16%	16%	17%	19%	14%	16%	15%
Voucher-back guarantee should I wish to cancel my trip	14%	15%	15%	15%	16%	14%	14%	13%
Official national hygiene label in accommodation and attractions in destination	13%	16%	14%	14%	19%	12%	14%	12%
Relaxation of visa requirements	6%	7%	8%	8%	8%	7%	8%	3%

Q20: What would make you more likely to travel internationally for leisure in the next 12 months? (Multiple Answers)
Base: Europe Int. (n = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552) – Large City Int. (n = 5,230)

Attitudes to travel (Short-haul)

The portrayal of a more responsible traveller is getting confirmed, willing to be tested prior to trip and keen to travel for discovering new / less crowded places in a safer and more sustainable way. The role of travel agents is valued in this context, while leaving booking until last minute remains dominant.

(% Completely + Somewhat agree)	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
I would be happy to take a pre-trip COVID-19 test should that be required before my next international trip	83%	80%	88%	79%	78%	80%	85%	71%	85%	73%	84%	76%
I will look for less crowded places to visit, even if it means “missing” must-see attractions	70%	65%	69%	57%	68%	72%	71%	65%	65%	53%	72%	59%
I will travel internationally as soon as I can after I get the vaccine	65%	63%	56%	66%	56%	59%	77%	66%	58%	68%	64%	58%
Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning	64%	56%	57%	52%	54%	52%	60%	56%	51%	69%	59%	47%
I will think more about sustainability and the environmental impact when planning future holidays	63%	54%	42%	53%	54%	55%	71%	48%	44%	53%	69%	52%
I will leave booking until later/last minute	59%	60%	61%	61%	67%	64%	62%	70%	53%	52%	67%	46%
I will favour local destinations in my home country instead of traveling internationally	58%	51%	45%	53%	48%	53%	50%	44%	54%	37%	73%	55%
I would be comfortable using public transport within the destination	57%	51%	49%	55%	46%	48%	50%	49%	53%	64%	45%	48%
I will be intending to take fewer but longer holidays	54%	41%	33%	41%	36%	47%	48%	32%	41%	40%	49%	38%
I will favour destinations I have been before rather than new places	49%	44%	43%	41%	41%	57%	40%	41%	47%	36%	47%	43%
Due to COVID-19 restrictions, I will have more annual leave to use for holidays in 2021	46%	34%	26%	30%	26%	43%	42%	42%	24%	28%	43%	34%

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 = 11,000)

Attitudes to travel (Long-haul)

LH markets express more contrasted attitudes including higher preference for domestic tourism in Australia, Canada and South Korea, a more cautious attitude towards post-vaccine travel in Japan, higher sensitivity to sustainability in Brazil and willingness to take a longer vacation in the GCC markets.

(% Completely + Somewhat agree)	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
I would be happy to take a pre-trip COVID-19 test should that be required before my next international trip	83%	86%	82%	92%	83%	89%	90%	78%	86%	86%	90%	81%
I will look for less crowded places to visit, even if it means "missing" must-see attractions	70%	74%	65%	69%	66%	87%	87%	61%	82%	74%	82%	66%
I will travel internationally as soon as I can after I get the vaccine	65%	67%	50%	88%	54%	77%	86%	40%	82%	54%	82%	57%
Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning	64%	71%	60%	74%	59%	87%	86%	61%	77%	65%	76%	60%
I will think more about sustainability and the environmental impact when planning future holidays	63%	71%	56%	77%	57%	87%	90%	59%	72%	80%	76%	57%
I will leave booking until later/last minute	59%	59%	62%	48%	54%	75%	67%	60%	59%	55%	57%	47%
I will favour local destinations in my home country instead of traveling internationally	58%	64%	70%	44%	65%	73%	72%	49%	67%	71%	66%	60%
I would be comfortable using public transport within the destination	57%	62%	54%	49%	49%	81%	73%	72%	60%	56%	61%	55%
I will be intending to take fewer but longer holidays	54%	65%	53%	57%	51%	81%	86%	70%	76%	54%	73%	51%
I will favour destinations I have been before rather than new places	49%	53%	52%	45%	48%	64%	72%	37%	66%	42%	59%	45%
Due to COVID-19 restrictions, I will have more annual leave to use for holidays in 2021	46%	56%	45%	51%	40%	75%	78%	25%	66%	52%	67%	47%

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 = 11,000)

Attitudes to travel among intenders to Europe

Attitudes to travel among Britain intenders are generally more positive compared to intenders to Europe on average and confirms an opportunity to attract post-vaccine “crowd-escapers”. The sensitiveness towards sustainability is also strong and consistent among Britain destinations’ potential visitors.

(% Completely + Somewhat agree)	Europe Intenders	Britain Intenders	England pot. visitors	Scotland pot. visitors	Wales pot. visitors	London pot. visitors	City Intenders
I would be happy to take a pre-trip COVID-19 test should that be required before my next international trip	83%	86%	85%	86%	85%	85%	85%
I will look for less crowded places to visit, even if it means “missing” must-see attractions	70%	72%	72%	72%	74%	68%	71%
I will travel internationally as soon as I can after I get the vaccine	67%	69%	70%	69%	72%	68%	70%
I will think more about sustainability and the environmental impact when planning future holidays	63%	69%	67%	68%	72%	64%	68%
Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning	63%	66%	68%	66%	70%	63%	66%
I will leave booking until later/last minute	61%	64%	60%	62%	63%	59%	61%
I will favour local destinations in my home country instead of traveling internationally	57%	60%	60%	59%	61%	56%	60%
I would be comfortable using public transport within the destination	57%	65%	63%	61%	65%	62%	65%
I will be intending to take fewer but longer holidays	52%	58%	60%	57%	65%	56%	59%
I will favour destinations I have been before rather than new places	49%	51%	51%	46%	49%	46%	52%
Due to COVID-19 restrictions, I will have more annual leave to use for holidays in 2021	45%	53%	52%	49%	56%	47%	52%

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 = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552) – Large City Int. (n = 5,230)

Stainer ‘Black 5’ Locomotive: Getty Images/ Gordon Edgar Images

Destination Planning

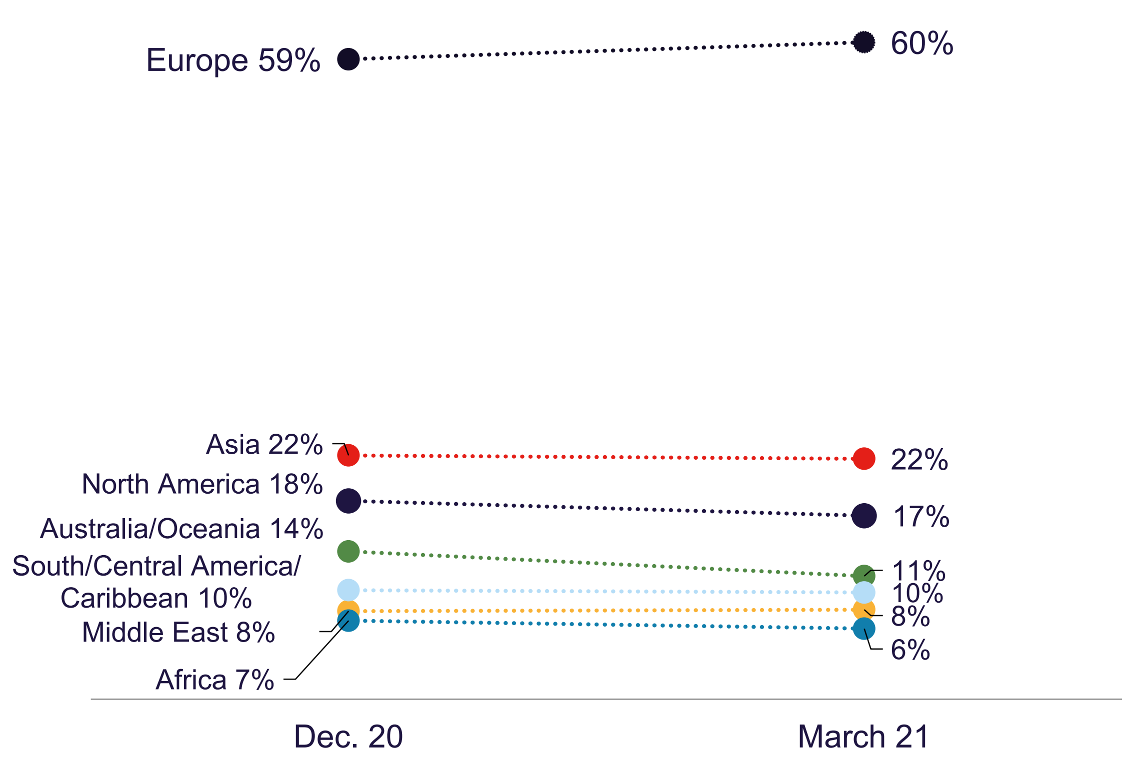
Destination planning: summary

- Europe remains the most considered region and has gained 1 point in intention to visit vs December 2020.
- While popularity for Southern/Mediterranean destinations (Spain, Italy, Greece) rises as summer approaches, Britain has significantly increased its overall competitive position, recording the second largest rise in visit intention in Europe in 3 months.
- The gain of popularity for Britain is very high in long-haul markets in particular (China, India) but also in Germany and Irish Republic, while France and Russia are more “at risk” with low travel intentions to Britain.
- The boost of consideration for Britain destinations is fueled by a spectacular improvement of their COVID-19 safety image, particularly for England which is now considered as a safe place to go for a majority.
- While younger generations express higher intentions to visit Britain in overall (and England / London notably), propensity to visit Britain widely rises among vaccinated respondents, offering opportunities to market all vaccinated generations, particularly among travellers who already visited the destination in the past and would easily see Britain as a “safe-haven” post-COVID-19 destination.
- In short-haul markets, England would be the nation on top of the list for a potential visit to Britain, but Scotland and Wales are also well considered. London would be considered by 4 in 10 potential visitors to England. Potential trip to Britain from Long-Haul markets would be England first but not exclusively, showing open attitude to visiting multiple destinations across Britain, beyond iconic places.
- General trust levels in transportation modes to and within Britain are high, including for flights, trains and ferries with various degrees of potential use per market (but no obvious “ban” or concerns expressed). Public transport is also gaining trust.
- Travellers are still open to using a variety of channels to plan their next trip. Travel agents/tour operators online remain the most popular channel while travel comparison websites are still popular among younger planners; the use of expert intermediaries is reassuring in the current uncertain travel scenario. Official destination websites and accommodation gain further importance in the booking process. The large share of VFR travel intentions gives friends and relatives a significant role too.

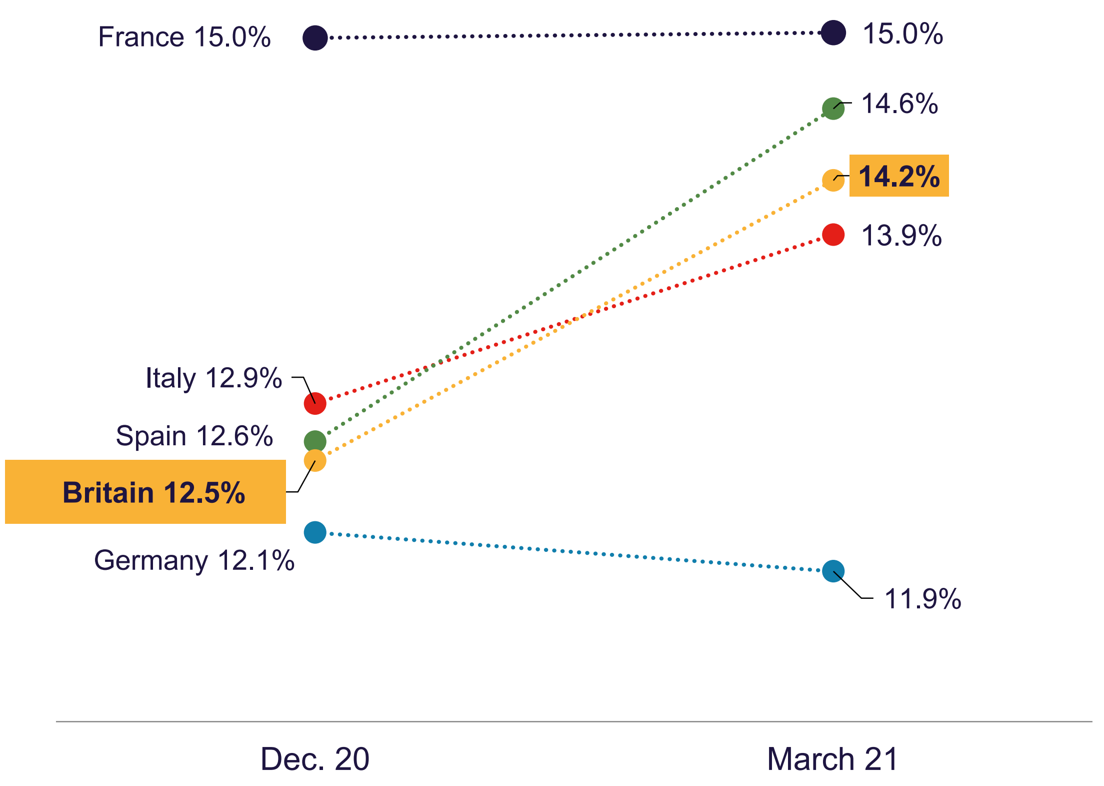
Trends: December 2020 vs March 2021

While Europe remains the most considered region, **Britain records the second largest increase** in visit intention in Europe between December 2020 and March 2021 when we look at the 14 market trend. Interest has gone from 12.5% to 14.2%. Looking at the top 5 European markets of interest, interest in France has stayed level whilst interest in Spain has increased, and interest for Germany and Italy has decreased.

Destinations envisaged



European destinations envisaged (TOP 5)



Trend calculated at constant perimeter (14 markets consolidated)

Trends: December 2020 vs March 2021

While Southern/Mediterranean destinations (Spain, Italy, Greece) tend to increase their shares of consideration as summer approaches, Britain benefits from a significant increase of interest in several long-haul markets, but also in Germany and Irish Republic. Italy, Norway and France are the only markets where the consideration levels have decreased vs December 2020.

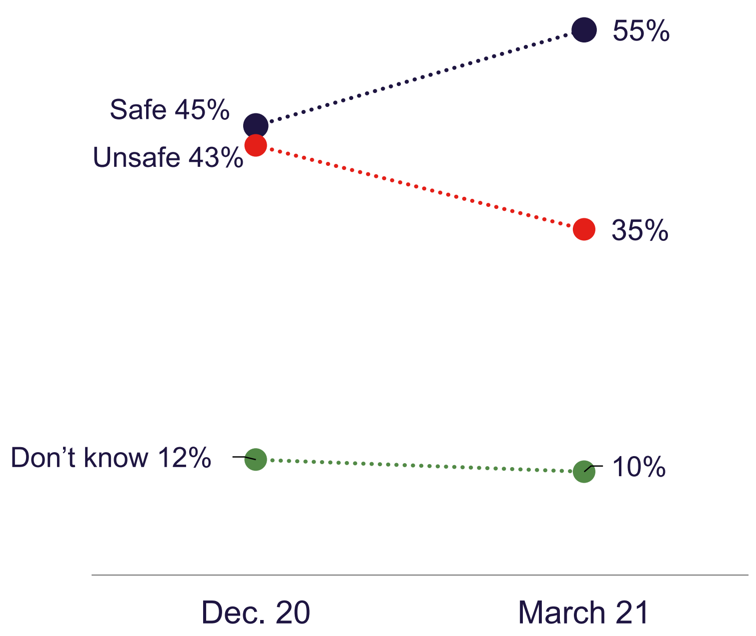
	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
Britain	1.6%	0.2%	3.1%	2.2%	0,00%	8.6%	-1.4%	2.6%	5.1%	4.5%	-4,00%	0.9%	-1.7%	0.2%	0.8%	0.6%	0.7%
Austria	-0.4%	-0.9%	0.1%	0.8%	-1.3%	0.2%	-1.4%	-1.9%	-0.5%	-0.5%	1.8%	-3.9%	0.3%	2.2%	-1.5%	-0.7%	-0.2%
Belgium	0.2%	-0.2%	0.6%	-0.3%	0.5%	2.3%	0.3%	-1.3%	0.7%	-0.6%	2.3%	-4.1%	1.3%	2.2%	1.1%	-0.8%	-1.2%
Croatia	0.3%	0.6%	0.1%	0.3%	-1.3%	1.6%	0.8%	-0.4%	-0.2%	0.4%	0.3%	0.3%	-1.1%	0.4%	1.5%	2.9%	-0.9%
Denmark	-0.1%	0.4%	-0.6%	-1.3%	0.9%	-2.1%	0.5%	-0.5%	2.2%	-1.1%	-1.2%	-1.6%	1.4%	-0.2%	2.1%	3.7%	-0.8%
Finland	0.3%	0.4%	0.2%	1.3%	-0.3%	0.3%	-1.3%	-0.9%	1.3%	-0.3%	1.5%	1,00%	-0.3%	1,00%	0.5%	2.9%	-0.9%
France	0,00%	0.5%	-0.5%	0.9%	-1.2%	-1.7%		-3.9%	0.3%	-0.1%	0.2%	0.6%	2.5%	0.8%	3.1%	-1.9%	-0.2%
Germany	-0.2%	0.1%	-0.5%	-2.1%	2.3%	-1.9%	0.1%		0.8%	-0.6%	-1,00%	-1.7%	-0.7%	1.6%	2,00%	3.9%	-1.3%
Greece	0.7%	1.7%	-0.4%	-0.2%	-1.5%	-1.3%	0,00%	0.4%	1.9%	0.7%	4.8%	2,00%	-0.3%	-0.8%	4.1%	2,00%	-0.1%
Italy	1,00%	2.1%	-0.2%	0.1%	0.7%	-6.1%	2,00%	0.1%	2.6%	0.6%		0.8%	1.4%	2.4%	1.7%	6.1%	2.3%
Netherlands	-0.4%	-0.1%	-0.6%	1.1%	-0.5%	-4.5%	0.3%	1.2%	3.8%	-1,00%	-2.4%		0.6%	0.4%	-0.7%	1.2%	-0.3%
Portugal	-0.1%	0.1%	-0.3%	0.1%	-1,00%	-1.4%	-3.7%	-0.3%	1.4%	0.7%	1.5%	0.5%	0.8%	0.2%	0.4%	0.7%	0,00%
Turkey	0.1%	0.6%	-0.4%	-1.1%	-0.9%	-3.1%	0.6%	0.7%	0.6%	-0.9%	1.9%	-0.7%	0.9%	5.7%	0.2%	1.7%	-0.5%
Spain	1.9%	3.2%	0.6%	-0.6%	-2.3%	-0.4%	1.8%	-1.8%	4.2%	5.9%	3.7%	5,00%	3,00%	2,00%		9.6%	1,00%
Sweden	-0.1%	-0.2%	0,00%	1.1%	-0.5%	-1.6%	-0.3%	-1.3%	2.4%	0.5%	-0.4%	-1.5%	1.4%	1,00%	-0.1%		-0.5%
Switzerland	0.5%	0.4%	0.7%	0.8%	-0.6%	-0.7%	1.5%	-3,00%	3.3%	-0.1%	1.4%	0.3%	-0.1%	4.4%	1.5%	1.4%	-0.5%

Q10. To which destination(s) in Europe in particular? (Multiple Answers - among leisure trip intenders)

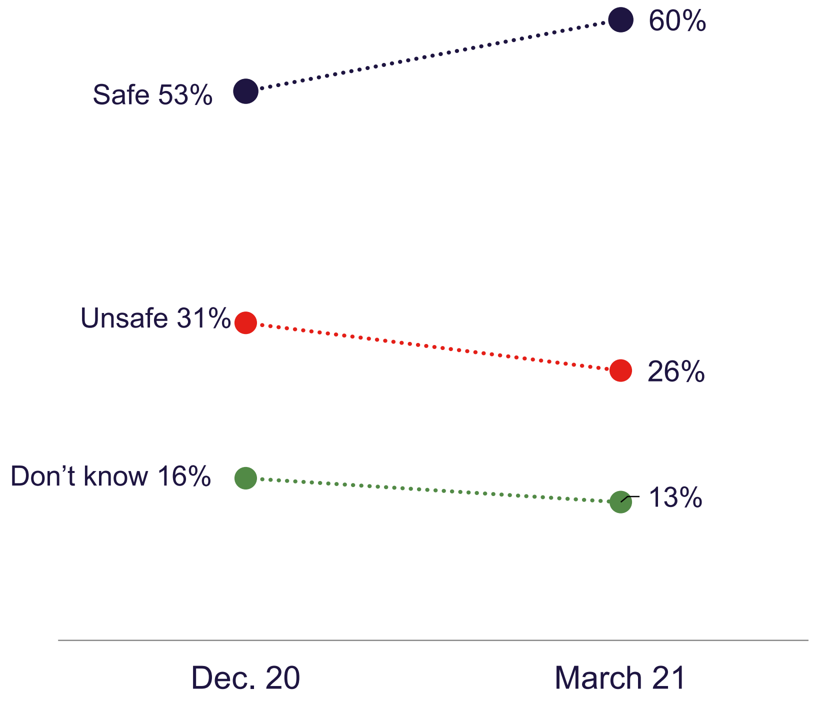
Trends: December 2020 vs March 2021

In a few months, the COVID-19 safety image has widely improved for all Britain destinations, particularly for England which is now considered as a safe place to go for a majority.

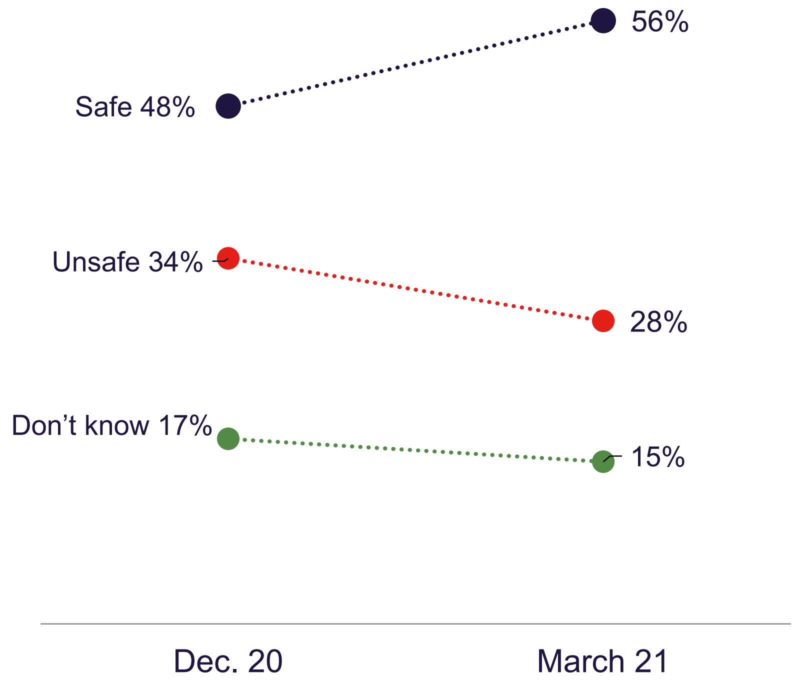
Perception of England COVID-19 sanitary safety



Perception of Scotland COVID-19 sanitary safety



Perception of Wales COVID-19 sanitary safety



Trend calculated at constant perimeter (14 markets consolidated)

Trends: December 2020 vs March 2021

The COVID-19 safety image has improved in most markets except China where the image rating for other destinations have also decreased on average.

W2/W1 Evolution (+/-)

Q21. Perception of country sanitary safety

(Very Safe + Safe %) + Safe %)	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Saudi Arabia	Spain	Sweden	USA
England	9.7%	14.3%	5.0%	5.1%	11.4%	-4.3%	7.7%	11.2%	3.4%	23.6%	23.7%	16.1%	13.0%	10.4%	10.0%	9.2%	9.6%
Scotland	7.0%	9.7%	4.3%	7.0%	7.8%	-0.8%	4.3%	9.8%	0.7%	15.1%	14.3%	7.6%	10.0%	6.0%	6.2%	9.8%	7.3%
Wales	8.0%	11.3%	4.8%	5.9%	6.2%	-0.4%	5.8%	10.4%	3.7%	17.8%	15.7%	9.4%	7.7%	9.8%	12.3%	10.8%	7.0%
Benchmark	1.4%	2.1%	0.7%	0.6%	8.5%	-1.4%	3.7%	4.1%	-2.2%	1.6%	10.1%	6.7%	8.3%	8.1%	2.3%	5.9%	2.8%

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 = 11,000)

Regional destinations for a next international leisure trip (Short-haul)

Overall, Europe remains by far the most attractive region among short-haul European markets at 72% interest, while Russia will also look towards Asia. However, Europe is not exclusively in European markets' mind with 15% wanting to go to Asia and 12% wanting to go to North America.

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Europe	58%	72%	77%	67%	72%	78%	70%	71%	76%	53%	77%	77%
Asia	25%	15%	11%	13%	11%	11%	13%	14%	14%	31%	11%	16%
North America	17%	12%	11%	11%	8%	16%	19%	15%	11%	3%	15%	10%
Australia/Oceania	12%	5%	4%	4%	5%	5%	7%	7%	3%	3%	5%	5%
South/Central America/Caribbean	9%	7%	4%	10%	6%	5%	11%	10%	4%	5%	13%	3%
Middle East	9%	5%	4%	6%	5%	4%	7%	4%	3%	12%	3%	4%
Africa	7%	6%	6%	8%	8%	4%	6%	8%	3%	8%	5%	5%
I don't know yet	5%	5%	4%	5%	7%	4%	2%	4%	7%	9%	2%	6%

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 = 10,804)

Regional destinations for a next international leisure trip (Long-haul)

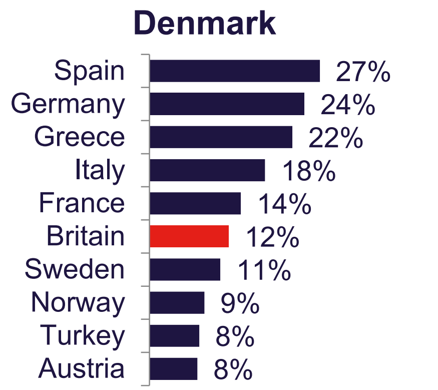
Europe still enjoys high levels of consideration for long-haul travellers (often higher than their own region), particularly in North America, China and Brazil. Japan and South Korea have higher interest in neighbouring Asia and Australia.

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Europe	58%	46%	29%	63%	45%	62%	45%	37%	33%	39%	38%	52%
Asia	25%	33%	40%	7%	20%	53%	37%	49%	21%	63%	27%	15%
North America	17%	22%	15%	34%	26%	22%	31%	26%	6%	26%	9%	23%
Australia/Oceania	12%	18%	31%	7%	10%	21%	35%	26%	4%	30%	7%	10%
South/Central America/Caribbean	9%	11%	5%	25%	22%	4%	12%	4%	2%	6%	3%	22%
Middle East	9%	12%	7%	4%	4%	9%	28%	4%	29%	4%	35%	5%
Africa	7%	7%	3%	4%	3%	2%	10%	3%	26%	3%	21%	4%
I don't know yet	5%	6%	7%	2%	5%	5%	1%	11%	9%	4%	5%	7%

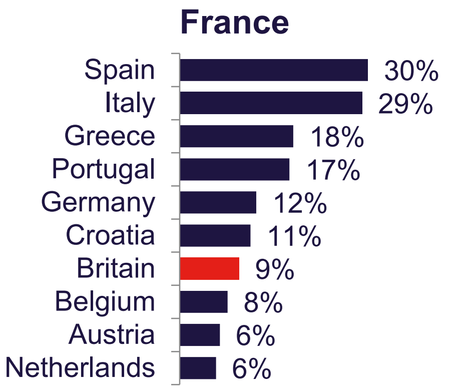
Q9: Where do you plan to travel on your next international leisure trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)

Top European destinations for travelers in short-haul markets

With summer vacation approaching, Britain faces a seasonal “sun & sand” competition from Mediterranean destinations in Northern/Nordic markets and Germany, yet keeping a significant share of consideration and higher ranking compared to December. Britain is now back in favour in Irish Republic but remains low in mind of France and Russia.



2.4 dest. mentioned on average



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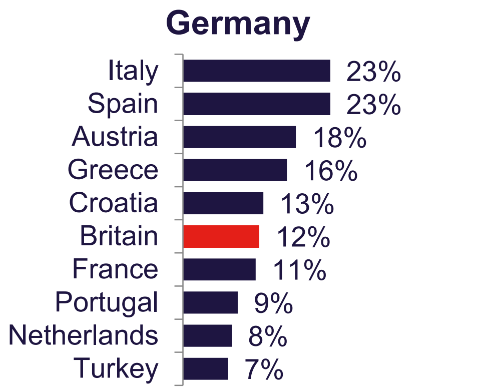

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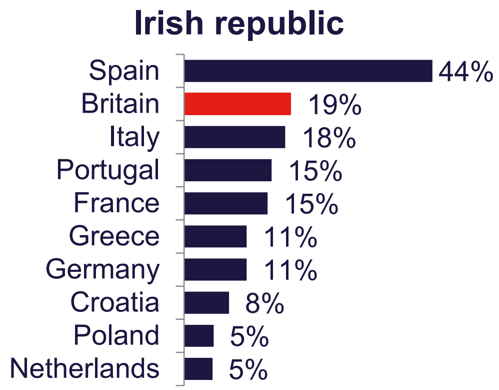

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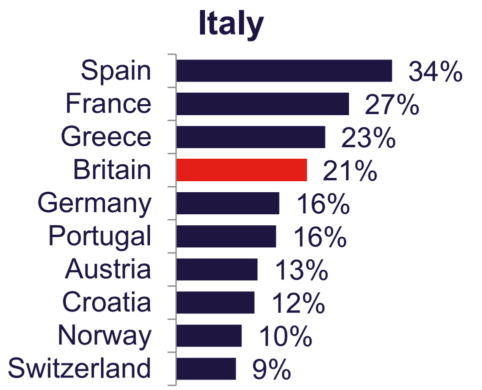
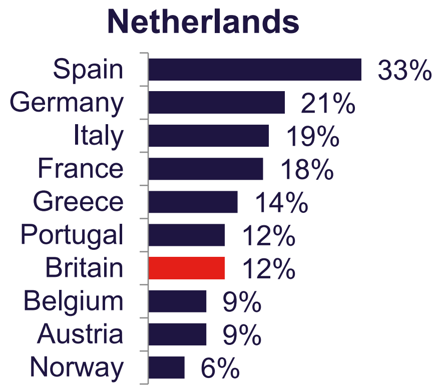
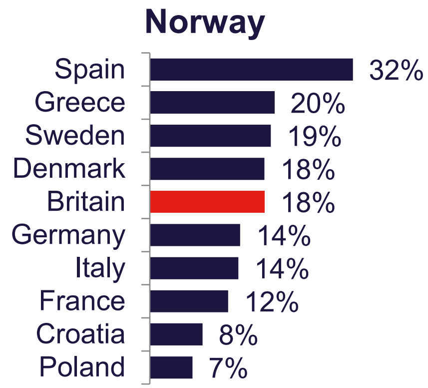


3.1 dest. mentioned on average



2.3 dest. mentioned on average



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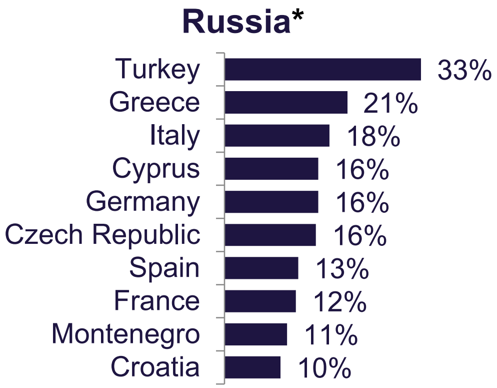
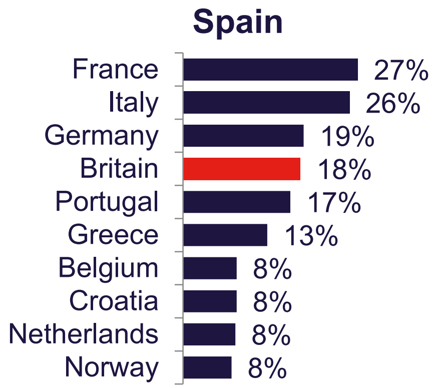
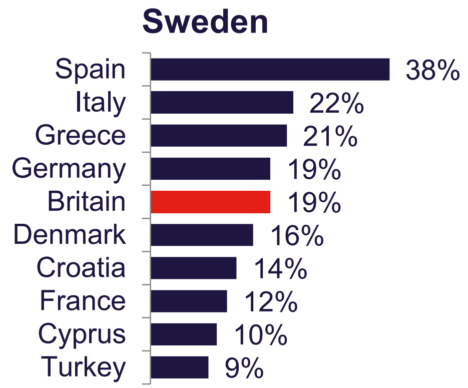


2.6 dest. mentioned on average
** Britain is not part of the TOP10*



2.5 dest. mentioned on average



2.8 dest. mentioned on average

Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking an European leisure trip in 2021 (n=6,255)

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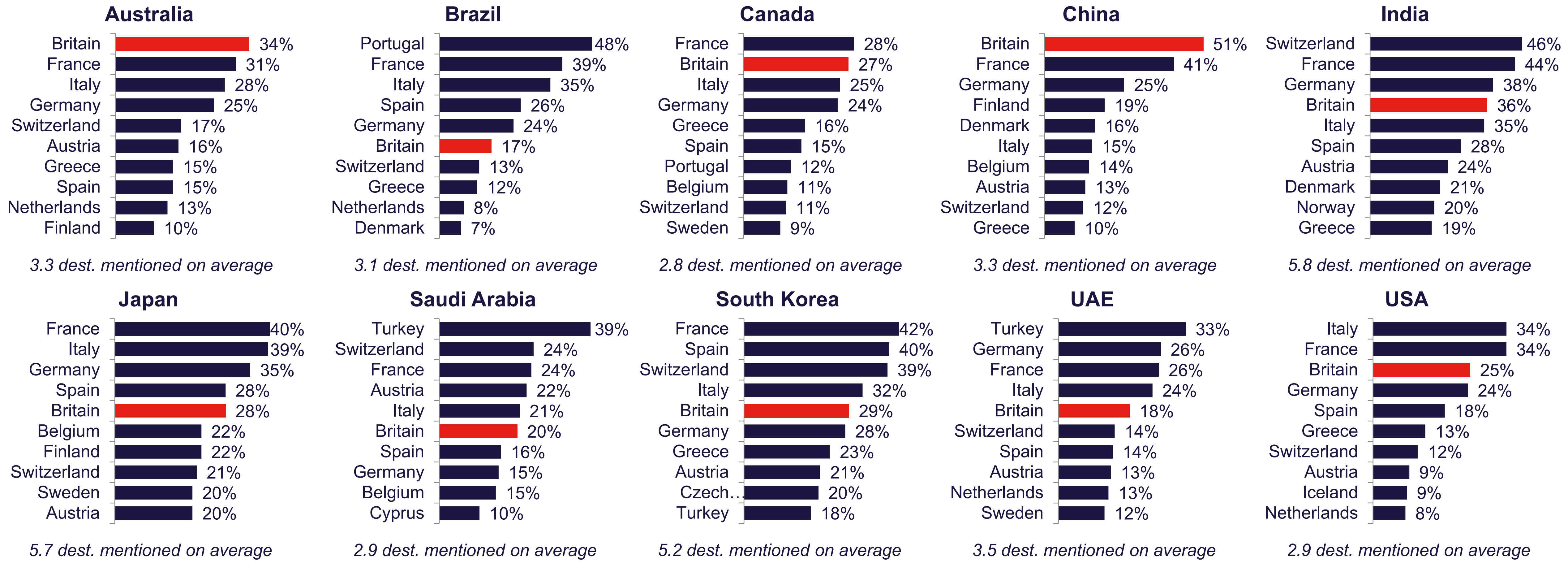
Top European destinations for travelers in long-haul markets

Britain consolidates a strong competitive position among long-haul markets, being in the top 3 in China, US, Canada and Australia, and in a fair position among other markets. The overall trend vs December wave is upward.

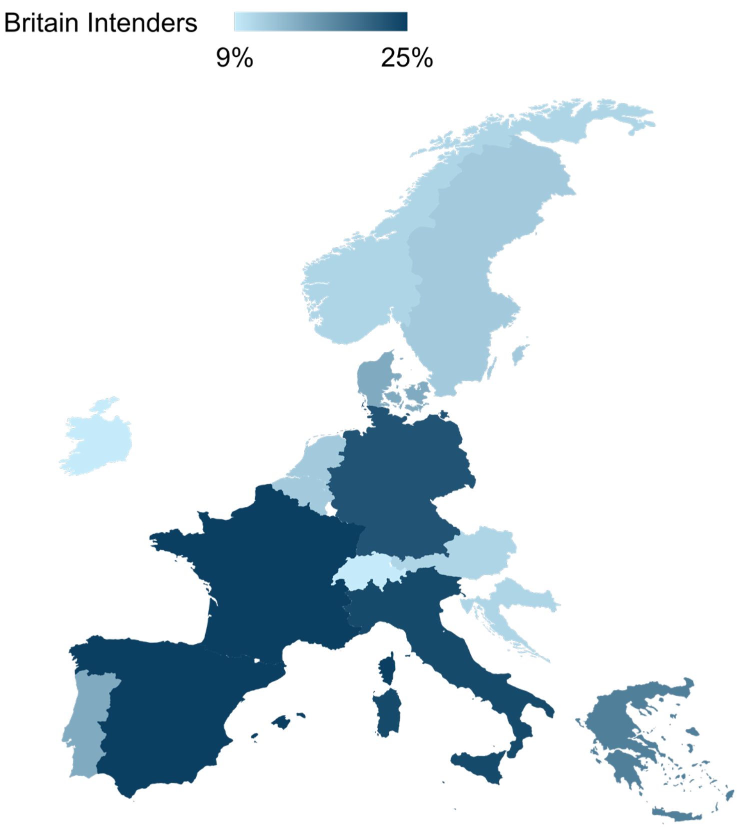


Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking an European leisure trip in 2021 (n=6,255)

Other European destinations considered by Britain intenders

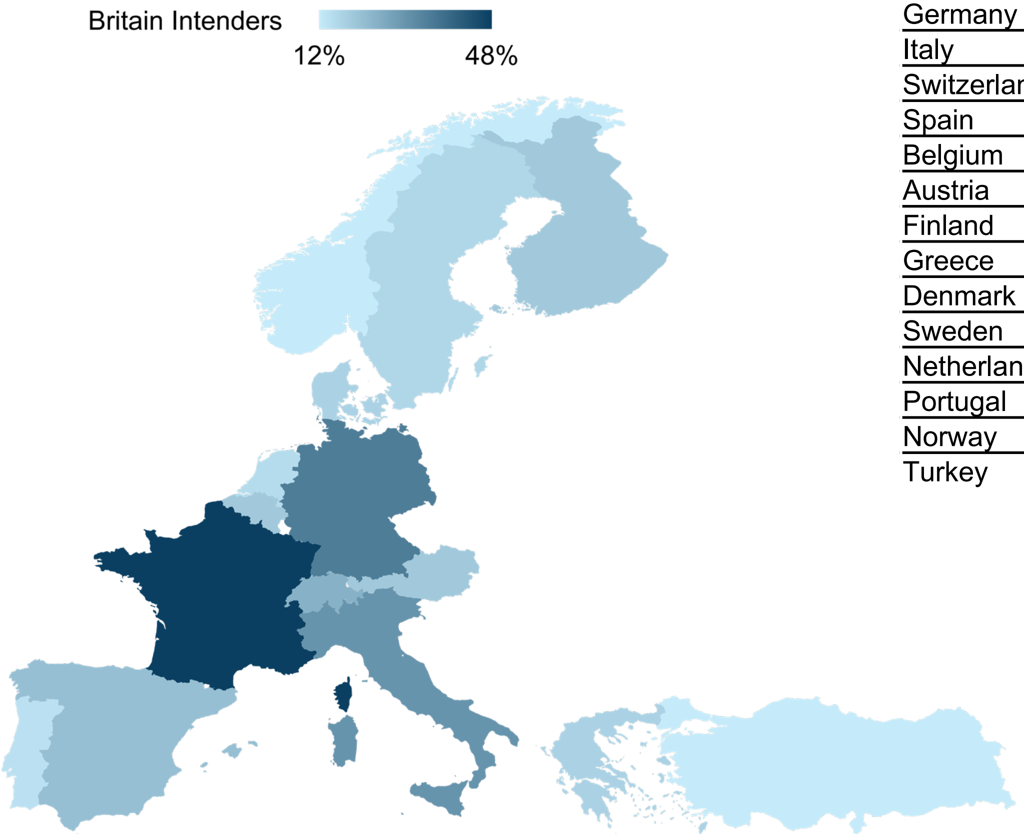
Britain intenders from short-haul markets still have a broad competitive set in mind, with both markets from Northern Europe ("closer" to Britain geographically) and Southern European (including spots more known for sun and sand like Greece and Croatia). In contrast, almost half of those intending to come to Britain from long-haul markets are also considering France, with sun and sand destinations being less prominent, confirming a more focussed competitive set that includes other major European gateways.

Short-haul markets



France	25%
Spain	25%
Italy	24%
Germany	23%
Greece	19%
Denmark	15%
Portugal	15%
Belgium	12%
Sweden	12%
Netherlands	12%
Austria	11%
Norway	11%
Croatia	11%
Switzerland	9%
Irish Republic	9%

Long-haul markets



France	48%
Germany	35%
Italy	30%
Switzerland	24%
Spain	21%
Belgium	19%
Austria	19%
Finland	19%
Greece	17%
Denmark	17%
Sweden	16%
Netherlands	15%
Portugal	14%
Norway	12%
Turkey	12%

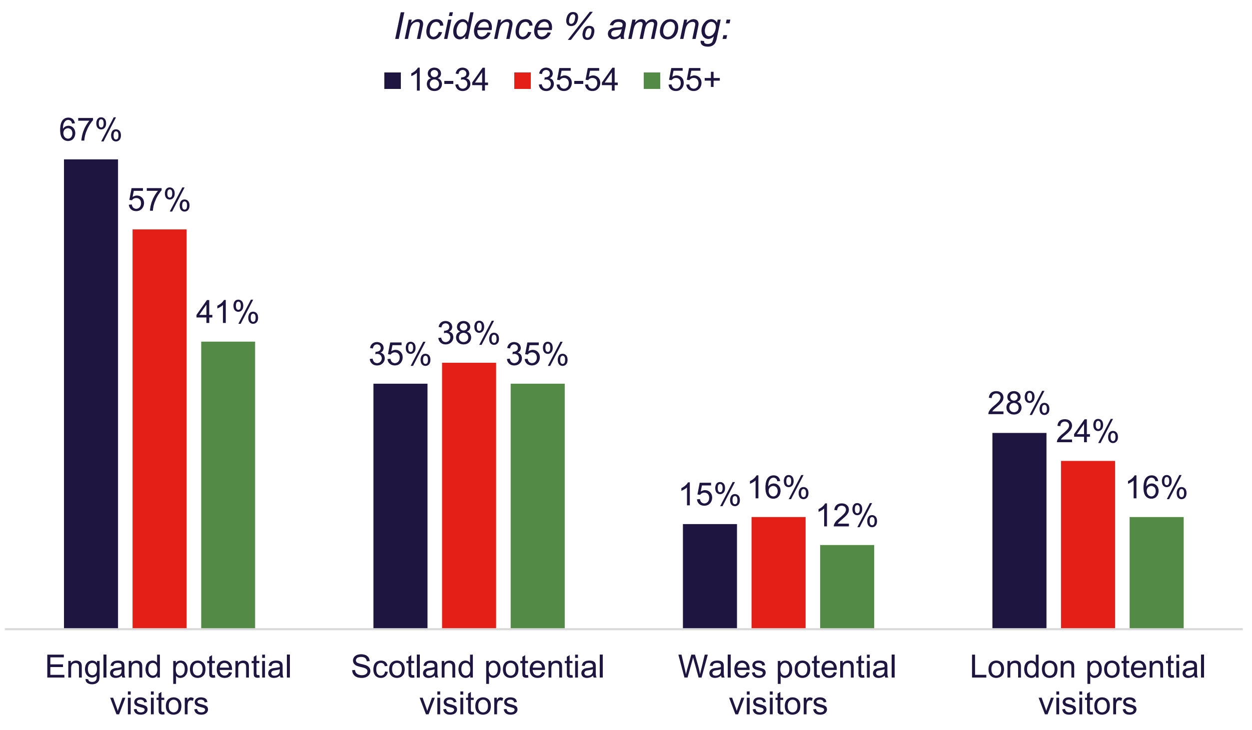
Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1,360)

Impact of age and gender on propensity to consider Britain

Reflecting a general pattern for travel overall, age is confirmed to be a driver of visiting Britain, though it appears more obvious for England and London. Interest in Wales and Scotland is more evenly spread across age groups.

Intention to visit Britain (%)

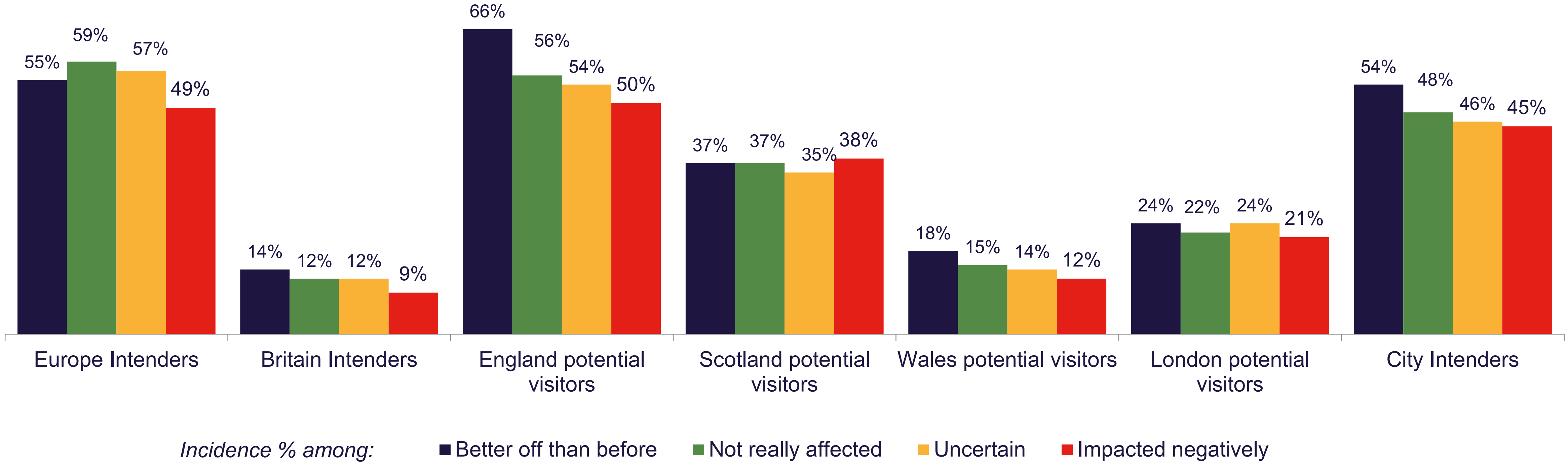
	Gender		Age		
	Male	Female	Less than 35	From 35 to 54	55 and over
Total	12%	13%	15%	12%	10%
Short-haul	11%	10%	13%	10%	8%
Long-haul	13%	15%	16%	13%	12%



Q10. To which destination(s) in Europe in particular?
Base: Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552)

Impact of financial situation on propensity to consider Britain

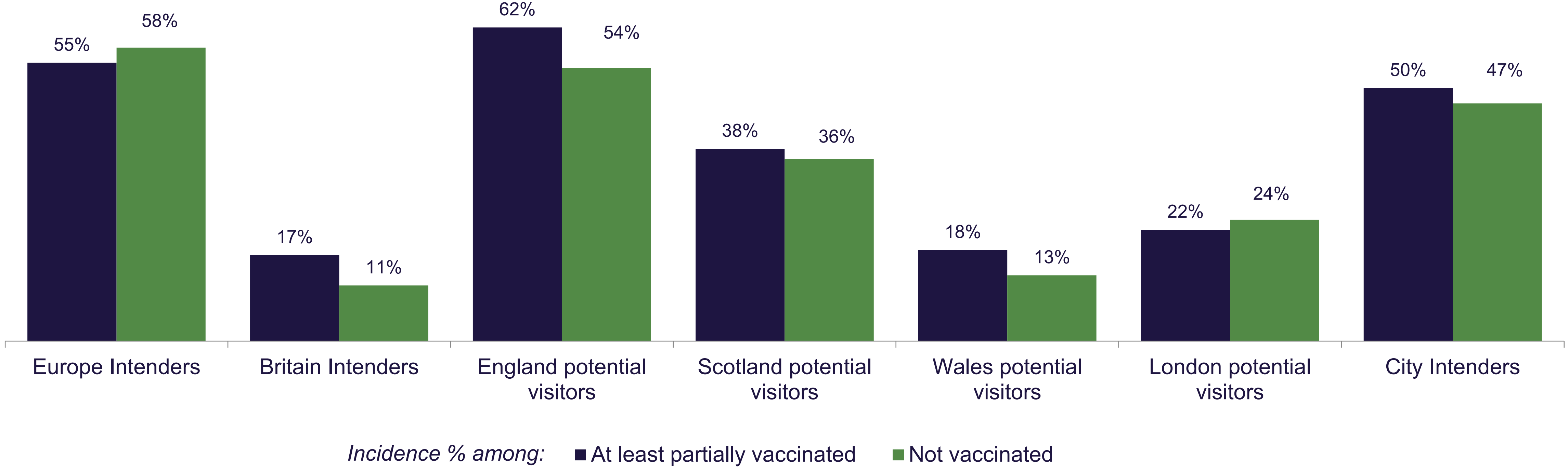
The financial situation is also a determinant of travel to Britain who tend to be considered more among people less affected by the crisis. In particular, opportunity exists in marketing affluent travellers who are better off than before.



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 = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552) – Large City Int. (n = 5,230)

Impact of vaccination on propensity to consider Britain

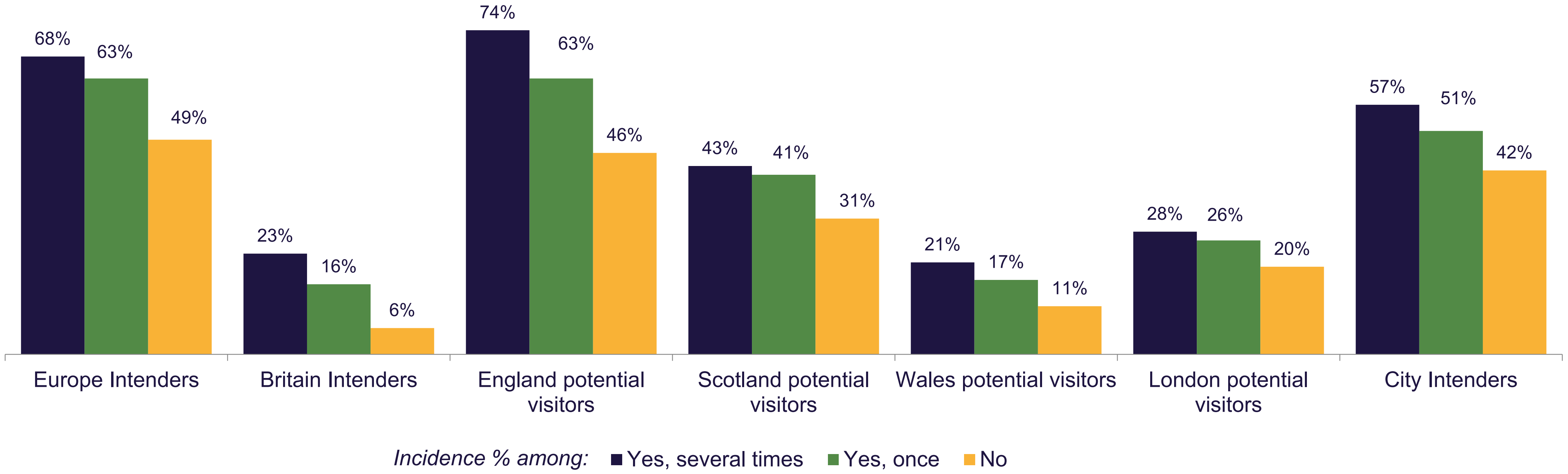
The vaccination in source markets positively drives intentions to visit Britain, particularly compared to the impact seen among Europe intenders in average, confirming the “vaccination” theme is a competitive trigger for choosing Britain. With 17% of intentions among vaccinated travellers, Britain is ranked second in Europe just behind France (18%).



Q26. Have you had a COVID-19 vaccination?
Base: Europe Int. (n = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552) – Large City Int. (n = 5,230)

Impact of previous visit on propensity to consider Britain

Propensity to consider Britain logically increases with past experiences of the destinations. Britain is easily seen as a "safe-haven" post-COVID-19 destination among those who already know the place.

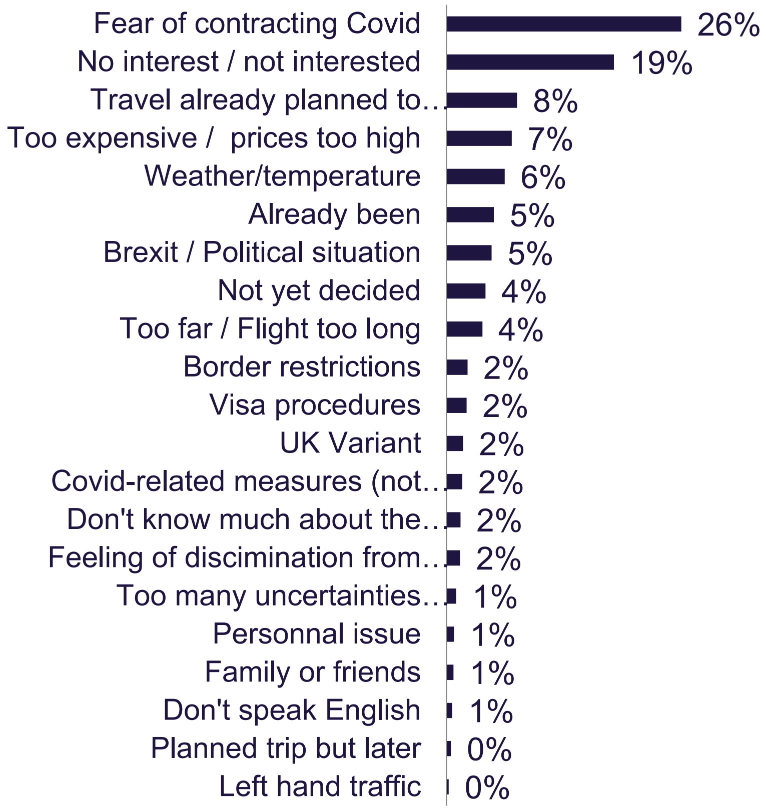


Q27. Have you visited Britain (England, Scotland, Wales) for a leisure trip for more than one night in the past five year?
Base: Europe Int. (n = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552) – Large City Int. (n = 5,230)

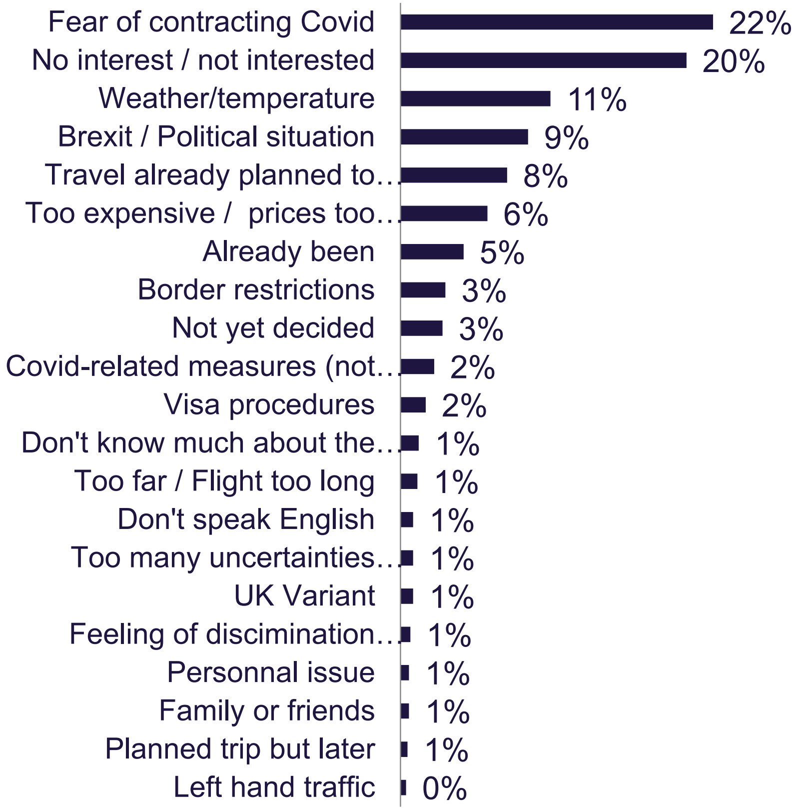
Reasons for not considering a trip in Britain (open end)

The sanitary context still is the first obstacle for choosing Britain, along with common barriers for travelling such as distance, costs, Visas, lack of interest, other destinations in mind etc, as well as specific UK attributes (weather, affordability, Brexit context…). The UK variant was spontaneously mentioned in the top 10 obstacles in long-haul markets.

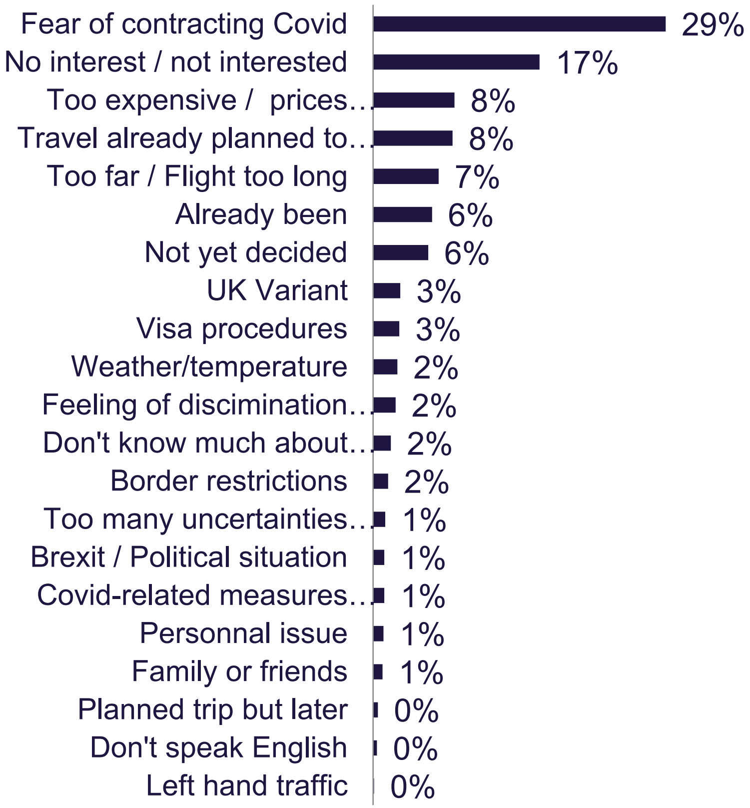
Total



Short Haul



Long Haul



Q11b. Why wouldn't you consider a trip to Britain (England, Scotland, Wales) in the short term? (Open Question)
Base: Respondents who responded "I don't know yet at Q11a. (n = 2,104)

Destinations in Britain considered for a leisure trip (Short-haul)

In short-haul markets, England would be the top nation on the list for a potential visit to Britain, but Scotland and Wales are also well considered, particularly among Germans, Italians, French and Spanish. London would be considered by nearly 1 in 2 potential visitors to England.

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
England	57%	49%	44%	43%	36%	56%	57%	44%	60%	49%	51%	50%
Scotland	37%	38%	34%	43%	48%	33%	47%	35%	28%	34%	50%	31%
Wales	15%	11%	9%	12%	12%	12%	13%	13%	10%	11%	13%	8%
I don't know yet	19%	20%	25%	22%	25%	16%	10%	26%	21%	23%	9%	27%

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
London	41%	46%	42%	49%	48%	41%	43%	42%	47%	50%	48%	50%
North West (e.g. Manchester, Liverpool, Lake District)	32%	26%	19%	20%	22%	32%	33%	22%	25%	34%	30%	24%
East of England (e.g. Cambridge, Norfolk Broads, Norwich)	30%	21%	22%	18%	15%	11%	36%	20%	18%	18%	26%	23%
South East (e.g. Brighton, Oxford, Kent, Windsor)	30%	28%	25%	32%	28%	20%	38%	32%	23%	25%	35%	27%
East Midlands (e.g. Leicester, Derby, Peak District)	20%	13%	10%	17%	16%	9%	19%	14%	10%	11%	14%	14%
South West (e.g. Bristol, Bath, Devon, Cornwall)	19%	17%	14%	18%	23%	18%	25%	16%	18%	9%	15%	19%
West Midlands (e.g. Birmingham, Stratford Upon Avon, Coventry)	17%	12%	6%	12%	13%	12%	16%	12%	11%	9%	11%	12%
Yorkshire & the Humber (e.g. Leeds, York, Yorkshire Dales)	14%	11%	7%	11%	13%	11%	13%	9%	10%	13%	12%	9%
North East (e.g. Newcastle, Durham)	13%	8%	6%	10%	9%	5%	11%	12%	8%	5%	11%	8%

Q11a: If you were to go to Britain in the next 12 months, which destination would you go to? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)

Q12: Which destination(s) in England? (Multiple Answers)
Base: Respondents who have chosen England in Q11a (n = 6,171)

Destinations in Britain considered for a leisure trip (Long-haul)

For long-haul prospects, a possible trip to Britain would be to England first but not exclusively, showing open attitude to visiting multiple destinations across Britain, beyond iconic places.

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
England	57%	64%	65%	77%	62%	56%	77%	61%	58%	64%	64%	63%
Scotland	37%	36%	37%	32%	35%	41%	50%	40%	19%	35%	26%	36%
Wales	15%	18%	22%	18%	15%	21%	27%	21%	12%	14%	12%	16%
I don't know yet	19%	19%	19%	4%	18%	28%	4%	24%	26%	21%	17%	18%

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
London	41%	38%	41%	48%	37%	43%	31%	41%	29%	37%	31%	40%
North West (e.g. Manchester, Liverpool, Lake District)	32%	35%	28%	41%	27%	33%	44%	37%	39%	41%	45%	26%
East of England (e.g. Cambridge, Norfolk Broads, Norwich)	30%	36%	26%	30%	21%	63%	45%	37%	30%	39%	34%	25%
South East (e.g. Brighton, Oxford, Kent, Windsor)	30%	31%	35%	34%	30%	36%	39%	38%	23%	34%	22%	22%
East Midlands (e.g. Leicester, Derby, Peak District)	20%	24%	21%	19%	15%	44%	33%	25%	23%	22%	23%	15%
South West (e.g. Bristol, Bath, Devon, Cornwall)	19%	20%	27%	15%	18%	27%	27%	19%	12%	16%	14%	20%
West Midlands (e.g. Birmingham, Stratford Upon Avon, Coventry)	17%	21%	22%	15%	16%	29%	34%	27%	16%	19%	19%	14%
Yorkshire & the Humber (e.g. Leeds, York, Yorkshire Dales)	14%	16%	22%	15%	10%	24%	22%	14%	9%	16%	14%	13%
North East (e.g. Newcastle, Durham)	13%	16%	15%	12%	11%	27%	22%	12%	18%	15%	19%	10%

Q11a: If you were to go to Britain in the next 12 months, which destination would you go to? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)

Q12: Which destination(s) in England? (Multiple Answers)
Base: Respondents who have chosen England in Q11a (n = 6,171)

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Comfort levels with transport to get to Britain (Short-haul)

Flight remains a confident transport option for almost 9 in 10 potential visitors to Britain on average, while ferry and tunnel are equally considered with confidence in the closest markets. Train/Eurostar is also seen as a comfortable option particularly in France, Netherlands but also Italy and Spain.

(% Very + Quite comfortable)	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Plane – via nonstop flight	88%	87%	93%	84%	76%	80%	89%	79%	89%	98%	92%	86%
Plane – via connecting flight	72%	67%	67%	68%	56%	62%	79%	72%	55%	62%	76%	74%
Own/rented vehicle – via Channel Tunnel	49%	49%	46%	63%	61%	56%	47%	61%	32%	30%	46%	44%
Own/rented vehicle – via Ferry	47%	49%	42%	60%	59%	65%	63%	56%	33%	24%	43%	44%
On foot – via Eurostar/Train	43%	39%	29%	58%	45%	43%	49%	52%	23%	10%	48%	34%
Coach – via Channel Tunnel	40%	35%	29%	49%	28%	33%	42%	42%	22%	34%	34%	32%
On foot – via Ferry	39%	38%	30%	52%	41%	56%	45%	42%	22%	13%	37%	35%
Coach – via Ferry	38%	34%	31%	46%	33%	36%	43%	36%	24%	25%	33%	31%

Q13: If you were to travel to Britain in the next 12 months, how comfortable would you feel using the following to get to Britain? (Multiple Answers)
Base: Respondents choosing either England, Scotland or Wales in Q11a (n = 8,700)

Comfort levels with transport to get to Britain (Long-haul)

Long-haul markets would feel comfortable using all types of transportation means to get to Britain, except Japan and South Korea who would be less willing to consider owned/rented vehicles (via Ferry or Channel). Eurostar/Train is also a confident option among Chinese travellers.

(% Very + Quite comfortable)	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Plane – via nonstop flight	88%	89%	68%	91%	83%	97%	95%	93%	93%	93%	95%	85%
Plane – via connecting flight	72%	75%	65%	80%	68%	69%	91%	63%	83%	71%	81%	78%
Own/rented vehicle – via Channel Tunnel	49%	49%	51%	55%	54%	56%	56%	30%	46%	39%	49%	48%
Own/rented vehicle – via Ferry	47%	46%	48%	50%	49%	48%	57%	27%	43%	38%	48%	45%
On foot – via Eurostar/Train	43%	47%	43%	44%	41%	62%	53%	44%	40%	38%	50%	43%
Coach – via Channel Tunnel	40%	44%	40%	38%	46%	50%	60%	23%	44%	33%	50%	44%
On foot – via Ferry	39%	40%	38%	30%	39%	59%	50%	27%	34%	24%	38%	41%
Coach – via Ferry	38%	41%	39%	36%	44%	48%	59%	19%	40%	27%	44%	43%

Q13: If you were to travel to Britain in the next 12 months, how comfortable would you feel using the following to get to Britain? (Multiple Answers)
Base: Respondents choosing either England, Scotland or Wales in Q11a (n = 8,700)

Perception of transport mode within Britain (Short-haul)

The overall trust level for public and collective transportation means is high and should not stop potential visitors to explore the destination, be that travelling on their own or via transportation means at disposal. A clear preference for using their own car is expressed in Ireland, Netherlands, France and Germany.

% of Consideration	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Public transport - Train	43%	43%	53%	39%	35%	35%	40%	47%	53%	48%	30%	53%
Rented car/vehicle	40%	40%	50%	41%	36%	41%	44%	36%	39%	37%	34%	39%
Public transport - Tube/subway	39%	37%	42%	38%	28%	29%	39%	38%	39%	47%	21%	50%
Domestic flight	34%	29%	25%	29%	18%	42%	36%	18%	23%	24%	43%	28%
Public transport - Bus	31%	32%	37%	34%	23%	28%	33%	29%	32%	44%	18%	47%
Own car vehicle	31%	37%	32%	44%	43%	58%	36%	53%	26%	16%	31%	35%
Taxi	28%	24%	21%	24%	11%	30%	34%	14%	24%	29%	16%	40%
Uber/other sharing app	22%	15%	12%	18%	5%	12%	20%	13%	14%	19%	10%	24%
Private coach/minibus	21%	16%	15%	16%	9%	18%	26%	15%	11%	23%	11%	17%

Q14. Thinking about travelling within Britain, which of the following would you be comfortable with? (Multiple Answers)
Base: Respondents selecting England, Scotland or Wales in Q11a (n = 8,700)

Perception of transport mode within Britain (Long-haul)

Among long-haul markets, there should be no particular “new” or unusual obstacles in using / combining various types of transportation at destination, including public transport or taxi services. Transport should therefore not be a major obstacle in visiting rural and urban environment and plan multiple destinations within Britain.

% of Consideration	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Public transport - Train	43%	43%	44%	46%	47%	33%	44%	65%	38%	39%	37%	42%
Rented car/vehicle	40%	40%	53%	50%	53%	29%	50%	29%	33%	40%	36%	37%
Public transport - Tube/subway	39%	41%	36%	42%	40%	47%	39%	54%	34%	45%	40%	37%
Domestic flight	34%	38%	45%	45%	38%	35%	57%	8%	32%	27%	34%	47%
Public transport - Bus	31%	31%	33%	29%	34%	35%	34%	43%	23%	30%	24%	26%
Own car vehicle	31%	26%	39%	29%	29%	28%	32%	5%	22%	15%	22%	29%
Taxi	28%	32%	33%	36%	34%	39%	39%	31%	18%	21%	27%	31%
Uber/other sharing app	22%	29%	22%	48%	24%	19%	40%	12%	33%	28%	31%	28%
Private coach/minibus	21%	24%	32%	19%	30%	20%	35%	25%	19%	14%	17%	30%

Q14. Thinking about travelling within Britain, which of the following would you be comfortable with? (Multiple Answers)
Base: Respondents selecting England, Scotland or Wales in Q11a (n = 8,700)

Planned booking channel for an international trip (Short-haul)

Travellers are still open to using a variety of channels to plan their next trip. Online travel agents/tour operators are the most popular channel; the use of expert intermediaries is reassuring to consumers in the current uncertain travel scenario. Official destination websites, transport and accommodation providers play a significant role in the booking process across most markets, again confirming the importance of reassurance and trust.

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Through a travel agent/tour operator online	37%	35%	42%	27%	45%	18%	29%	42%	38%	39%	27%	42%
A travel comparison website	36%	35%	32%	30%	31%	28%	48%	21%	29%	29%	49%	51%
Direct with airline/train/ferry operator	33%	33%	32%	24%	22%	46%	25%	31%	49%	26%	32%	43%
Direct from the official website of the destination	30%	28%	21%	26%	22%	33%	26%	31%	24%	28%	35%	31%
Direct with accommodation provider	29%	31%	26%	28%	38%	43%	24%	42%	20%	26%	33%	27%
Through a travel agent/tour operator at a storefront	26%	21%	14%	21%	27%	12%	22%	20%	10%	46%	21%	17%
Through friends and family in the in the destination country	14%	11%	7%	13%	9%	12%	11%	11%	9%	11%	12%	12%

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)

Planned booking channel for an international trip (Long-haul)

The role of expert intermediaries is even higher in long-haul markets (online and at a storefront), particularly in Asia. Airlines are also channels highly envisaged in North America, while Brazil and South Korea would make an extensive use of comparison websites. The large share of VFR travel intentions gives friends and relatives a significant role, notably for Indians and Chinese potential visitors.

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Through a travel agent/tour operator online	37%	38%	31%	42%	32%	46%	47%	40%	31%	55%	30%	31%
A travel comparison website	36%	38%	30%	53%	37%	25%	52%	54%	31%	53%	30%	30%
Direct with airline/train/ferry operator	33%	33%	38%	39%	34%	21%	40%	38%	30%	23%	31%	39%
Direct from the official website of the destination	30%	32%	29%	35%	29%	38%	46%	18%	31%	24%	30%	31%
Direct with accommodation provider	29%	27%	37%	27%	25%	20%	35%	26%	17%	32%	20%	33%
Through a travel agent/tour operator at a storefront	26%	30%	31%	37%	25%	35%	34%	34%	27%	30%	25%	21%
Through friends and family in the in the destination country	14%	16%	12%	16%	13%	21%	33%	9%	16%	8%	18%	13%

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)

Planned booking channel for a trip to Britain

The diversity of booking channels mentioned and possible use of several in the same booking process (including personal contacts in the UK) should continue encouraging destinations to provide consistent promotional and informative content throughout all channels, particularly as travellers look for trusted sources to activate last minute trips in safe conditions. The role of official websites is confirmed to be essential in the planning and booking process.

	Total	Short-haul	Long-haul
Through a travel agent/tour operator online	42%	32%	49%
Direct with airline/train/ferry operator	42%	48%	38%
A travel comparison website	42%	41%	42%
Direct from the official website of the destination	38%	29%	44%
Direct with accommodation provider	35%	35%	35%
Through a travel agent/tour operator at a storefront	30%	18%	37%
Through friends and family in the in the destination country	18%	14%	21%

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1,360)

Planned booking channel for a trip to Britain by age

Travel comparison websites and official destinations' websites are still popular options among young travel intenders to Britain from short and long-haul markets, while the older generation are more likely to book directly through transport operators.

Short-haul markets

	18-34	35-54	55+
Direct with airline/train/ferry operator	47%	44%	54%
A travel comparison website	49%	42%	27%
Direct with accommodation provider	37%	32%	34%
Through a travel agent/tour operator online	33%	32%	31%
Direct from the official website of the destination	35%	30%	19%
Through a travel agent/tour operator at a storefront	21%	17%	13%
Through friends and family in the in the destination country	19%	9%	14%

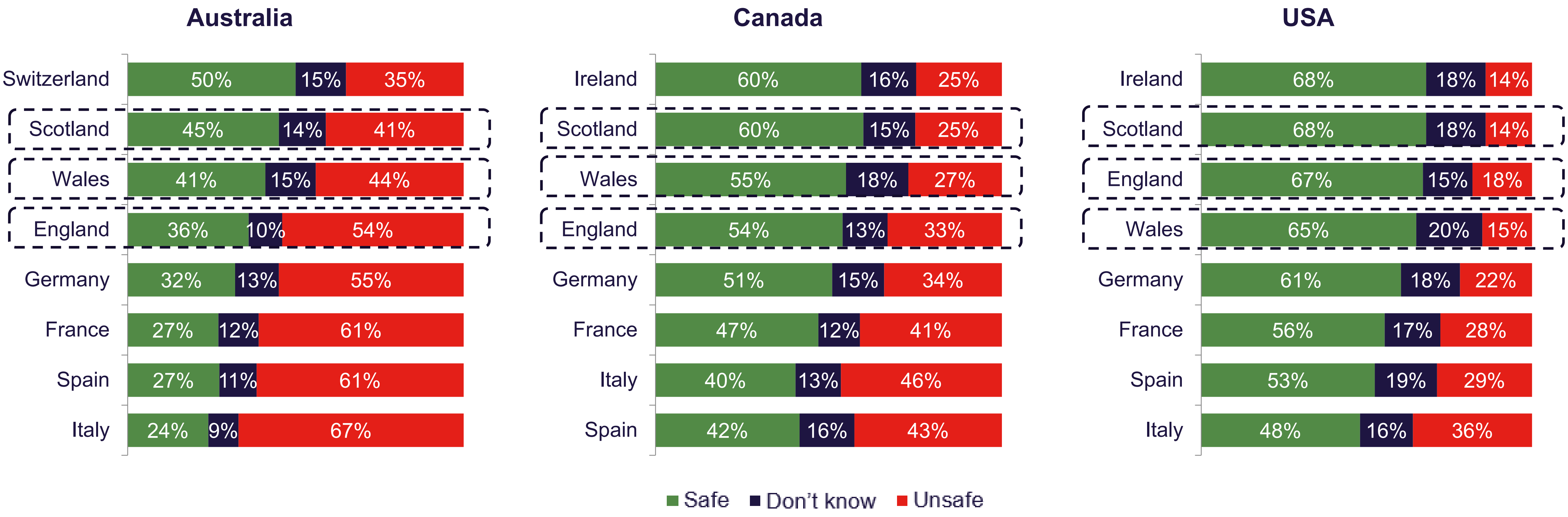
Long-haul markets

	18-34	35-54	55+
Through a travel agent/tour operator online	46%	51%	49%
Direct from the official website of the destination	48%	46%	33%
A travel comparison website	47%	43%	32%
Direct with airline/train/ferry operator	37%	38%	39%
Through a travel agent/tour operator at a storefront	39%	36%	34%
Direct with accommodation provider	36%	33%	37%
Through friends and family in the in the destination country	23%	20%	19%

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1,360)

COVID-19 safety perception (1)

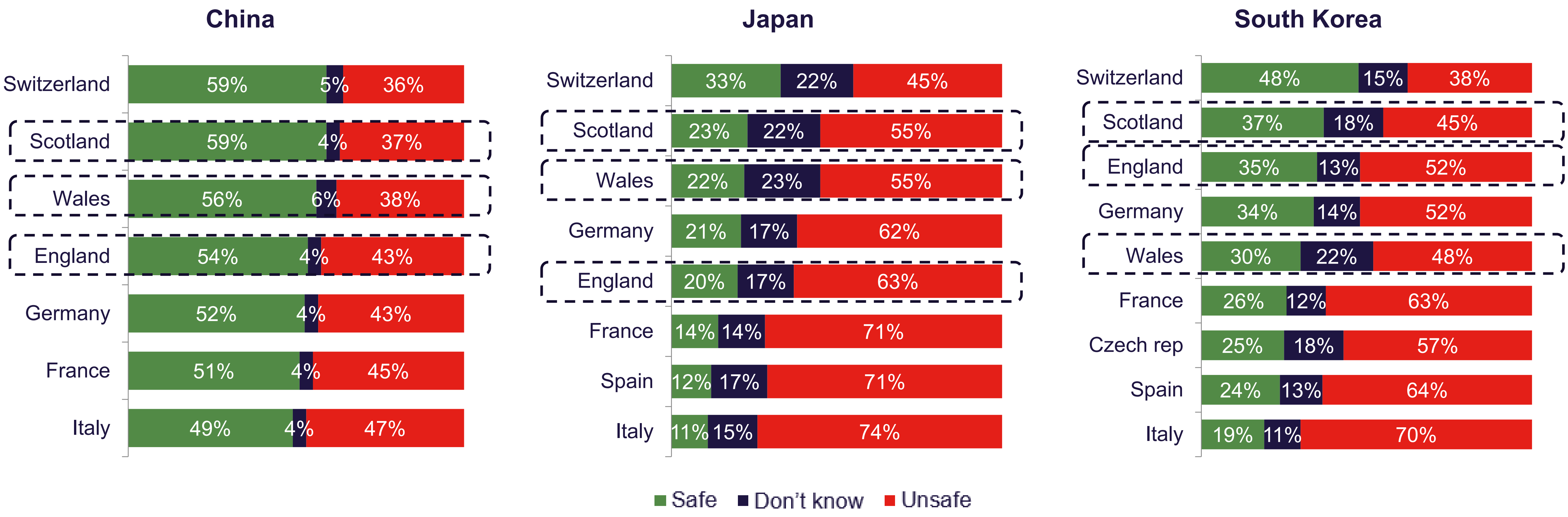
In North America and Australia, British destinations generate a safer image than other large competitive destinations in Europe such as France, Italy or Spain. England has started making up the gap vs Scotland and Wales observed in December.



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 = 11,000)

COVID-19 safety perception (2)

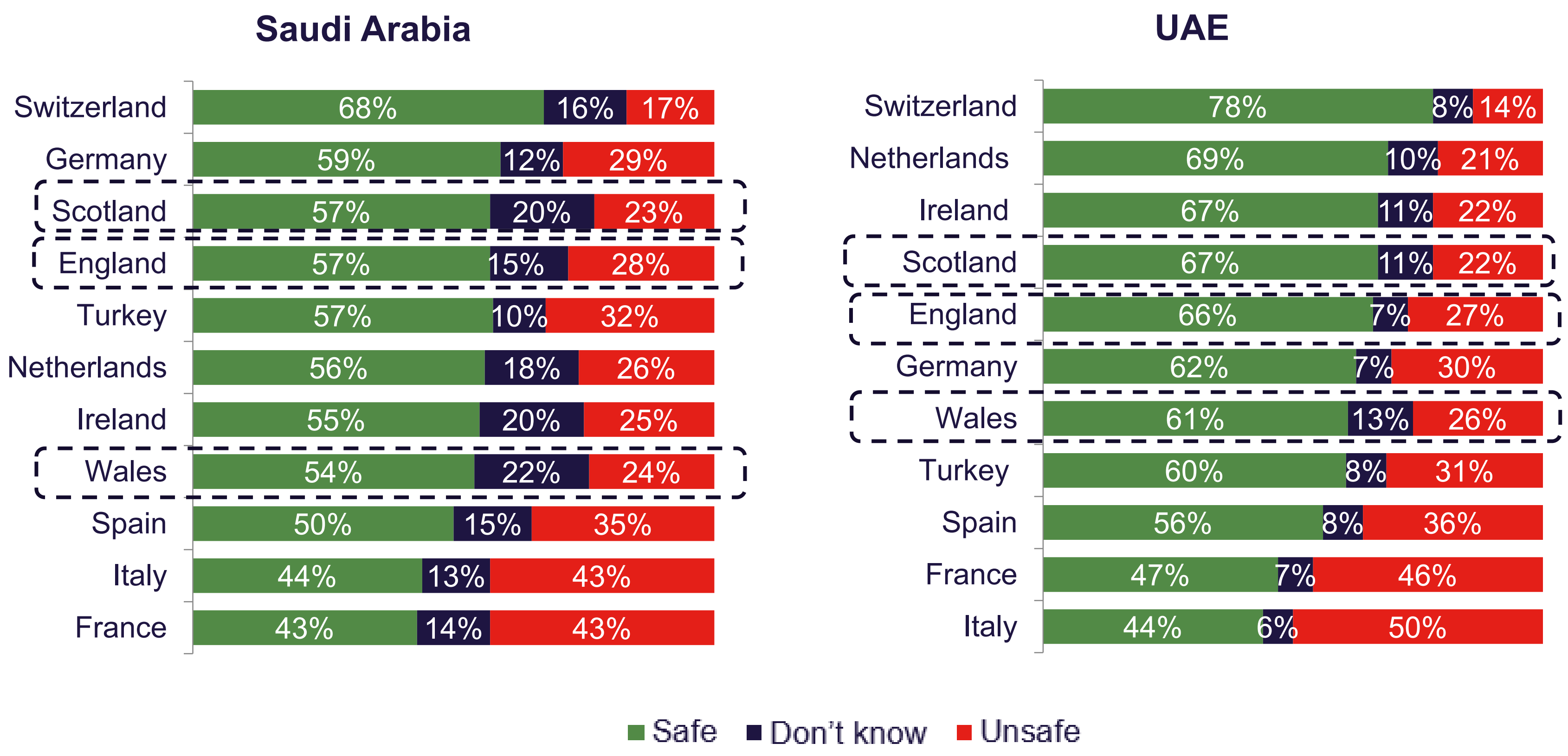
In Asian markets, the image of Britain with COVID-19 is also consistent and competitive, only Switzerland and Germany tend to generate (slightly) better perceptions. Reflecting an overall careful attitude to travel now, the Japanese perceive all destinations as unsafe in majority.



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 = 11,000)

COVID-19 safety perception (3)

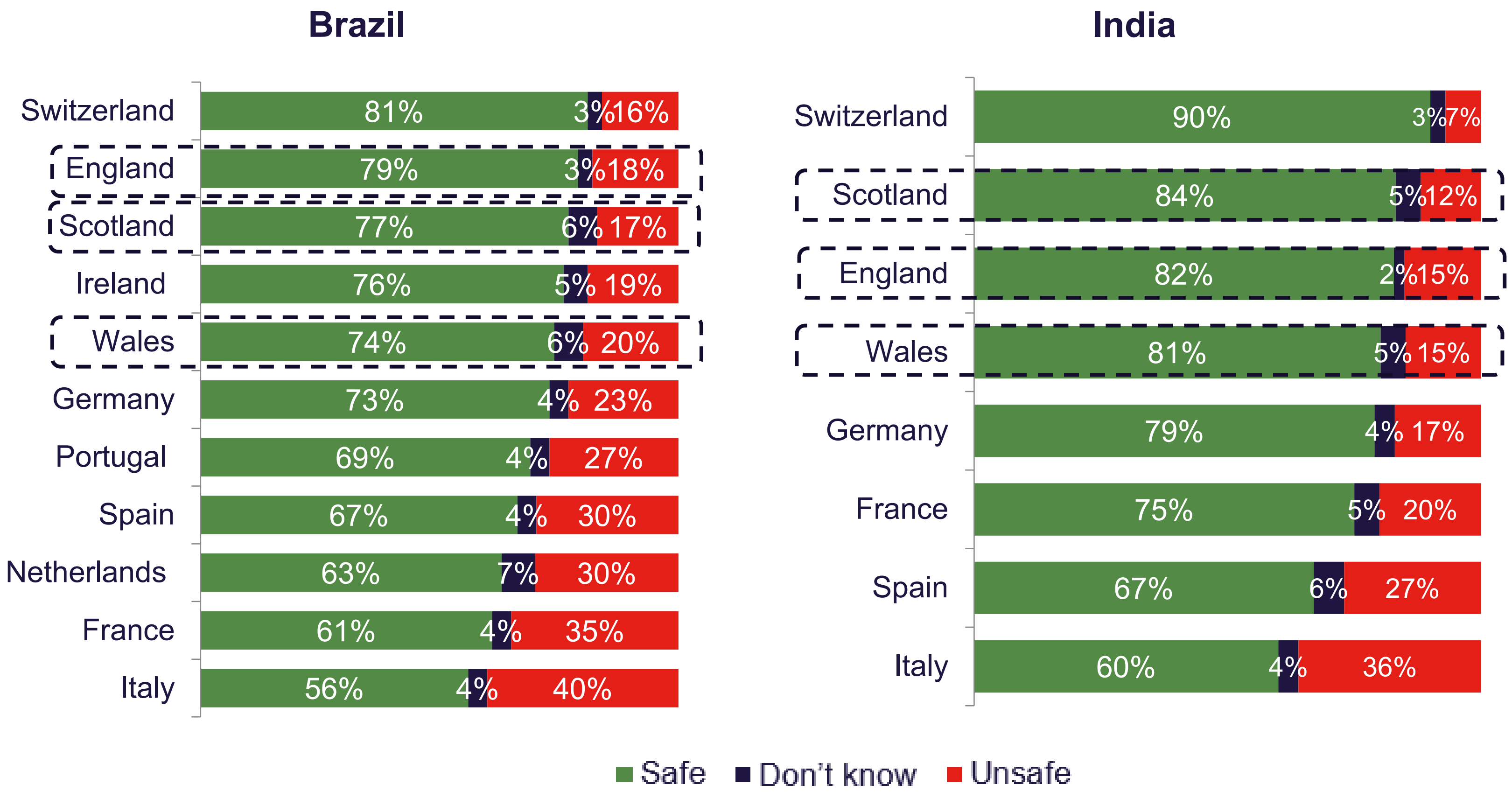
The COVID-19 safety image has improved significantly in Saudi Arabia. Switzerland benefits from the best image in the UAE, however Britain destinations are seen as safe in absolute value by a majority of respondents.



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 = 11,000)

COVID-19 safety perception (4)

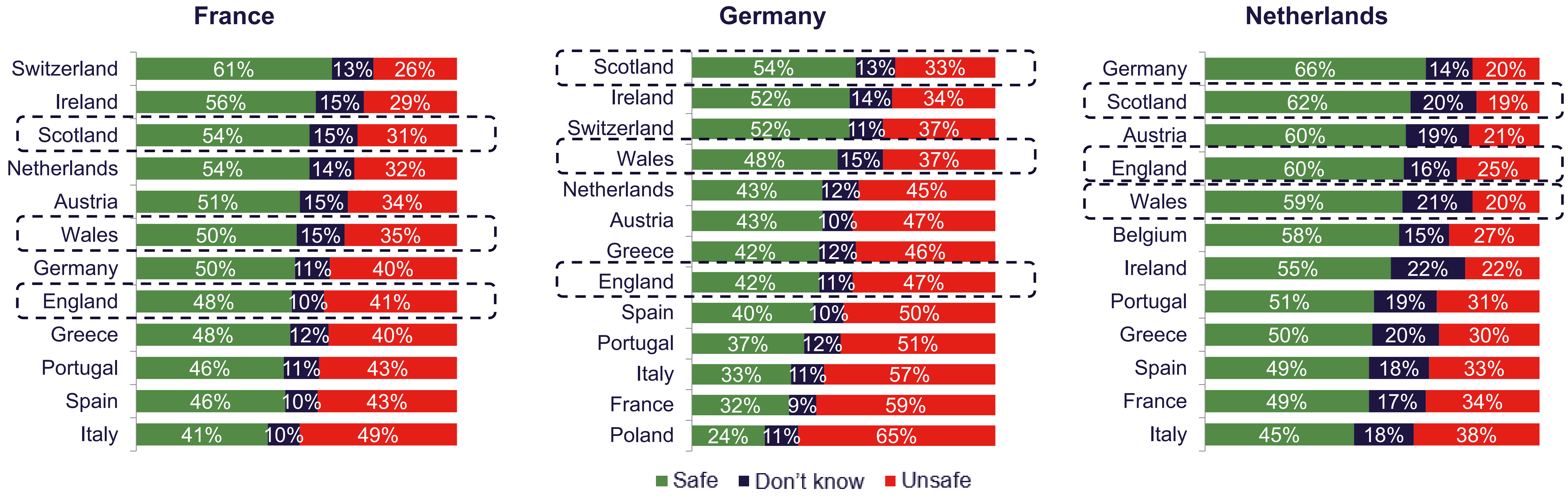
Britain's image in Brazil and India in relation to the COVID-19 safety is positive and competitive vs other large European destinations usually visited from those markets.



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 = 11,000)

COVID-19 safety perception (5)

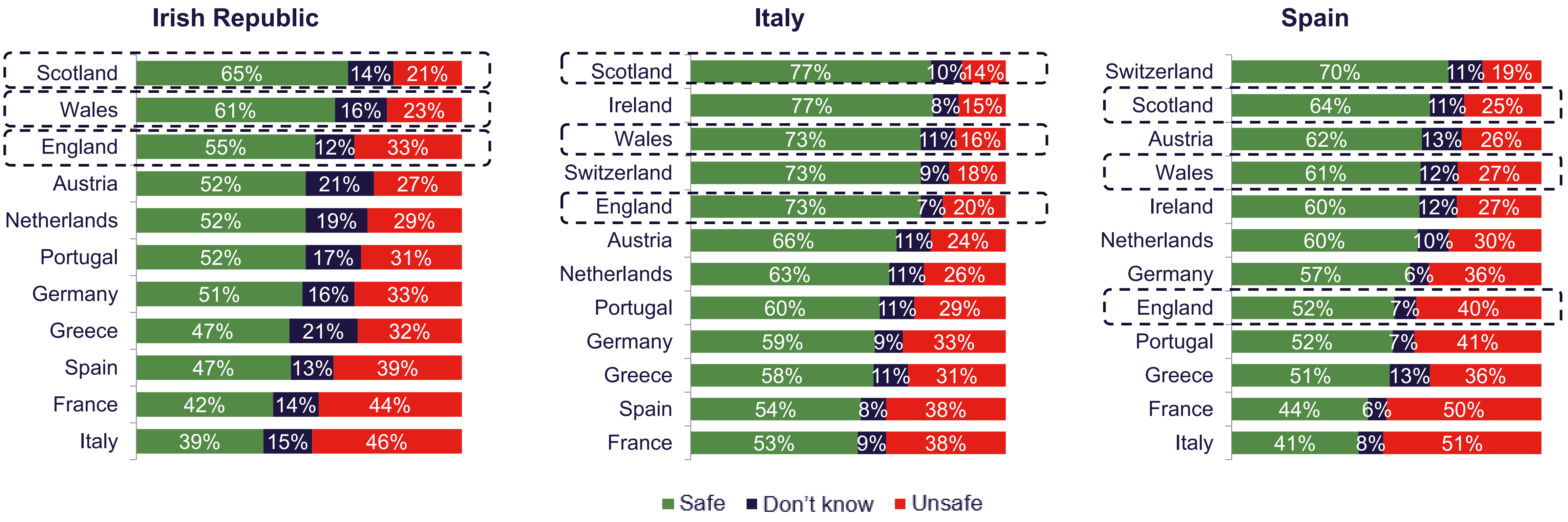
The perception gap between England and the other destinations in Britain remains in France and Germany, but has reduced in the Netherlands compared to December. Britain destinations' image has improved in those markets overall, but the image of England in particular still generated mixed feelings in France and Germany (where England is still seen more as unsafe than safe).



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 = 11,000)

COVID-19 safety perception (6)

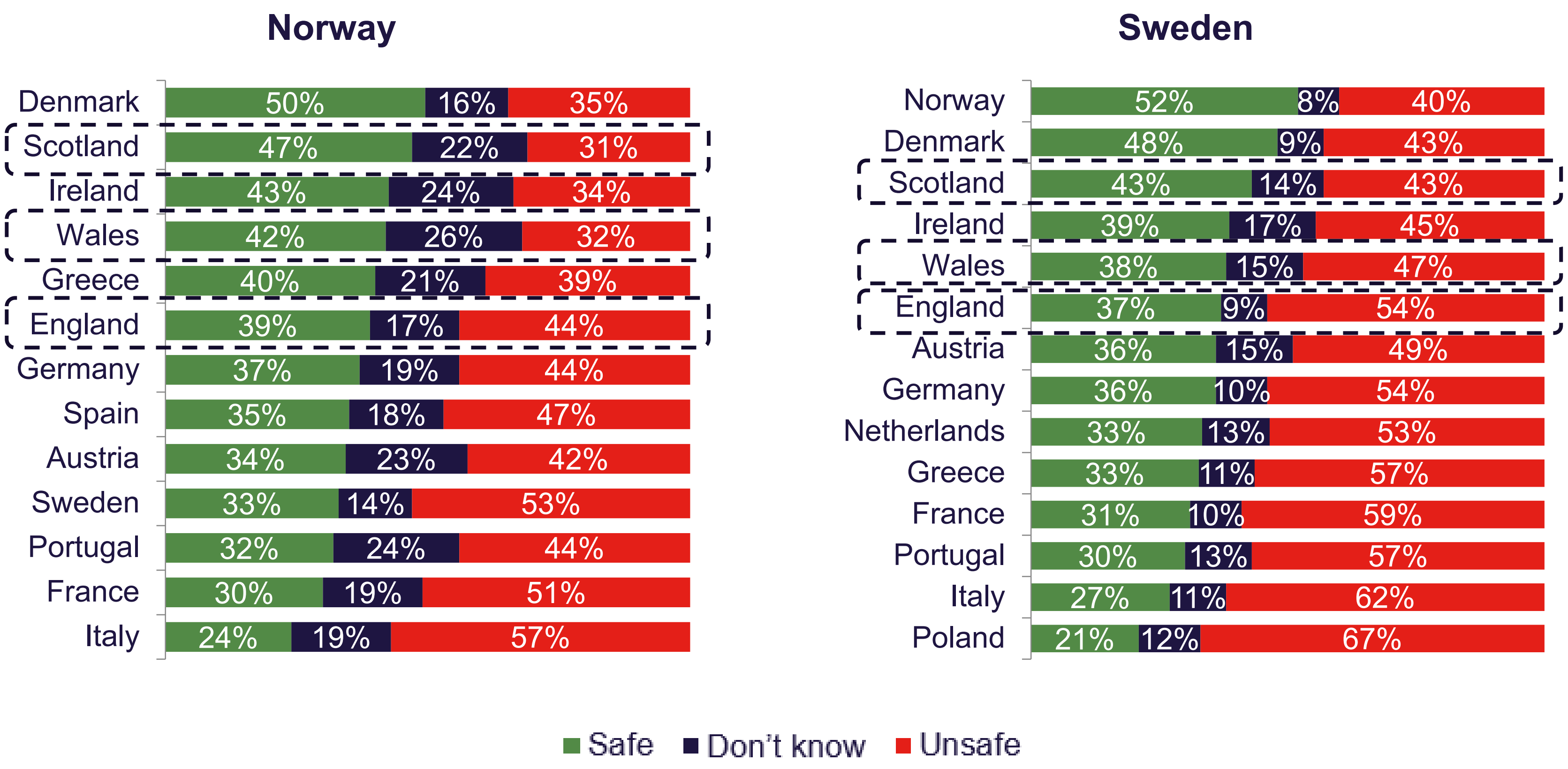
A clear positive dynamic is observed in the Irish Republic, Italy and (to a lesser extend for England) Spain where Britain destinations now enjoy a competitive position in relation to COVID-19 safety.



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 = 11,000)

COVID-19 safety perception (7)

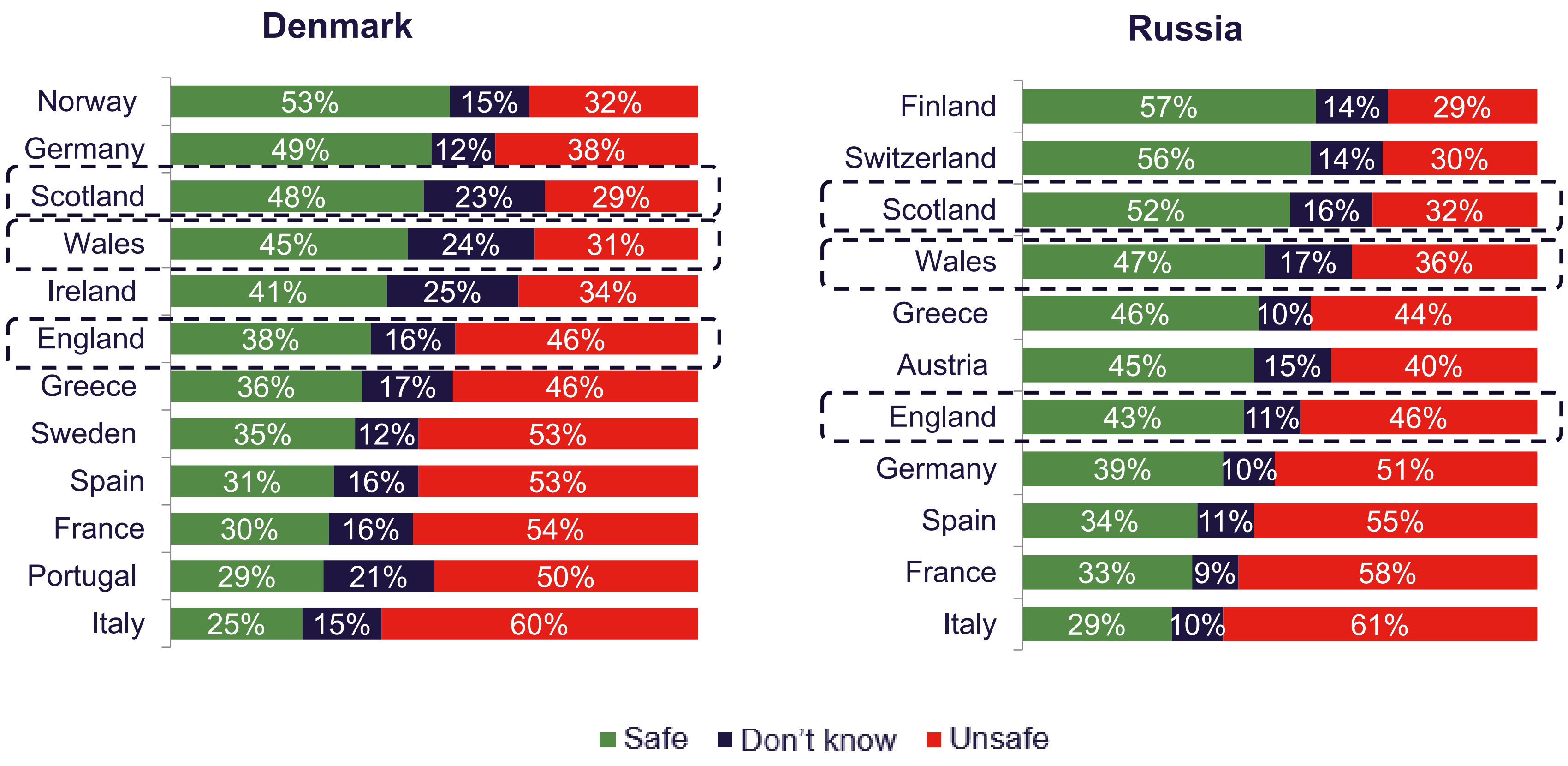
Nordic markets still have a better image of Northern European countries and Britain destinations maintain a competitive advantage vs. France, Italy or Germany. In both markets however, England is still seen as more unsafe than safe.



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 = 11,000)

COVID-19 safety perception (8)

In Russia, the gap between England and the other Britain destinations is marked, while perceptions Denmark matches the Nordic trend.



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 = 11,000)

River Conwy: ©VisitBritain/ Bob Radlinski

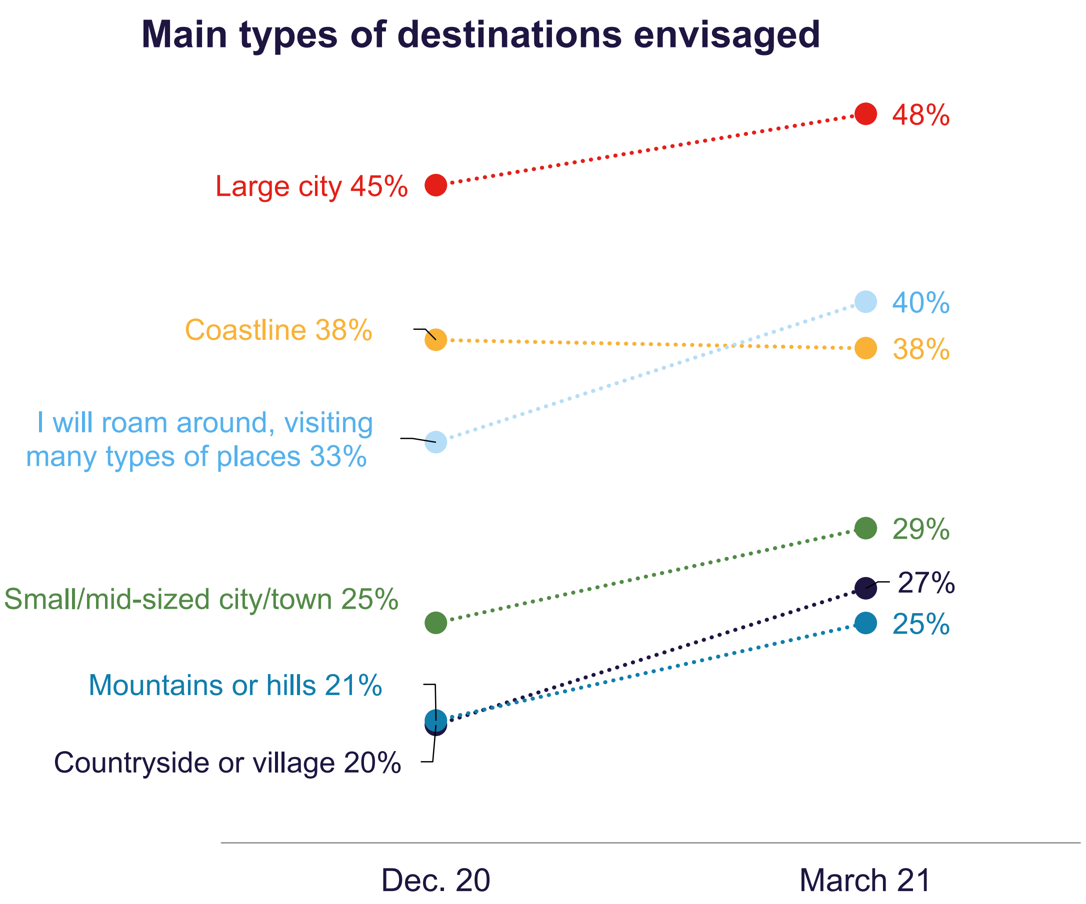
Travel Preferences

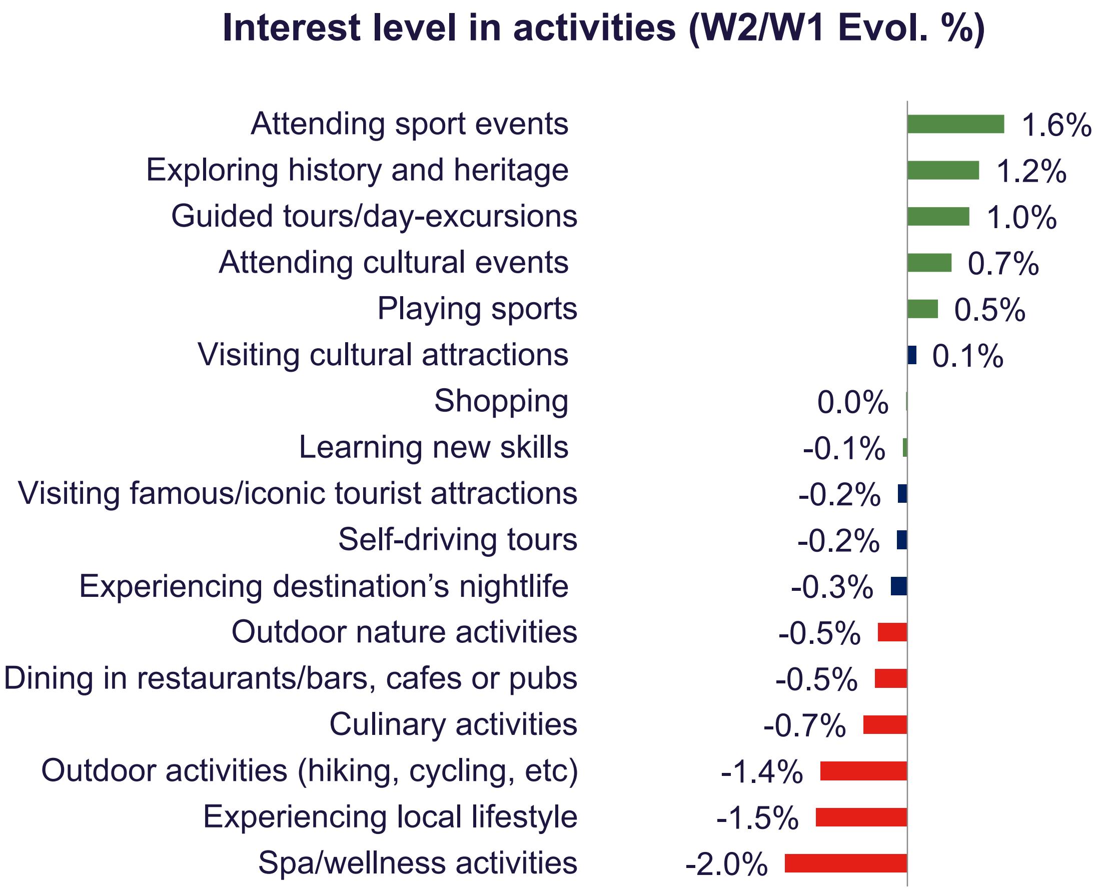
Travel preferences: summary

- The overall travel sentiment increase concerns all types of destination's types (large and smaller cities, rural, coastal, mountain areas…) and reveals stronger desire for exploring and roaming around, suggesting existence of a "catching-up" sentiment after a long period of restriction (also known as the "revenge tourism" concept driven by cumulated frustrations).
- The combined wish expressed to see both iconic places AND visit secondary destinations also accelerates demand for roaming around, particularly high in long-haul markets and giving Britain destinations further opportunity to promote multiple destinations / tours beyond iconic gateways in the region.
- Friends travel demand is on the rise. Intenders to Britain confirm envisaging a quite larger than average travel cell including children or other adult travel companions, possibly boosting or spreading spent at destinations while they express higher intention to roam around.
- Most accommodation types benefit from increased trust levels. While hotel chains seem still high on planners' mind, interest for various types of accommodations remain (boutique hotels, B&Bs, self-catered properties…) confirming special affinities per market and destinations such as historic houses in Britain, hotel chains in London or holiday villages/centres and historic houses/castles in Scotland and Wales.
- Sign of an expected return to normal, cultural and sport events are gaining interest in travellers' mind too. The desire amongst some to return to many pre-pandemic activities when on holiday is confirmed, including interest in iconic tourist attractions but also lively activities (dining out, local lifestyle, shopping…). Socializing with local people is somewhat less on the bucket list compared to March 2020, probably linked to some growing concerns around local residents' welcome to foreign tourists.

Trends: December 2020 vs March 2021

The overall travel sentiment increase concerns all types of areas and reveals a desire for exploring and roaming around in the destination. Events are regaining interest in travellers' mind too – a possible sign of an expected return to normal.





Trend calculated at constant perimeter (14 markets consolidated)

Main destination types for an international leisure trip (Short-haul)

Visiting large cities and coastal areas are still top of mind, but intentions widely differ from one market to another: for example, many Germans are looking for coastal experiences, while Italians, Spanish and Swedish are more open to planning city breaks than average. Russians and Italians will also want to roam around and visit many types of places.

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Large city	48%	44%	40%	37%	28%	47%	57%	37%	48%	39%	54%	52%
I will roam around, visiting many types of places	43%	37%	38%	34%	34%	25%	54%	38%	33%	56%	27%	30%
Coastline	38%	39%	40%	35%	49%	40%	37%	37%	43%	50%	26%	36%
Small/mid-sized city/town	30%	27%	25%	25%	19%	26%	35%	28%	24%	25%	32%	29%
Countryside or village	26%	20%	22%	22%	18%	24%	22%	21%	17%	13%	12%	26%
Mountains or hills	25%	21%	22%	14%	26%	17%	21%	31%	9%	24%	24%	16%
I'm not sure	6%	6%	7%	6%	6%	7%	3%	5%	8%	1%	7%	8%

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 = 10,804)

Main destination types for an international leisure trip (Long-haul)

The desire to roam around is particularly high in long-haul markets, notably in Brazil, South Korea, Japans and GCC markets. Given the strong position of Britain in mind of long-haul markets, opportunities of promoting multiple Britain destinations / tours seem high.

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Large city	48%	52%	46%	57%	46%	61%	59%	58%	44%	52%	46%	49%
I will roam around, visiting many types of places	43%	48%	46%	61%	41%	50%	49%	52%	42%	54%	51%	42%
Coastline	38%	37%	31%	22%	34%	42%	40%	35%	41%	43%	42%	35%
Small/mid-sized city/town	30%	32%	34%	36%	31%	38%	41%	44%	21%	32%	23%	25%
Countryside or village	26%	31%	37%	24%	31%	31%	41%	26%	36%	23%	38%	29%
Mountains or hills	25%	29%	30%	31%	24%	21%	60%	17%	34%	19%	43%	26%
I'm not sure	6%	5%	9%	4%	12%	1%	2%	8%	3%	3%	2%	10%

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 = 10,804)

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Main destination types for a leisure trip in Europe

Those who intend to visit Britain confirms over-indexing the most on large cities. Scotland and Wales potential visitors are more likely to say that they want to roam around.

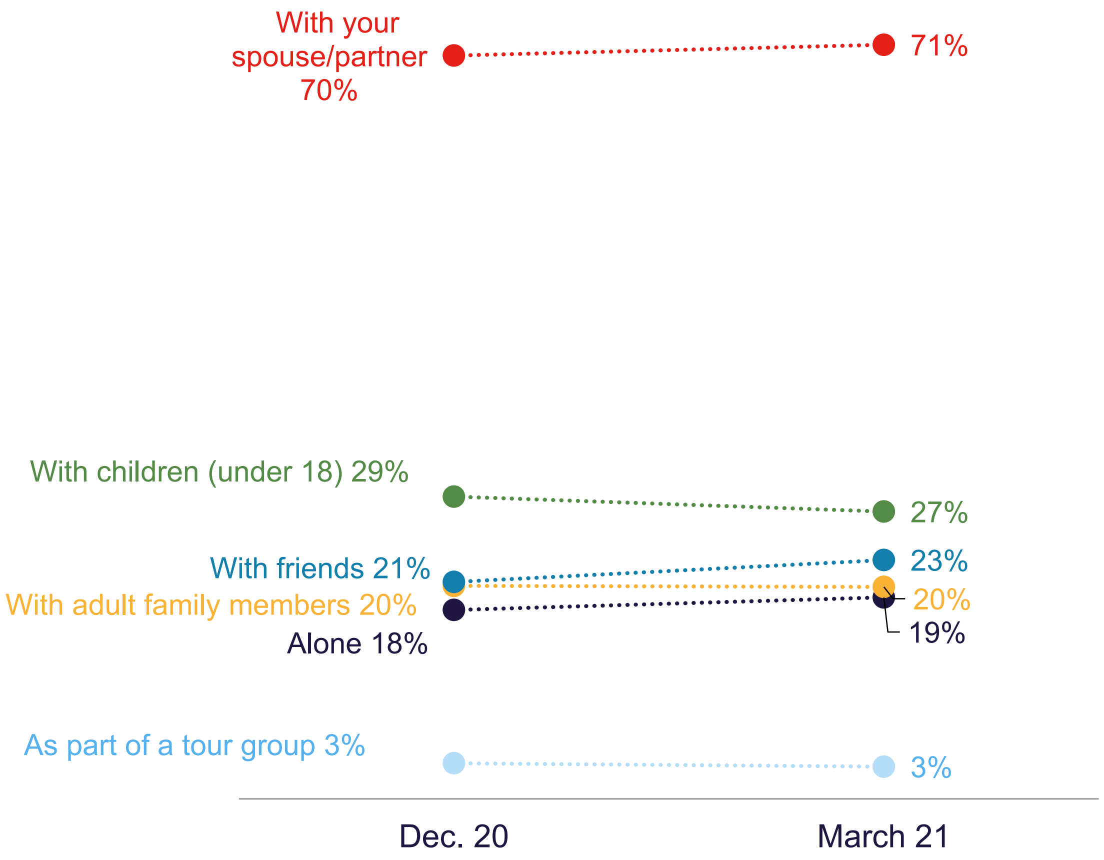
	Europe Intenders	Britain Intenders	England potential visitors	Scotland potential visitors	Wales potential visitors	London potential visitors
Large city	51%	64%	60%	48%	57%	67%
I will roam around, visiting many types of places	43%	52%	46%	52%	57%	45%
Coastline	39%	41%	38%	45%	52%	37%
Small/mid-sized city/town	32%	40%	32%	39%	48%	32%
Countryside or village	27%	32%	27%	36%	45%	24%
Mountains or hills	27%	30%	27%	36%	43%	24%
I'm not sure	5%	4%	4%	4%	3%	3%

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 = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552)

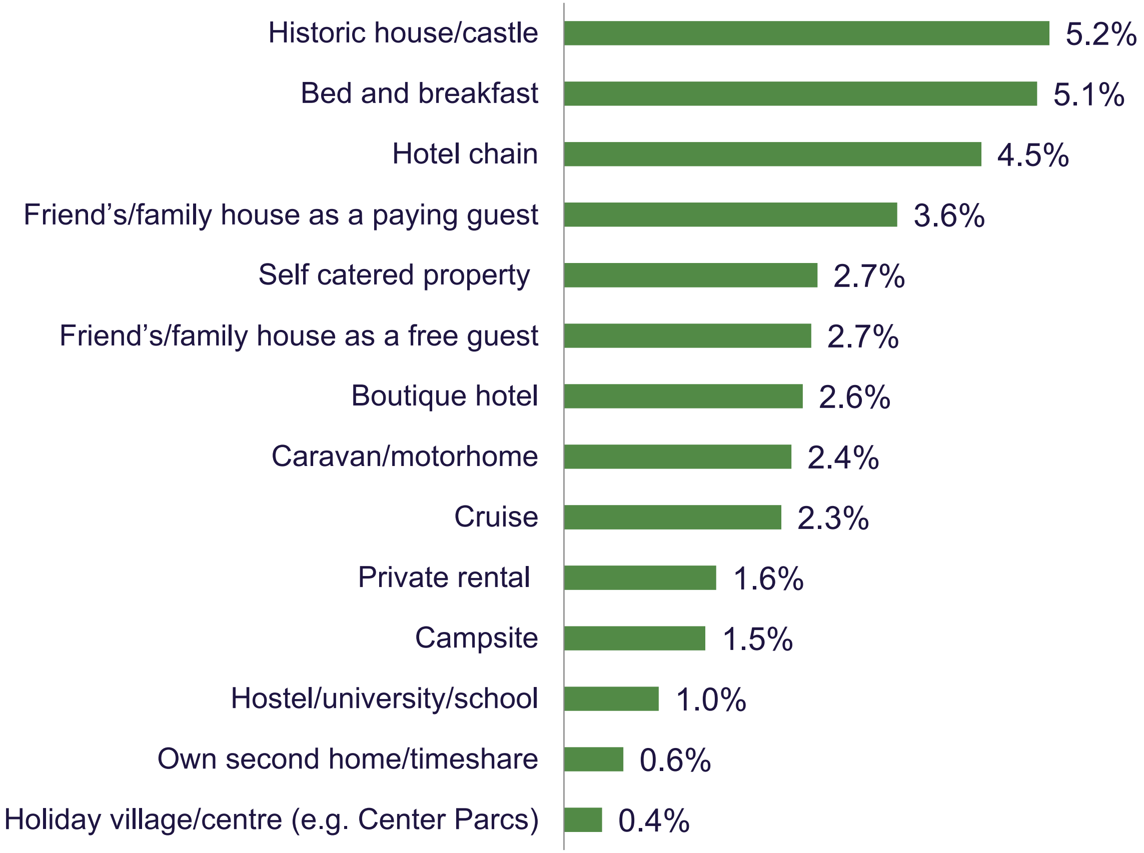
Trends: December 2020 vs March 2021

The demand for travelling with friends has increased while groups remains low in considerations. The rise of interest for many types of accommodation reflects stronger desire and confidence in travel. The focus on historical house/castle is interesting for Britain!

Travel party



Accommodation (W2/W1 Evol. %)



Trend calculated at constant perimeter (14 markets consolidated)

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Travel party for an international leisure trip (Short-haul)

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

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
With your spouse/partner	70%	70%	66%	67%	68%	70%	72%	73%	68%	69%	77%	73%
With children (under 18)	28%	25%	24%	28%	24%	28%	23%	24%	23%	25%	28%	27%
With friends	23%	25%	22%	17%	17%	18%	24%	27%	35%	25%	23%	44%
With adult family members	20%	21%	20%	16%	13%	18%	15%	23%	29%	18%	22%	33%
Alone	19%	20%	19%	16%	19%	20%	15%	22%	31%	12%	14%	30%
As part of a tour group	4%	3%	4%	2%	1%	1%	2%	5%	5%	7%	2%	6%

Q18: Would you envisage traveling… (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)

Travel party for an international leisure trip (Long-haul)

Families trips are particularly considered in GCC markets and Brazil while trips with spouse/partners from the US is expected to be very popular. Transversally, tour group seems low in consideration across markets.

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
With your spouse/partner	70%	70%	67%	75%	67%	74%	72%	62%	72%	66%	64%	74%
With children (under 18)	28%	29%	26%	37%	21%	25%	41%	19%	39%	26%	39%	27%
With friends	23%	21%	14%	22%	18%	19%	30%	28%	16%	28%	16%	19%
With adult family members	20%	20%	15%	24%	17%	20%	32%	19%	20%	26%	20%	14%
Alone	19%	18%	24%	20%	22%	12%	18%	26%	15%	14%	21%	17%
As part of a tour group	4%	4%	3%	5%	2%	2%	5%	4%	2%	5%	3%	5%

Q18: Would you envisage traveling… (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)

Travel party for a leisure trip in Europe/Britain

All markets consolidated, Intenders to Britain seem envisaging a larger than average travel cell including children or other adult travel companions. This trend suggests a good potential affinity with “road trip” type of travel. Wales records stronger interest amongst those with children and groups.

	Europe Intenders	Britain Intenders	England pot. visitors	Scotland pot. visitors	Wales pot. visitors	London pot. visitors	Large City Intenders
With your spouse/partner	72%	72%	71%	73%	75%	72%	70%
With children (under 18)	28%	33%	32%	31%	38%	31%	30%
With friends	24%	27%	24%	25%	27%	26%	26%
With adult family members	20%	23%	21%	22%	25%	22%	22%
Alone	20%	23%	20%	20%	23%	22%	21%
As part of a tour group	3%	4%	3%	4%	6%	3%	4%

Q18: Would you envisage traveling… (Multiple Answers)
Base: Europe Int. (n = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552) – Large City Int. (n = 5,230)

Accommodation types for an international leisure trip (Short-haul)

Hotel chains are confirmed by most to be a preferred choice for a next leisure trip abroad, potentially suggesting a higher level of trust in COVID-19 protocols implemented in well known brands. Self-catered accommodation is also confirmed as a popular option in COVID-19 era. The consideration levels for self-catering and B&Bs are on the same level in Europe.

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Hotel chain	64%	65%	72%	45%	62%	61%	61%	66%	77%	65%	67%	75%
Bed and breakfast	35%	39%	48%	24%	35%	36%	54%	44%	40%	45%	15%	51%
Boutique hotel	33%	28%	20%	37%	30%	35%	28%	27%	18%	11%	48%	26%
Self catered property (rented house, cottage, chalet, apartment)	32%	39%	44%	20%	49%	45%	36%	47%	42%	36%	27%	48%
Friend's/family house as a free guest	27%	30%	33%	20%	28%	44%	25%	29%	31%	17%	28%	41%
Private rental such as Airbnb, Couchsurfing, FlipKey	27%	29%	28%	30%	25%	29%	34%	28%	26%	25%	29%	30%
Historic house/castle	25%	25%	29%	9%	21%	20%	26%	32%	31%	15%	31%	37%
Holiday village/centre (e.g. Center Parcs)	22%	22%	22%	17%	24%	22%	26%	34%	24%	18%	15%	21%
Cruise	19%	17%	19%	8%	16%	12%	17%	18%	25%	12%	17%	27%
Friend's/family house as a paying guest	17%	18%	17%	12%	26%	22%	15%	23%	10%	7%	17%	33%
Campsite	13%	14%	18%	11%	18%	15%	10%	23%	13%	11%	8%	15%
Hostel/university/school	13%	11%	12%	6%	8%	10%	7%	13%	6%	10%	18%	22%
Own second home/timeshare	12%	14%	29%	7%	12%	14%	12%	18%	10%	5%	5%	33%
Caravan/motorhome	12%	13%	17%	6%	20%	13%	7%	23%	13%	5%	11%	17%

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 = 10,804)

Accommodation types for an international leisure trip (Long-haul)

Long-haul markets express high intention to staying in boutique hotels beyond chains that drive however the highest level of interest. Brazil shows a stronger than average consideration level for self catered properties and private rentals. Cruise is also a popular option envisaged in the US market.

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Hotel chain	64%	63%	69%	74%	66%	48%	61%	84%	46%	77%	47%	70%
Bed and breakfast	35%	31%	45%	13%	37%	30%	39%	12%	17%	42%	26%	38%
Boutique hotel	33%	37%	42%	32%	36%	46%	35%	35%	24%	40%	26%	40%
Self catered property (rented house, cottage, chalet, apartment)	32%	26%	34%	43%	28%	24%	31%	19%	22%	19%	23%	24%
Friend's/family house as a free guest	27%	24%	37%	34%	33%	9%	41%	11%	20%	12%	28%	29%
Private rental such as Airbnb, Couchsurfing, FlipKey	27%	25%	31%	44%	32%	14%	42%	12%	12%	25%	18%	29%
Historic house/castle	25%	25%	29%	31%	27%	31%	34%	20%	15%	17%	14%	29%
Holiday village/centre (e.g. Center Parcs)	22%	21%	22%	19%	17%	35%	42%	7%	16%	12%	20%	15%
Cruise	19%	21%	21%	26%	19%	8%	27%	18%	25%	9%	25%	29%
Friend's/family house as a paying guest	17%	16%	21%	21%	19%	6%	35%	7%	17%	9%	18%	17%
Campsite	13%	12%	10%	12%	14%	9%	20%	7%	12%	7%	15%	12%
Hostel/university/school	13%	14%	12%	19%	11%	11%	21%	11%	20%	11%	23%	10%
Own second home/timeshare	12%	10%	8%	14%	9%	9%	17%	5%	8%	6%	12%	12%
Caravan/motorhome	12%	11%	16%	11%	12%	9%	20%	5%	9%	7%	11%	10%

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 = 10,804)

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 potential visitors over-index on holiday villages/centres and historic houses/castles.

	Europe Intenders	Britain Intenders	England pot. visitors	Scotland pot. visitors	Wales pot. visitors	London pot. visitors	Large City Intenders
Hotel chain	65%	69%	66%	66%	68%	71%	71%
Bed and breakfast	37%	44%	36%	42%	43%	37%	37%
Self catered property (rented house, cottage, chalet, apartment)	36%	38%	32%	38%	39%	34%	32%
Boutique hotel	34%	43%	35%	38%	42%	39%	39%
Private rental such as Airbnb, Couchsurfing, FlipKey	28%	32%	30%	33%	35%	33%	30%
Friend's/family house as a free guest	28%	30%	28%	27%	30%	29%	28%
Historic house/castle	28%	36%	26%	36%	41%	27%	28%
Holiday village/centre (e.g. Center Parcs)	23%	29%	24%	28%	33%	22%	24%
Cruise	19%	20%	21%	22%	26%	19%	21%
Friend's/family house as a paying guest	18%	20%	19%	20%	22%	19%	19%
Own second home/timeshare	14%	16%	13%	15%	18%	13%	13%
Hostel/university/school	13%	18%	14%	15%	21%	13%	16%
Campsite	13%	16%	13%	17%	20%	11%	13%
Caravan/motorhome	12%	13%	12%	16%	18%	10%	11%

Q17: For your next international leisure trip, would you be comfortable staying in a … (Multiple Answers)
Base: Europe Int. (n = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552) – Large City Int. (n = 5,230)

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Level of interest in activities (Short-haul)

The desire amongst some to return to many pre-pandemic behaviours when on holiday is confirmed, including interest in iconic tourist attractions but also lively and socialising activities (dining out, local lifestyle, shopping…), particularly among Nordic markets. Outdoor nature activities still rank highly. Self-driving touring is driving a lot of interest in France and the Netherlands, while Russia would take guided excursions. Southern Europeans and Russians as well as the French want to see the history & heritage and sights again.

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

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 = 10,804)

Level of interest in activities (Long-haul)

A range of experiences is also mentioned by most long-haul markets who still consider iconic tourist attractions on top. Shopping seem driving strong interest in some (Brazil, India and GCC markets). With recent concerns heard around lack of potential locals' welcome (in Asian social conversations notably), socializing with locals may not be seen as a priority in most Asian markets.

(% very interested)	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Exploring history and heritage	44%	48%	39%	60%	49%	40%	62%	43%	43%	46%	50%	48%
Visiting famous/iconic tourist attractions	44%	50%	39%	62%	45%	42%	65%	36%	54%	46%	60%	53%
Dining in restaurants/bars, cafes or pubs	43%	44%	32%	59%	40%	31%	57%	39%	45%	42%	51%	48%
Outdoor nature activities	42%	45%	33%	54%	41%	41%	63%	25%	54%	39%	57%	43%
Visiting cultural attractions	41%	45%	31%	59%	37%	42%	56%	42%	46%	45%	51%	44%
Experiencing local lifestyle, socialising with locals	34%	37%	28%	44%	31%	40%	54%	16%	40%	27%	43%	37%
Shopping	34%	39%	27%	52%	23%	34%	61%	36%	49%	37%	53%	32%
Outdoor activ. (hiking, cycling..)	33%	35%	22%	41%	34%	32%	49%	18%	51%	20%	51%	34%
Guided tours/day-excursions	31%	34%	24%	46%	31%	27%	54%	19%	37%	18%	42%	39%
Self-driving tours	29%	29%	24%	41%	29%	30%	44%	10%	32%	19%	35%	25%
Attending cultural events	26%	30%	21%	36%	22%	33%	46%	21%	32%	24%	35%	29%
Culinary activities	25%	29%	18%	35%	22%	32%	43%	20%	25%	31%	29%	28%
Spa/wellness activities	24%	26%	16%	33%	17%	36%	45%	14%	27%	16%	31%	24%
Experiencing destination's nightlife	23%	26%	17%	42%	15%	32%	49%	12%	N/A	15%	N/A	26%
Attending sport events	21%	26%	18%	30%	15%	26%	42%	16%	34%	20%	40%	24%
Learning new skills	21%	26%	13%	38%	15%	30%	46%	10%	34%	14%	38%	19%
Playing sports	18%	23%	12%	24%	14%	28%	44%	13%	30%	13%	31%	18%

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 = 10,804)

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 pot. visitors	Scotland pot. visitors	Wales pot. visitors	London pot. visitors	Large City Intenders
Exploring history and heritage	46%	51%	48%	53%	56%	48%	49%
Visiting famous/iconic tourist attractions	44%	49%	49%	49%	55%	50%	50%
Dining in restaurants/bars, cafes or pubs	44%	46%	47%	45%	47%	47%	50%
Visiting cultural attractions	42%	48%	45%	48%	52%	47%	47%
Outdoor nature activities	42%	45%	44%	49%	52%	41%	43%
Experiencing local lifestyle, socialising with locals	34%	39%	37%	39%	46%	36%	38%
Outdoor activ. (hiking, cycling..)	33%	34%	34%	38%	42%	31%	33%
Shopping	32%	38%	40%	35%	42%	37%	41%
Guided tours/day-excursions	31%	33%	35%	35%	40%	32%	35%
Self-driving tours	30%	30%	30%	34%	38%	27%	30%
Attending cultural events	27%	32%	31%	30%	38%	29%	32%
Culinary activities	25%	29%	28%	31%	37%	25%	29%
Experiencing destination’s nightlife	24%	29%	28%	25%	32%	26%	29%
Spa/wellness activities	23%	25%	27%	26%	34%	24%	28%
Attending sport events	21%	28%	27%	23%	31%	24%	27%
Learning new skills	20%	26%	25%	23%	30%	21%	25%
Playing sports	18%	22%	22%	21%	27%	18%	22%

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 = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552) – Large City Int. (n = 5,230)

Saffron Walden: ©VisitBritain/ Herewegoagain.blog

Key Takeaways

What has changed since Dec. 2020?

Key Takeaways – Overall travel sentiment

1. **Desire to travel internationally remains very high** and has increased in most markets surveyed both in December and March. Japan, South Korea, Australia and Norway show lower intentions to travel abroad compared to the other markets.
2. Travel plans are **getting more concrete**, but bookings are still low and **destination choice remains very open in consumers' mind**.
3. While **high expectations focus on summer 2021** - either for planning holidays abroad and/or reconnecting with friends or relatives as soon as possible - **a third of planners envisage 2022 and beyond** as horizon or **just do not know yet** when they would go.
4. **Vaccination** is confirmed to play a **critical role in triggering short term travel intention and booking**, opening more opportunities to market vaccinated people regardless age groups and segments.
5. **The age continues driving travel sentiment** as younger generations show the strongest intentions to take a trip abroad this year.
6. While vaccination (in markets as well as at destination) accelerates positive travel sentiment, **other obstacles for travel remain very influential in decision making process**: COVID-19 cases at destination, quarantine policies, refund/cancellation flexibility, political environment).
7. Travellers' set of mind shows little changes since last wave and confirms **general expectations for living the full destination experience in safe conditions**, taking the most profit from the stay to explore **both iconic and secondary sites**.
8. **The overall increased positive sentiment benefits to many destination types, activities and accommodation options**. There is no evidence that vaccination would trigger *different* expectations in terms of activities: the incremental confidence vaccination creates helps envisaging *more activities* or *more of activities that were unavailable so far* (such as sport or cultural events).
9. Attitudes towards a more **responsible and sustainable travel** are clearly expressed. It remains yet to be seen how far they will be converted into effective responsible and sustainable behaviours at destination.
10. While socializing is expected as integral part of the next experience at destination, **the concept of immersive social experiences with locals may be less obvious to define,** particularly for Asian markets who report growing concerns on potential lack of locals' welcome.

Key Takeaways – perceptions of destinations/Britain

1. **Europe** maintains and often amplifies its **status of favourite region** in most markets
2. In a few months and fuelled by a spectacular improvement of its COVID-19 sanitary image, **Britain has gained in popularity and competitiveness**, recording the **second largest increase in Europe** in visit intentions after Spain.
3. Britain is now **particularly attractive amongst vaccinated travellers**, sharing the pole position in Europe with France in this group
4. Providing pre-COVID-19 visits' volumes, intention levels and COVID-19 image, the competitive position of Britain is summarized as follows:
    - **1 market in highly favourable competitive position:** China (also very keen at travelling abroad overall)
    - **8 markets in favourable competitive position:** US, Canada, India, Italy, Spain, Sweden, Norway and Irish Republic
    - **8 markets in average competitive position:** Brazil, Australia, S.Korea, UAE, Saudi Arabia, Denmark, Germany and Netherlands
    - **3 markets in at-risk competitive position:** France, Russia and (also due to low travel intentions to Europe) Japan
5. Among the 14 markets surveyed in December 2020:
    - **5 markets have improved their competitive position:** US, India, Germany, Netherlands and Irish Republic
    - **6 markets have kept their favourable competitive position**: Sweden, Norway, Italy, Spain, China and Canada
    - **2 markets have kept their average competitive position**: Saudi Arabia and Australia
    - **1 market remains at risk:** France

Key Takeaways – Segments to target

Confirmed segments and experiences to prioritize for Britain

- Couples / **Young parents / Family / Friends reconnection trips**
- Secondary destinations explorers / **Crowd-escapers / Coastal itineraries**
- **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 / "socializing bubbles"
- **Nature/outdoor active** deals: Golf, Electric bike + B&Bs self-guided tours…
- **Foodies** and hybrid experiences including gastronomy
- "Under sanitary control" **first-in-Europe festive events**
- **Sensorial trip experiences** (Arts in gardens, Suspended bridges, Big Wheels, panoramic views etc).
- **Affluent visitors** targeting the "lucky ones" whom spending power have risen through the crisis
- **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-19 times:
    - Film locations (Netflix and other streaming platforms influence and usage massively growing since COVID-19)
    - 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 - Channels

Planning, booking and influencing channels

1. **OTAs/TOs** well considered across all short-haul markets and among younger generations too. **Intermediaries are seen as trusted channels** in times of uncertainties and should offer **flexible cancellation policies**.
2. **Official destination websites increasingly influential** in the trip planning process as trusted source on both COVID-19-safety (simplified) information and guidance on the "full experience" promotion. Promoting best rated performers (hotels, attractions) in terms of Sanitary Safety is recommended, as well as a timely inventory of what is open and not at destination (Google status).
3. **"Experiential Packages"** including guided / self-guided excursions for roaming travellers in search of maximizing the full experience
4. **SoMe and digital marketing** can generate high ROI as Millennials are to resume international travel sooner.
5. **Transport operators** are expected to offer the most flexible cancellation policies possible. This also applies to Travel Packages.
6. **Travel comparison websites** have a massive influence in sort-haul markets, as consumers are trying to best inform their decision.
7. **Visitor pre-trip consistent and timely information** required to both **end-consumers** and **the Trade** particularly in long-haul markets.
8. **Selling Britain as the "safest post-vaccine Europe gateway"** among long-haul markets as **Europe is still top of mind**.
9. **Promoting multi-modal transport flexibility** while travellers are increasingly building trust in flights, trains, ferries and public transport.
10. Providing clear **itineraries and road maps** (on destination apps) for **roaming travellers using their own/rented cars.**

Giants Causeway: ©VisitBritain/Ben Selway

Appendix

Market Summaries

Paddleboarding: ©VisitBritain/Matthew Williamson Ellis

Australia Market Summary

Travel intentions

62% Intend to travel abroad for leisure*

Among leisure trip intenders:

29% consider **Europe**

10% consider **Britain**

Among Britain intenders:

65% consider England
37% consider Scotland
26% consider London
22% consider Wales

Journey purpose

Holiday	81%
Visit friends or relatives	47%
Other leisure purposes	18%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
32%	31%	32%	5%

Travel drivers

Receiving a Covid-19 vaccination	52%
Money-back guarantee should I wish to cancel my trip	38%
Removal of quarantine policies in destination country	34%
Decrease in coronavirus cases at destination	34%
Government's advice on international travel	33%

Travel attitudes**

I would be happy to take a pre-trip covid-19 test if required	82%
I will favour local destinations instead of traveling internationally	70%
I will look for less crowded places, even if I miss attractions	65%
I will leave booking until later/last minute	62%
Booking through a travel agent is a safer option at the moment	60%

Travel preferences

Top activities

Iconic tourist attractions	39%
History and heritage	39%
Outdoor nature activities	33%
Dining out	32%
Visiting cultural attractions	31%

Destination types

37% Country/ village

46% Large city

46% Will roam around

30% Mountains or hills

34% Small/mid-sized city/town

31% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

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Brazil Market Summary

Travel intentions

82% Intend to travel abroad for leisure*

Among leisure trip intenders:

63% consider **Europe**

10% consider **Britain**

Among Britain intenders:

77% consider England
37% consider London
32% consider Scotland
18% consider Wales

Journey purpose

Holiday	79%
Visit friends or relatives	39%
Other leisure purposes	38%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
12%	31%	47%	10%

Travel drivers

Receiving a Covid-19 vaccination	60%
Decrease in coronavirus cases at destination	40%
Money-back guarantee should I wish to cancel my trip	36%
High proportion ofdestination population being vaccinated	34%
Hygiene & safety protocols in place at destination	33%

*Travel attitudes***

I would be happy to take a pre-trip covid-19 test if required	92%
I will travel internationally as soon as I can after I get the vaccine	88%
I will think more about sustainability and the environmental impact	77%
Booking through a travel agent is a safer option at the moment	74%
I will look for less crowded places to visit, even if I miss attractions	69%

Travel preferences

Top activities

Iconic tourist attractions	62%
History and heritage	60%
Visiting cultural attractions	59%
Dining out	59%
Outdoor nature activities	54%

Destination types

- 24% Country/ village
- 57% Large city
- 61% Will roam around
- 31% Mountains or hills
- 36% Small/mid-sized city/town
- 22% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

Canada Market Summary

Travel intentions

63% Intend to travel abroad for leisure*

Among leisure trip intenders:

- **45%** consider **Europe**
- **12%** consider **Britain**

Among Britain intenders:

- **62%** consider England
- **35%** consider Scotland
- **23%** consider London
- **15%** consider Wales

Journey purpose

Holiday	86%
Visit friends or relatives	43%
Other leisure purposes	19%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
32%	32%	30%	6%

Travel drivers

Receiving a Covid-19 vaccination	54%
Money-back guarantee should I wish to cancel my trip	38%
Decrease in coronavirus cases at destination	37%
Removal of quarantine policies in destination country	35%
High proportion of destination population being vaccinated	33%

Travel attitudes**

I would be happy to take a pre-trip covid-19 test if required	83%
I will look for less crowded places to visit, even if I miss attractions	66%
I will favour local destinations instead of traveling internationally	65%
Booking through a travel agent is a safer option at the moment	59%
I will think more about sustainability and the environmental impact	57%

Travel preferences

Top activities

History and heritage	49%
Iconic tourist attractions	45%
Outdoor nature activities	41%
Dining out	40%
Visiting cultural attractions	37%

Destination types

- 31% Country/ village
- 46% Large city
- 41% Will roam around
- 24% Mountains or hills
- 31% Small/mid-sized city/town
- 34% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

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China Market Summary

Travel intentions

82% Intend to travel abroad for leisure*

Among leisure trip intenders:

62% consider **Europe**

32% consider **Britain**

Among Britain intenders:

56% consider England
41% consider Scotland
24% consider London
21% consider Wales

Journey purpose

Holiday	73%
For other leisure purposes	38%
To visit friends or relatives	13%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
23%	55%	18%	4%

Travel drivers

Stable political environment in destination country	29%
Receiving a Covid-19 vaccination	28%
Hygiene & safety protocols in place at destination	28%
Decrease in coronavirus cases at destination	27%
Removal of quarantine policies in destination country	25%

Travel attitudes**

I would be happy to take a pre-trip covid-19 test if required	89%
Booking through a travel agent is a safer option at the moment	87%
I will look for less crowded places to visit, even if I miss attractions	87%
I will think more about sustainability and the environmental impact	87%
I will be intending to take fewer but longer holidays	81%

Travel preferences

Top activities

Visiting cultural attractions	42%
Iconic tourist attractions	42%
Outdoor nature activities	41%
History and heritage	40%
Experiencing local lifestyle	40%

Destination types

31% Country/ village

61% Large city

50% Will roam around

21% Mountains or hills

38% Small/mid-sized city/town

42% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

Denmark Market Summary

Travel intentions

72% Intend to travel abroad for leisure*

Among leisure trip intenders:

77% consider **Europe**

10% consider **Britain**

Among Britain intenders:

44% consider England
34% consider Scotland
19% consider London
9% consider Wales

Journey purpose

Holiday	81%
Visit friends or relatives	31%
Other leisure purposes	13%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
25%	25%	37%	12%

Travel drivers

Receiving a Covid-19 vaccination	59%
Money-back guarantee should I wish to cancel my trip	45%
Removal of quarantine policies in destination country	43%
Removal of quarantine policies in home country	37%
Decrease in coronavirus cases at destination	36%

Travel attitudes**

I would be happy to take a pre-trip covid-19 test if required	88%
I will look for less crowded places to visit, even if I miss attractions	69%
I will leave booking until later/last minute	61%
Booking through a travel agent is a safer option at the moment	57%
I will travel internationally as soon as I can after I get the vaccine	56%

Travel preferences

Top activities

Dining out	43%
Iconic tourist attractions	33%
Outdoor nature activities	33%
History and heritage	28%
Visiting cultural attractions	27%

Destination types

22% Country/ village

40% Large city

38% Will roam around

22% Mountains or hills

25% Small/mid-sized city/town

40% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

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France Market Summary

Travel intentions

80% Intend to travel abroad for leisure*

Among leisure trip intenders:

67% consider **Europe**

6% consider **Britain**

Among Britain intenders:

43% consider England
43% consider Scotland
21% consider London
12% consider Wales

Journey purpose

Holiday	89%
Visit friends or relatives	32%
Other leisure purposes	15%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
36%	30%	26%	9%

Travel drivers

Money-back guarantee should I wish to cancel my trip	45%
Removal of quarantine policies in destination country	34%
Receiving a Covid-19 vaccination	32%
Decrease in coronavirus cases at destination	31%
Removal of quarantine policies in home country	29%

Travel attitudes**

I would be happy to take a pre-trip covid-19 test if required	79%
I will travel internationally as soon as I can after I get the vaccine	66%
I will leave booking until later/last minute	61%
I will look for less crowded places to visit, even if I miss attractions	57%
I would be comfortable using public transport within the destination	55%

Travel preferences

Top activities

Self-driving tours	52%
Dining out	48%
History and heritage	47%
Outdoor nature activities	45%
Visiting cultural attractions	41%

Destination types

22% Country/ village

37% Large city

34% Will roam around

14% Mountains or hills

25% Small/mid-sized city/town

35% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

Germany Market Summary

Travel intentions

67%
Intend to travel abroad for leisure*

Among leisure trip intenders:

72% consider **Europe**

9% consider **Britain**

Among Britain intenders:

48% consider Scotland
36% consider England
17% consider London
12% consider Wales

Journey purpose

Holiday	89%
Visit friends or relatives	27%
Other leisure purposes	15%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
27%	37%	27%	9%

Travel preferences

Top activities

Dining out	42%
Outdoor nature activities	40%
History and heritage	36%
Iconic tourist attractions	36%
Outdoor activities	32%

Destination types

- 18% Country/ village
- 28% Large city
- 34% Will roam around
- 26% Mountains or hills
- 19% Small/mid-sized city/town
- 49% Coastline

Travel drivers

Receiving a Covid-19 vaccination	43%
Removal of quarantine policies in destination country	43%
Money-back guarantee should I wish to cancel my trip	37%
Removal of quarantine policies in home country	36%
Decrease in coronavirus cases at destination	35%

*Travel attitudes***

I would be happy to take a pre-trip covid-19 test if required	78%
I will look for less crowded places to visit, even if I miss attractions	68%
I will leave booking until later/last minute	67%
I will travel internationally as soon as I can after I get the vaccine	56%
I will think more about sustainability and the environmental impact	54%

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

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India Market Summary

Travel intentions

90% Intend to travel abroad for leisure*

Among leisure trip intenders:

45% consider **Europe**

16% consider **Britain**

Among Britain intenders:

77% consider England
50% consider Scotland
27% consider Wales
24% consider London

Journey purpose

Holiday	78%
Visit friends or relatives	51%
Other leisure purposes	48%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
14%	37%	38%	11%

Travel drivers

Hygiene & safety protocols in place at destination	47%
Receiving a Covid-19 vaccination	41%
Decrease in coronavirus cases at destination	34%
Money-back guarantee should I wish to cancel my trip	27%
Government's advice on international travel	27%

Travel attitudes**

I would be happy to take a pre-trip covid-19 test if required	90%
I will think more about sustainability and the environmental impact	90%
I will look for less crowded places to visit, even if I miss attractions	87%
I will travel internationally as soon as I can after I get the vaccine	86%
I will be intending to take fewer but longer holidays	86%

Travel preferences

Top activities

Iconic tourist attractions	65%
Outdoor nature activities	63%
History and heritage	62%
Shopping	61%
Dining out	57%

Destination types

- 41% Country/ village
- 59% Large city
- 49% Will roam around
- 60% Mountains or hills
- 41% Small/mid-sized city/town
- 40% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

Irish Republic Market Summary

Travel intentions

68% Intend to travel abroad for leisure*

Among leisure trip intenders:

78% consider **Europe**

15% consider **Britain**

Among Britain intenders:

56% consider England
33% consider Scotland
23% consider London
12% consider Wales

Journey purpose

Holiday	79%
Visit friends or relatives	50%
Other leisure purposes	18%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
32%	29%	32%	6%

Travel drivers

Receiving a Covid-19 vaccination	56%
Money-back guarantee should I wish to cancel my trip	42%
Decrease in coronavirus cases at destination	35%
Removal of quarantine policies in destination country	34%
Removal of quarantine policies in home country	33%

Travel attitudes**

I would be happy to take a pre-trip covid-19 test if required	80%
I will look for less crowded places to visit, even if I miss attractions	72%
I will leave booking until later/last minute	64%
I will travel internationally as soon as I can after I get the vaccine	59%
I will favor destinations I have been before rather than new places	57%

Travel preferences

Top activities

Outdoor nature activities	43%
Dining out	43%
Iconic tourist attractions	37%
History and heritage	36%
Visiting cultural attractions	32%

Destination types

24% Country/ village

47% Large city

25% Will roam around

17% Mountains or hills

26% Small/mid-sized city/town

40% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

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Italy Market Summary

Travel intentions

81% Intend to travel abroad for leisure*

Among leisure trip intenders:

70% consider **Europe**

14% consider **Britain**

Among Britain intenders:

57% consider England
47% consider Scotland
25% consider London
13% consider Wales

Journey purpose

Holiday	91%
Visit friends or relatives	32%
Other leisure purposes	25%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
21%	41%	34%	3%

Travel drivers

Receiving a Covid-19 vaccination	48%
Money-back guarantee should I wish to cancel my trip	40%
Hygiene & safety protocols in place at destination	37%
Decrease in coronavirus cases at destination	31%
An attractive offer e.g. discounts on flights or accommodation	29%

*Travel attitudes***

I would be happy to take a pre-trip covid-19 test if required	85%
I will travel internationally as soon as I can after I get the vaccine	77%
I will look for less crowded places to visit, even if I miss attractions	71%
I will think more about sustainability and the environmental impact	71%
I will leave booking until later/last minute	62%

Travel preferences

Top activities

History and heritage	57%
Visiting cultural attractions	53%
Iconic tourist attractions	52%
Outdoor nature activities	49%
Dining out	42%

Destination types

- 22% Country/ village
- 57% Large city
- 54% Will roam around
- 21% Mountains or hills
- 35% Small/mid-sized city/town
- 37% Coastline

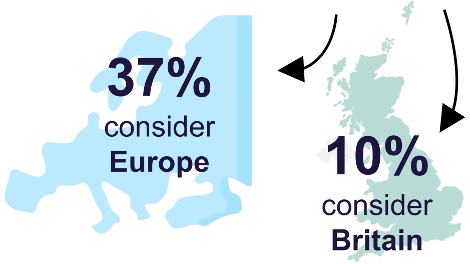
*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

Japan Market Summary

Travel intentions

42% Intend to travel abroad for leisure*

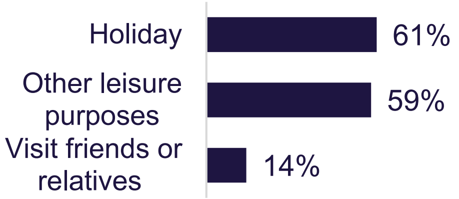
Among leisure trip intenders:



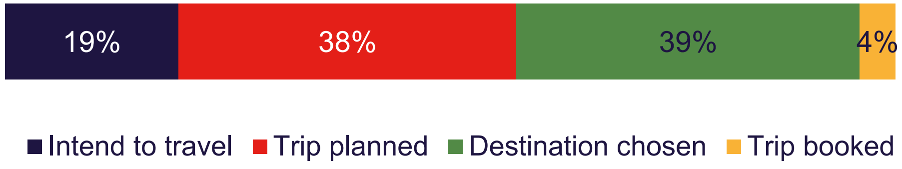
Among Britain intenders:

61% consider England
40% consider Scotland
25% consider London
21% consider Wales

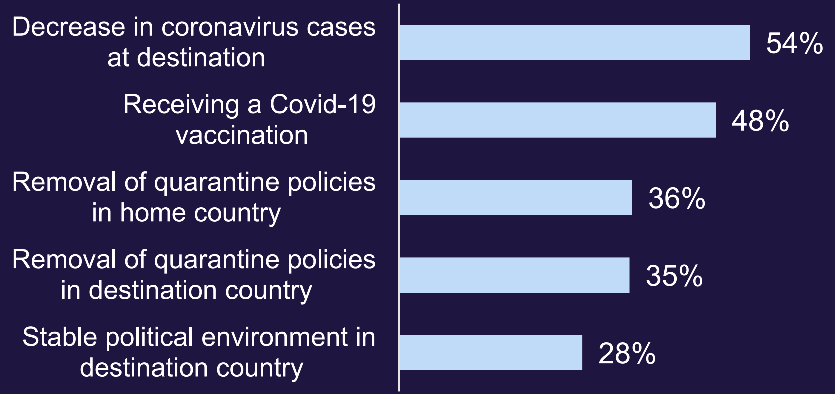
Journey purpose



Planning stage



Travel drivers



Travel attitudes**

Travel preferences

Top activities

Destination types

- 26% Country/village
- 58% Large city
- 52% Will roam around
- 17% Mountains or hills
- 44% Small/mid-sized city/town
- 35% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

Netherlands Market Summary

Travel intentions

72% Intend to travel abroad for leisure*

Among leisure trip intenders:

71% consider **Europe**

8% consider **Britain**

Among Britain intenders:

44% consider England
35% consider Scotland
18% consider London
13% consider Wales

Journey purpose

Holiday	88%
Visit friends or relatives	35%
Other leisure purposes	20%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
28%	28%	29%	15%

Travel drivers

Receiving a Covid-19 vaccination	43%
Removal of quarantine policies in destination country	41%
Money-back guarantee should I wish to cancel my trip	36%
Removal of quarantine policies in home country	32%
Government's advice on international travel	31%

Travel attitudes**

I would be happy to take a pre-trip covid-19 test if required	71%
I will leave booking until later/last minute	70%
I will travel internationally as soon as I can after I get the vaccine	66%
I will look for less crowded places to visit, even if I miss attractions	65%
Booking through a travel agent is a safer option at the moment	56%

Travel preferences

Top activities

Dining out	48%
Outdoor activities	47%
Outdoor nature activities	43%
Self-driving tours	41%
History and heritage	39%

Destination types

- 21% Country/ village
- 37% Large city
- 38% Will roam around
- 31% Mountains or hills
- 28% Small/mid-sized city/town
- 37% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

Norway Market Summary

Travel intentions

53% Intend to travel abroad for leisure*

Among leisure trip intenders:

76% consider **Europe**

14% consider **Britain**

Among Britain intenders:

60% consider England
28% consider Scotland
28% consider London
10% consider Wales

Journey purpose

Holiday	82%
Visit friends or relatives	35%
Other leisure purposes	14%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
36%	20%	37%	6%

Travel drivers

Receiving a Covid-19 vaccination	43%
Government's advice on international travel	41%
Removal of quarantine policies in home country	40%
Removal of quarantine policies in destination country	40%
Money-back guarantee should I wish to cancel my trip	34%

Travel attitudes**

I would be happy to take a pre-trip covid-19 test if required	85%
I will look for less crowded places to visit, even if I miss attractions	65%
I will travel internationally as soon as I can after I get the vaccine	58%
I will favour local destinations instead of traveling internationally	54%
I would be comfortable using public transport within the destination	53%

Travel preferences

Top activities

Dining out	51%
History and heritage	28%
Iconic tourist attractions	27%
Visiting cultural attractions	26%
Outdoor nature activities	25%

Destination types

Country/ village	17%
Large city	48%
Will roam around	33%
Mountains or hills	9%
Small/mid-sized city/town	24%
Coastline	43%

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

Russia Market Summary

Travel intentions

83% Intend to travel abroad for leisure*

Among leisure trip intenders:

53% consider **Europe**

2% consider **Britain**

Among Britain intenders:

49% consider England
34% consider Scotland
24% consider London
11% consider Wales

Journey purpose

Leisure purposes	84%
Visit friends or relatives	20%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
11%	46%	40%	3%

Travel drivers

Removal of quarantine policies in destination country	50%
Removal of quarantine policies in home country	43%
An attractive offer e.g. discounts on flights or accommodation	43%
Relaxation of visa requirements	43%
Money-back guarantee should I wish to cancel my trip	35%

*Travel attitudes***

I would be happy to take a pre-trip covid-19 test if required	73%
Booking through a travel agent is a safer option at the moment	69%
I will travel internationally as soon as I can after I get the vaccine	68%
I would be comfortable using public transport within the destination	64%
I will think more about sustainability and the environmental impact	53%

Travel preferences

Top activities

Iconic tourist attractions	51%
History and heritage	47%
Visiting cultural attractions	46%
Guided tours/excursions	44%
Outdoor nature activities	41%

Destination types

13% Country/ village

39% Large city

56% Will roam around

24% Mountains or hills

25% Small/mid-sized city/town

50% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

Saudi Arabia Market Summary

Travel intentions

85% Intend to travel abroad for leisure*

Among leisure trip intenders:

33% consider **Europe**

7% consider **Britain**

Among Britain intenders:

58% consider England
19% consider Scotland
17% consider London
12% consider Wales

Journey purpose

Holiday	70%
Visit friends or relatives	47%
Other leisure purposes	37%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
26%	39%	33%	2%

Travel drivers

An attractive offer e.g. discounts on flights or accommodation	34%
Decrease in coronavirus cases at destination	34%
Relaxation of visa requirements	31%
Receiving a Covid-19 vaccination	27%
Hygiene & safety protocols in place at destination	25%

Travel attitudes**

I would be happy to take a pre-trip covid-19 test if required	86%
I will travel internationally as soon as I can after I get the vaccine	82%
I will look for less crowded places to visit, even if I miss attractions	82%
Booking through a travel agent is a safer option at the moment	77%
I will be intending to take fewer but longer holidays	76%

Travel preferences

Top activities

Iconic tourist attractions	54%
Outdoor nature activities	54%
Outdoor activities	51%
Shopping	49%
Visiting cultural attractions	46%

Destination types

36% Country/village
44% Large city
42% Will roam around
34% Mountains or hills
21% Small/mid-sized city/town
41% Coastline

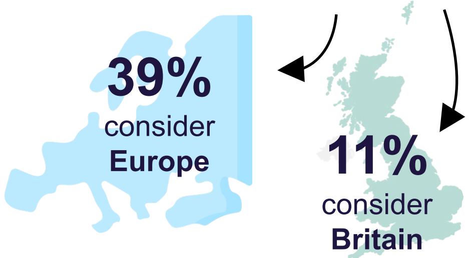
*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

South Korea Market Summary

Travel intentions

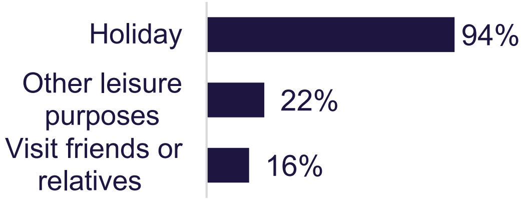
56%
Intend to travel abroad for leisure*

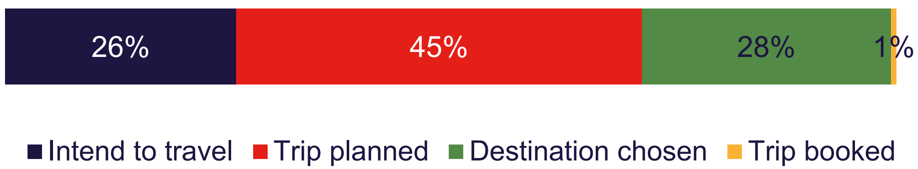
Among leisure trip intenders:



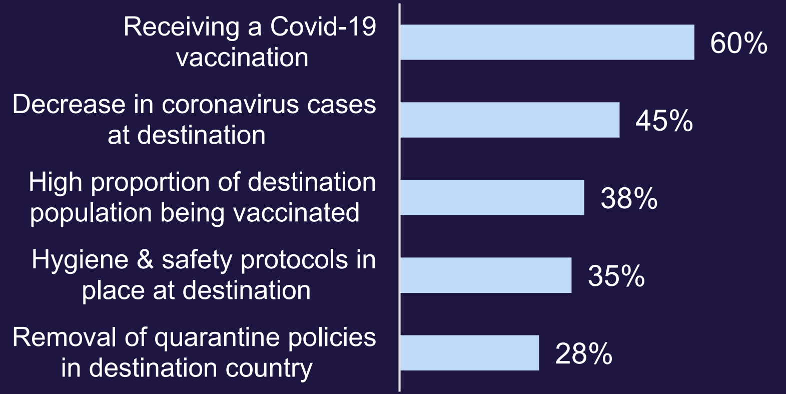
Among Britain intenders:

64% consider England
35% consider Scotland
23% consider London
14% consider Wales





Travel drivers



Travel attitudes**

Travel preferences

Destination types

23% Country/ village

52% Large city

54% Will roam around

19% Mountains or hills

32% Small/mid-sized city/town

43% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

Spain Market Summary

Travel intentions

77% Intend to travel abroad for leisure*

Among leisure trip intenders:

77% consider **Europe**

14% consider **Britain**

Among Britain intenders:

51% consider England
50% consider Scotland
24% consider London
13% consider Wales

Journey purpose

Holiday	87%
Visit friends or relatives	33%
Other leisure purposes	25%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
24%	35%	36%	4%

Travel drivers

Receiving a Covid-19 vaccination	41%
Money-back guarantee should I wish to cancel my trip	40%
Hygiene & safety protocols in place at destination	37%
Decrease in coronavirus cases at destination	36%
Removal of quarantine policies in destination country	34%

*Travel attitudes***

I would be happy to take a pre-trip covid-19 test if required	84%
I will favour local destinations instead of traveling internationally	73%
I will look for less crowded places to visit, even if I miss attractions	72%
I will think more about sustainability and the environmental impact	69%
I will leave booking until later/last minute	67%

Travel preferences

Top activities

History and heritage	53%
Visiting cultural attractions	45%
Outdoor nature activities	40%
Dining out	38%
Iconic tourist attractions	37%

Destination types

- 12% Country/ village
- 54% Large city
- 27% Will roam around
- 24% Mountains or hills
- 32% Small/mid-sized city/town
- 26% Coastline

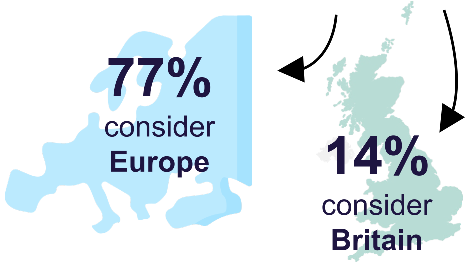
*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

Sweden Market Summary

Travel intentions

67%
Intend to travel abroad for leisure*

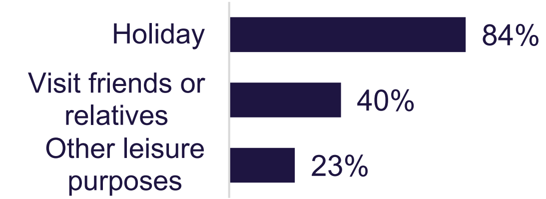
Among leisure trip intenders:



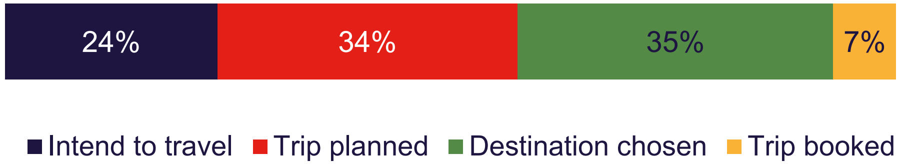
Among Britain intenders:

50% consider England
31% consider Scotland
25% consider London
8% consider Wales

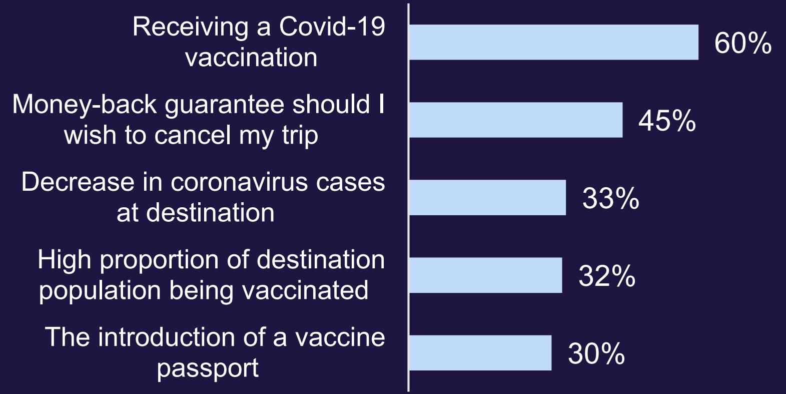
Journey purpose



Planning stage



Travel drivers



*Travel attitudes***

Travel preferences

Top activities

Destination types

26% Country/ village

52% Large city

30% Will roam around

16% Mountains or hills

29% Small/mid-sized city/town

36% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

UAE Market Summary

Travel intentions

86% Intend to travel abroad for leisure*

Among leisure trip intenders:

38% consider **Europe**

7% consider **Britain**

Among Britain intenders:

64% consider England
26% consider Scotland
19% consider London
12% consider Wales

Journey purpose

Holiday	76%
Visit friends or relatives	60%
Other leisure purposes	33%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
25%	33%	36%	5%

Travel drivers

Decrease in coronavirus cases at destination	34%
An attractive offer e.g. discounts on flights or accommodation	34%
Relaxation of visa requirements	32%
Receiving a Covid-19 vaccination	27%
Hygiene & safety protocols in place at destination	27%

*Travel attitudes***

I would be happy to take a pre-trip covid-19 test if required	90%
I will look for less crowded places to visit, even if I miss attractions	82%
I will travel internationally as soon as I can after I get the vaccine	82%
Booking through a travel agent is a safer option at the moment	76%
I will think more about sustainability and the environmental impact	76%

Travel preferences

Top activities

Iconic tourist attractions	60%
Outdoor nature activities	57%
Shopping	53%
Outdoor activities	51%
Dining out	51%

Destination types

- 38% Country/village
- 46% Large city
- 51% Will roam around
- 43% Mountains or hills
- 23% Small/mid-sized city/town
- 42% Coastline

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

USA Market Summary

Travel intentions

73% Intend to travel abroad for leisure*

Among leisure trip intenders:

52% consider **Europe**

13% consider **Britain**

Among Britain intenders:

63% consider England
36% consider Scotland
25% consider London
16% consider Wales

Journey purpose

Holiday	85%
Visit friends or relatives	32%
Other leisure purposes	29%

Planning stage

Intend to travel	Trip planned	Destination chosen	Trip booked
26%	34%	25%	16%

Travel drivers

Receiving a Covid-19 vaccination	41%
Money-back guarantee should I wish to cancel my trip	38%
Hygiene & safety protocols in place at destination	35%
Decrease in coronavirus cases at destination	34%
High proportion of destination population being vaccinated	34%

Travel attitudes**

I would be happy to take a pre-trip covid-19 test if required	81%
I will look for less crowded places to visit, even if I miss attractions	66%
Booking through a travel agent is a safer option at the moment	60%
I will favour local destinations instead of traveling internationally	60%
I will think more about sustainability and the environmental impact	57%

Travel preferences

Top activities

Iconic tourist attractions	53%
History and heritage	48%
Dining out	48%
Visiting cultural attractions	44%
Outdoor nature activities	43%

Destination types

Country/village	29%
Large city	49%
Will roam around	42%
Mountains or hills	26%
Small/mid-sized city/town	25%
Coastline	35%

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree

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Loch Ness: ©VisitBritain/Andrew Pickett

Destination Summaries

Britain – Intenders Profile

Travel intentions & Profile

% intending to visit the UK

Total	Short Haul	Long Haul	AU	BR	CA	CN	DK	FR	GE	IN	IR	IT	JP	NL	NO	RU	SA	KR	ES	SE	UAE	USA
13%	11%	14%	10%	10%	12%	32%	10%	6%	9%	16%	15%	14%	10%	8%	14%	2%	7%	11%	14%	14%	7%	13%

Channel booking

TAs/TOs - Online	42%
Travel comparison website	42%
Airline/train/ferry operator	42%
Destination website direct	38%
Accom. Provider direct	35%
TAs/TOs - Storefront	30%

Travel Party

With your spouse/partner	72%
With children (under 18)	33%
With friends	27%
With adult family members	23%
Alone	23%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
41%	37%	22%

Ever visited Britain

Several times	Once	No
38%	35%	28%

Travel drivers

Receiving a COVID-19 vaccination	44%
A significant decrease in coronavirus cases at destination	37%
Money-back guarantee should I wish to cancel my trip	33%
Removal of quarantine policies in destination country	32%
Hygiene & safety protocols in place at destination	31%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	86%
I will look for less crowded places, even if I miss attractions	72%
I will travel internationally as soon as I can after I get the vaccine	69%
I will think more about sustainability and the environmental impact	69%
Booking through a travel agent is a safer option at the moment	66%

Travel preferences

Top activities

History and heritage	51%
Iconic tourist attractions	49%
Visiting cultural attractions	48%
Dining out	46%
Outdoor nature activities	45%

Destination types

Country/village	32%
Large city	64%
Will roam around	53%
Mountains or hills	30%
Small/mid-sized city/town	41%
Coastline	41%

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK on your next international leisure trip (n = 1,360)

Britain – Intenders Profile (Short-haul)

Travel intentions & Profile

% intending to visit the UK

Short Haul	DK	FR	GE	IR	IT	NL	NO	RU	ES	SE
11%	10%	6%	9%	15%	14%	8%	14%	2%	14%	14%

Channel booking

Airline/train/ferry operator	48%
Travel comparison website	41%
Accom. Provider direct	35%
TAs/TOs - Online	32%
Destination website direct	29%
TAs/TOs - Storefront	18%

Travel Party

With your spouse/partner	64%
With friends	35%
Alone	28%
With adult family members	27%
With children (under 18)	25%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
41%	36%	23%

Ever visited Britain

Several times	Once	No
44%	31%	25%

Travel drivers

Receiving a COVID-19 vaccination	49%
Money-back guarantee should I wish to cancel my trip	41%
A significant decrease in coronavirus cases at destination	38%
Removal of quarantine policies in destination country	34%
A high proportion of destination population being vaccinated	32%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	82%
I will look for less crowded places, even if I miss attractions	69%
I will travel internationally as soon as I can after I get the vaccine	64%
I will leave booking until later/last minute	64%
I will think more about sustainability and the environmental impact	60%

Travel preferences

Top activities

Dining out	48%
History and heritage	48%
Visiting cultural attractions	45%
Iconic tourist attractions	44%
Outdoor nature activities	42%

Destination types

- 23% Country/ village
- 64% Large city
- 39% Will roam around
- 23% Mountains or hills
- 36% Small/mid-sized city/town
- 32% Coastline

Note: TA/TO = Travel Agencies/Tour Operators

Base: Respondents intending to visit the UK on your next international leisure trip (n = 524)

Britain – Intenders Profile (Long-haul)

Travel intentions & Profile

% intending to visit the UK

Long Haul	AU	BR	CA	CN	IN	JP	SA	KR	UAE	USA
14%	10%	10%	12%	32%	16%	10%	7%	11%	7%	13%

Channel booking

TAs/TOs - Online	49%
Destination website direct	44%
Travel comparison website	42%
Airline/train/ferry operator	38%
TAs/TOs - Storefront	37%
Accom. Provider direct	35%

Travel Party

With your spouse/partner	77%
With children (under 18)	37%
With friends	22%
With adult family members	21%
Alone	20%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
41%	37%	22%

Ever visited Britain

Several times	Once	No
34%	37%	29%

Travel drivers

Receiving a COVID-19 vaccination	40%
A significant decrease in coronavirus cases at destination	36%
Hygiene & safety protocols in place at destination	34%
A high proportion of destination population being vaccinated	30%
Removal of quarantine policies in destination country	30%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	89%
Booking through a travel agent is a safer option at the moment	75%
I will think more about sustainability and the environmental impact	75%
I will look for less crowded places, even if I miss attractions	74%
I will travel internationally as soon as I can after I get the vaccine	73%

Travel preferences

Top activities

History and heritage	53%
Iconic tourist attractions	51%
Visiting cultural attractions	49%
Outdoor nature activities	47%
Dining out	44%

Destination types

Country/ village	38%
Large city	64%
Will roam around	61%
Mountains or hills	34%
Small/mid-sized city/town	43%
Coastline	47%

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK on your next international leisure trip (n = 836)

England – Potential Visitors Profile

Travel intentions & Profile

■ % intending to visit the UK
■ % of those intending to visit the UK who would consider visiting England

	Total	Short Haul	Long Haul	AU	BR	CA	CN	DK	FR	GE	IN	IR	IT	JP	NL	NO	RU	SA	KR	ES	SE	UAE	USA
% intending to visit the UK	13%	11%	14%	10%	10%	12%	32%	10%	6%	9%	16%	15%	14%	10%	8%	14%	2%	7%	11%	14%	14%	7%	13%
% of those intending to visit the UK who would consider visiting England	11%	8%	13%	9%	10%	11%	29%	7%	5%	6%	15%	12%	11%	9%	6%	12%	2%	6%	10%	10%	11%	6%	10%

Channel booking

TAs/TOs - Online	44%
Travel comparison website	43%
Airline/train/ferry operator	42%
Destination website direct	39%
Accom. Provider direct	35%
TAs/TOs - Storefront	31%

Travel Party

With your spouse/partner	72%
With children (under 18)	34%
With friends	27%
Alone	24%
With adult family members	23%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
42%	37%	21%

Ever visited Britain

Several times	Once	No
39%	35%	26%

Travel drivers

Receiving a COVID-19 vaccination	44%
A significant decrease in coronavirus cases at destination	36%
Money-back guarantee should I wish to cancel my trip	32%
Removal of quarantine policies in destination country	31%
Hygiene & safety protocols in place at destination	31%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	87%
I will travel internationally as soon as I can after I get the vaccine	72%
I will look for less crowded places, even if I miss attractions	72%
I will think more about sustainability and the environmental impact	69%
Booking through a travel agent is a safer option at the moment	67%

Travel preferences

Top activities

History and heritage	50%
Iconic tourist attractions	48%
Visiting cultural attractions	47%
Outdoor nature activities	45%
Dining out	45%

Destination types

Country/ village	32%
Large city	68%
Will roam around	52%
Mountains or hills	29%
Small/mid-sized city/town	41%
Coastline	42%

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting England in the next 12 months (n = 1,155)

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England – Potential Visitors Profile (Short-haul)

Travel intentions & Profile

■ % intending to visit the UK
■ % of those intending to visit the UK who would consider visiting England

	Short Haul	DK	FR	GE	IR	IT	NL	NO	RU	ES	SE
% intending to visit the UK	11%	10%	6%	9%	15%	14%	8%	14%	2%	14%	14%
% of those intending to visit the UK who would consider visiting England	8%	7%	5%	6%	12%	11%	6%	12%	2%	10%	11%

Channel booking

Airline/train/ferry operator	51%
Travel comparison website	41%
Accom. Provider direct	34%
TAs/TOs - Online	33%
Destination website direct	29%
TAs/TOs - Storefront	18%

Travel Party

With your spouse/partner	63%
With friends	36%
Alone	29%
With adult family members	27%
With children (under 18)	27%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
42%	35%	23%

Ever visited Britain

Several times	Once	No
47%	31%	22%

Travel drivers

Receiving a COVID-19 vaccination	49%
Money-back guarantee should I wish to cancel my trip	40%
A significant decrease in coronavirus cases at destination	37%
Removal of quarantine policies in destination country	33%
A high proportion of destination population being vaccinated	32%

Travel attitudes (% completely & somewhat agree)

I would be happy to take a pre-trip COVID-19 test if required	82%
I will look for less crowded places, even if I miss attractions	68%
I will travel internationally as soon as I can after I get the vaccine	66%
I will leave booking until later/last minute	65%
I would be comfortable using public transport within the destination	60%

Travel preferences

Top activities

Dining out	47%
History and heritage	46%
Visiting cultural attractions	45%
Iconic tourist attractions	45%
Outdoor nature activities	41%

Destination types

Country/ village	21%
Large city	70%
Will roam around	33%
Mountains or hills	22%
Small/mid-sized city/town	34%
Coastline	32%

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting England in the next 12 months (n = 405)

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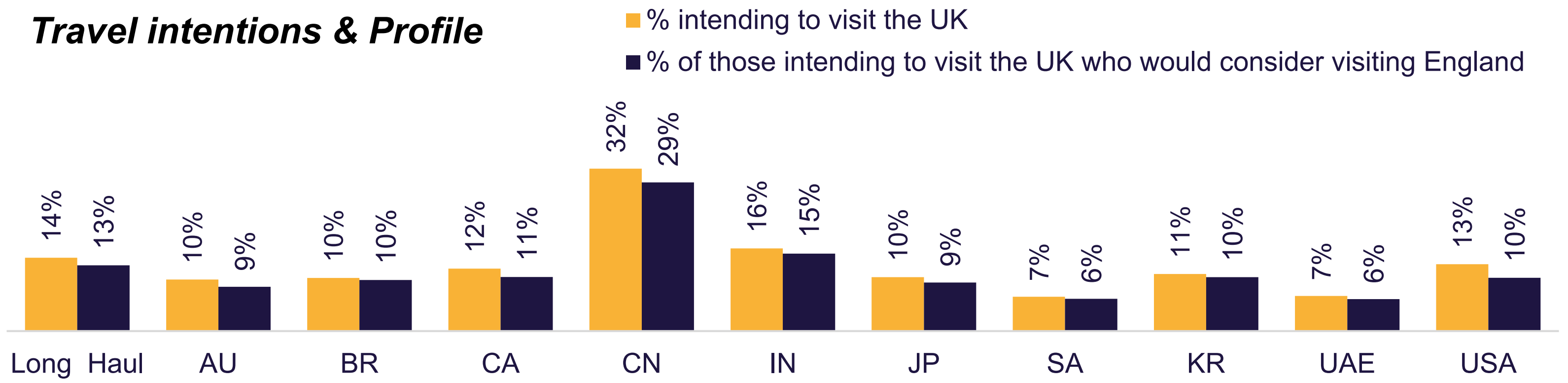
England – Potential Visitors Profile (Long-haul)

Travel intentions & Profile



Channel booking

TAs/TOs - Online	49%
Destination website direct	45%
Travel comparison website	44%
TAs/TOs - Storefront	38%
Airline/train/ferry operator	37%
Accom. Provider direct	35%

Travel Party

With your spouse/partner	77%
With children (under 18)	38%
With friends	22%
With adult family members	21%
Alone	21%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
42%	38%	19%

Ever visited Britain

Several times	Once	No
34%	38%	28%

Travel drivers

Receiving a COVID-19 vaccination	41%
A significant decrease in coronavirus cases at destination	36%
Hygiene & safety protocols in place at destination	34%
Removal of quarantine policies in destination country	30%
A high proportion of destination population being vaccinated	29%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	89%
Booking through a travel agent is a safer option at the moment	76%
I will think more about sustainability and the environmental impact	75%
I will travel internationally as soon as I can after I get the vaccine	75%
I will look for less crowded places, even if I miss attractions	74%

Travel preferences

Top activities

History and heritage	53%
Iconic tourist attractions	50%
Visiting cultural attractions	48%
Outdoor nature activities	47%
Dining out	44%

Destination types

- 37% Country/ village
- 67% Large city
- 62% Will roam around
- 33% Mountains or hills
- 44% Small/mid-sized city/town
- 48% Coastline

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting England in the next 12 months (n = 750)

Scotland – Potential Visitors Profile

Travel intentions & Profile

	% intending to visit the UK	% of those intending to visit the UK who would consider visiting Scotland
Total	13%	6%
Short Haul	11%	4%
Long Haul	14%	8%
AU	10%	4%
BR	10%	4%
CA	12%	6%
CN	32%	19%
DK	10%	2%
FR	6%	2%
GE	9%	4%
IN	16%	11%
IR	15%	4%
IT	14%	6%
JP	10%	6%
NL	8%	3%
NO	14%	4%
RU	2%	1%
SA	7%	2%
KR	11%	6%
ES	14%	7%
SE	14%	5%
UAE	7%	3%
USA	13%	6%

Channel booking

TAs/TOs - Online	50%
Travel comparison website	47%
Destination website direct	47%
Airline/train/ferry operator	44%
Accom. Provider direct	40%
TAs/TOs - Storefront	37%

Travel Party

With your spouse/partner	75%
With children (under 18)	40%
With friends	30%
With adult family members	25%
Alone	24%
As part of a tour group	5%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
41%	37%	22%

Ever visited Britain

Several times	Once	No
39%	32%	29%

Travel drivers

Receiving a COVID-19 vaccination	43%
A significant decrease in coronavirus cases at destination	36%
Money-back guarantee should I wish to cancel my trip	31%
Removal of quarantine policies in destination country	31%
Hygiene & safety protocols in place at destination	30%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	90%
I will think more about sustainability and the environmental impact	78%
I will look for less crowded places, even if I miss attractions	77%
I will travel internationally as soon as I can after I get the vaccine	76%
Booking through a travel agent is a safer option at the moment	74%

Travel preferences

Top activities

History and heritage	59%
Visiting cultural attractions	58%
Iconic tourist attractions	55%
Outdoor nature activities	54%
Dining out	49%

Destination types

- 47% Country/ village
- 67% Large city
- 59% Will roam around
- 44% Mountains or hills
- 56% Small/mid-sized city/town
- 54% Coastline

Note: TA/TO = Travel Agencies/Tour Operators

Base: Respondents intending to visit the UK who would consider visiting Scotland in the next 12 months (n = 636)

Scotland – Potential Visitors Profile (Short-haul)

Travel intentions & Profile

■ % intending to visit the UK
■ % of those intending to visit the UK who would consider visiting Scotland

	Short Haul	DK	FR	GE	IR	IT	NL	NO	RU	ES	SE
% intending to visit the UK	11%	10%	6%	9%	15%	14%	8%	14%	2%	14%	14%
% of those intending to visit the UK who would consider visiting Scotland	4%	2%	2%	4%	4%	6%	3%	4%	1%	7%	5%

Channel booking

Travel comparison website	46%
Airline/train/ferry operator	45%
Accom. Provider direct	40%
Destination website direct	37%
TAs/TOs - Online	35%
TAs/TOs - Storefront	20%

Travel Party

With your spouse/partner	69%
With friends	37%
Alone	30%
With children (under 18)	28%
With adult family members	26%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
43%	37%	20%

Ever visited Britain

Several times	Once	No
40%	34%	26%

Travel drivers

Receiving a COVID-19 vaccination	50%
Money-back guarantee should I wish to cancel my trip	40%
A significant decrease in coronavirus cases at destination	40%
Removal of quarantine policies in destination country	34%
The introduction of a vaccine passport	29%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	84%
I will look for less crowded places, even if I miss attractions	74%
I will think more about sustainability and the environmental impact	71%
I will travel internationally as soon as I can after I get the vaccine	70%
I will leave booking until later/last minute	68%

Travel preferences

Top activities

History and heritage	62%
Visiting cultural attractions	60%
Dining out	56%
Iconic tourist attractions	53%
Outdoor nature activities	51%

Destination types

- 35% Country/ village
- 60% Large city
- 55% Will roam around
- 38% Mountains or hills
- 48% Small/mid-sized city/town
- 41% Coastline

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Scotland in the next 12 months (n = 189)

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Scotland – Potential Visitors Profile (Long-haul)

Travel intentions & Profile

	Long Haul	AU	BR	CA	CN	IN	JP	SA	KR	UAE	USA
% intending to visit the UK	14%	10%	10%	12%	32%	16%	10%	7%	11%	7%	13%
% of those intending to visit the UK who would consider visiting Scotland	8%	4%	4%	6%	19%	11%	6%	2%	6%	3%	6%

Channel booking

TAs/TOs - Online	56%
Destination website direct	52%
Travel comparison website	47%
TAs/TOs - Storefront	44%
Airline/train/ferry operator	43%
Accom. Provider direct	40%

Travel Party

With your spouse/partner	77%
With children (under 18)	45%
With friends	27%
With adult family members	25%
Alone	22%
As part of a tour group	6%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
40%	37%	23%

Ever visited Britain

Several times	Once	No
39%	32%	30%

Travel drivers

Receiving a COVID-19 vaccination	40%
A significant decrease in coronavirus cases at destination	34%
Hygiene & safety protocols in place at destination	32%
A high proportion of destination population being vaccinated	31%
Removal of quarantine policies in destination country	30%

Travel attitudes (% completely & somewhat agree)

I would be happy to take a pre-trip COVID-19 test if required	92%
I will think more about sustainability and the environmental impact	81%
Booking through a travel agent is a safer option at the moment	80%
I will travel internationally as soon as I can after I get the vaccine	78%
I will look for less crowded places, even if I miss attractions	78%

Travel preferences

Top activities

History and heritage	58%
Visiting cultural attractions	57%
Iconic tourist attractions	56%
Outdoor nature activities	55%
Experiencing local lifestyle	50%

Destination types

- 52% Country/ village
- 70% Large city
- 61% Will roam around
- 47% Mountains or hills
- 59% Small/mid-sized city/town
- 59% Coastline

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Scotland in the next 12 months (n = 447)

Wales – Potential Visitors Profile

Travel intentions & Profile

	% intending to visit the UK	% of those intending to visit the UK who would consider visiting Wales
Total	13%	3%
Short Haul	11%	2%
Long Haul	14%	4%
AU	10%	3%
BR	10%	3%
CA	12%	3%
CN	32%	11%
DK	10%	1%
FR	6%	1%
GE	9%	2%
IN	16%	8%
IR	15%	3%
IT	14%	2%
JP	10%	3%
NL	8%	1%
NO	14%	2%
RU	2%	1%
SA	7%	1%
KR	11%	3%
ES	14%	2%
SE	14%	2%
UAE	7%	2%
USA	13%	3%

Channel booking

Destination website direct	58%
TAs/TOs - Online	57%
Travel comparison website	55%
Airline/train/ferry operator	55%
Accom. Provider direct	45%
TAs/TOs - Storefront	43%

Travel Party

With your spouse/partner	79%
With children (under 18)	51%
With friends	33%
With adult family members	31%
Alone	24%
As part of a tour group	7%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
42%	38%	19%

Ever visited Britain

Several times	Once	No
45%	29%	26%

Travel drivers

Receiving a COVID-19 vaccination	43%
Hygiene & safety protocols in place at destination	34%
Removal of quarantine policies in destination country	33%
A significant decrease in coronavirus cases at destination	31%
Money-back guarantee should I wish to cancel my trip	30%

Travel attitudes (% completely & somewhat agree)

I would be happy to take a pre-trip COVID-19 test if required	89%
I will think more about sustainability and the environmental impact	80%
I will travel internationally as soon as I can after I get the vaccine	79%
I will look for less crowded places, even if I miss attractions	78%
Booking through a travel agent is a safer option at the moment	78%

Travel preferences

Top activities

History and heritage	64%
Visiting cultural attractions	61%
Iconic tourist attractions	61%
Outdoor nature activities	59%
Dining out	53%

Destination types

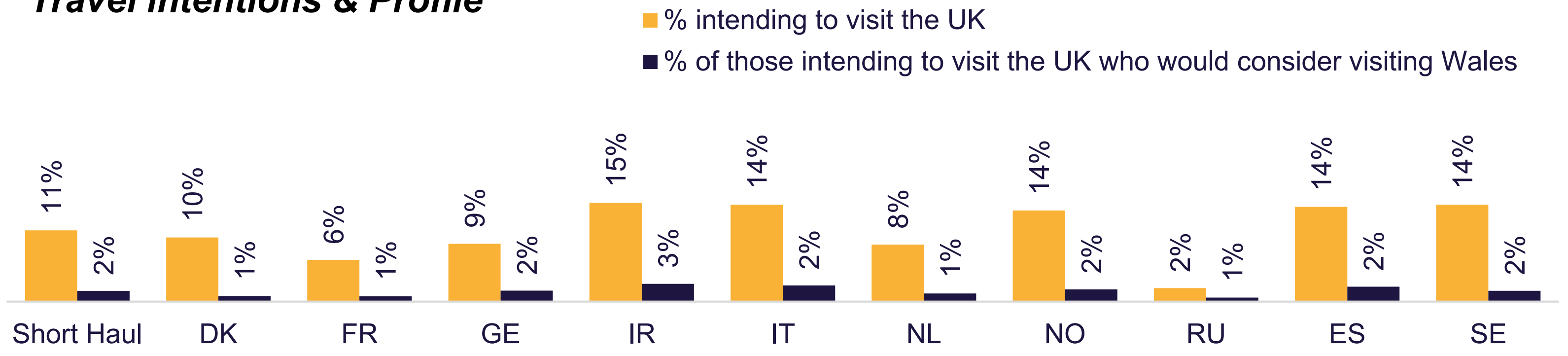
- 55% Country/ village
- 72% Large city
- 65% Will roam around
- 55% Mountains or hills
- 63% Small/mid-sized city/town
- 62% Coastline

Note: TA/TO = Travel Agencies/Tour Operators

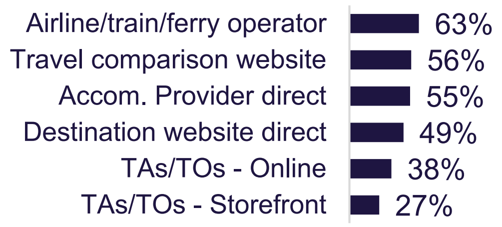
Base: Respondents intending to visit the UK who would consider visiting Wales in the next 12 months (n = 341)

Wales – Potential Visitors Profile (Short-haul)

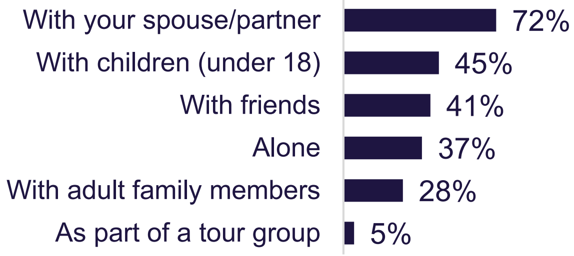
Travel intentions & Profile



Channel booking



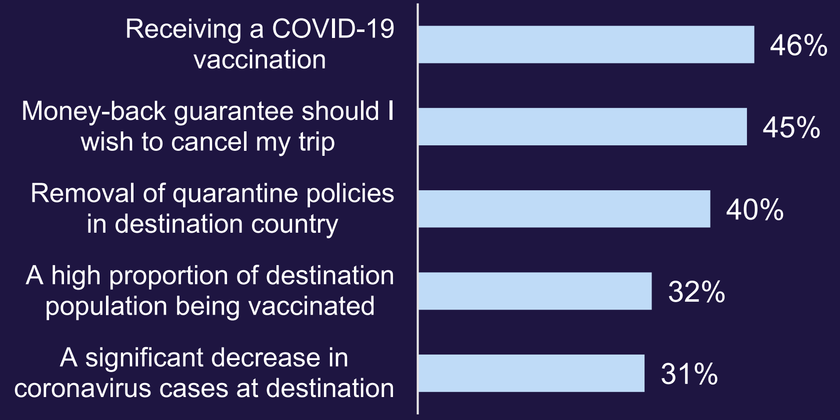
Travel Party



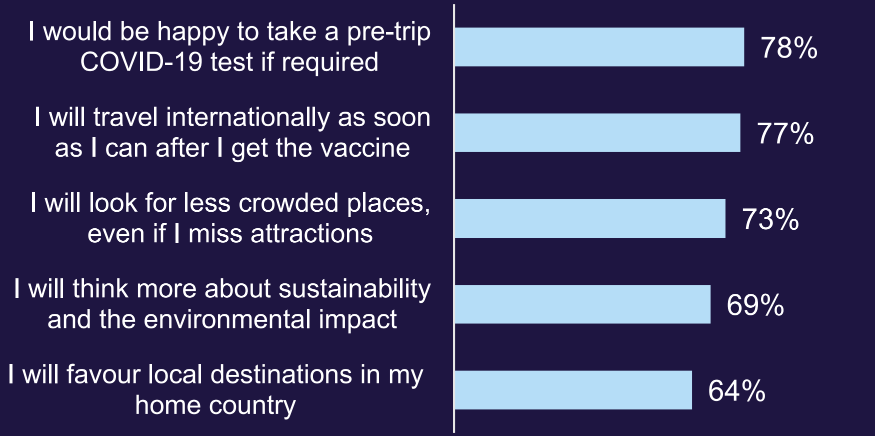
Age

Ever visited Britain

Travel drivers



Travel attitudes (% completely & somewhat agree)



Travel preferences

Top activities

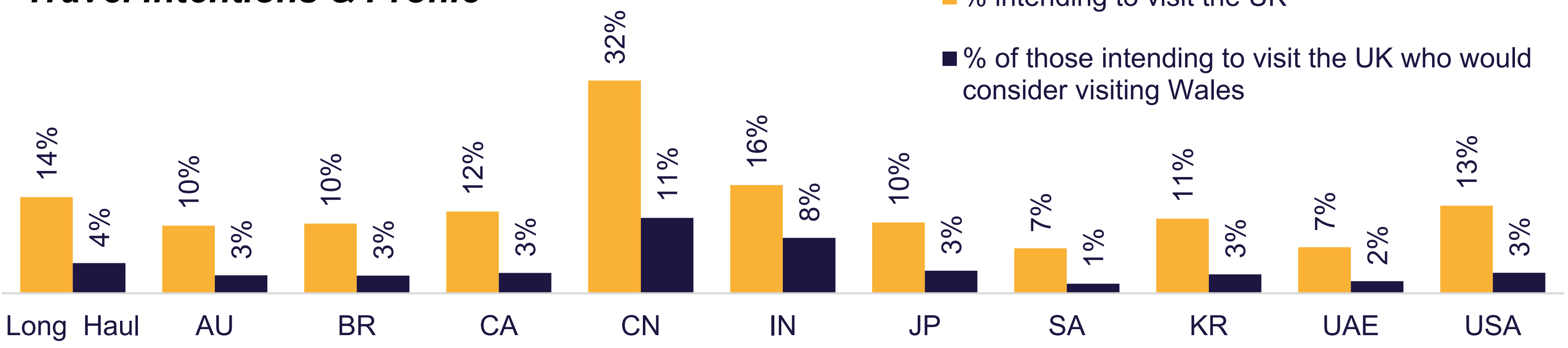
Destination types

- 45% Country/ village
- 68% Large city
- 60% Will roam around
- 56% Mountains or hills
- 63% Small/mid-sized city/town
- 58% Coastline

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Wales in the next 12 months (n = 78)

Wales – Potential Visitors Profile (Long-haul)

Travel intentions & Profile



Channel booking

TAs/TOs - Online	62%
Destination website direct	61%
Travel comparison website	55%
Airline/train/ferry operator	52%
TAs/TOs - Storefront	48%
Accom. Provider direct	42%

Travel Party

With your spouse/partner	81%
With children (under 18)	52%
With adult family members	32%
With friends	31%
Alone	20%
As part of a tour group	8%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
40%	38%	22%

Ever visited Britain

Several times	Once	No
42%	30%	29%

Travel drivers

Receiving a COVID-19 vaccination	41%
Hygiene & safety protocols in place at destination	37%
A significant decrease in coronavirus cases at destination	31%
Removal of quarantine policies in destination country	31%
Stable political environment in destination country	29%

Travel attitudes (% completely & somewhat agree)

I would be happy to take a pre-trip COVID-19 test if required	92%
I will think more about sustainability and the environmental impact	83%
Booking through a travel agent is a safer option at the moment	83%
I will look for less crowded places, even if I miss attractions	80%
I will be intending to take fewer but longer holidays	80%

Travel preferences

Top activities

History and heritage	63%
Outdoor nature activities	60%
Visiting cultural attractions	59%
Iconic tourist attractions	59%
Experiencing local lifestyle	55%

Destination types

Country/ village	57%
Large city	73%
Will roam around	66%
Mountains or hills	54%
Small/mid-sized city/town	63%
Coastline	64%

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Wales in the next 12 months (n = 263)

London – Potential Visitors Profile

Travel intentions & Profile

	% intending to visit the UK	% of those intending to visit the UK who would consider visiting London
Total	13%	5%
Short Haul	11%	4%
Long Haul	14%	6%
AU	10%	4%
BR	10%	5%
CA	12%	3%
CN	32%	14%
DK	10%	4%
FR	6%	3%
GE	9%	3%
IN	16%	6%
IR	15%	5%
IT	14%	5%
JP	10%	4%
NL	8%	3%
NO	14%	5%
RU	2%	1%
SA	7%	2%
KR	11%	4%
ES	14%	5%
SE	14%	6%
UAE	7%	2%
USA	13%	6%

Channel booking

Travel comparison website	46%
TAs/TOs - Online	45%
Airline/train/ferry operator	44%
Destination website direct	43%
Accom. Provider direct	37%
TAs/TOs - Storefront	31%

Travel Party

With your spouse/partner	74%
With children (under 18)	33%
With friends	29%
With adult family members	25%
Alone	25%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
43%	38%	18%

Ever visited Britain

Several times	Once	No
38%	39%	23%

Travel drivers

Receiving a COVID-19 vaccination	44%
A significant decrease in coronavirus cases at destination	39%
Money-back guarantee should I wish to cancel my trip	35%
Removal of quarantine policies in destination country	33%
Hygiene & safety protocols in place at destination	31%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	86%
I will travel internationally as soon as I can after I get the vaccine	70%
I will look for less crowded places, even if I miss attractions	70%
I will think more about sustainability and the environmental impact	67%
I would be comfortable using public transport within the destination	67%

Travel preferences

Top activities

History and heritage	51%
Iconic tourist attractions	51%
Visiting cultural attractions	49%
Dining out	46%
Outdoor nature activities	43%

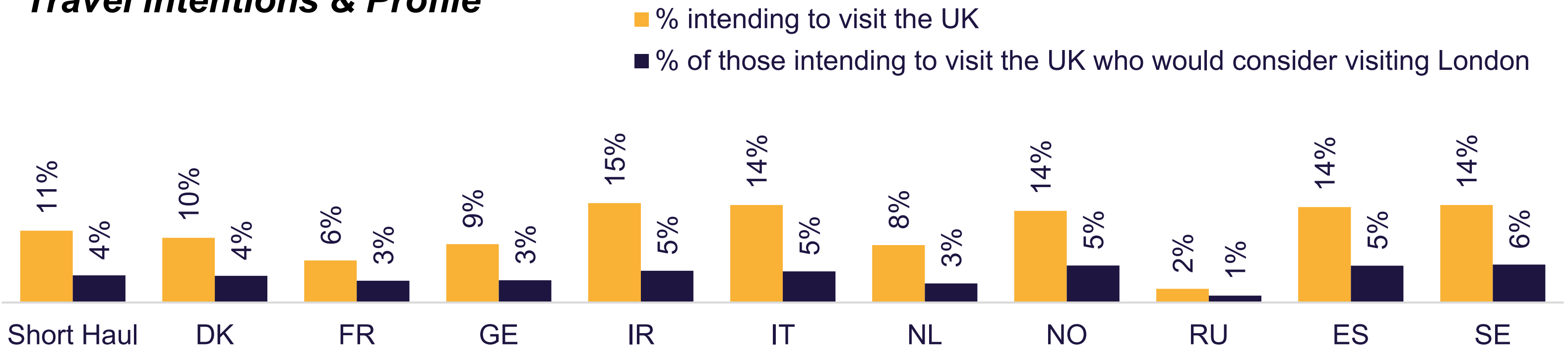
Accommodation

Hotel chain	72%
Boutique hotel	50%
Bed and breakfast	43%
Self catered property	37%
Historic house/castle	36%

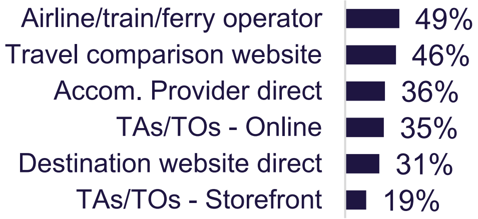
Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 543)

London – Potential Visitors Profile (Short-haul)

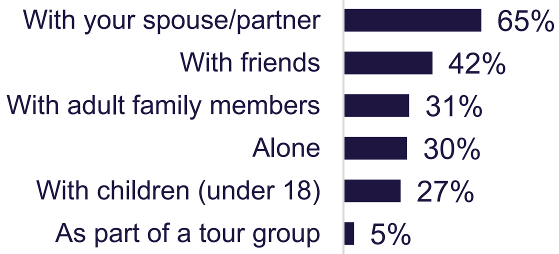
Travel intentions & Profile



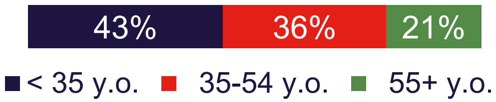
Channel booking



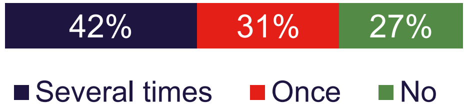
Travel Party



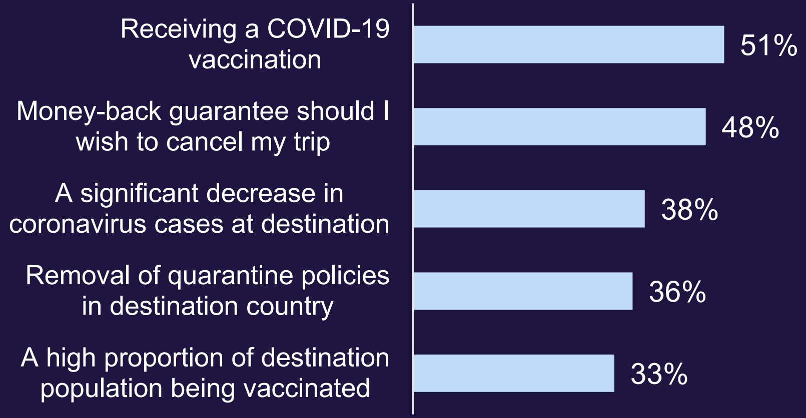
Age



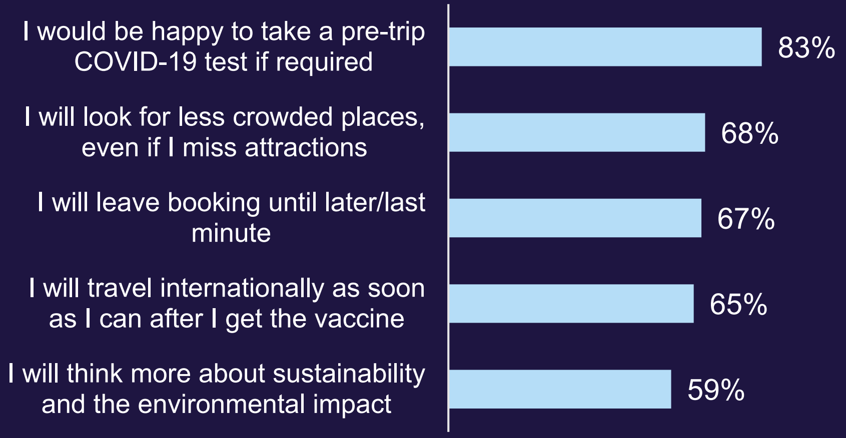
Ever visited Britain



Travel drivers



Travel attitudes *(% completely & somewhat agree)*



Travel preferences

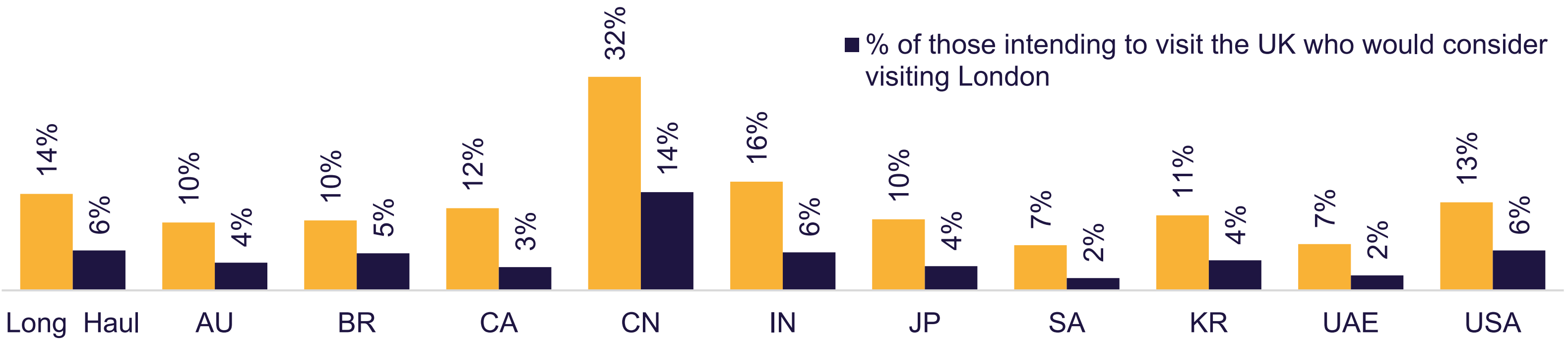
Top activities

Accommodation

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 198)

London – Potential Visitors Profile (Long-haul)

Travel intentions & Profile



Channel booking

TAs/TOs - Online	51%
Destination website direct	50%
Travel comparison website	46%
Airline/train/ferry operator	40%
Accom. Provider direct	38%
TAs/TOs - Storefront	37%

Travel Party

With your spouse/partner	79%
With children (under 18)	37%
With friends	22%
Alone	22%
With adult family members	21%
As part of a tour group	3%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
43%	39%	17%

Ever visited Britain

Several times	Once	No
35%	43%	21%

Travel drivers

Receiving a COVID-19 vaccination	41%
A significant decrease in coronavirus cases at destination	39%
Hygiene & safety protocols in place at destination	33%
Removal of quarantine policies in destination country	32%
A high proportion of destination population being vaccinated	30%

Travel attitudes (% completely & somewhat agree)

I would be happy to take a pre-trip COVID-19 test if required	87%
I would be comfortable using public transport within the destination	74%
Booking through a travel agent is a safer option at the moment	73%
I will travel internationally as soon as I can after I get the vaccine	73%
I will think more about sustainability and the environmental impact	72%

Travel preferences

Top activities

History and heritage	52%
Iconic tourist attractions	50%
Visiting cultural attractions	48%
Outdoor nature activities	45%
Dining out	43%

Accommodation

Hotel chain	70%
Boutique hotel	55%
Bed and breakfast	42%
Historic house/castle	37%
Self catered property	34%

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 345)

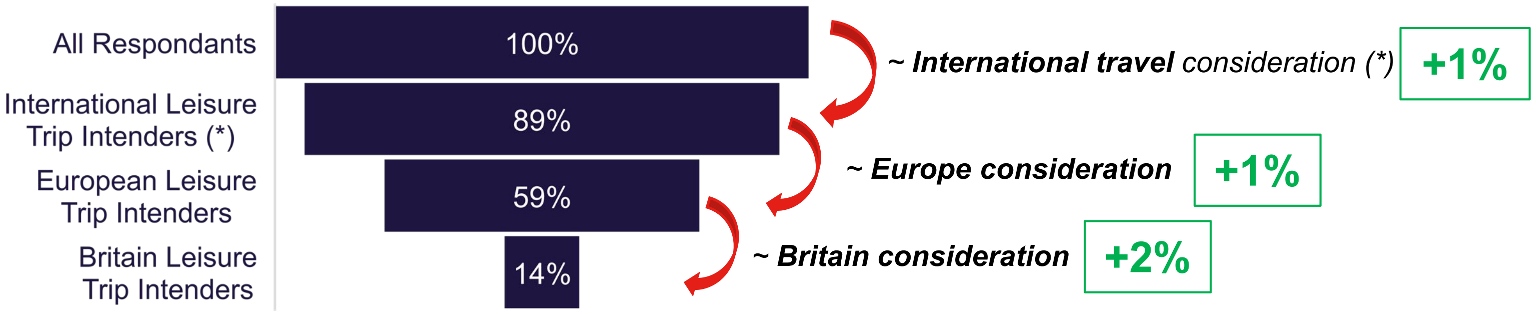
Glyder Fach: ©VisitBritain/Kris Williams

Funnels
Travel Horizons
Sample profile

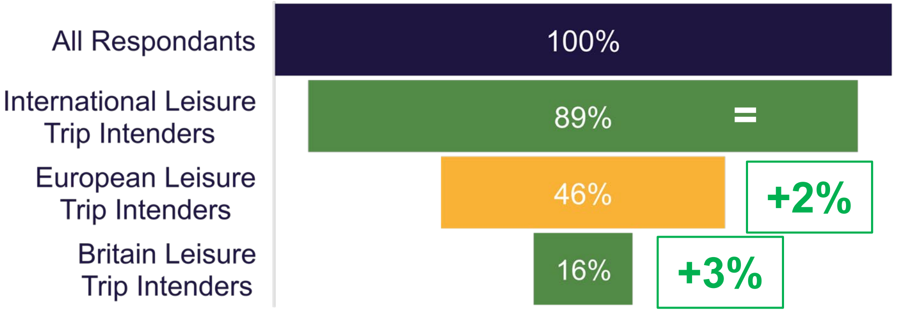
Trends: December 2020 vs March 2021

Market: All

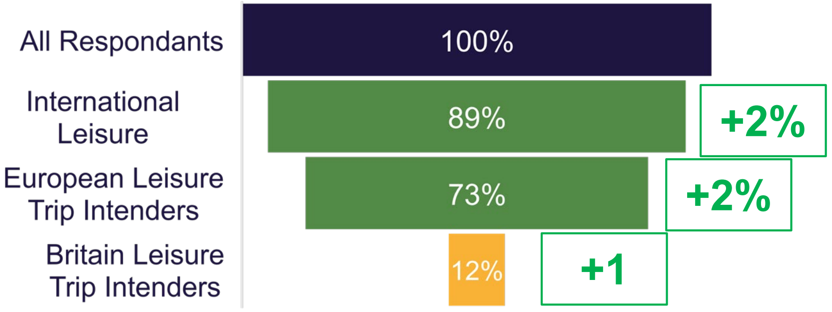
What conversion funnels measure



Market: long-haul



Market: short-haul



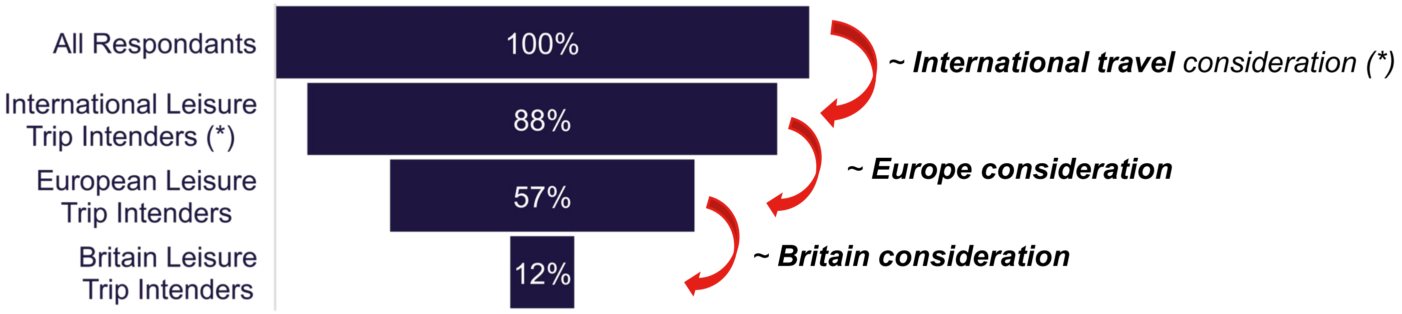
- High conversion rate
- Medium conversion rate
- Low conversion rate

(*) Would definitely, probably or maybe consider an international leisure trip for more than one night in the next 12 months
Base: All Respondents (n = 11,000)

Conversion Funnel summary

Market: All

What conversion funnels measure

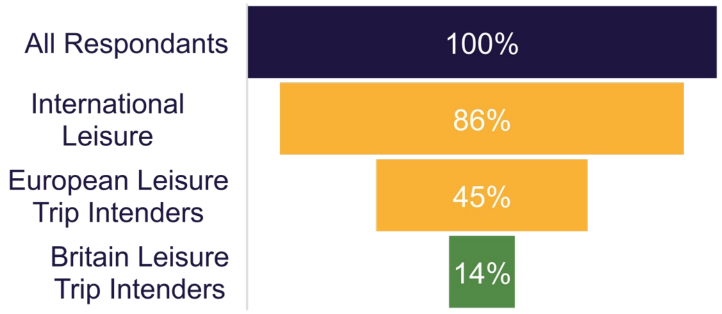


High conversion rate

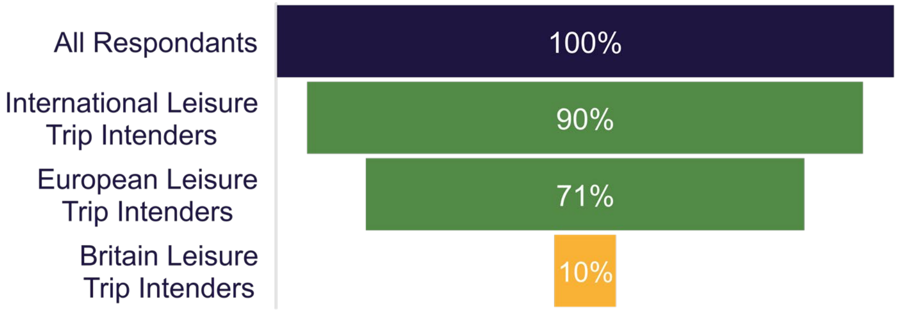
Medium conversion rate

Low conversion rate

Market: long-haul



Market: short-haul



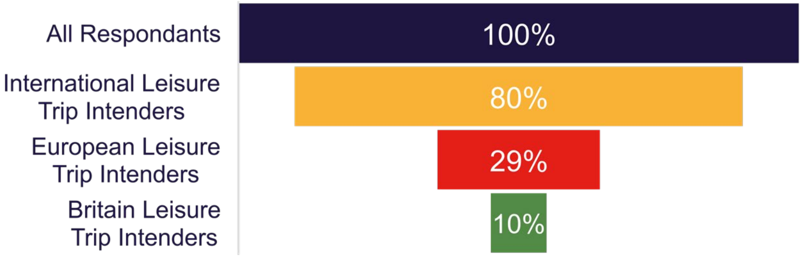
(*) Would definitely, probably or maybe consider an international leisure trip for more than one night in the next 12 months
Base: All Respondents (n = 11,000)

Conversion Funnel summary

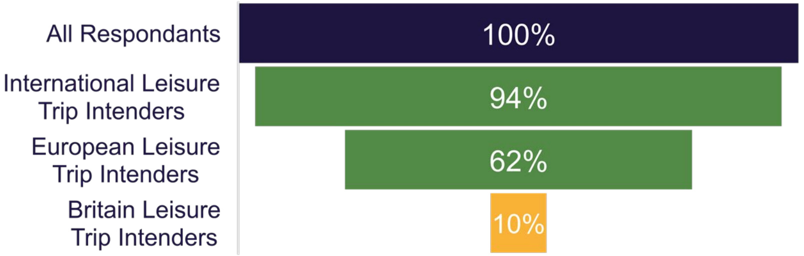
High conversion rate
Medium conversion rate
Low conversion rate

Long-haul markets

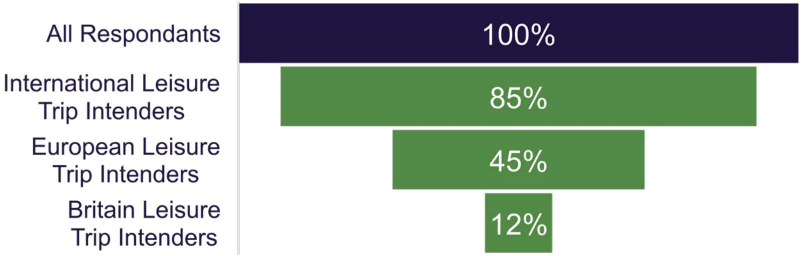
Market: Australia



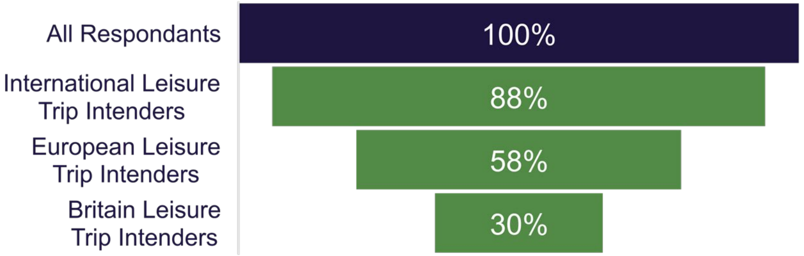
Market: Brazil



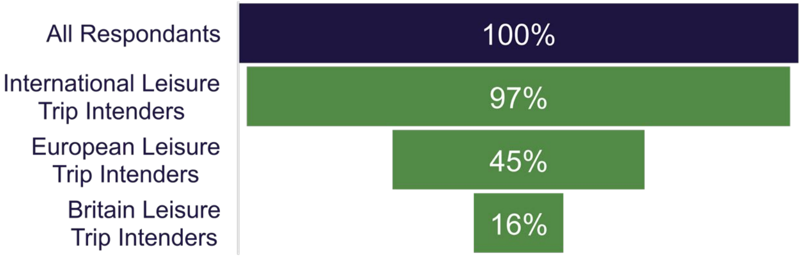
Market: Canada



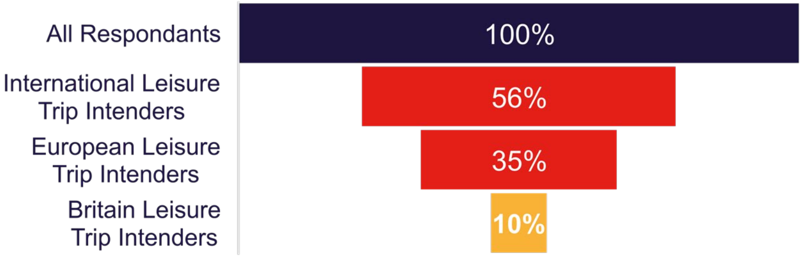
Market: China



Market: India



Market: Japan



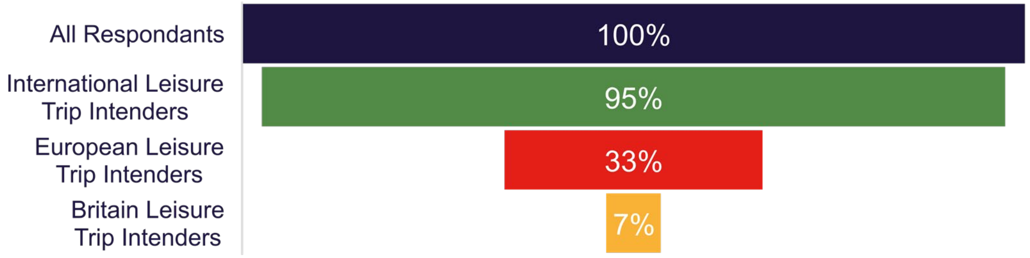
Q: /
Base: All Respondents (n = 11,000)

Conversion Funnel summary

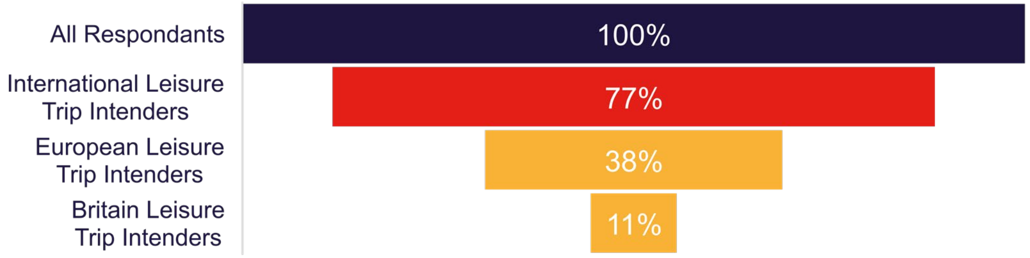
High conversion rate
Medium conversion rate
Low conversion rate

Long-haul markets

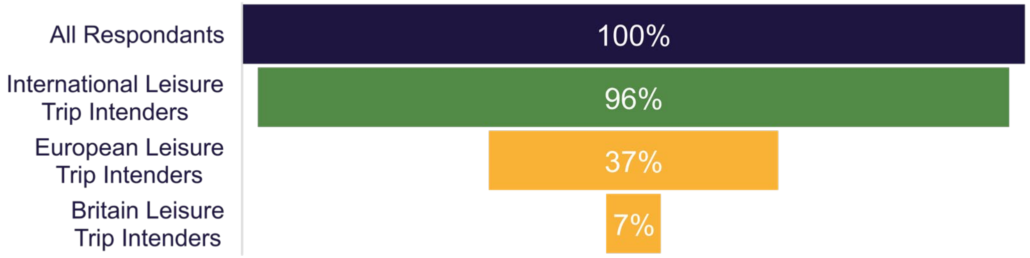
Market: Saudi Arabia



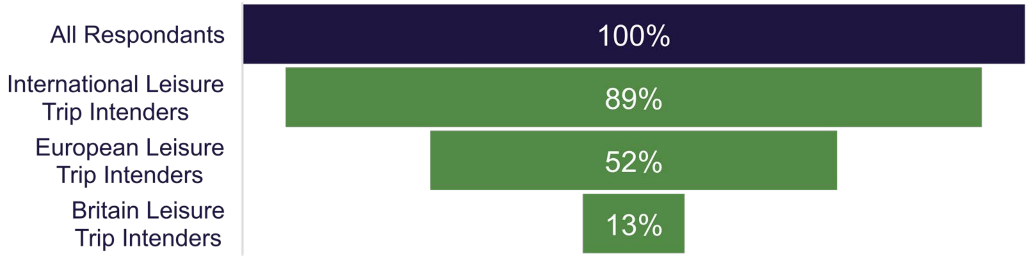
Market: South Korea



Market: UAE



Market: USA



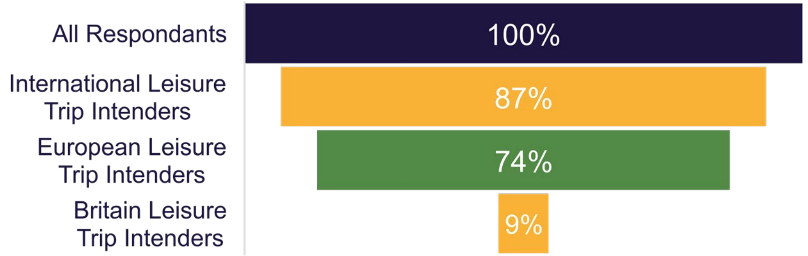
Q: /
Base: All Respondents (n = 11,000)

Conversion Funnel summary

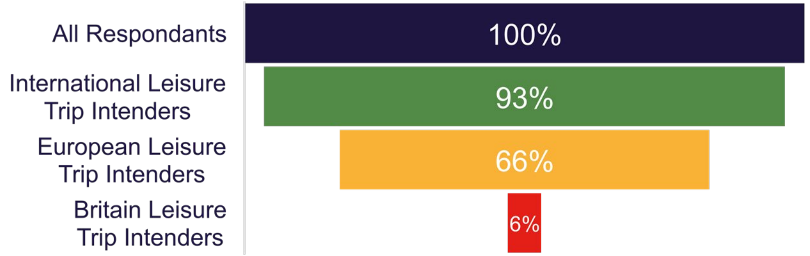
High conversion rate
Medium conversion rate
Low conversion rate

Short-haul markets

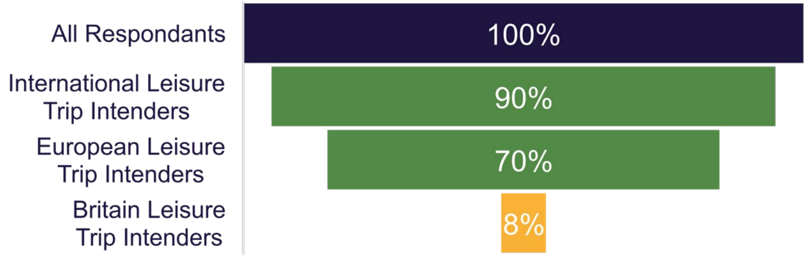
Market: Denmark



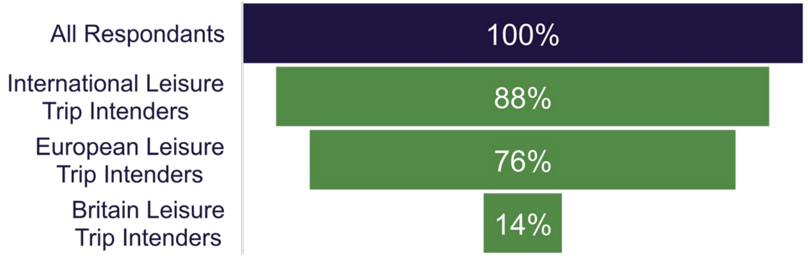
Market: France



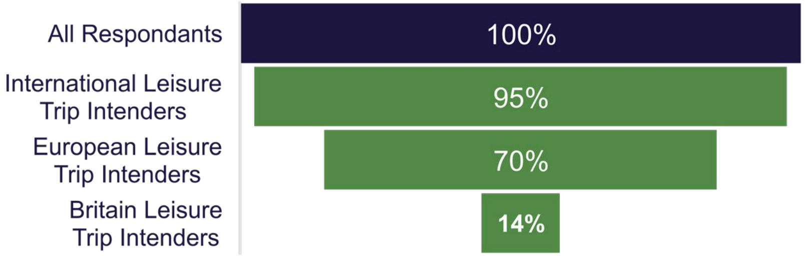
Market: Germany



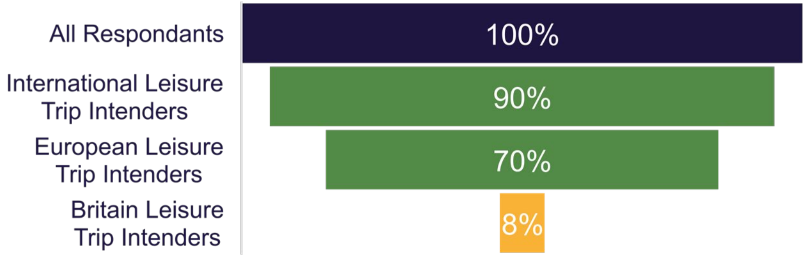
Market: Irish Republic



Market: Italy



Market: Netherlands



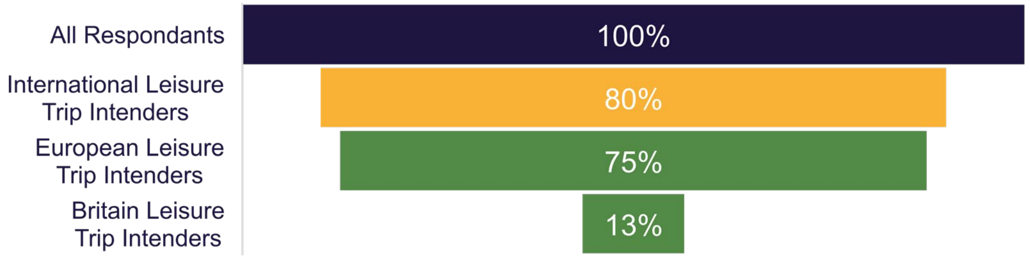
Q: /
Base: All Respondents (n = 11,000)

Conversion Funnel summary

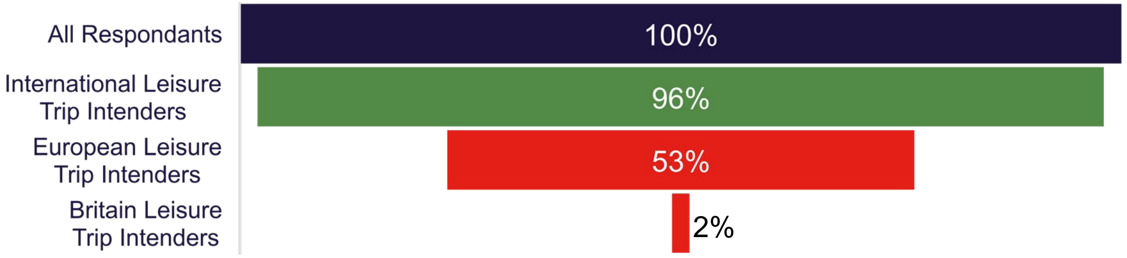
High conversion rate
Medium conversion rate
Low conversion rate

Short-haul markets

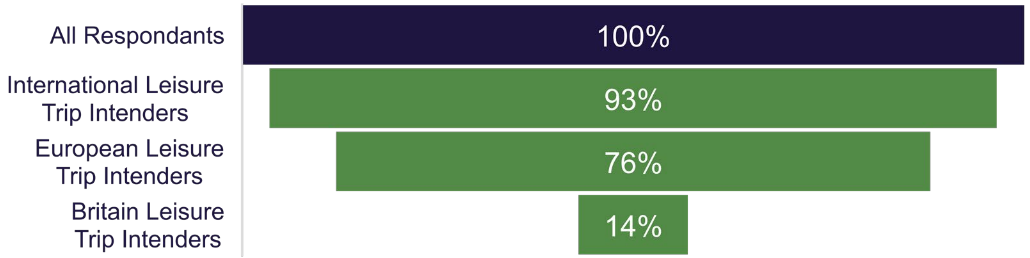
Market: Norway



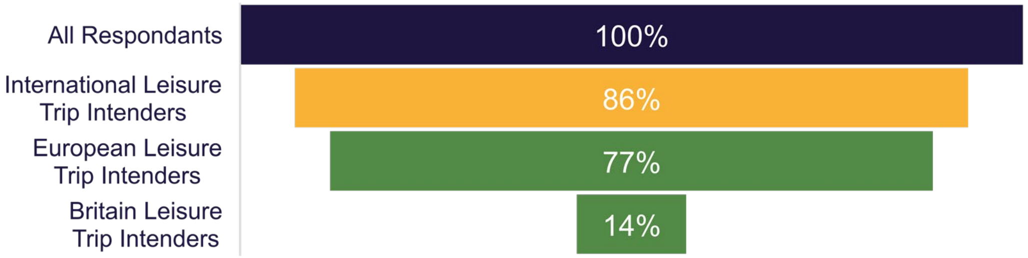
Market: Russia



Market: Spain



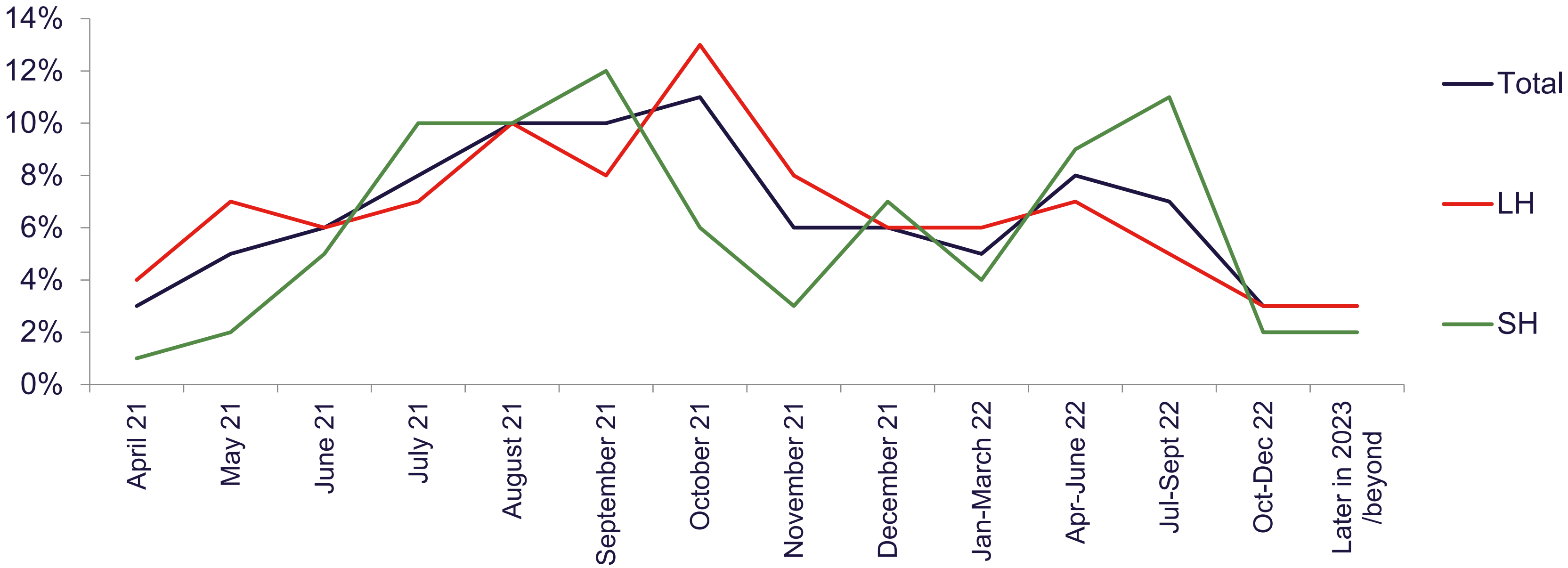
Market: Sweden



Q: /
Base: All Respondents (n = 11,000)

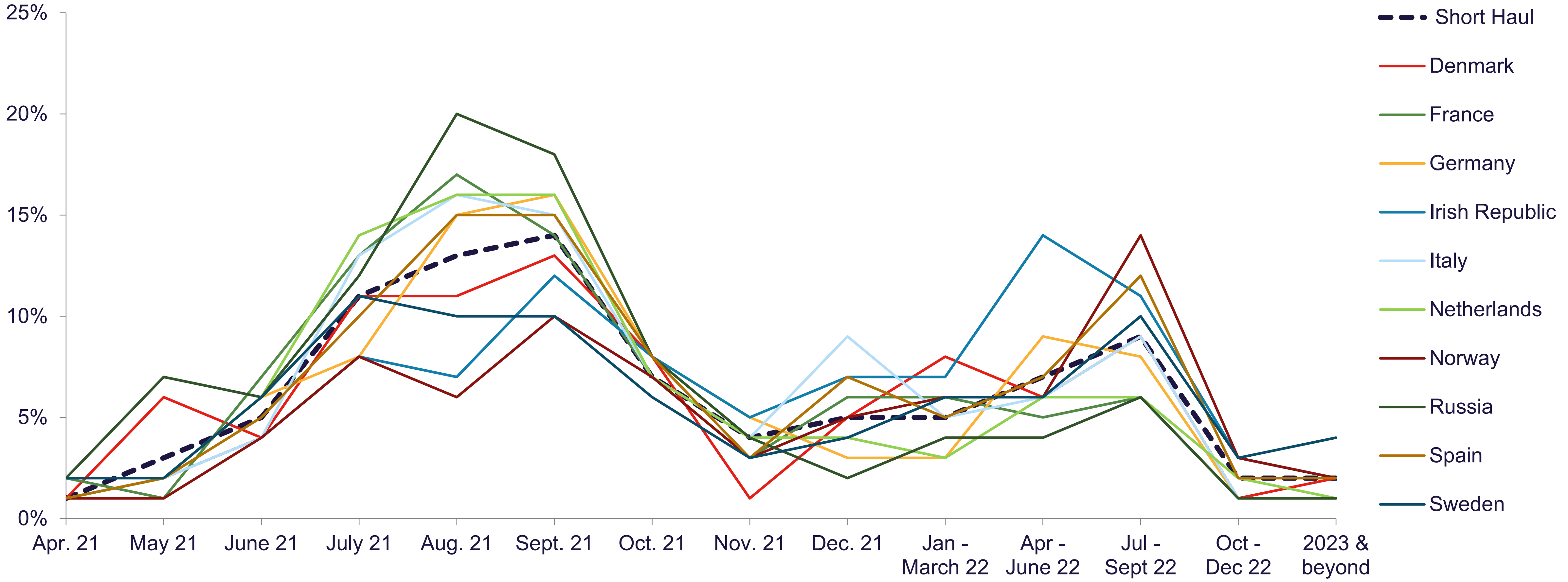
Britain Intenders – Travel Horizons

Britain Intenders	Short-haul (n = 524)	Long-haul (n = 836)	Total (n = 1360)
April 21-June 21	8%	17%	14%
Later in 2021	48%	52%	50%
Later in 2022	26%	21%	23%
Later in 2023 and beyond	2%	3%	3%



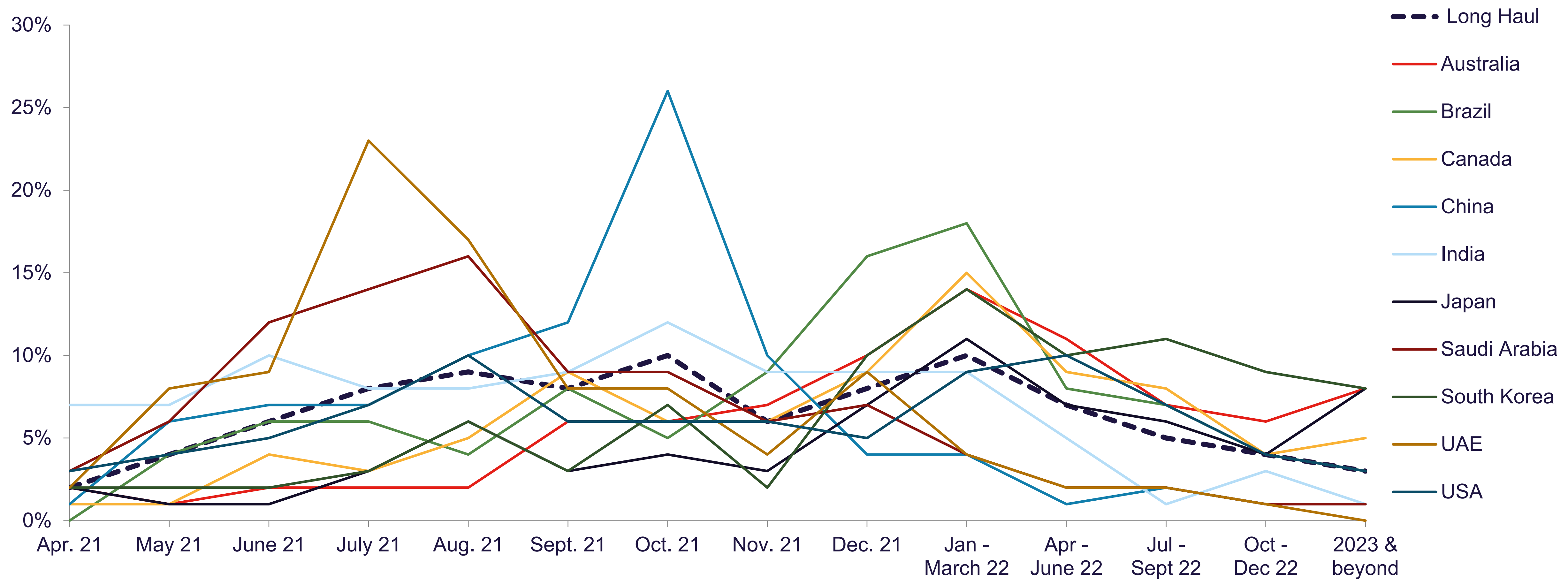
Base: Respondents who plan on taking a leisure trip in Britain (n = 1360)

Travel horizon for next international leisure trip (SH)



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 = 10804)

Travel horizon for next international leisure trip (LH)



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 = 10804)

Sample description (SH)

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Male	52%	50%	48%	49%	51%	49%	53%	53%	48%	50%	55%	49%
Female	48%	49%	52%	51%	49%	50%	47%	47%	52%	50%	45%	51%

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Less than 35	35%	33%	26%	34%	34%	37%	35%	35%	28%	33%	35%	28%
From 35 to 54	38%	38%	32%	36%	39%	37%	41%	34%	37%	43%	44%	36%
55 and over	27%	30%	42%	30%	27%	26%	24%	31%	35%	24%	21%	37%

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Working full-time	66%	60%	49%	61%	56%	56%	63%	51%	48%	81%	71%	60%
Working part-time	10%	12%	10%	9%	15%	15%	11%	19%	13%	6%	10%	10%
Retired	13%	15%	27%	17%	17%	12%	9%	13%	23%	10%	7%	18%
Homemaker	4%	3%	2%	3%	4%	5%	4%	5%	4%	1%	3%	0%
Unemployed	3%	4%	3%	5%	2%	8%	4%	4%	4%	1%	5%	4%
Student	3%	5%	8%	5%	6%	4%	8%	7%	7%	1%	3%	7%

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Not impacted	53%	52%	69%	50%	49%	52%	37%	63%	58%	44%	36%	59%
Uncertain	40%	40%	28%	44%	45%	39%	50%	34%	34%	46%	48%	35%
Impacted negatively	8%	8%	3%	7%	6%	9%	14%	3%	7%	11%	16%	6%

Base: All Respondents (n = 11,000)

Sample description (LH)

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Male	52%	53%	49%	51%	49%	49%	52%	47%	61%	49%	74%	50%
Female	48%	47%	51%	49%	51%	48%	48%	53%	39%	51%	26%	49%

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Less than 35	35%	37%	30%	35%	29%	40%	44%	26%	41%	34%	53%	35%
From 35 to 54	38%	39%	33%	42%	34%	40%	40%	33%	51%	46%	43%	31%
55 and over	27%	24%	37%	23%	37%	20%	16%	41%	7%	20%	4%	34%

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Working full-time	66%	72%	49%	76%	57%	95%	82%	64%	72%	77%	80%	57%
Working part-time	10%	9%	18%	10%	12%	1%	9%	12%	11%	8%	12%	8%
Retired	13%	12%	26%	9%	21%	4%	2%	7%	4%	4%	1%	28%
Homemaker	4%	4%	3%	1%	3%	0%	3%	13%	7%	6%	3%	3%
Unemployed	3%	2%	2%	3%	4%	0%	1%	2%	2%	2%	2%	3%
Student	3%	2%	2%	0%	3%	1%	3%	1%	3%	3%	2%	1%

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Not impacted	53%	53%	58%	37%	60%	61%	64%	28%	50%	37%	49%	68%
Uncertain	40%	40%	35%	55%	33%	38%	31%	65%	38%	49%	39%	27%
Impacted negatively	8%	7%	8%	8%	7%	1%	4%	7%	11%	14%	12%	5%

Base: All Respondents (n = 11,000)

in conjunction with

International Recovery Research

Wave 2 – April 2021

Fieldwork: 24th March – 5th April 2021

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

Destination Bristol ©Gary Newman