VisitScotland | Alba

LONDON & PARTNERS

Llywodraeth Cymru
Welsh Government

VisitBritain

in conjunction with TCI Research
Travel Competitive Intelligence

Inbound COVID-19 Sentiment Tracker

Wave 3 – September 2021

Fieldwork: 23rd August – 6th September 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, Canada, China, France, Germany, India, Irish Republic, Italy, Netherlands, Norway, Spain, Sweden, USA
- **Target:** people who have travelled abroad at least once in the past 3 years
- **Fieldwork period (Wave 3): 23rd August – 6th September 2021**
- **Data collection:** online interviews on Access Panel; Quotas on gender, age and regions, same questionnaire basis as for wave 1 and 2 with some additional questions
- **Sample Size:** 7,500 interviews. Trended data is calculated at a constant perimeter (based on the 13 markets surveyed in Wave 1 and 2. You can read reports from the first two waves on vb.org: Wave 1 report / Wave 2 report.
- ***Note****: international surveys involve a cultural factor in the way respondents express their opinion. Commonly, Indian and Chinese respondents 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:

Market	Sample Size
France	500
Germany	500
Irish Republic	500
Italy	500
Netherlands	500
Norway	500
Spain	500
Sweden	500
Total Short-haul	**4,000**
Australia	500
Canada	500
China	1,000
India	500
USA	1,000
Total Long-haul	**3,500**
Total	**7,500**

Useful definitions:

- **European Intenders** = those who intend to travel to Europe
- **Britain intenders** = those who intend to travel to Britain
- **England Pot Visitors** = those who intend to travel to England
- **Large city intenders** = those who intend to travel to any large city

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 prioritise marketing efforts in 2021.
- This report shows results of the third wave, which took place **from 23th August to 6th September 2021**. It includes trended data vs wave 1 conducted from 4th to 15th December 2020 and wave 2 conducted from 24th March to 5th April 2021.

Interpreting the survey results in a changing travel context

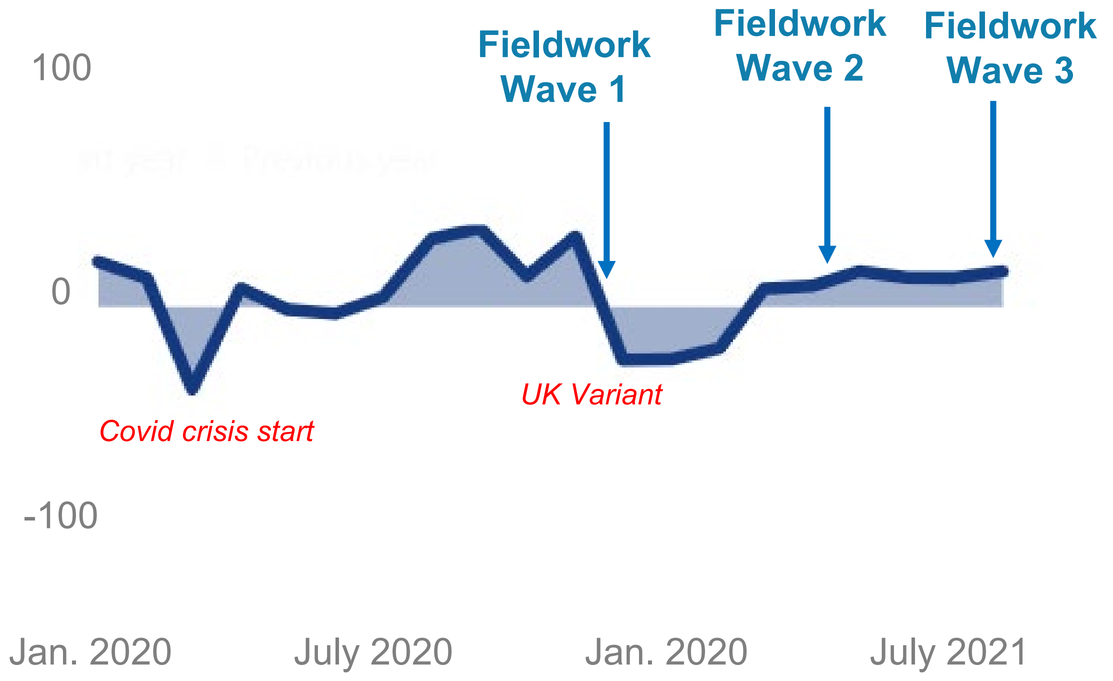
- Consumers' sentiments are in essence subject to the context evolution and particularly the sanitary environment impacting travel restrictions and effective choices of destinations available to consumers, which are changing almost every week. Travel intent should therefore be interpreted more as travel "desire" and not actual booking behaviours. 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.
- Based on the TCI-Travelsat Sentiment Tracker monitoring e-reputation of travel and destinations(*), the reputation of Britain in social conversations was still below the European average but had been on a stable/positive trend for months, with no major detrimental UK-related stories to be reported and a mixed sentiment driven by positive drivers (UK secret spots, back to normal life, events and festivals, golf tourism, van life trips…) and negative drivers (paying PCR tests, increase in COVID cases, airport "chaos", lack of qualified tourism staff to meet the demand…) Please see the next slide to see this illustrated.

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

Britain-related reputation context during the fieldwork

UNWTO Recover Tracker – TCI/Travelsat Net Sentiment Index (UK)

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

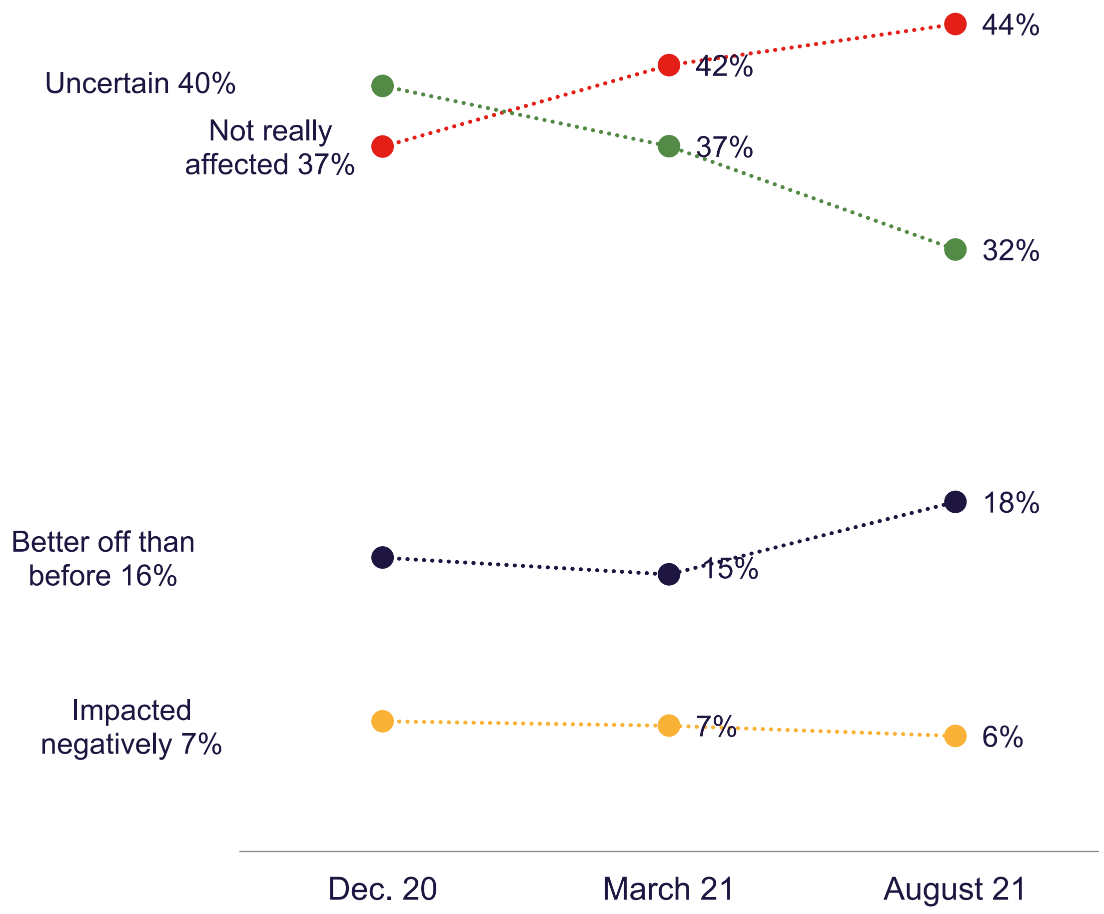


Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
China	-24	-10	0	19	15	22	17	-7
France	35	41	40	35	39	43	15	32
Germany	17	7	15	29	38	30	26	25
Italy	46	53	51	61	54	62	60	54
Mexico	-17	-5	12	32	35	19	26	32
Spain	24	43	16	48	32	33	23	33
Thailand	49	46	51	47	53	57	50	43
Turkey	33	14	37	11	8	35	21	-13
United Kingdom	-18	-14	6	7	12	10	10	12
United States	-1	34	28	25	27	27	19	9
World	**17**	**30**	**30**	**32**	**35**	**41**	**36**	**33**

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.

Respondents’ financial situation (Trends)

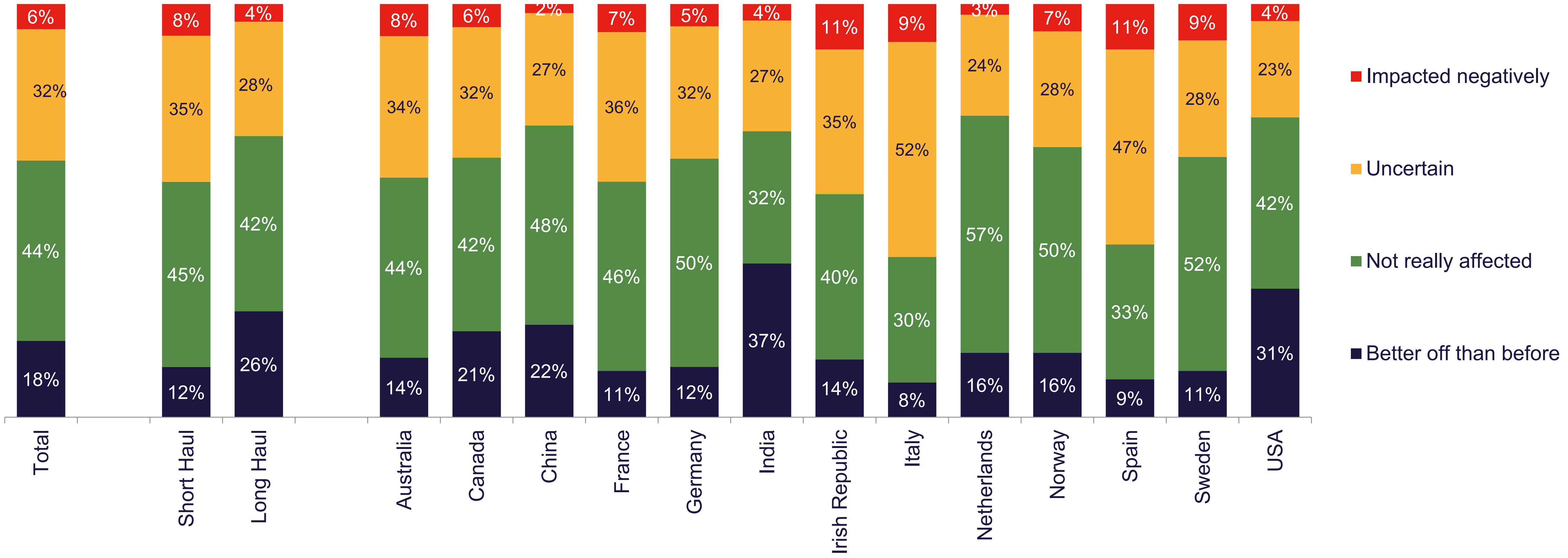
Trended data **confirms a movement from a “Cautious” to “Alright” attitude** in relation to consumers’ spending power.



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 (13 markets consolidated)

Respondents' financial situation

While many markets start an economic rebound, on average, **nearly 2 in 3 respondents** reported their financial situation has not really been affected or is even better than before. However, uncertainties remain for a third of them, particularly for the Southern European markets surveyed. **LH markets** – notably the USA - showed a **growing optimism** about their financial situation.



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 = 7,500)

River Thames/Tower Bridge: ©VisitBritain/Luca Micheli

Overall travel intentions

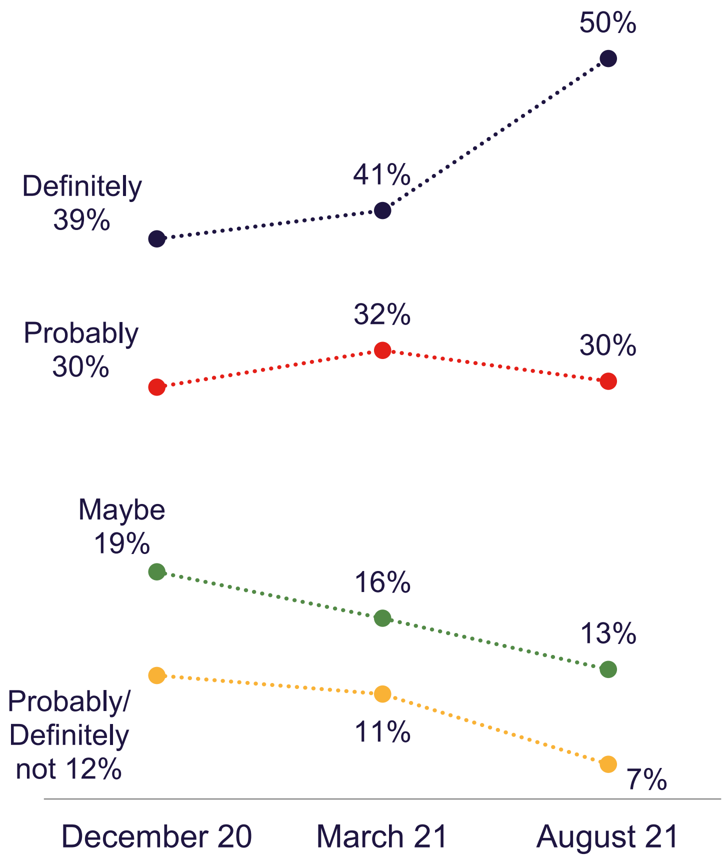
Overall travel intentions: summary

- Previously hesitant consumers now express firm desires for travelling today with half of respondents definitely planning a trip abroad in the coming 12 months. While bookings have increased, the choice of the destination remains open among other planners.
- Beyond holiday motivations, the need for reconnection with friends and relatives is still expressed by a third of respondents on average and by around half in Republic of Ireland, India and Australia. Demand for a leisure trip has increased in most markets.
- 4 in 10 respondents in Short-Haul (SH) markets envisage a trip by the end of the year. 2022 spring and summer are also in mind. Long-Haul (LH) markets' travel intentions for 2021 focus on the festive period and then span over the first quarter of 2022. The horizon is not yet defined for a significant part of consumers in the Nordics and Australia, reflecting a more careful travel attitude in these countries.
- Propensity to travel in the very short term remains higher among young potential travellers. Older demographics show high interest in holidaying in Spring 2022. Vaccination accelerates motivations for travelling by the end of 2021, but while a very large majority of respondents are vaccinated, non-vaccination is no longer a major obstacle to envisage short to mid-term trip planning.
- While vaccination and other health and hygiene factors in destination countries still act as key activators for planning a trip, the attitudinal shift from health-centric to money-centric is tangible: money-back guarantee is now mentioned as #1 activator in 10 out of 13 markets surveyed, and attention paid to attractive deals grows. Insurance for COVID-19 travel is also often mentioned as a trigger.
- The portrayal of a more responsible traveller is confirmed, still keen to travel for discovering new / less crowded places in a safer and more sustainable way. With vaccination, the willingness to take pre-trip testing remains high but has slightly decreased.
- Last-minute booking is still widely considered to accommodate the market uncertainties, but less than before.
- Respect of COVID-19 rules by other people, access to healthcare and change in quarantine requirements are the most frequent concerns among those wishing to go to Britain. This should encourage all players of the destination ecosystem to provide the most accurate and updated information for international trip planners looking for reinsurance.

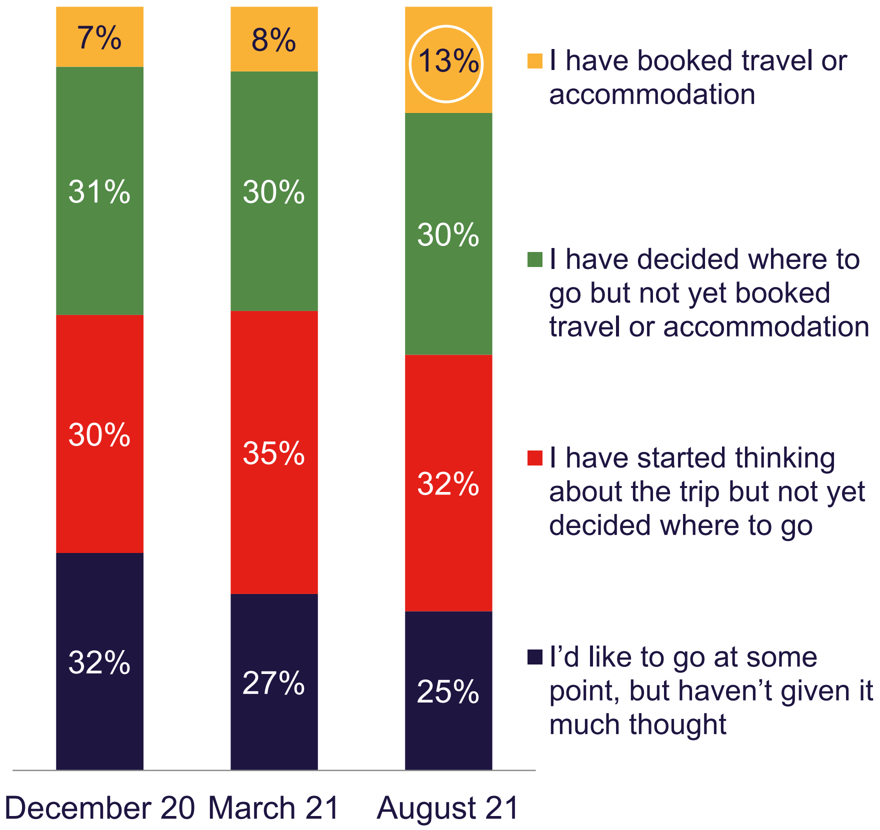
Trended data

Previously hesitant consumers now express firm desires for travelling: today, half of respondents definitely plan a trip abroad in the coming 12 months. While bookings have increased, the choice of the destination remains open among other planners.

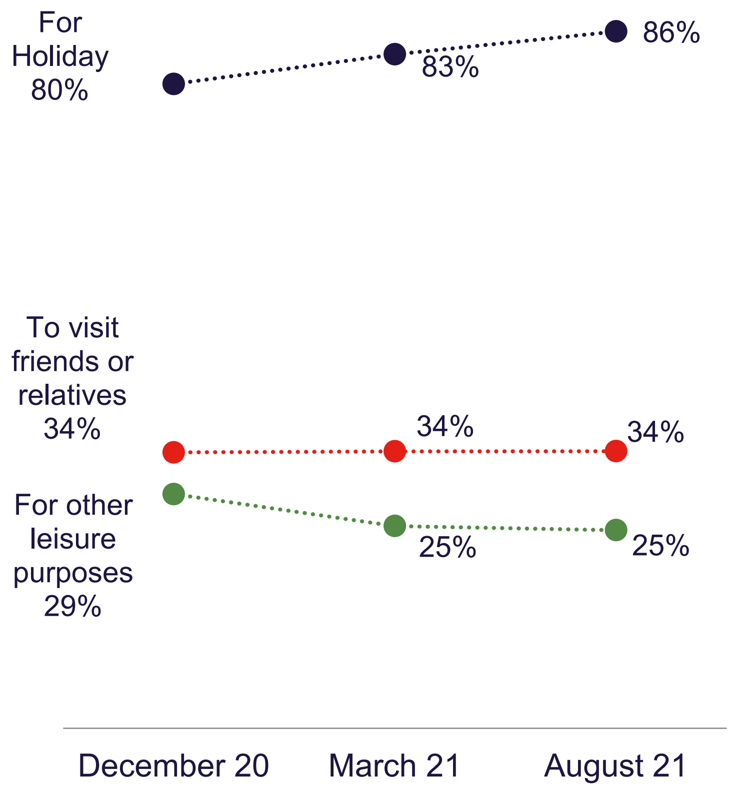
Travel consideration



Trip planning stage



Purpose of leisure travel



Trend calculated at constant perimeter (13 markets consolidated)

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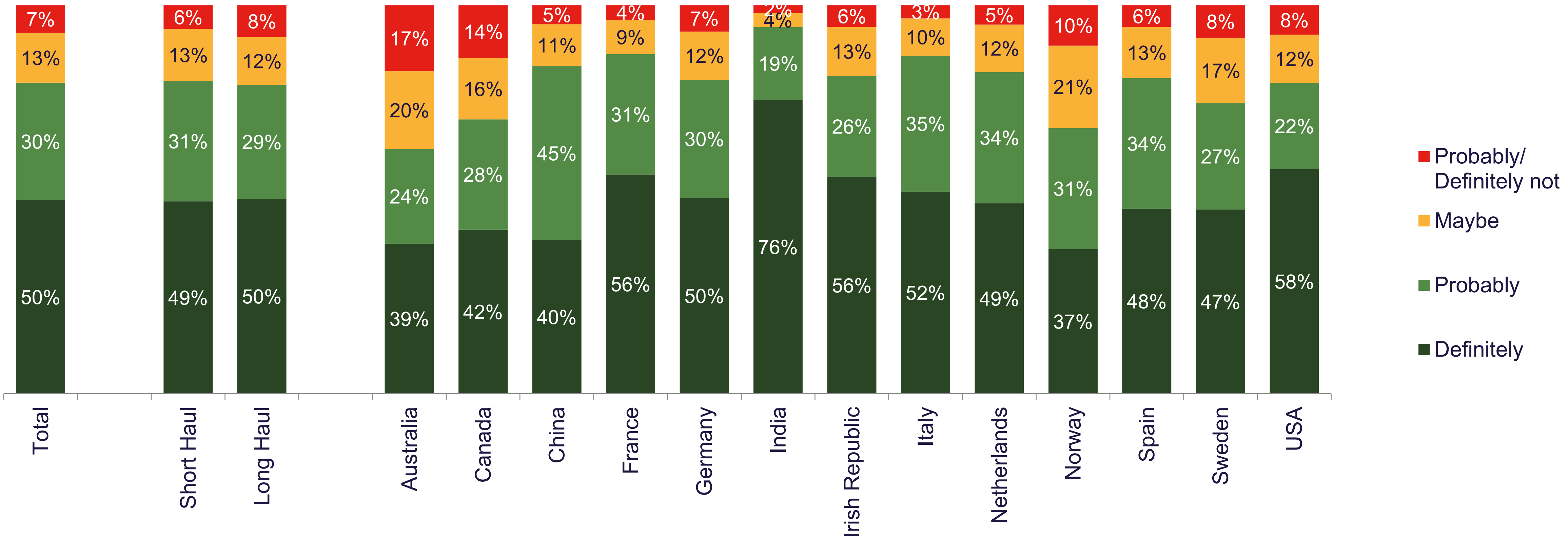
Travel consideration for an international leisure trip

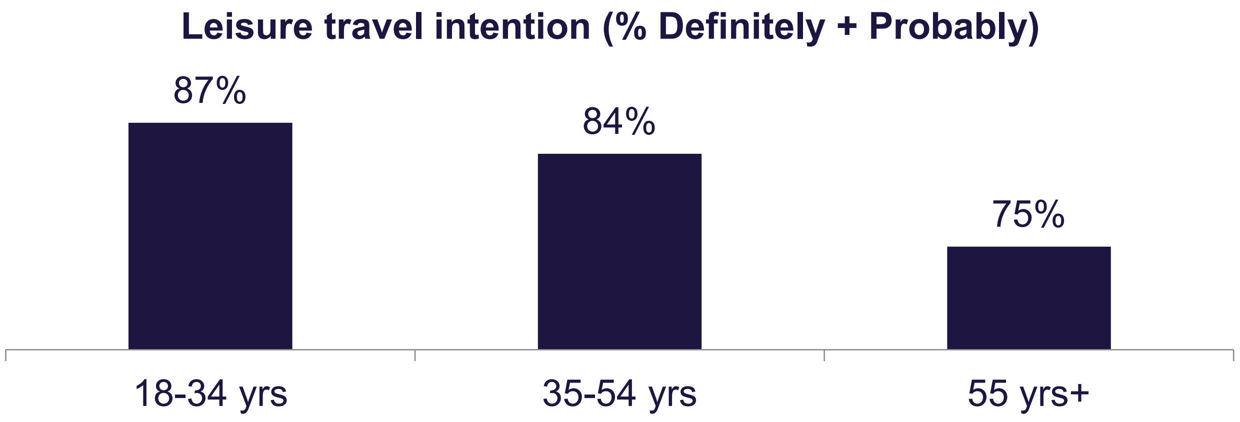
Despite prolonged pandemic uncertainties, a steady and more established desire to travel is confirmed across many markets. While the Nordics still show a more reserved attitude, France, Italy and the Republic of Ireland show the most positive sentiment towards travelling abroad. In LH markets, the US and India are the most advanced in their intentions.



Q5: How likely would you consider an international leisure trip for more than one night in the next 12 months?
Base: All respondents (n = 7,500)

Age impact on propensity to travel to Europe

The younger generation still shows the highest propensity to travel internationally across most markets. However, with vaccination widely adopted across adult populations, sentiment towards travel grows in older adult generations who tend to have already decided (and booked) their destination more frequently than those that are younger. The age seems to be less of a determining factor in China, India, Germany and in the Netherlands.



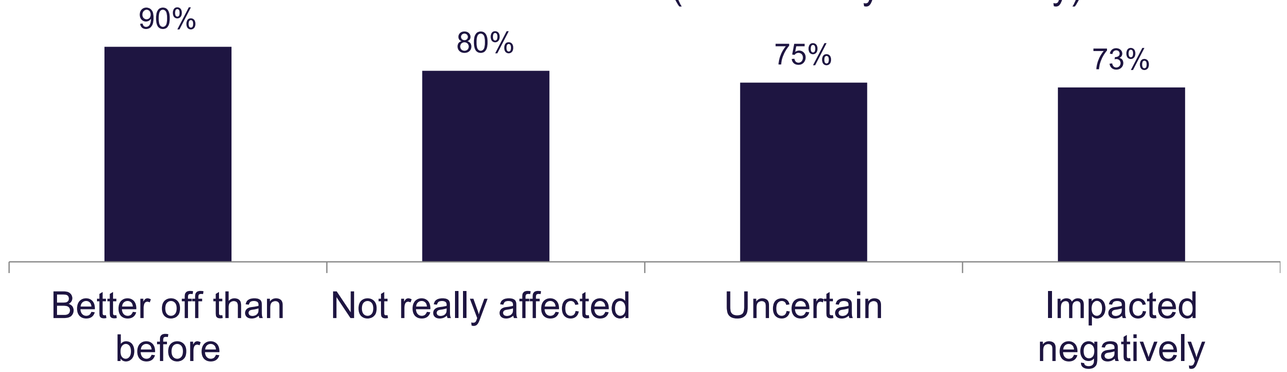
(% Definitely + Probably)	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
18 - 34 y.o.	87%	89%	67%	88%	88%	92%	85%	99%	87%	96%	89%	71%	86%	81%	89%
35 - 54 y.o.	82%	89%	76%	79%	91%	89%	78%	97%	80%	92%	80%	72%	84%	80%	92%
55+ y.o.	77%	69%	54%	61%	98%	80%	84%	97%	78%	74%	90%	70%	71%	75%	65%

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 the next 12 months (n = 4,664)

Impact of financial situation on propensity to travel

Opportunity to travel for those who are better off (or not impacted) financially remains high, but uncertainty in financial situation is not hugely detrimental to travel intentions. The financial factor seems less important today in SH markets, particularly in France or Italy (where a segment of affluent travellers exist despite the uncertain economic context in the country). Financial uncertainties act more as an obstacle in the Nordics, which are showing a more risk-averse attitude to travel internationally.

Leisure travel intention (% Definitely + Probably)

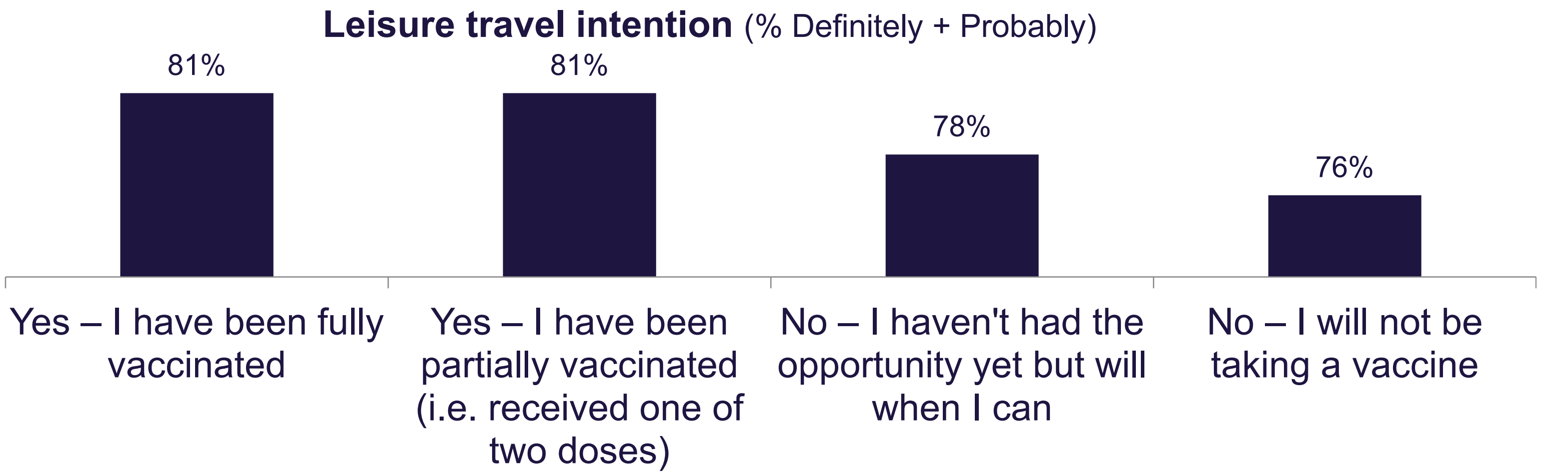


(% Definitely + Probably)	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Not impacted	83%	83%	83%	83%	83%	89%	92%	84%	97%	84%	91%	84%	74%	88%	77%	82%
Uncertain	75%	78%	71%	78%	71%	74%	82%	76%	89%	81%	87%	80%	59%	77%	75%	71%
Impacted negatively	73%	71%	78%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?
Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: All respondents (n = 7,500)

Impact of vaccination on propensity to travel

While most respondents were vaccinated when they took the survey, the gap of intention between vaccinated and non-vaccinated consumers has diminished, particularly in SH markets where 8 in 10 non-vaccinated people envisage a trip abroad (there were 7 in 10 before summer). The vaccination continues to be a trigger of travel among LH markets.

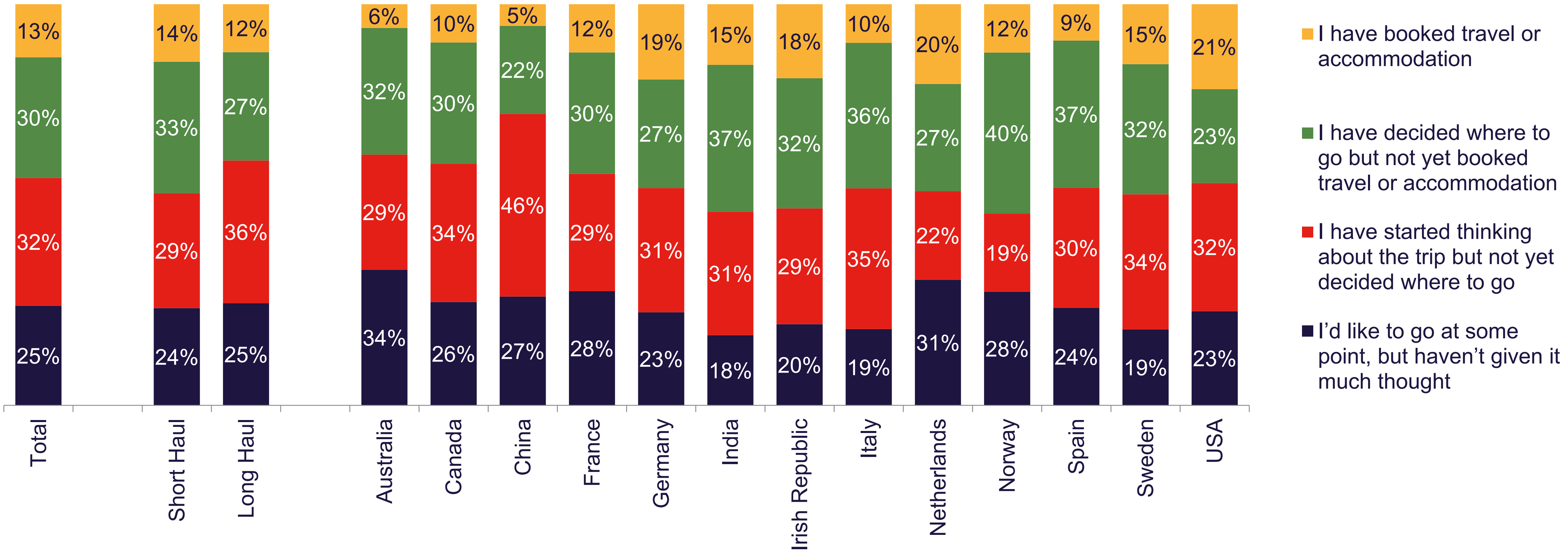


Intention to travel internationally (% Definitely + Probably)	SH	LH
Yes – I have been fully vaccinated	81%	80%
Yes – I have been partially vaccinated	77%	83%
No – I haven't had the opportunity yet but will when I can	79%	77%
No – I will not be taking a vaccine	79%	69%

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 = 7,500)

Trip planning stage per market

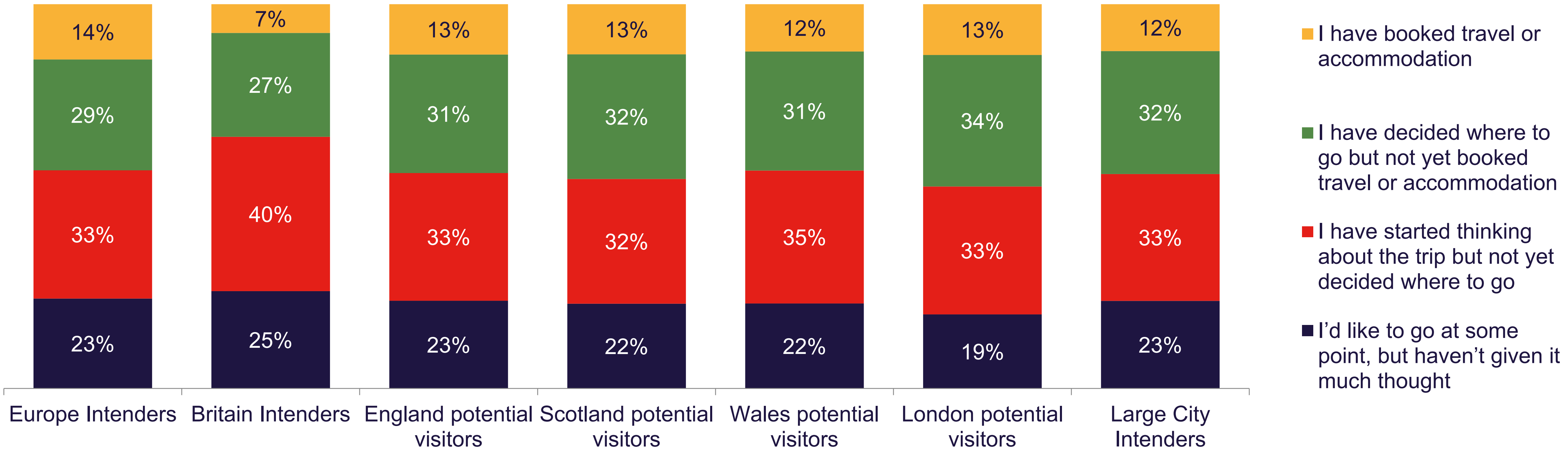
With stronger consumer sentiment and increased choice of destination, bookings tend to rise. The US, the Netherlands, Germany and the Irish Republic have the highest level of booking rate among markets surveyed (about 1 in 5 have booked travel or accommodation). China and Australia are less advanced in the trip definition process.



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 the next 12 months (n = 7,450)

Trip planning stage among Intenders to Europe

Among leisure travel intenders considering Britain, only a very small minority have booked. There is still a 'wait and see' attitude with many 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 = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)

Travel horizon for next international leisure trip

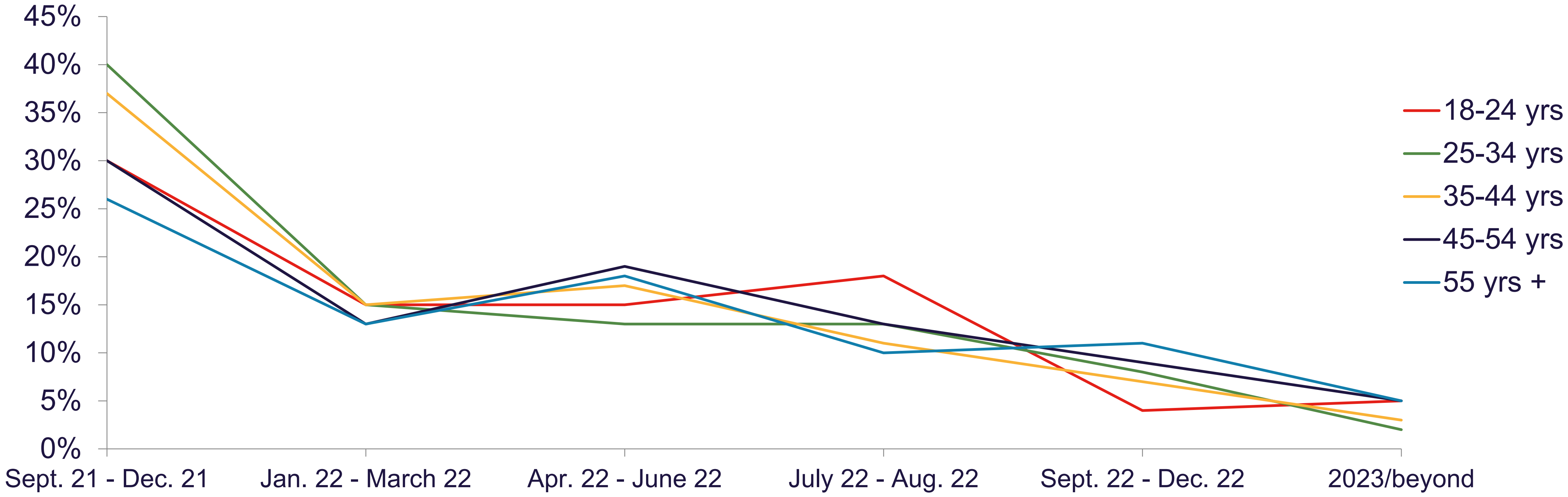
4 in 10 respondents in SH markets envisage a trip by the end of the year, including during the shoulder or summer season and the festive season. Spring and Summer 2022 are also already in mind. LH markets' travel intentions for 2021 focus on festive period (and China Gold Week) then span over the first semester in 2022. The horizon is not yet defined for a significant part of consumers in the Nordics and Australia, reflecting a more careful travel attitude in these countries.

Date	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Aug-21	2%	2%	2%	1%	1%	1%	1%	3%	5%	3%	1%	6%	1%	1%	1%	3%
Sept-21	9%	13%	4%	2%	3%	1%	11%	19%	7%	12%	15%	15%	10%	12%	8%	7%
Oct-21	8%	9%	7%	2%	5%	11%	9%	11%	5%	10%	7%	12%	7%	8%	7%	8%
Nov-21	6%	6%	6%	2%	5%	7%	7%	4%	9%	7%	5%	6%	4%	7%	5%	6%
Dec-21	10%	10%	10%	7%	8%	8%	10%	6%	22%	10%	16%	9%	8%	15%	8%	10%
Jan-22	5%	3%	7%	4%	7%	5%	3%	2%	14%	3%	2%	3%	6%	3%	4%	7%
Feb-22	4%	3%	6%	4%	7%	6%	5%	4%	7%	3%	2%	3%	5%	3%	3%	4%
Mar-022	5%	4%	5%	4%	8%	3%	4%	4%	7%	6%	4%	2%	3%	3%	5%	5%
Apr-22	4%	5%	4%	4%	4%	4%	5%	4%	4%	6%	6%	3%	4%	3%	5%	5%
May-22	6%	6%	7%	4%	7%	9%	7%	7%	5%	7%	5%	8%	4%	6%	5%	7%
Jun-22	6%	6%	5%	6%	5%	6%	6%	7%	3%	8%	7%	5%	7%	4%	7%	6%
Jul-22	7%	8%	5%	8%	6%	6%	9%	7%	1%	7%	7%	9%	9%	9%	10%	5%
Aug-22	5%	6%	4%	4%	4%	4%	7%	6%	3%	4%	8%	5%	4%	8%	4%	4%
Sept-22	3%	3%	4%	7%	4%	3%	2%	4%	2%	2%	4%	2%	3%	4%	4%	3%
Oct-22	2%	1%	3%	4%	2%	5%	2%	1%	1%	1%	1%	2%	1%	1%	2%	2%
Nov-22	1%	1%	2%	3%	1%	2%	0%	1%	2%	1%	0%	0%	1%	1%	1%	1%
Dec-22	2%	1%	2%	4%	2%	2%	0%	1%	2%	1%	1%	1%	0%	0%	3%	2%
2023/beyond	4%	2%	6%	11%	8%	7%	2%	1%	1%	4%	2%	1%	4%	3%	2%	3%
Don't know	10%	10%	10%	19%	11%	10%	9%	10%	1%	6%	6%	7%	20%	8%	16%	9%

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 the next 12 months (n = 7,450)

Age impact on travel horizon

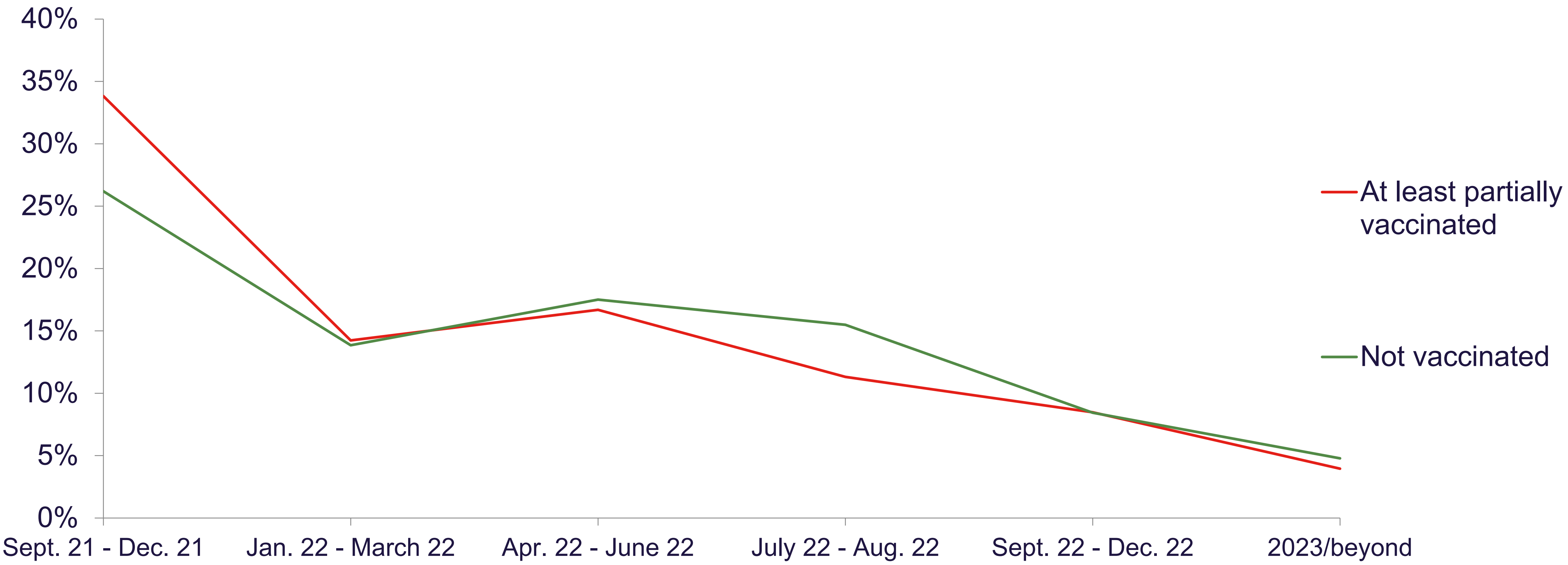
Propensity to travel in the very short term remains higher among young potential travellers. Older demographics show high interest in holidaying next Spring 2022.



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 the next 12 months (n = 7,450)

Vaccination impact on travel horizon

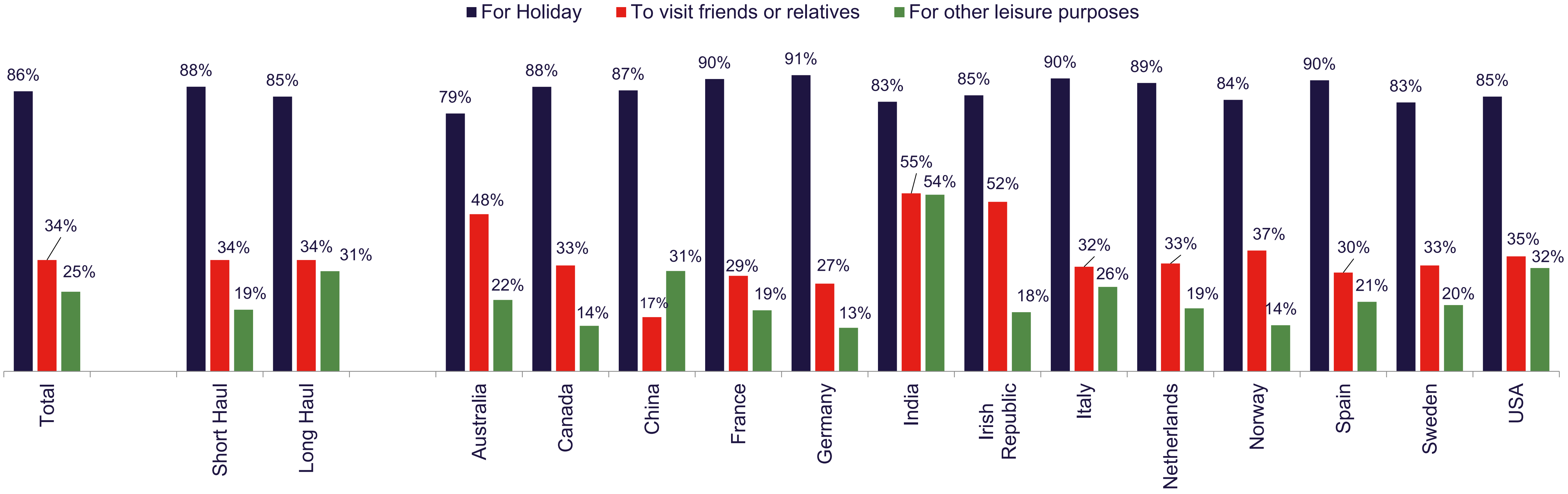
Vaccination accelerates motivations for travelling by then end of 2021, but while a very large majority of respondents are vaccinated, non-vaccination is no longer a major obstacle to envisage short to mid-term trip planning.



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 the next 12 months (n = 7,450)

Purpose of leisure travel

Beyond holiday motivations, the need for reconnection with friends and relatives is still expressed by a third of respondents on average and half of them in Irish Republic, India and Australia. Demand for a holiday trip has increased in most markets.

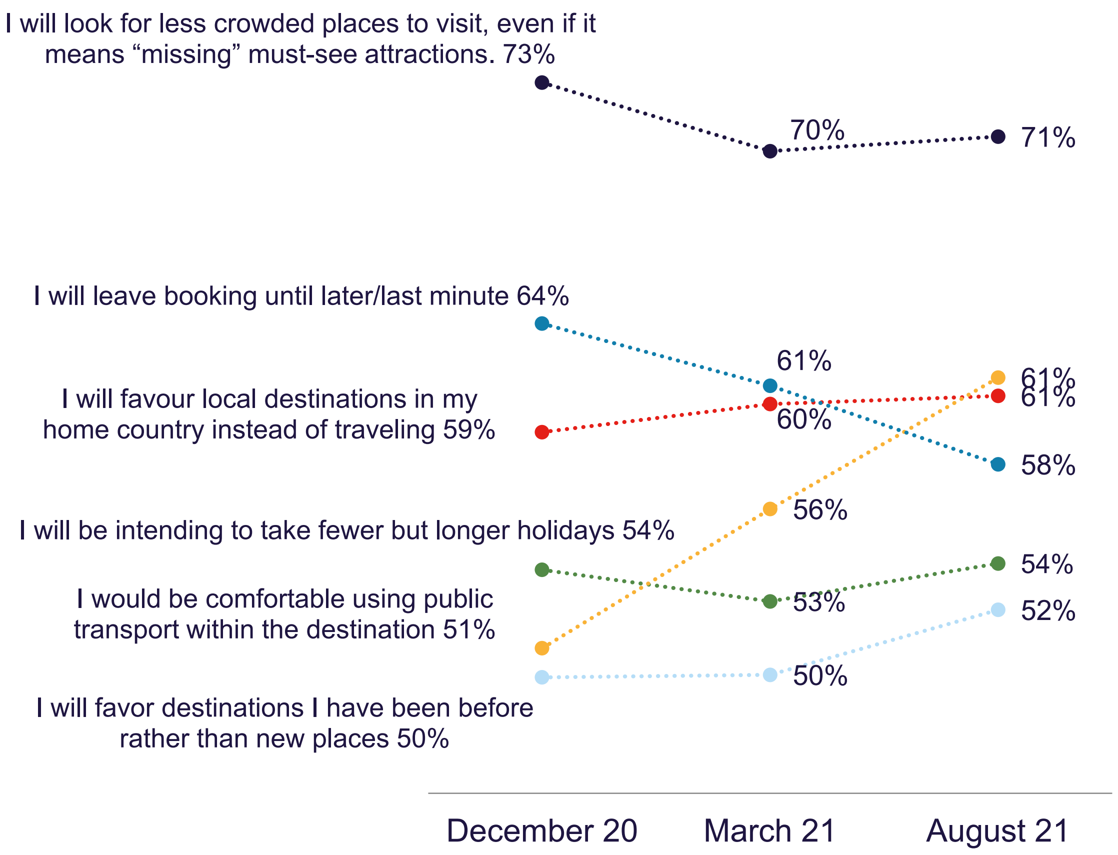


Q6: Considering your next international leisure trip, for what purpose(s) would you travel? (Multiple Answers)
Base: All respondents (n = 7,500)

Trended data

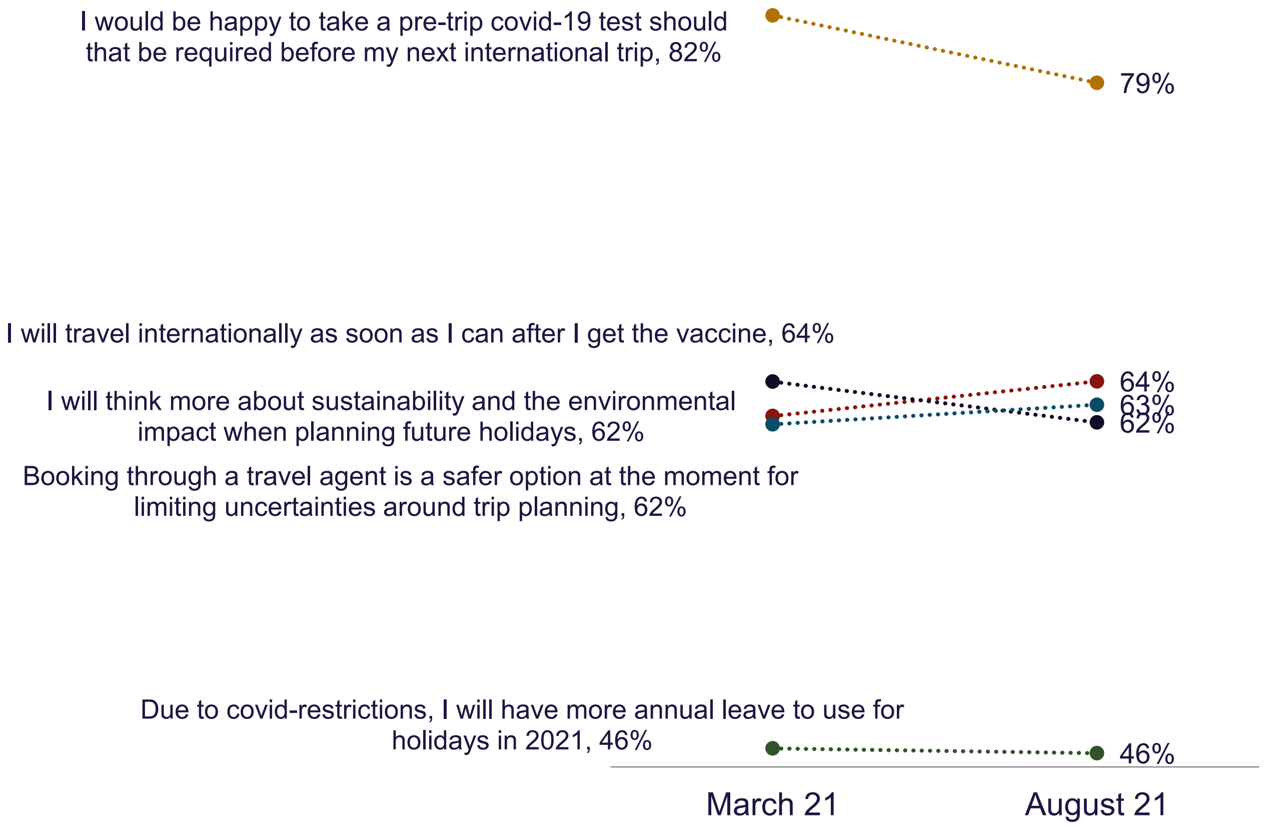
Booking last-minute remains a popular attitude yet declines while consumers are offered more flexible cancellation guarantees. Trust in using public transport has increased, suggesting a continued slight shift to pre-pandemic attitudes. The overall consumer mind is still fueled by a sense of responsibility in relation to health and environment.

Travel attitudes (Completely+Somewhat agree)



Trend calculated at constant perimeter (13 markets consolidated)

Travel attitudes (Completely+Somewhat agree)



Activators for an international leisure trip

While vaccination and other health and hygiene factors in the destination country (low cases, safety protocols, vaccinated population…) still act as key activators for a trip planning, the shift from *health-centric* to *money-centric* attitude is tangible: money-back guarantee is now mentioned as #1 activator in 10 out of 13 markets surveyed, and attention paid to attractive deals grows. Insurance for COVID-19 travel is also often mentioned.

Activator	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Rep.	Italy	Neths.	Norway	Spain	Sweden	USA
Money-back guarantee should I wish to cancel my trip	35%	39%	30%	44%	41%	13%	42%	38%	26%	41%	39%	39%	31%	40%	43%	35%
A significant decrease in coronavirus cases at destination	31%	30%	31%	30%	35%	25%	23%	32%	31%	36%	32%	26%	28%	31%	35%	35%
Removal of quarantine policies in destination country	28%	30%	26%	34%	32%	19%	31%	34%	27%	27%	24%	32%	34%	32%	27%	24%
Hygiene & safety protocols in place at destination	26%	24%	29%	25%	29%	26%	20%	23%	40%	33%	34%	18%	17%	37%	10%	31%
A high proportion of the population being vaccinated in the destination country	25%	24%	27%	27%	31%	21%	17%	20%	28%	30%	27%	18%	26%	25%	28%	32%
An attractive offer e.g. discounts on flights or accommodation	25%	27%	23%	17%	26%	21%	28%	20%	29%	30%	28%	23%	25%	30%	27%	25%
Insurance for COVID-19 related travel changes/changes to regulations	25%	23%	27%	39%	33%	19%	27%	14%	30%	22%	27%	22%	20%	26%	29%	24%
Receiving a Covid-19 vaccination	23%	18%	29%	32%	19%	30%	11%	18%	38%	26%	22%	12%	14%	17%	25%	26%
The introduction of a vaccine passport	22%	23%	21%	31%	33%	12%	22%	12%	19%	28%	30%	17%	26%	19%	34%	21%
Removal of quarantine policies in home country	22%	23%	20%	36%	25%	15%	25%	27%	21%	25%	18%	21%	33%	23%	15%	16%
Your Government's advice on international travel	19%	19%	20%	30%	20%	16%	11%	11%	25%	31%	11%	19%	32%	13%	23%	18%
Stable political environment in destination country	19%	20%	19%	11%	17%	26%	22%	26%	18%	13%	19%	16%	17%	22%	21%	17%
Welcoming locals	16%	16%	16%	10%	11%	20%	21%	19%	20%	11%	13%	15%	22%	15%	12%	16%
Assurance that there will be a range of/enough things to do	15%	14%	16%	7%	13%	19%	22%	22%	18%	12%	9%	16%	7%	16%	10%	17%
Voucher-back guarantee should I wish to cancel my trip	14%	16%	12%	10%	13%	9%	13%	14%	14%	14%	22%	18%	8%	26%	11%	15%
Mandatory coronavirus testing at some point during the trip	13%	10%	16%	14%	13%	14%	9%	8%	22%	11%	13%	10%	9%	15%	6%	16%
Official national hygiene label in accommodation and attractions in destination	12%	9%	15%	8%	9%	22%	9%	9%	23%	9%	11%	9%	6%	10%	6%	12%
Relaxation of visa requirements	4%	N/A	8%	N/A	N/A	16%	N/A	N/A	23%	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Q20: What would make you more likely to travel internationally for leisure in the next 12 months? (Multiple Answers)
Base: All respondents (n = 7,500)

Activators for a leisure trip to Britain

Activators for a leisure trip in Britain are quite similar to the ones measured for international trips overall (including trends in COVID-19 cases), yet the ranking suggests a slightly higher relative weight given for deals and attractive offers (ranked 4th vs 6th).

Activator	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Rep.	Italy	Neths.	Norway	Spain	Sweden	USA
Money-back guarantee should I wish to cancel my trip	28%	30%	26%	38%	34%	13%	33%	25%	22%	31%	36%	27%	23%	38%	32%	30%
A significant decrease in coronavirus cases at destination	27%	26%	27%	27%	28%	24%	22%	21%	30%	34%	30%	19%	25%	30%	27%	30%
Removal of quarantine policies in destination country	23%	24%	22%	25%	25%	17%	28%	27%	26%	21%	21%	20%	24%	29%	21%	21%
An attractive offer e.g. discounts on flights or accommodation	23%	22%	23%	18%	24%	20%	24%	18%	28%	25%	26%	18%	20%	26%	22%	25%
Hygiene & safety protocols in place at destination	22%	18%	26%	18%	20%	29%	12%	16%	38%	28%	28%	13%	15%	28%	8%	26%
A high proportion of the population being vaccinated in the destination country	22%	19%	25%	23%	26%	20%	13%	15%	30%	27%	23%	17%	15%	19%	26%	29%
Insurance for COVID-19 related travel changes/changes to regulations	20%	18%	23%	32%	25%	18%	18%	11%	28%	19%	21%	13%	14%	24%	23%	21%
Receiving a COVID-19 vaccination	19%	15%	24%	25%	17%	26%	8%	12%	28%	21%	19%	10%	11%	18%	17%	21%
The introduction of a vaccine passport	19%	17%	21%	25%	25%	15%	16%	10%	22%	21%	24%	11%	13%	16%	24%	21%
Removal of quarantine policies in home country	18%	19%	18%	30%	17%	12%	22%	17%	22%	20%	17%	15%	25%	21%	11%	15%
Your Government's advice on international travel	16%	15%	18%	24%	17%	17%	9%	11%	22%	25%	11%	12%	25%	9%	17%	14%
Welcoming locals in destination country	14%	12%	16%	9%	11%	20%	15%	12%	21%	11%	12%	9%	15%	14%	8%	15%
Assurance that there will be a range of/enough things to do	14%	12%	15%	7%	11%	18%	20%	18%	19%	7%	9%	14%	6%	17%	8%	17%
Stable political environment in destination country	13%	10%	17%	7%	12%	25%	11%	14%	21%	7%	11%	8%	7%	13%	8%	15%
Voucher-back guarantee should I wish to cancel my trip	13%	13%	13%	13%	13%	12%	13%	9%	15%	13%	22%	13%	7%	20%	8%	15%
Official national hygiene label in accommodation and attractions in destination	12%	9%	16%	7%	9%	23%	8%	9%	27%	10%	10%	9%	6%	14%	5%	13%
Mandatory coronavirus testing at some point during the trip	11%	9%	14%	12%	11%	13%	8%	6%	21%	12%	14%	8%	6%	12%	6%	15%
Relaxation of visa requirements	4%	N/A	8%	N/A	N/A	14%	N/A	N/A	25%	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Q20: What would make you more likely to travel to Britain (England, Scotland, Wales) for leisure in the next 12 months? (Multiple Answers)
Base: All respondents (n = 7,500)

Concerns about next international leisure trip

The lack of respect for COVID-19 rules by other people is driving a lot of concerns among travellers, along with uncertainties implied with planning (changes in quarantine requirements, access to healthcare at destination, lack of experience at destination…). Cost-related issues (air fare, insurance, tests…) are driving more concerns among LH markets who are also paying attention to locals' attitudes.

(% Very + Somewhat concerned)	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Other people not following COVID-19 policies and procedures during the journey and in destination	78%	72%	86%	82%	86%	90%	70%	51%	92%	82%	74%	71%	71%	86%	71%	82%
Access to healthcare if I contract COVID-19 abroad	76%	67%	86%	81%	85%	90%	71%	45%	94%	78%	74%	63%	62%	86%	59%	79%
Change in quarantine requirements on my return home	75%	67%	84%	86%	79%	90%	68%	53%	91%	81%	67%	63%	64%	86%	53%	75%
Contracting COVID-19 during my journey/trip	71%	61%	82%	77%	76%	89%	57%	39%	93%	71%	67%	59%	58%	83%	57%	74%
Extra admin involved with new policy/rules during the trip	71%	64%	78%	66%	76%	86%	67%	41%	89%	65%	61%	69%	67%	82%	64%	72%
Limited / restricted experiences at destination	70%	61%	81%	73%	76%	88%	67%	45%	89%	70%	67%	56%	49%	83%	49%	77%
Affordability of robust travel insurance (to cover COVID-19 related travel changes)	67%	56%	80%	80%	78%	88%	60%	38%	90%	69%	58%	54%	47%	79%	43%	68%
Costs of mandatory COVID-19 tests	65%	58%	73%	65%	74%	85%	65%	42%	83%	69%	57%	55%	46%	83%	48%	60%
Accessibility of affordable air fares	65%	53%	78%	78%	75%	85%	63%	35%	87%	69%	52%	48%	45%	75%	39%	67%
Locals' attitude towards international tourists	61%	50%	74%	57%	66%	88%	55%	30%	87%	59%	51%	44%	43%	73%	42%	68%

Q23: How concerned are you about the following when thinking about your next international trip?
Base: All Respondents (n = 7,500)

Concerns among Britain Intenders

Lack of respect for COVID-19 rules by other people, access to healthcare and change in quarantine requirements are the most frequent concerns among those wishing to go to Britain. This should encourage all players of the destination ecosystem to provide the most accurate and updated information for international trip planners looking for reinsurance.

(% Very + Somewhat concerned)	Europe Intenders	Britain Intenders	England pot. visitors	Scotland pot. visitors	Wales pot. visitors	London pot. visitors	City Intenders
Other people not following COVID-19 policies and procedures during the journey and in destination	78%	85%	80%	80%	82%	78%	80%
Access to healthcare if I contract COVID-19 abroad	74%	82%	78%	79%	81%	75%	78%
Change in quarantine requirements on my return home	73%	80%	78%	78%	80%	75%	78%
Contracting COVID-19 during my journey/trip	69%	79%	74%	73%	78%	71%	74%
Extra admin involved with new policy/rules during the trip	69%	77%	74%	74%	77%	70%	74%
Limited / restricted experiences at destination	68%	74%	74%	73%	77%	73%	74%
Affordability of robust travel insurance (to cover COVID-19 related travel changes)	65%	75%	72%	71%	75%	68%	72%
Costs of mandatory COVID-19 tests	63%	71%	68%	69%	71%	64%	70%
Accessibility of affordable air fares	61%	70%	68%	68%	73%	65%	69%
Locals' attitude towards international tourists	59%	68%	65%	65%	71%	61%	66%

Q23: How concerned are you about the following when thinking about your next international trip?
Base: Europe Int. (n = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)

Attitudes to travel

The portrayal of a more responsible traveller is confirmed, still keen to travel for discovering new / less crowded places in a safer and more sustainable way. With vaccination widely spread, the willingness to take pre-trip testing remains high but has slightly decreased. The role of travel agents is valued and intentions to book last-minute, though less dominant, remains high to accommodate uncertainties.

Statement	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Rep.	Italy	Neths.	Norway	Spain	Sweden	USA
I would be happy to take a pre-trip COVID-19 test should that be required before my next international trip	79%	73%	86%	86%	80%	87%	74%	72%	92%	78%	82%	60%	74%	76%	64%	85%
I will look for less crowded places to visit, even if it means “missing” must-see attractions	71%	65%	77%	70%	69%	83%	58%	64%	91%	72%	72%	65%	62%	72%	57%	73%
I will think more about sustainability and the environmental impact when planning future holidays	64%	56%	73%	58%	57%	85%	60%	50%	95%	55%	67%	53%	43%	70%	52%	65%
Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning	63%	54%	74%	62%	65%	82%	58%	58%	88%	51%	58%	54%	51%	59%	40%	68%
I will travel internationally as soon as I can after I get the vaccine	62%	59%	66%	54%	51%	72%	71%	56%	88%	52%	70%	62%	52%	66%	40%	62%
I would be comfortable using public transport within the destination	61%	56%	68%	59%	52%	80%	67%	49%	79%	57%	51%	54%	59%	58%	51%	62%
I will favour local destinations in my home country instead of traveling internationally	61%	54%	69%	69%	65%	73%	54%	51%	75%	56%	51%	45%	51%	72%	48%	64%
I will leave booking until later/last minute	58%	54%	63%	63%	52%	74%	58%	60%	72%	58%	53%	63%	43%	63%	35%	52%
I will be intending to take fewer but longer holidays	54%	41%	69%	58%	49%	82%	43%	33%	89%	50%	48%	38%	37%	50%	30%	61%
I will favour destinations I have been before rather than new places	52%	45%	60%	54%	48%	67%	38%	44%	75%	57%	38%	45%	52%	46%	40%	56%
Due to COVID-19 restrictions, I will have more annual leave to use for holidays in 2021	46%	32%	61%	52%	40%	76%	33%	26%	81%	38%	35%	38%	21%	42%	24%	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: All Respondents (n = 7,500)

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Attitudes to travel among intenders to Europe

Acceptance of a pre-trip COVID-19 test, if required, is widely positive across all of those wishing to travel to British destinations. Escaping crowded sites is a popular opinion, except for potential visitors to London, who will not want to miss "must-see" places. 3 in 4 Britain intenders will think more about sustainability for their future holidays, a score significantly above the average individual wishing to travel to Europe.

(% 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	78%	84%	82%	82%	84%	81%	81%
I will look for less crowded places to visit, even if it means "missing" must-see attractions.	71%	75%	72%	73%	76%	67%	71%
I will think more about sustainability and the environmental impact when planning future holidays	64%	73%	69%	69%	74%	64%	69%
I will travel internationally as soon as I can after I get the vaccine	63%	65%	69%	65%	69%	65%	68%
I would be comfortable using public transport within the destination	62%	70%	69%	67%	69%	66%	69%
Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning	61%	66%	67%	67%	71%	60%	65%
I will favour local destinations in my home country instead of traveling	59%	64%	63%	63%	66%	57%	63%
I will leave booking until later/last minute	58%	61%	60%	62%	63%	55%	60%
I will favor destinations I have been before rather than new places	51%	54%	56%	51%	56%	49%	56%
I will be intending to take fewer but longer holidays	51%	60%	62%	59%	67%	55%	61%
Due to covid-restrictions, I will have more annual leave to use for holidays in 2021	43%	53%	54%	51%	60%	46%	53%

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 = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)

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

Destination Planning

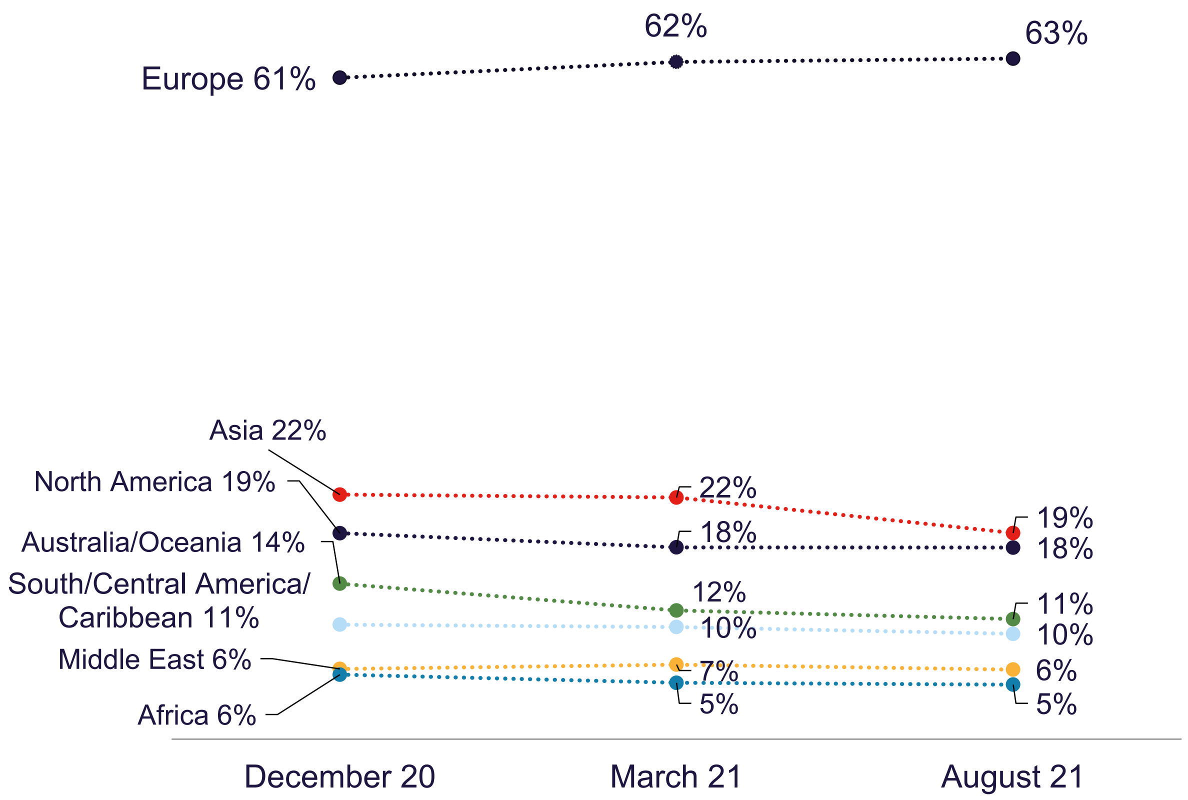
Destination planning: summary

- Europe reinforces its pole position at the top of regions envisaged among trip planners.
- Britain, like most large destinations in Europe, is considered less while smaller destinations are driving more interest, yet it now rivals Italy and Spain and surpasses Germany significantly.
- The COVID-19 safety image has continued to improve for all British destinations, with 2 out of 3 respondents now rating the destination as COVID-19 safe compared to a minority having this opinion in December 2020.
- 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.
- In SH 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 and Spaniards. London would be considered by nearly 1 in 2 potential visitors to England. For LH 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.
- Flight remains a confident transport option while ferry and tunnel are equally considered in the closest markets. LH markets would feel comfortable using all types of transportation means to get to Britain including Eurostar/Train as part of a trip involving multiple countries.
- The overall trust level for public and collective transportation means is confirmed and should encourage exploring rural and urban environments as well as planning multiple destinations within Britain.
- The use of expert intermediaries still 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.

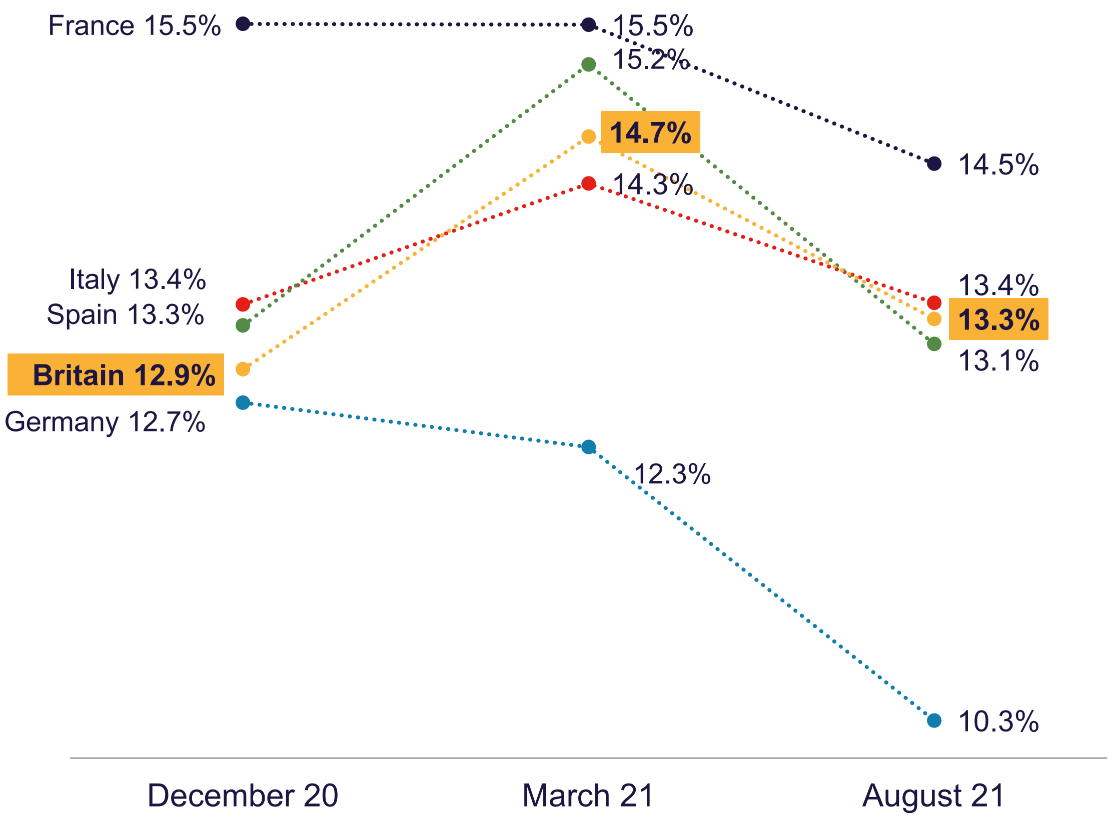
Trended data

Europe reinforces its pole position on top of regions envisaged among trip planners. Britain has lost 1.4 points of intention vs March 2021 but has simultaneously improved its competitive position compared to other large destinations in Europe, now rivalling Italy and Spain. The competitive gap vs Germany is also higher (+3 points vs 0.2 points in December 2020).

Destinations envisaged



European destinations envisaged (TOP 5)



Trend calculated at constant perimeter (13 markets consolidated)

Trended data per market (gap of %)

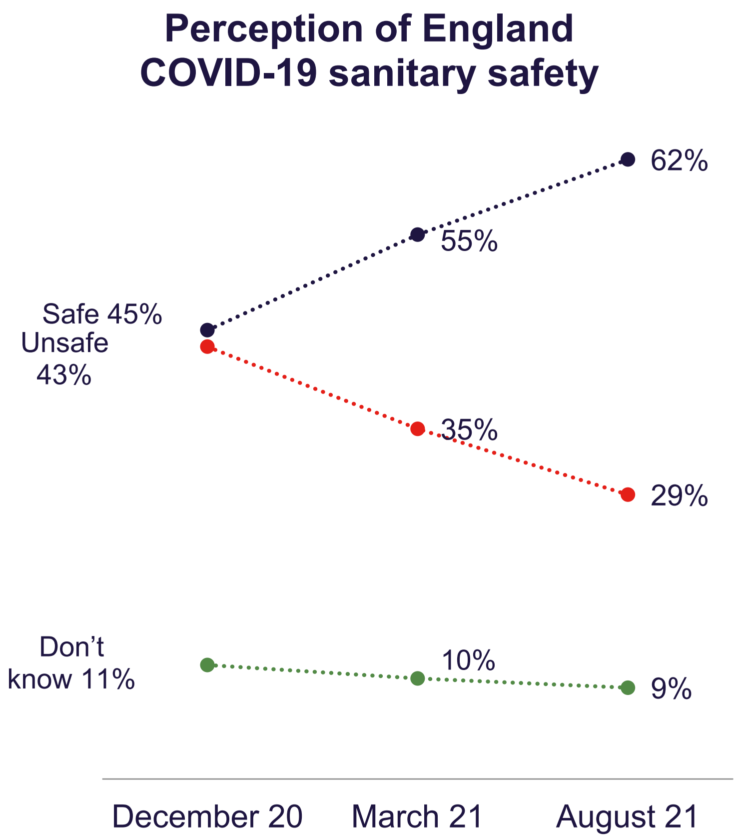
In SH markets, Britain has gained consideration shares in the Republic of Ireland, France, the Netherlands and Italy. Like other large destinations (France, Germany, Italy…), Britain has lost some individuals wishing to travel from China and North America but has gained more from Australia and India.

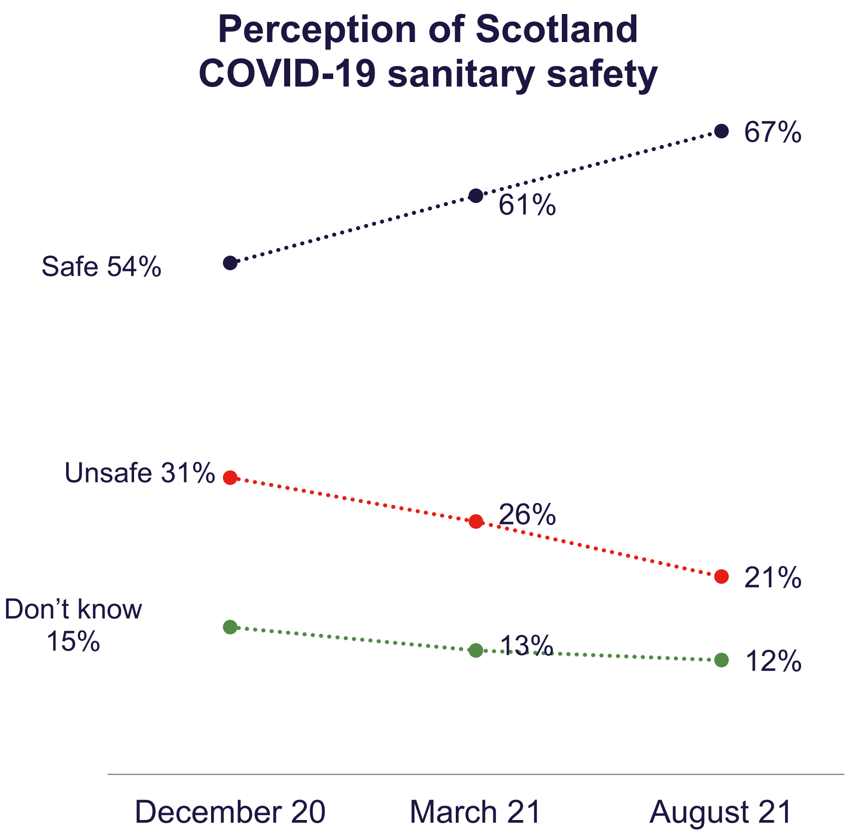
Destination ↓	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Britain	-1.4%	-0.4%	-2.5%	2.2%	-2.2%	-6.8%	1.0%	-3.5%	2.1%	2.5%	0.4%	1.8%	-1.5%	-2.5%	-1.5%	-3.8%
Austria	0.4%	0.3%	0.5%	-2.7%	0.4%	0.1%	0.0%	0.7%	1.9%	2.8%	-1.8%	0.4%	-0.8%	2.2%	-1.2%	1.7%
Belgium	0.1%	0.0%	0.2%	0.6%	-1.6%	-1.4%	-0.8%	1.8%	1.4%	1.5%	-2.0%	2.8%	-0.6%	-1.8%	-1.2%	1.6%
Croatia	0.4%	0.1%	0.6%	0.4%	0.0%	1.2%	3.6%	-0.5%	1.0%	1.3%	-3.4%	3.4%	2.0%	-2.4%	-2.8%	0.3%
Denmark	0.1%	0.1%	0.1%	0.8%	-0.6%	0.7%	1.0%	1.0%	-2.0%	0.2%	1.2%	1.4%	0.1%	-1.0%	-2.5%	0.4%
Finland	-0.5%	-0.4%	-0.6%	-1.0%	-0.4%	-3.0%	1.4%	-0.4%	1.0%	0.8%	-1.2%	-1.0%	0.4%	-0.4%	-2.4%	0.9%
France	-1.0%	-0.5%	-1.7%	1.8%	1.7%	-8.0%		4.8%	1.3%	0.6%	-2.6%	0.5%	-4.1%	1.7%	-1.2%	-0.7%
Germany	-2.1%	-1.7%	-2.5%	-1.9%	-2.8%	-6.6%	-1.2%		1.5%	0.8%	-0.4%	-1.7%	-1.9%	-2.5%	-4.8%	-0.8%
Greece	-0.6%	-1.2%	0.2%	1.6%	-0.2%	-0.6%	2.8%	-0.5%	0.6%	-1.8%	-2.4%	-0.7%	-3.9%	-2.7%	-0.3%	0.2%
Italy	-0.9%	-1.1%	-0.7%	1.8%	-1.0%	-1.8%	0.8%	-1.4%	1.3%	-0.3%		-3.1%	0.7%	3.7%	-4.7%	-1.5%
Netherlands	-0.3%	-0.3%	-0.2%	-0.8%	0.6%	0.0%	1.2%	-0.5%	-1.8%	1.1%	1.2%		-1.2%	0.6%	-2.6%	0.3%
Portugal	-0.1%	-0.7%	0.8%	1.2%	1.0%	0.7%	3.0%	-1.3%	0.0%	0.2%	-1.8%	-3.3%	-0.8%	-0.1%	-2.0%	1.0%
Turkey	-0.1%	-0.5%	0.4%	0.2%	0.2%	1.1%	-0.2%	-0.9%	-0.2%	1.2%	-0.4%	0.4%	-1.8%	1.0%	-3.4%	0.4%
Spain	-2.1%	-2.8%	-1.2%	-0.8%	-0.4%	0.1%	0.0%	-0.3%	-2.8%	-6.4%	-4.0%	-5.4%	-1.0%		-5.7%	-2.1%
Sweden	-0.3%	-0.7%	0.0%	0.4%	-1.4%	0.7%	1.0%	1.4%	-0.6%	-1.5%	-0.8%	-1.2%	-2.3%	1.4%		0.1%
Switzerland	-0.3%	-0.6%	0.0%	1.6%	0.2%	-0.3%	1.0%	-1.9%	-0.7%	0.6%	0.4%	-2.2%	-0.2%	-0.4%	-2.2%	-0.3%

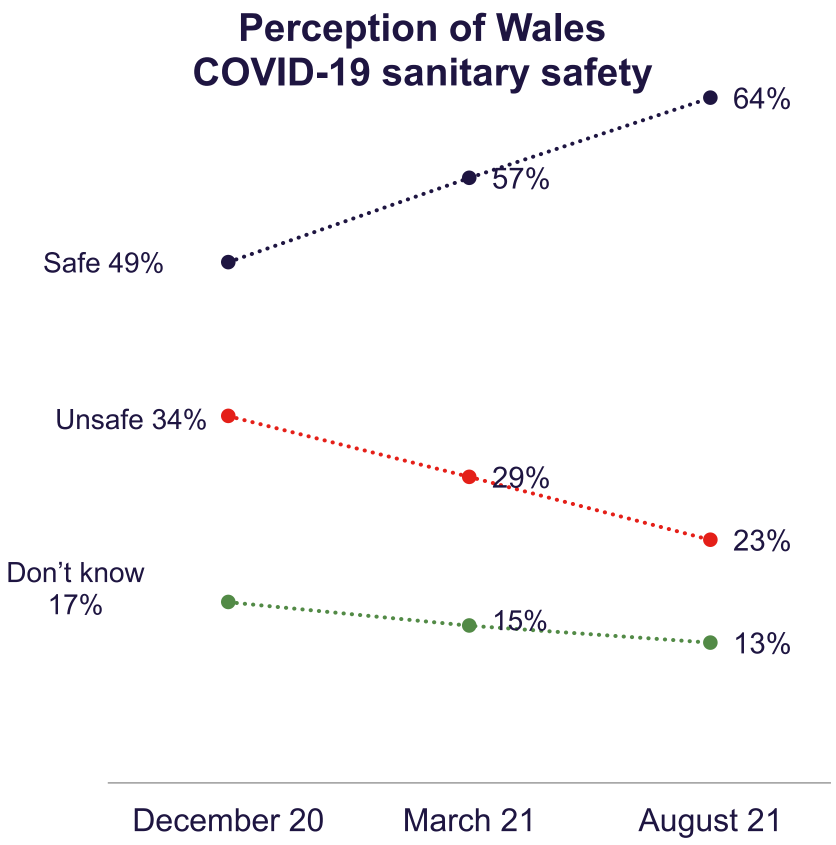
Q10. To which destination(s) in Europe in particular? (Multiple Answers - among leisure trip intenders)

Trended data

The COVID-19 perception of safety has continued widely improving for all British destinations, with 2 out 3 respondents now rating the destination as COVID-19 safe while they were a minority having this opinion in December 2020.







Trend calculated at constant perimeter (13 markets consolidated)

Trends: March 2021 vs August 2021 (gap of %)

The COVID-19 perception of safety of Britain has improved faster than for the average destinations and see its reputation widely improved in Australia and China, but also in closer markets like France or Spain. Only Italy is showing a more balanced opinion (after however a sharp improvement recorded in the last wave).

W3/W2 Evolution (+/-)

(Very Safe + Safe %)	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
England	7.5%	3.4%	12.3%	21.4%	7.6%	15.4%	11.4%	7.6%	9.8%	3.4%	-12.2%	1.8%	1.6%	10.4%	3.4%	8.1%
Scotland	6.8%	5.0%	8.9%	16.2%	2.4%	12.0%	11.2%	5.0%	6.2%	6.2%	-6.0%	8.4%	3.8%	9.0%	2.0%	6.6%
Wales	7.5%	5.7%	9.6%	17.2%	2.6%	12.3%	11.0%	5.4%	6.2%	7.2%	-5.4%	7.6%	8.4%	9.4%	1.6%	8.3%
Benchmark	3.3%	3.9%	2.7%	15.9%	5.1%	9.0%	11.4%	12.9%	12.0%	14.2%	1.5%	12.9%	11.1%	13.8%	3.0%	11.4%

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 = 7,500)

Regional destinations for a next international leisure trip

After summer experiences and more choices available regionally, Europe remains by far the most attractive region among SH European markets at 75% interest. Asia is less in mind today for Europeans while 12% still envisage North America(*). Europe also enjoys high levels of consideration for LH travellers, mentioned as the top region in mind (above their own region) in all LH markets surveyed except Australia where the intention rate for Europe has increased 6 points though.

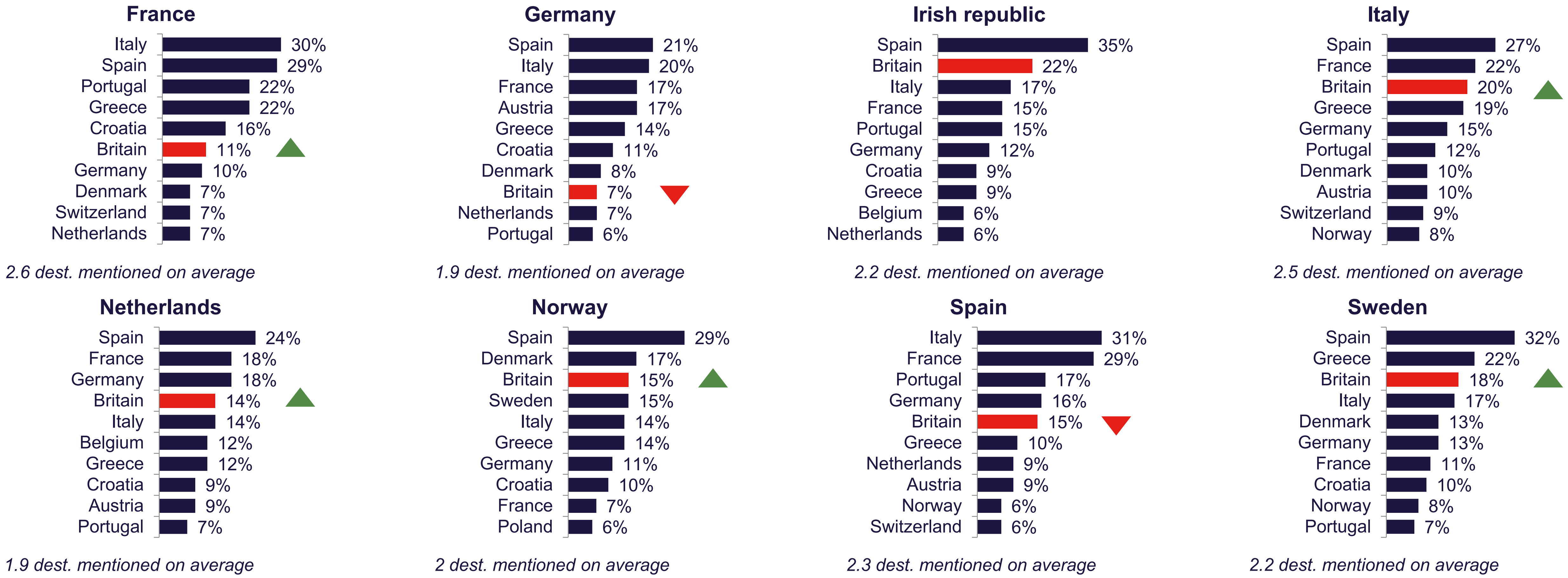
Region	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Europe	63%	75%	48%	35%	42%	52%	67%	78%	50%	79%	75%	75%	79%	78%	74%	52%
Asia	19%	10%	30%	41%	18%	42%	11%	9%	43%	10%	8%	10%	12%	7%	10%	11%
North America	18%	12%	24%	19%	31%	16%	12%	7%	31%	16%	18%	12%	8%	15%	11%	26%
Australia/Oceania	11%	3%	20%	25%	7%	24%	3%	4%	37%	5%	5%	5%	2%	2%	2%	11%
South/Central America/Caribbean	10%	6%	13%	5%	24%	4%	9%	5%	15%	5%	7%	9%	2%	11%	3%	21%
Middle East	6%	3%	10%	5%	3%	9%	4%	4%	27%	4%	4%	5%	2%	2%	2%	8%
Africa	5%	5%	5%	3%	3%	5%	10%	6%	12%	3%	6%	5%	4%	3%	3%	5%
I don't know yet	6%	4%	7%	5%	5%	15%	5%	2%	1%	3%	4%	4%	4%	4%	7%	5%

(*): The US travel ban on Europe was applicable when respondents took the survey

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 the next 12 months (n = 7,450)

Top European destinations for travelers in SH markets

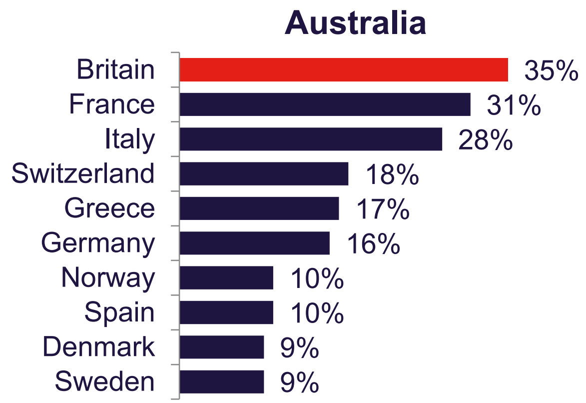
Britain has increased its competitive ranking in most SH markets surveyed except in Spain and Germany, now enjoying a position in the top 3 in Nordic markets after gaining 2 places in the ranking. The increased consideration in France is real yet probably still below pre-COVID levels.



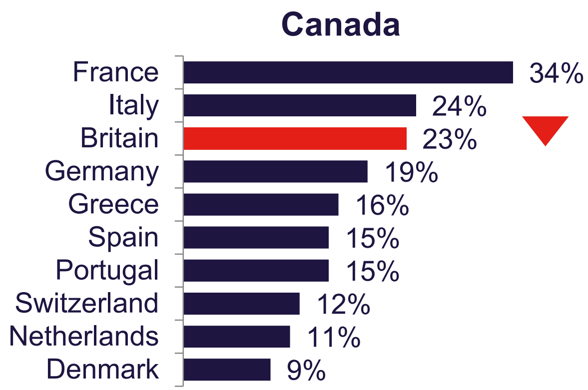
Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking an European leisure trip in the next 12 months (n=4,664)

Top European destinations for travelers in LH markets

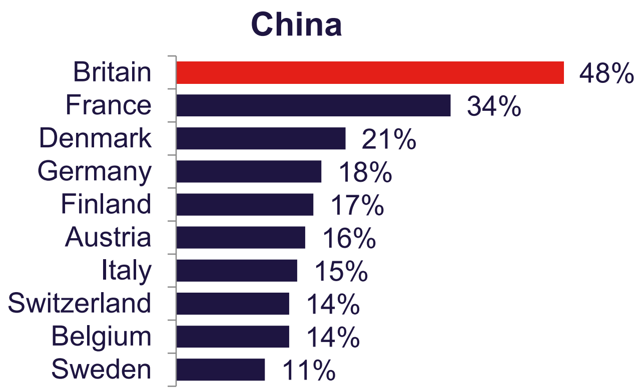
Britain consolidates a strong competitive position in Asia (Australia, China and India) but has lost some significant share of consideration in North American markets.



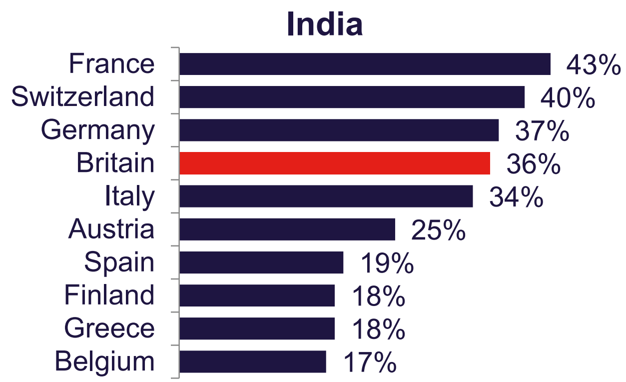
2.8 dest. mentioned on average



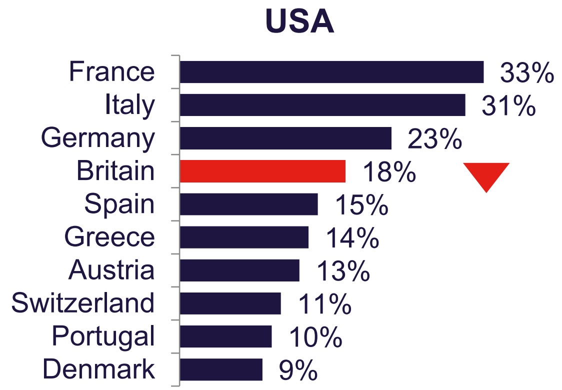
2.7 dest. mentioned on average



3.5 dest. mentioned on average



5.1 dest. mentioned on average



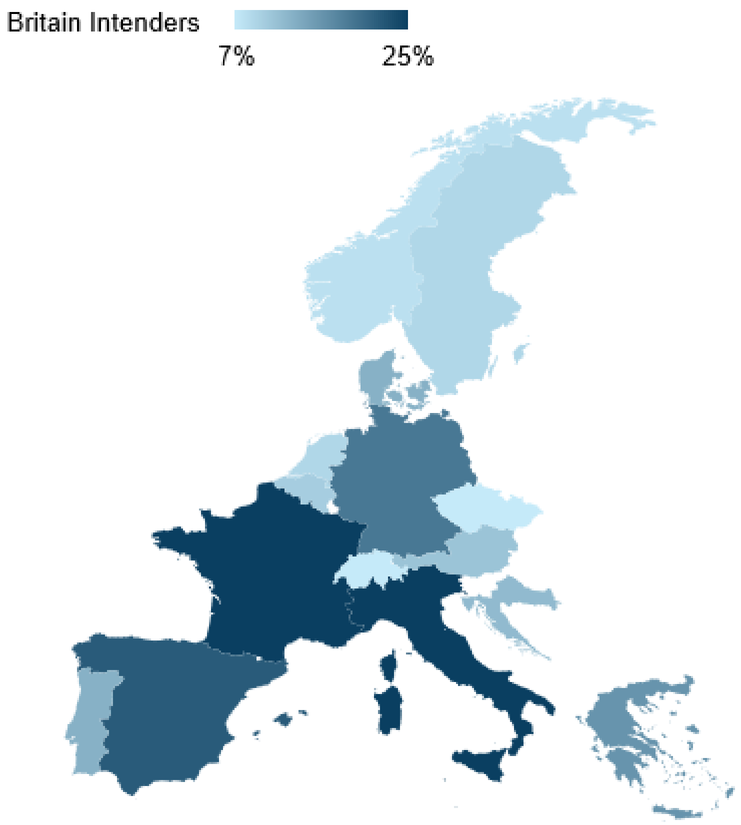
2.9 dest. mentioned on average

Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking an European leisure trip in the next 12 months (n=4,664)

Other European destinations considered by Britain intenders

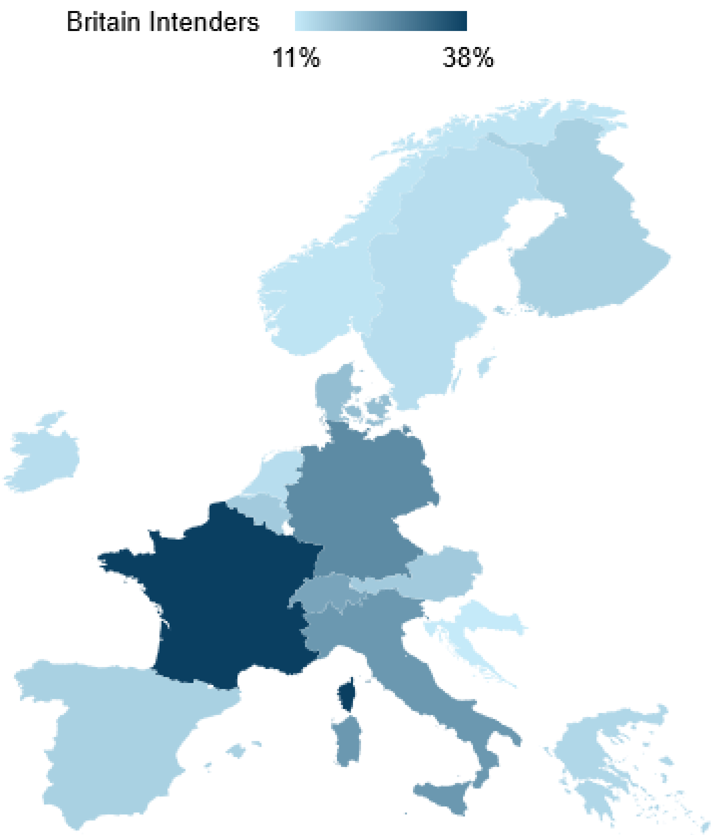
Those wishing to go to Britain from SH markets have a broad competitive set in mind, with the usual France/Italy/Spain trio dominating the ranking along with popular (shoulder season) summer spots (Portugal, Greece, Croatia). France is still the top alternative destination among those intending to come to Britain from LH, along with more Central or Northern European places like Switzerland or Germany.

Short-haul markets



Italy	25%
France	25%
Spain	22%
Germany	19%
Greece	16%
Portugal	13%
Denmark	13%
Croatia	12%
Austria	11%
Belgium	10%
Sweden	9%
Netherlands	9%
Norway	8%
Switzerland	7%
Czech Republic	7%

Long-haul markets



France	38%
Germany	26%
Italy	24%
Switzerland	22%
Denmark	18%
Austria	16%
Belgium	16%
Finland	15%
Spain	15%
Greece	14%
Netherlands	13%
Sweden	13%
Irish republic	13%
Norway	12%
Croatia	11%

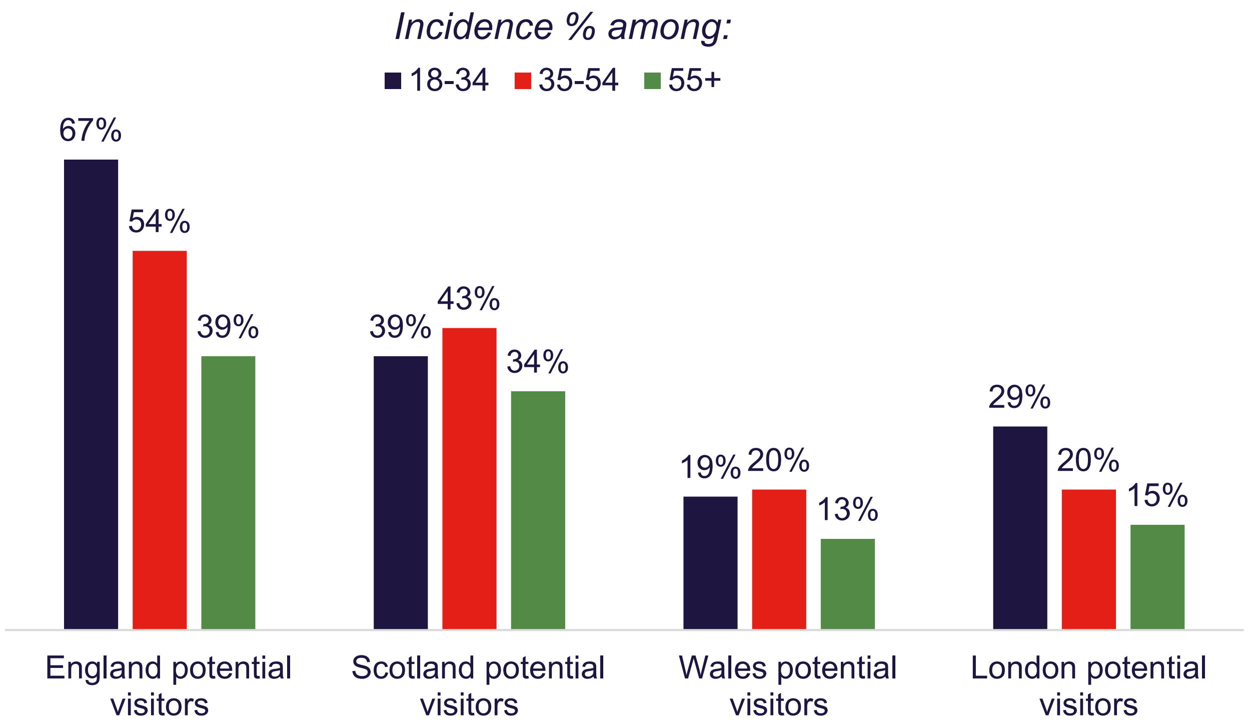
Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 991)

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 (%)

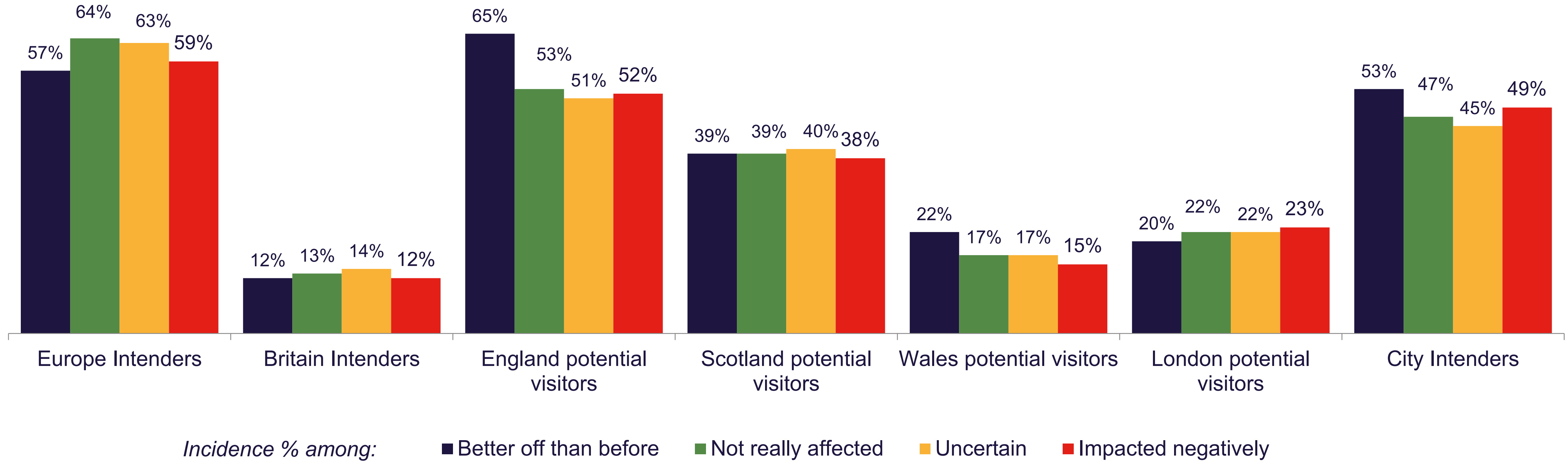
	Gender		Age		
	Male	Female	Less than 35	From 35 to 54	55 and over
Total	14%	13%	16%	13%	10%
SH	11%	12%	15%	10%	9%
LH	17%	14%	17%	17%	11%



Q10. To which destination(s) in Europe in particular?
Base: Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619)

Impact of financial situation on propensity to consider Britain

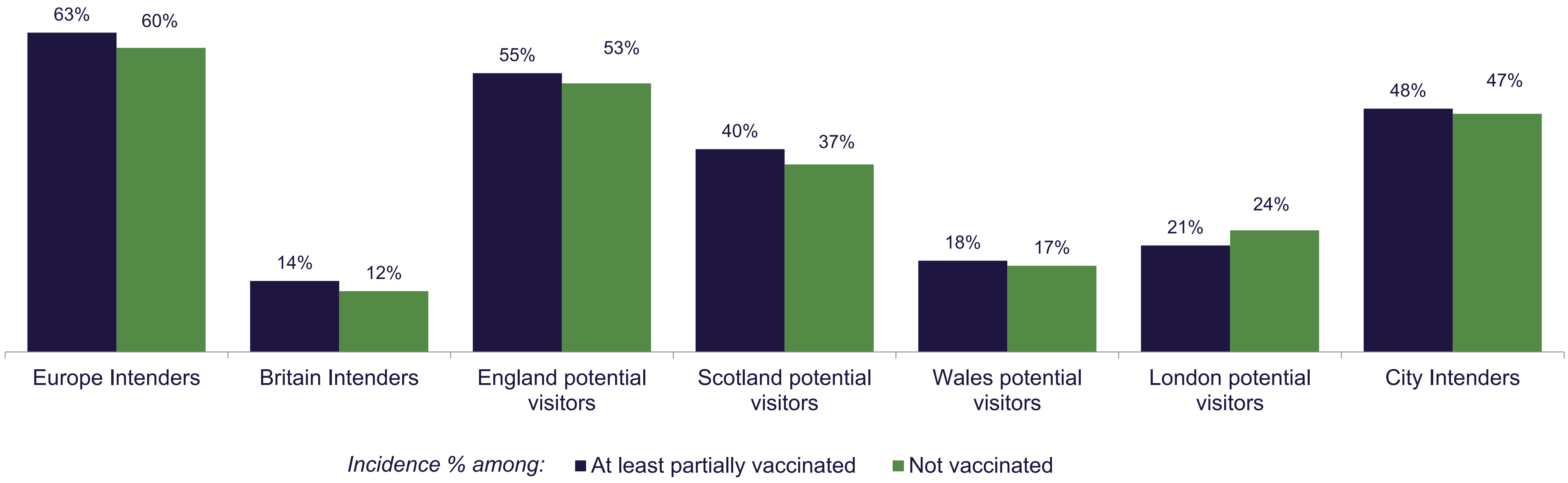
The financial situation is a determinant of travel to England more so than to other British and European destinations, with opportunity for marketing affluent travellers who are better off than before.



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 = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)

Impact of vaccination on propensity to consider Britain

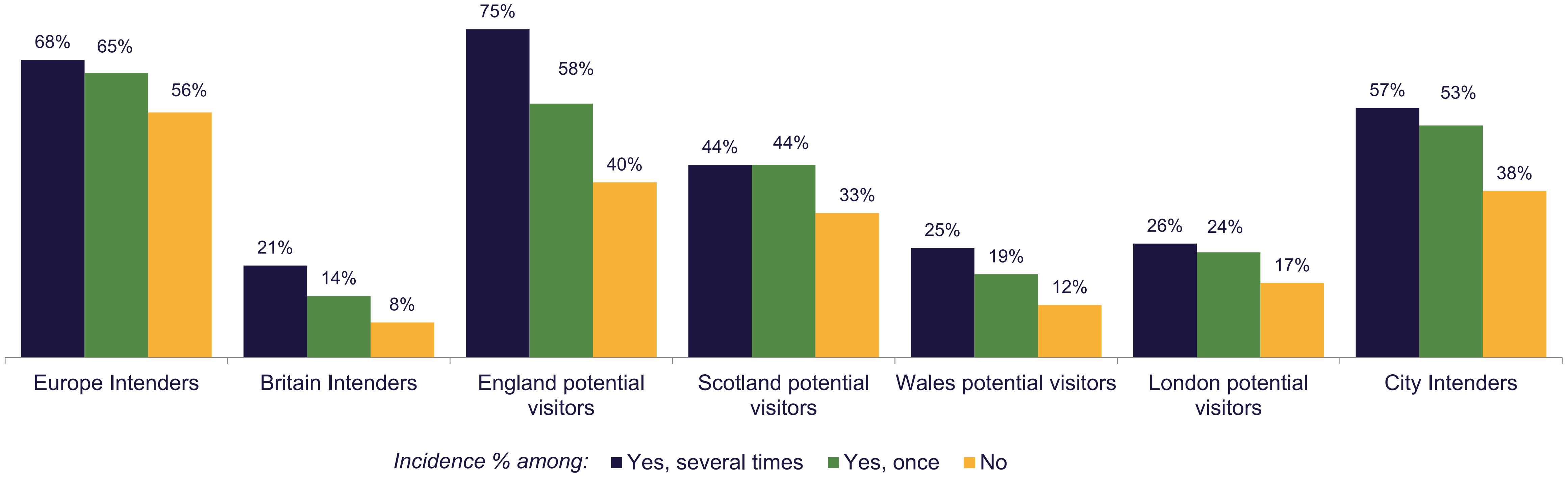
As widely adopted today both in sourcing market and at destination, vaccination is now a less clear determinant of travel among Britain intenders.



Q26. Have you had a COVID-19 vaccination?
Base: Europe Int. (n = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)

Impact of previous visit on propensity to consider Britain

Propensity to consider Britain logically increases with past experiences of the destinations, however we measure an increase of intention among potential first-timers.



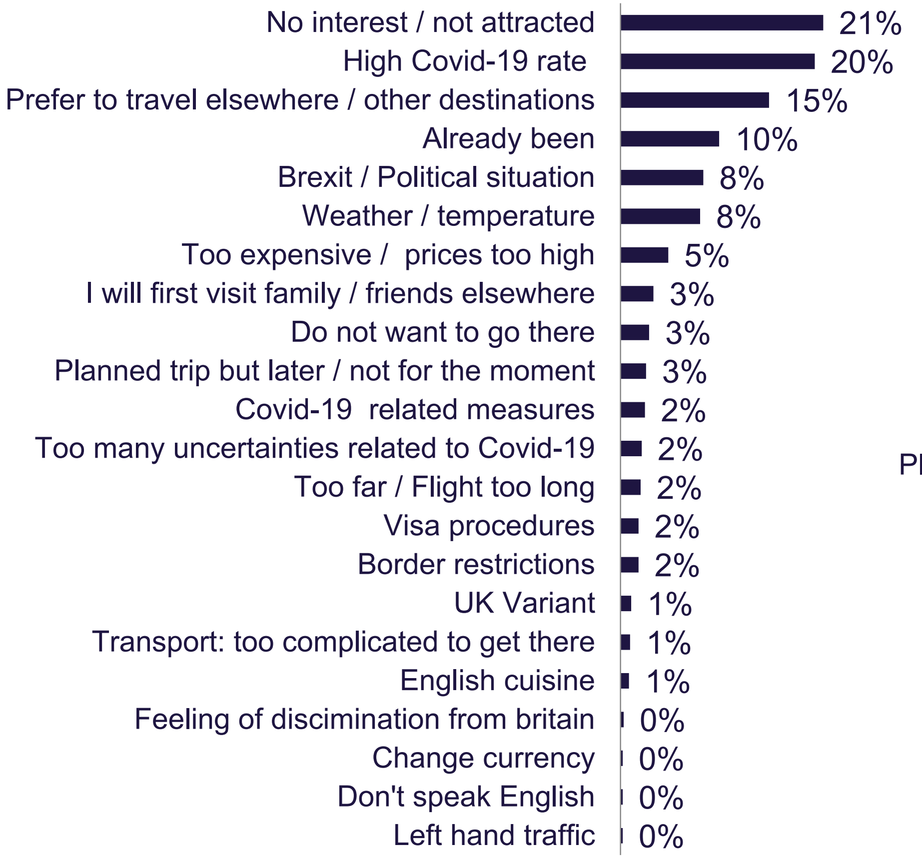
Q27. Have you visited Britain (England, Scotland, Wales) for a leisure trip for more than one night in the past five year?

Base: Europe Int. (n = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)

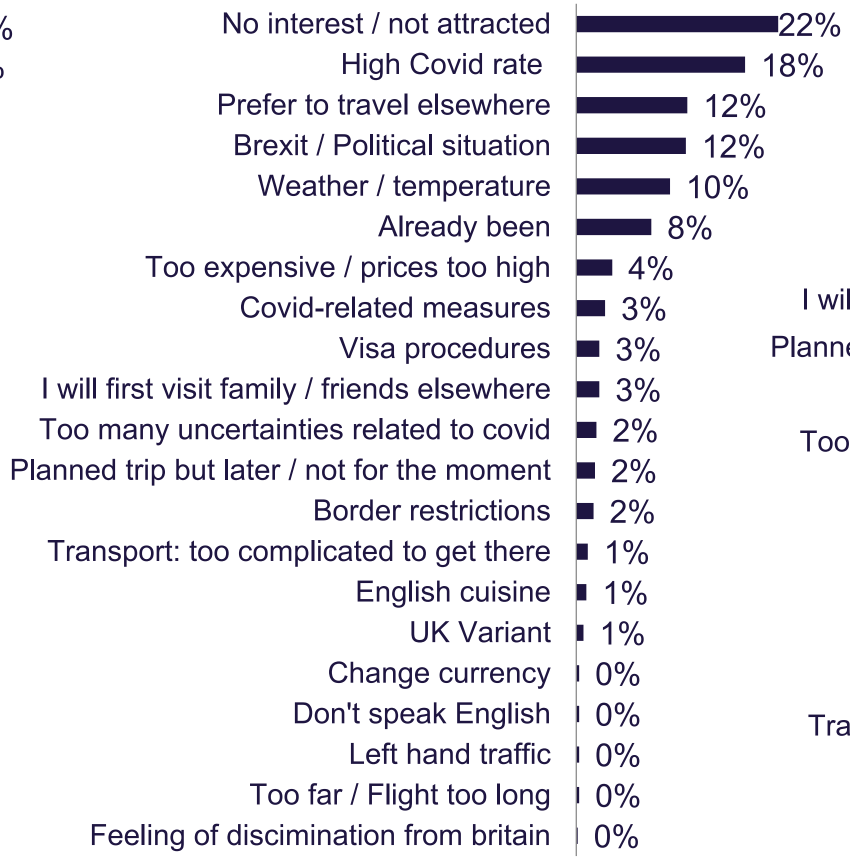
Reasons for not considering a trip in Britain (open end)

The sanitary safety, though still high in mind, is no longer the first obstacle for choosing Britain. Besides common barriers for travelling such as distance, costs, Visas, lack of interest, other destinations in mind etc, the Brexit context seems to generate more spontaneous mentions along with other specific UK attributes (weather, affordability…). The UK variant still is present in mind but less frequently mentioned vs March 2021.

Total



SH



LH

Q11b. Why wouldn't you consider a trip to Britain (England, Scotland, Wales) in the short term? (Open Question)
Base: Respondents who responded "I wouldn't consider a trip to Britain" at Q11a. (n = 922)

Destinations in Britain considered for a leisure trip

In SH 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 and Spaniards. London would be considered by nearly 1 in 2 potential visitors to England. For LH 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.

Destination	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
England	55%	49%	62%	64%	57%	50%	47%	38%	79%	58%	55%	48%	49%	49%	46%	66%
Scotland	39%	36%	43%	38%	37%	49%	38%	40%	52%	34%	47%	32%	25%	49%	25%	37%
Wales	18%	11%	25%	23%	16%	30%	14%	11%	31%	11%	14%	11%	8%	16%	6%	22%
I wouldn't consider a trip to Britain	12%	16%	8%	16%	16%	3%	16%	22%	4%	13%	7%	19%	22%	8%	21%	8%
I don't know yet	9%	8%	10%	6%	9%	18%	8%	8%	1%	5%	4%	10%	10%	6%	16%	8%

Destination	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
London	40%	46%	34%	45%	37%	30%	46%	47%	27%	42%	50%	41%	42%	52%	50%	34%
South East (e.g. Brighton, Oxford, Kent, Windsor)	31%	29%	33%	39%	34%	39%	35%	36%	32%	21%	35%	22%	23%	36%	23%	25%
East of England (e.g. Cambridge, Norfolk Broads, Norwich)	30%	21%	38%	34%	27%	55%	23%	20%	46%	12%	28%	20%	16%	31%	14%	26%
North West (e.g. Manchester, Liverpool, Lake District)	28%	24%	31%	29%	33%	31%	22%	26%	37%	26%	24%	20%	30%	28%	19%	28%
South West (e.g. Bristol, Bath, Devon, Cornwall)	21%	17%	24%	27%	22%	27%	12%	27%	24%	13%	21%	18%	16%	16%	14%	21%
East Midlands (e.g. Leicester, Derby, Peak District)	19%	14%	23%	20%	12%	31%	17%	18%	32%	10%	22%	14%	9%	15%	11%	17%
West Midlands (e.g. Birmingham, Stratford Upon Avon, Coventry)	17%	12%	21%	18%	17%	28%	13%	9%	26%	10%	16%	15%	10%	13%	9%	14%
Yorkshire & the Humber (e.g. Leeds, York, Yorkshire Dales)	16%	11%	20%	20%	18%	23%	10%	9%	26%	9%	18%	9%	7%	15%	7%	16%
North East (e.g. Newcastle, Durham)	14%	9%	18%	15%	11%	26%	10%	9%	20%	7%	11%	14%	5%	11%	7%	14%
I don't know yet	11%	10%	12%	13%	16%	13%	12%	6%	4%	6%	8%	11%	14%	11%	17%	14%

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 the next 12 months (n = 7,450)

Q12: Which destination(s) in England? (Multiple Answers)
Base: Respondents who have chosen England in Q11a (n = 4,083)

Comfort levels with transport to get to Britain

Flight remains a confident transport option for almost 9 in 10 potential visitors to Britain on average, while ferry and tunnel are equally considered in the closest markets. Train/Eurostar is also seen as a comfortable option particularly in France, Netherlands but also Italy and Spain. LH markets would feel comfortable using all types of transportation means to get to Britain including Eurostar/Train as part of a trip involving multiple countries.

(% Very + Quite comfortable	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Plane – via nonstop flight	89%	89%	89%	83%	88%	89%	89%	80%	95%	88%	91%	82%	91%	95%	91%	89%
Plane – via connecting flight	78%	74%	82%	81%	74%	75%	71%	67%	95%	70%	83%	76%	65%	79%	78%	86%
Own/rented vehicle – via Ferry	56%	54%	57%	50%	53%	57%	63%	59%	64%	70%	62%	56%	34%	45%	42%	57%
Own/rented vehicle – via Channel Tunnel	55%	52%	58%	54%	55%	57%	62%	60%	64%	58%	48%	57%	35%	47%	47%	59%
On foot – via Eurostar/Train	51%	48%	54%	48%	47%	55%	62%	47%	60%	55%	51%	53%	29%	48%	37%	55%
On foot – via Ferry	49%	45%	52%	43%	47%	55%	53%	44%	58%	67%	45%	49%	31%	35%	35%	53%
Coach – via Channel Tunnel	47%	40%	55%	46%	49%	55%	52%	41%	68%	40%	44%	39%	28%	36%	32%	57%
Coach – via Ferry	47%	39%	56%	43%	48%	55%	50%	40%	68%	43%	46%	39%	27%	35%	33%	58%

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 = 5,862)

Perception of transport mode within Britain

The overall level of trust for public and collective transportation means is confirmed and should encourage exploring rural and urban environments as well planning multiple destinations within Britain, be that travelling on their own or via transportation means at their disposal. A clear preference for using their own car is expressed in Ireland, the Netherlands, France and Germany. Among LH markets, there should be no particularly "new" or unusual obstacles in using / combining various types of transportation at destination, including public transport or taxi services.

% of Consideration	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Public transport - Train	42%	44%	39%	49%	50%	27%	48%	35%	46%	46%	44%	41%	53%	34%	53%	37%
Public transport - Tube/subway	39%	39%	40%	48%	43%	41%	46%	29%	41%	40%	44%	36%	37%	27%	52%	32%
Rented car/vehicle	39%	36%	42%	56%	47%	32%	41%	30%	51%	42%	47%	26%	29%	34%	38%	38%
Domestic flight	39%	31%	48%	54%	47%	37%	33%	16%	57%	46%	31%	22%	25%	41%	24%	49%
Own car vehicle	35%	39%	31%	33%	29%	27%	42%	38%	33%	57%	37%	46%	26%	31%	35%	32%
Public transport - Bus	32%	33%	32%	38%	37%	31%	44%	28%	35%	35%	35%	32%	32%	19%	44%	25%
Taxi	31%	28%	34%	32%	41%	34%	29%	17%	37%	40%	34%	20%	28%	11%	47%	32%
Private coach/minibus	22%	16%	29%	32%	31%	21%	16%	14%	36%	22%	23%	14%	13%	10%	14%	30%
Uber/other sharing app	22%	16%	28%	31%	28%	21%	21%	10%	40%	19%	22%	14%	12%	12%	19%	26%

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 = 5,862)

Planned booking channel for an international trip

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 in LH markets; the use of expert intermediaries still 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. The role of expert intermediaries is even higher in LH markets (online and at a storefront), particularly in China. Airlines are also channels highly envisaged in North America, while the large share of VFR travel intentions gives friends and relatives a significant role, notably for Indians and Chinese potential visitors

Booking channel	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
A travel comparison website	35%	36%	34%	37%	36%	26%	36%	30%	50%	30%	54%	22%	27%	45%	43%	31%
Through a travel agent/tour operator online	34%	31%	37%	30%	32%	45%	23%	42%	43%	20%	25%	37%	35%	29%	39%	33%
Direct with airline/train/ferry operator	34%	34%	34%	40%	31%	25%	27%	23%	42%	53%	21%	34%	50%	30%	37%	39%
Direct from the official website of the destination	31%	26%	35%	30%	24%	39%	24%	20%	51%	35%	23%	30%	24%	29%	25%	33%
Direct with accommodation provider	30%	29%	32%	44%	27%	21%	28%	34%	42%	43%	20%	41%	23%	27%	20%	33%
Through a travel agent/tour operator at a storefront	23%	18%	30%	23%	27%	40%	22%	22%	34%	12%	24%	19%	9%	21%	11%	23%
Through friends and family in the destination country	15%	10%	20%	11%	11%	24%	10%	10%	33%	13%	9%	12%	9%	8%	10%	17%

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7,450)

Planned booking channel for a trip to Britain

With diverse booking channels and possible use of several in the same booking process (including personal contacts in the UK), destinations are encouraged to provide consistent promotional and informative content throughout all channels, particularly as travellers look for trusted sources to activate last-minute and longer-in-advance trips in changing constraints with high level of administrative requirements. The role of official websites is confirmed to be essential in the planning and booking process

Booking channel	Total	SH	LH
Direct with airline/train/ferry operator	43%	46%	41%
Through a travel agent/tour operator online	42%	32%	50%
A travel comparison website	40%	41%	39%
Direct from the official website of the destination	37%	30%	43%
Direct with accommodation provider	34%	33%	35%
Through a travel agent/tour operator at a storefront	29%	18%	38%
Through friends and family in the destination country	20%	15%	24%

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 991)

Planned booking channel for a trip to Britain by age

Travel comparison websites and official destinations' websites are confirmed to be popular options among young people intending to travel to Britain, while the older generation are more likely to book directly through transport operators. The online TOs/OTAs channel is also considered the top choice among younger generations in LH markets.

SH markets

Booking channel	18-34	35-54	55+
Direct with airline/train/ferry operator	42%	45%	55%
A travel comparison website	49%	41%	25%
Direct with accommodation provider	34%	38%	26%
Through a travel agent/tour operator online	31%	32%	33%
Direct from the official website of the destination	30%	34%	22%
Through a travel agent/tour operator at a storefront	18%	15%	20%
Through friends and family in the destination country	20%	14%	8%

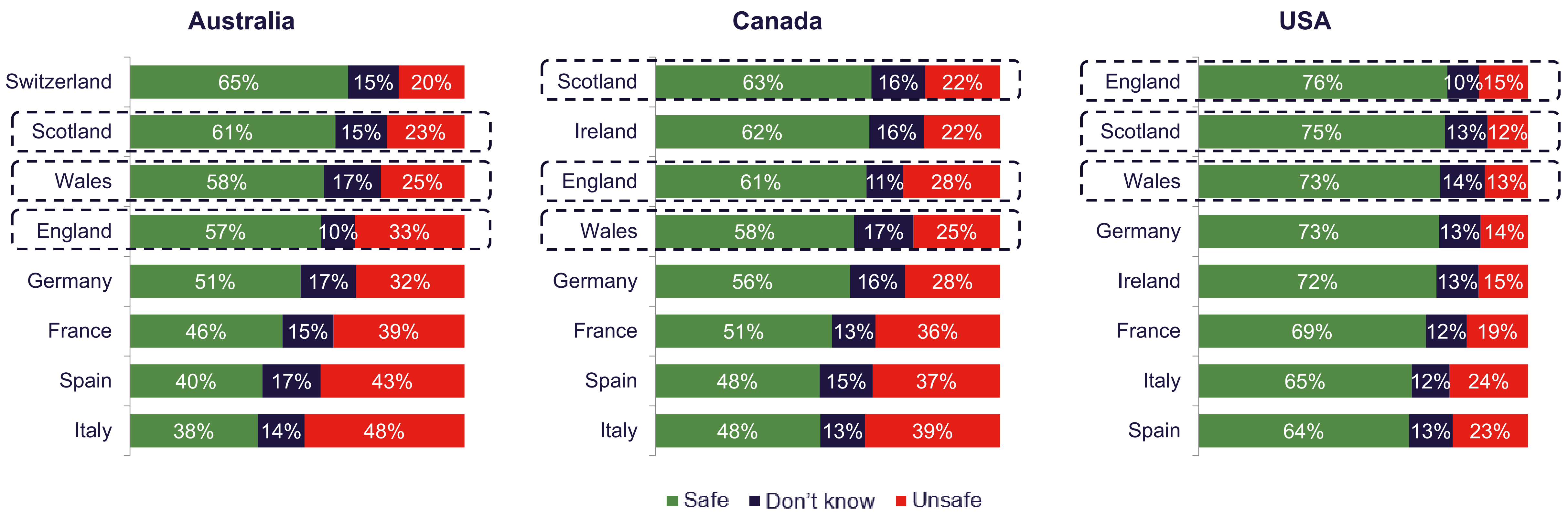
LH markets

Booking channel	18-34	35-54	55+
Through a travel agent/tour operator online	52%	52%	42%
Direct from the official website of the destination	49%	40%	37%
Direct with airline/train/ferry operator	38%	39%	53%
A travel comparison website	42%	44%	26%
Through a travel agent/tour operator at a storefront	44%	38%	28%
Direct with accommodation provider	33%	34%	40%
Through friends and family in the destination country	31%	23%	14%

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 991)

COVID-19 safety perception (1)

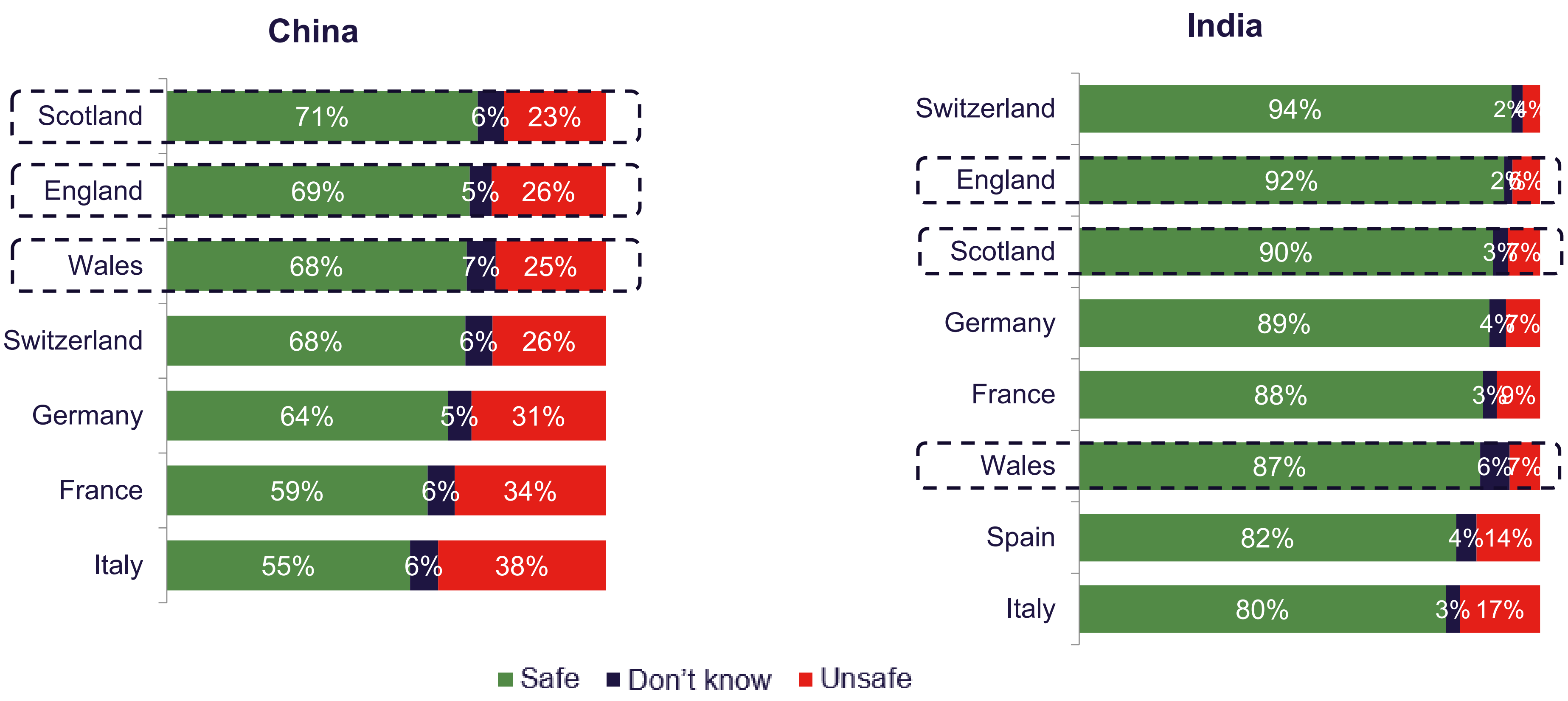
In North America and Australia, British destinations capitalise on a safer image compared to other large competitive destinations in Europe such as France, Italy or Spain. England nearly matches the level of positivity of other British destinations.



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 = 7,500)

COVID-19 safety perception (2)

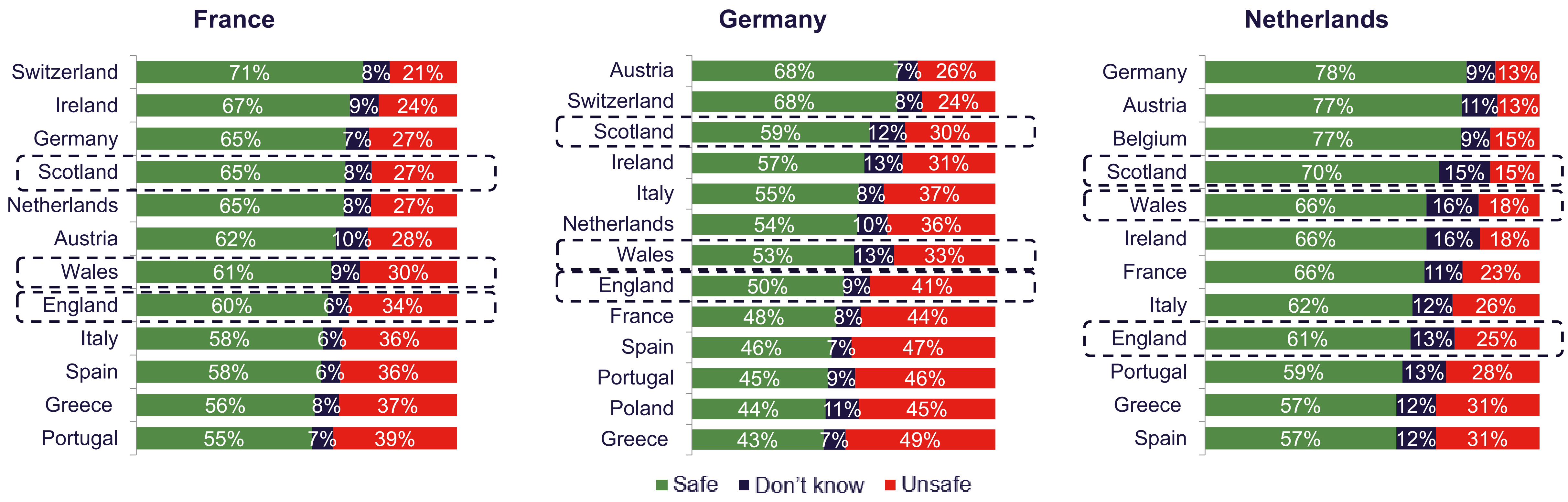
In China and India, the image of Britain with COVID-19 is now very competitive.



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 = 7,500)

COVID-19 safety perception (3)

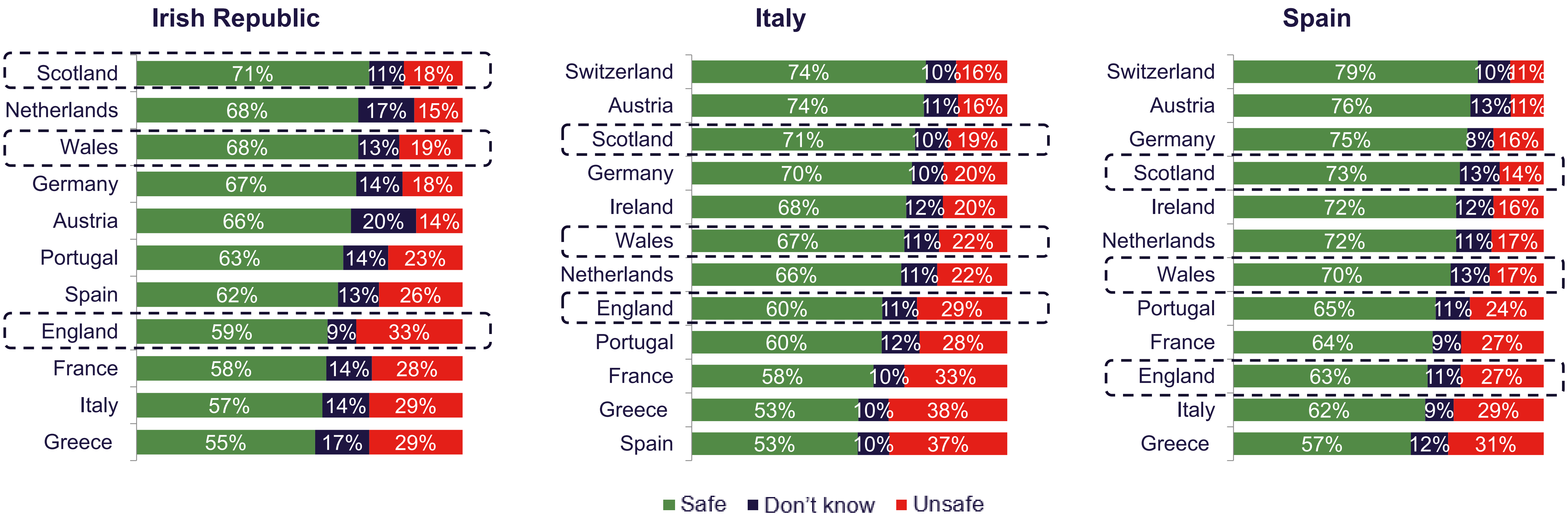
A perception gap between England and the other destinations in Britain still exists in France, Germany and the Netherlands, however Britain destinations' image has improved in those markets with more positive than negative sentiment today in relation to the COVID-19 perception.



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 = 7,500)

COVID-19 safety perception (4)

Perceptions in Republic of Ireland and Spain are still positive but other destinations (Switzerland, Austria, Germany) are also seen today as safer than England. Even if the overall COVID-19 safety sentiment towards England remains more positive than negative in Italy, other destinations are perceived as safer today, maybe partly based on experiences lived in the summer.



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 = 7,500)

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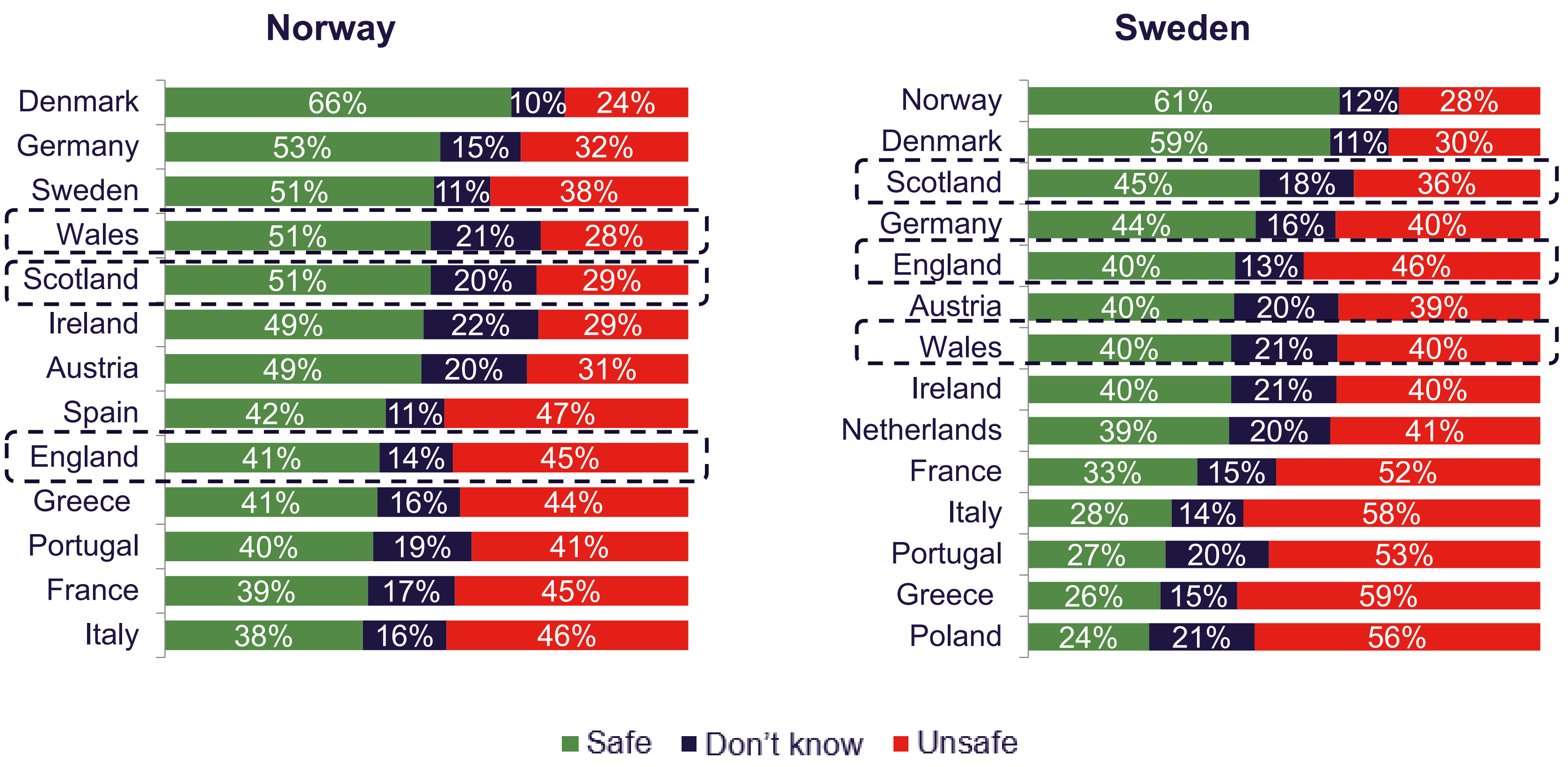
COVID-19 safety perception (5)

The Nordic markets have a positive image of other Northern European/Nordic countries while British destinations maintain a competitive advantage vs. France, Italy or other Southern/ Mediterranean destinations (Greece, Portugal). 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 = 7,500)

River Conwy: ©VisitBritain/ Bob Radlinski

Travel Preferences

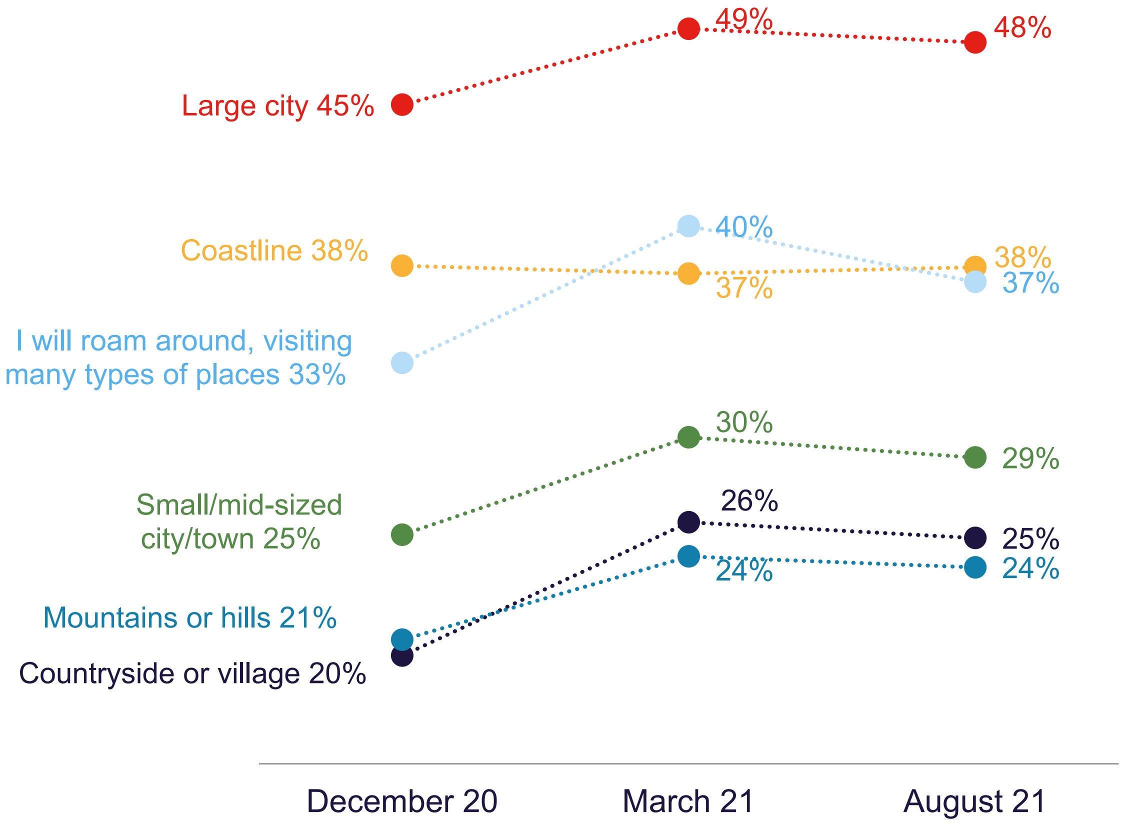
Travel preferences: summary

- The desire amongst some to return to many pre-pandemic behaviours when travelling grows further, including for lively, immersive socialising activities (dining out, local lifestyle, shopping…), with usual affinities per market. Outdoor nature activities still rank highly.
- The interest in Food and Gastronomy-related activities is now massive across markets, as it combines a way of socialising, of exploring one facet of the local heritage while enjoying oneself after a difficult period.
- The desire to roam around is still high in LH markets offering a great opportunity of promoting multiple Britain destinations, while visiting large cities and coastal areas are still top of mind in SH markets.
- Germans confirm interest in coastal experiences whilst Italians, the Irish and Spaniards are open to planning city breaks. Italians still want to roam around and visit many types of places.
- Couples (with or without children) still dominate, while tour groups are still quite low in consideration across markets. Travelling with friends or solo is more envisaged in SH than LH markets on average, notably from the Nordics.
- Confirming previous wave's results, hotel chains are a preferred choice, while self-catered accommodation remains a popular option in the COVID-19 era.
- The consideration levels for self-catering and B&Bs are on the same level in Europe. LH markets also envisage boutique hotels beyond chains. Cruises maintain a fair level of interest in the US and India.

Trended data

While desire for exploring and roaming around in the destination mitigates as summer ends, the “return to normal” in destination experience is tangible though the increased interest expressed for all types of activities, including socialising and lively experiences. A growing demand for food-related experiences is also visible.

Main types of destinations envisaged



Interest level in activities (W3/W2 Evol. - gap of %)

Trend calculated at constant perimeter (13 markets consolidated)

Main destination types for an international leisure trip

The desire to roam around is still high in LH markets, offering a great opportunity of promoting multiple Britain destinations. Visiting large cities and coastal areas are still top of mind in SH markets, with diverse intentions from one market to another: Germans confirm interest for coastal experiences, Italians, Irish and Spanish are open to planning city breaks. Italians still want to roam around and visit many types of places.

Destination Type	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Large city	48%	44%	52%	49%	44%	55%	39%	31%	62%	49%	53%	36%	49%	56%	43%	50%
Coastline	38%	36%	40%	35%	34%	49%	40%	46%	48%	36%	29%	35%	38%	29%	34%	32%
I will roam around, visiting many types of places	37%	31%	44%	46%	39%	47%	36%	26%	51%	22%	51%	33%	30%	25%	22%	39%
Small/mid-sized city/town	29%	26%	33%	30%	31%	37%	23%	21%	42%	25%	34%	24%	24%	32%	23%	26%
Countryside or village	25%	19%	33%	40%	27%	29%	21%	17%	47%	22%	21%	22%	15%	11%	21%	29%
Mountains or hills	24%	18%	31%	27%	20%	25%	15%	25%	63%	16%	21%	27%	10%	20%	9%	28%
I'm not sure	7%	7%	7%	10%	11%	6%	6%	6%	1%	6%	4%	5%	7%	7%	13%	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 the next 12 months (n = 7,450)

Main destination types for a leisure trip in Europe

Britain intenders confirm a strong desire to experience lively urban environments as well as roaming around for visiting many types of places (particularly among Wales and Scotland potential visitors).

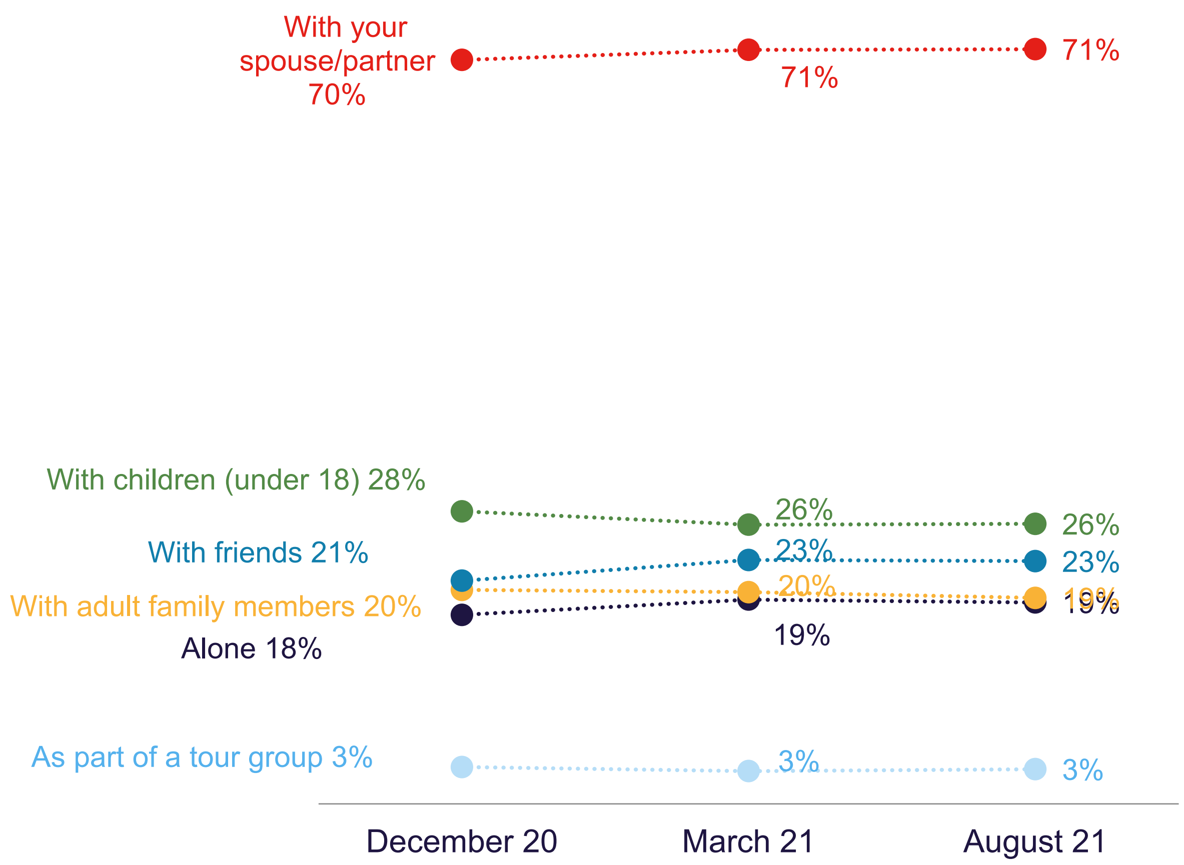
Destination Type	Europe Intenders	Britain Intenders	England pot. visitors	Scotland pot. visitors	Wales pot. visitors	London pot. visitors
Large city	50%	66%	61%	49%	56%	68%
Coastline	39%	40%	37%	44%	50%	36%
I will roam around, visiting many types of places	36%	46%	41%	47%	52%	42%
Small/mid-sized city/town	31%	40%	33%	37%	45%	30%
Countryside or village	26%	35%	29%	36%	44%	24%
Mountains or hills	25%	28%	27%	34%	41%	23%
I'm not sure	5%	3%	4%	4%	4%	4%

Q15: Which of the following best describes the main types of destination where you are likely to stay during your next international leisure trip? (Multiple Answers)
Base: Europe Int. (n = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619)

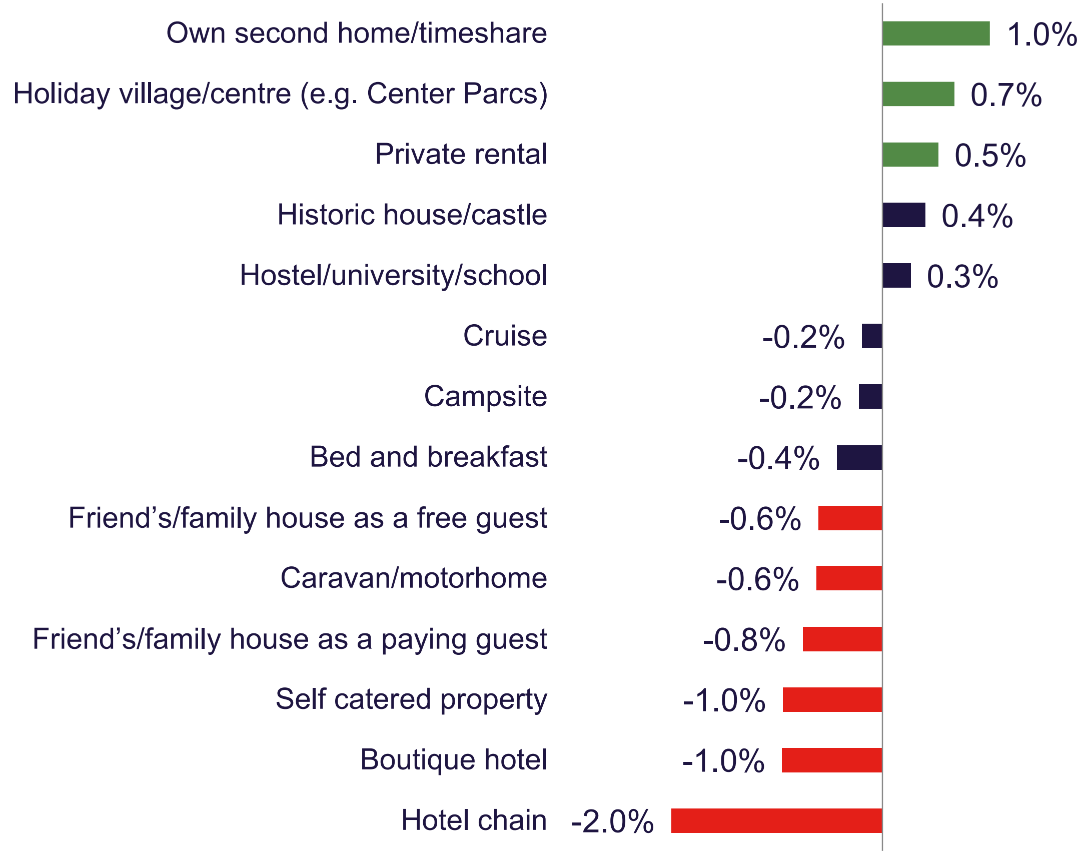
Trended data

No significant changes are to be reported concerning the demand for accommodation types, nor the travel party when compared to the previous wave.

Travel party



Accommodation (W3/W2 Evol. - gap of %)



Trend calculated at constant perimeter (13 markets consolidated)

Travel party for an international leisure trip

Couples (with or without children) still dominate while tour groups are still quite low in consideration across markets. Travelling with friends or solo is more envisaged in SH than LH markets on average, notably from Nordics.

Travel Party	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
With your spouse/partner	71%	70%	73%	71%	68%	76%	67%	68%	71%	70%	76%	72%	64%	75%	70%	73%
With children (under 18)	26%	26%	27%	22%	18%	20%	24%	26%	45%	31%	21%	28%	24%	31%	24%	31%
With friends	23%	26%	20%	16%	18%	22%	21%	23%	27%	20%	23%	26%	33%	23%	38%	17%
With adult family members	19%	20%	19%	15%	18%	21%	16%	14%	29%	20%	11%	20%	26%	19%	33%	15%
Alone	19%	21%	16%	18%	19%	13%	14%	20%	19%	22%	14%	26%	27%	15%	32%	17%
As part of a tour group	3%	3%	4%	3%	4%	3%	1%	1%	5%	1%	2%	3%	6%	2%	7%	4%

Q18: Would you envisage traveling… (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7,450)

Travel party for a leisure trip in Europe/Britain

All markets consolidated, those wishing to visit Britain seem to consider a larger than average travel party including friends and other adult travel companions. Again, Wales records a stronger interest amongst families while potential visitors to London in particular have the highest affinity to travelling with friends.

Travel Party	Europe Intenders	Britain Intenders	England pot. visitors	Scotland pot. visitors	Wales pot. visitors	London pot. visitors	City Intenders
With your spouse/partner	72%	72%	71%	75%	78%	70%	71%
With children (under 18)	28%	29%	32%	29%	37%	28%	31%
With friends	24%	28%	24%	22%	22%	28%	26%
Alone	20%	24%	21%	18%	19%	21%	21%
With adult family members	19%	24%	21%	20%	21%	23%	21%
As part of a tour group	3%	3%	3%	3%	4%	4%	3%

Q18: Would you envisage traveling… (Multiple Answers)
Base: Europe Int. (n = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)

Accommodation types for an international leisure trip

Confirming the previous wave's results, hotel chains are a preferred choice, while self-catered accommodation remains a popular option in COVID-19 era. The consideration levels for self-catering and B&Bs are on the same level in Europe. LH markets envisage also boutique hotels beyond chains. Cruises maintain a fair level of interest in the US and India.

Accommodation Type	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Rep.	Italy	Neths.	Norway	Spain	Sweden	USA
Hotel chain	61%	64%	57%	70%	66%	42%	46%	59%	52%	69%	64%	64%	69%	67%	77%	65%
Bed and breakfast	37%	38%	35%	45%	35%	27%	27%	38%	41%	37%	54%	43%	40%	16%	47%	36%
Boutique hotel	35%	31%	39%	47%	36%	38%	34%	26%	37%	42%	25%	26%	16%	47%	29%	38%
Self catered property (rented house, cottage, chalet, apartment)	33%	38%	27%	37%	23%	23%	22%	47%	38%	51%	34%	41%	36%	28%	42%	22%
Private rental such as Airbnb, Couchsurfing, FlipKey	29%	29%	29%	36%	32%	16%	35%	25%	42%	35%	31%	24%	26%	32%	23%	30%
Friend's/family house as a free guest	28%	31%	26%	35%	30%	12%	20%	31%	38%	45%	26%	29%	29%	29%	36%	27%
Historic house/castle	28%	26%	31%	32%	26%	31%	13%	24%	37%	27%	25%	27%	28%	28%	35%	30%
Holiday village/centre (e.g. Center Parcs)	25%	22%	28%	22%	16%	40%	17%	24%	41%	27%	26%	28%	20%	15%	17%	19%
Cruise	19%	17%	21%	19%	19%	11%	10%	15%	29%	13%	21%	16%	22%	17%	20%	29%
Friend's/family house as a paying guest	18%	19%	17%	19%	18%	7%	11%	24%	34%	24%	18%	22%	11%	15%	24%	17%
Own second home/timeshare	14%	13%	14%	11%	9%	13%	4%	15%	24%	16%	13%	17%	10%	4%	27%	14%
Campsite	13%	13%	13%	10%	8%	13%	12%	16%	24%	14%	9%	18%	14%	9%	12%	12%
Caravan/motorhome	12%	12%	12%	13%	10%	11%	5%	16%	22%	16%	8%	17%	13%	10%	11%	10%
Hostel/university/school	12%	10%	14%	10%	10%	13%	10%	8%	26%	9%	9%	12%	7%	14%	13%	13%

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 the next 12 months (n = 7,450)

Accommodation types for a leisure trip in Europe

Those wishing to visit Britain are still considering a range of accommodation experiences, including hotel chains and boutique properties, but also B&Bs, historic houses and private rentals. Those wishing to visit London are again particularly drawn to (boutique) hotel chains. Potential visitors to Scotland and Wales confirm high levels of interest for lodging in historic houses/castles.

Accommodation Type	Europe Intenders	Britain Intenders	England pot. visitors	Scotland pot. visitors	Wales pot. visitors	London pot. visitors	City Intenders
Hotel chain	64%	65%	64%	63%	62%	72%	66%
Bed and breakfast	39%	44%	39%	43%	43%	41%	38%
Self catered property (rented house, cottage, chalet, apartment)	35%	41%	34%	37%	37%	35%	33%
Boutique hotel	35%	41%	38%	40%	43%	44%	40%
Private rental such as Airbnb, Couchsurfing, FlipKey	30%	37%	33%	34%	38%	38%	33%
Historic house/castle	30%	36%	30%	37%	39%	31%	30%
Friend's/family house as a free guest	28%	34%	30%	28%	29%	31%	31%
Holiday village/centre (e.g. Center Parcs)	26%	32%	28%	30%	36%	26%	27%
Cruise	18%	19%	21%	21%	24%	20%	21%
Friend's/family house as a paying guest	18%	19%	20%	21%	22%	19%	19%
Own second home/timeshare	14%	17%	15%	16%	18%	15%	15%
Campsite	14%	15%	15%	16%	19%	14%	14%
Caravan/motorhome	13%	14%	13%	16%	17%	12%	13%
Hostel/university/school	12%	14%	14%	15%	20%	13%	14%

Q17: For your next international leisure trip, would you be comfortable staying in a … (Multiple Answers)
Base: Europe Int. (n = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)

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Level of interest in activities

The desire amongst some to return to many pre-pandemic behaviours when travelling grows further, including for lively, immersive socialising activities (dining out, local lifestyle, shopping…), with usual affinities per market. Outdoor nature activities still rank highly. The interest in Food and Gastronomy-related activities is now massive across markets, as it combines a way of socialising, of exploring one facet of the local heritage while enjoying oneself after a difficult period.

(% very interested)	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Rep.	Italy	Neths.	Norway	Spain	Sweden	USA
Dining in restaurants/bars, cafes or pubs	51%	52%	49%	48%	47%	37%	55%	52%	66%	51%	49%	57%	53%	44%	58%	54%
Exploring history and heritage	48%	45%	53%	51%	49%	44%	49%	42%	68%	41%	57%	44%	29%	60%	34%	57%
Visiting famous/iconic tourist attractions	47%	42%	53%	49%	47%	45%	49%	42%	69%	42%	53%	42%	29%	44%	31%	57%
Outdoor nature activities	46%	43%	49%	44%	45%	41%	55%	44%	70%	48%	49%	43%	29%	44%	34%	51%
Visiting cultural attractions	43%	39%	48%	41%	43%	42%	41%	35%	66%	37%	55%	39%	27%	47%	29%	53%
Experiencing local lifestyle, socialising with locals	41%	37%	46%	36%	40%	42%	45%	34%	66%	33%	42%	43%	27%	36%	34%	48%
Outdoor activ. (hiking, cycling..)	38%	36%	41%	31%	34%	37%	39%	39%	60%	36%	44%	50%	25%	29%	23%	46%
Shopping	37%	33%	42%	30%	32%	41%	34%	37%	68%	36%	32%	37%	27%	30%	27%	40%
Guided tours/day-excursions	35%	30%	40%	31%	35%	32%	36%	24%	58%	26%	43%	40%	17%	39%	18%	46%
Self-driving tours	35%	33%	36%	31%	32%	35%	51%	29%	51%	28%	32%	44%	24%	24%	32%	35%
Culinary activities	31%	25%	37%	27%	26%	37%	26%	30%	55%	23%	30%	24%	21%	28%	22%	38%
Attending cultural events	30%	24%	37%	27%	26%	35%	26%	23%	58%	25%	30%	25%	21%	24%	16%	39%
Spa/wellness activities	30%	25%	35%	23%	19%	40%	32%	30%	54%	24%	29%	22%	20%	27%	14%	35%
Experiencing destination’s nightlife	28%	22%	35%	22%	22%	37%	24%	22%	59%	25%	28%	19%	16%	25%	14%	35%
Learning new skills	25%	18%	33%	18%	19%	36%	21%	18%	53%	15%	27%	18%	10%	22%	8%	33%
Attending sport events	24%	18%	31%	19%	19%	32%	21%	16%	52%	22%	22%	17%	16%	16%	12%	32%
Playing sports	22%	16%	29%	14%	14%	32%	16%	17%	50%	17%	19%	16%	16%	14%	9%	29%

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 the next 12 months (n = 7,450)

Level of interest in activities in Europe/Britain

Britain intenders confirm 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	City Intenders
Dining in restaurants/bars, cafes or pubs	52%	53%	56%	53%	53%	59%	56%
Exploring history and heritage	49%	56%	53%	58%	60%	53%	54%
Visiting famous/iconic tourist attractions	46%	54%	53%	52%	57%	54%	55%
Outdoor nature activities	46%	50%	50%	53%	55%	48%	49%
Visiting cultural attractions	44%	53%	50%	51%	53%	49%	51%
Experiencing local lifestyle, socialising with locals	40%	46%	45%	47%	49%	42%	46%
Outdoor activ. (hiking, cycling..)	39%	41%	42%	44%	48%	39%	40%
Shopping	36%	41%	45%	39%	44%	43%	45%
Self-driving tours	35%	36%	37%	40%	44%	33%	36%
Guided tours/day-excursions	34%	37%	40%	40%	44%	36%	40%
Culinary activities	30%	32%	35%	36%	40%	32%	35%
Attending cultural events	29%	37%	37%	34%	40%	34%	37%
Spa/wellness activities	29%	30%	34%	33%	38%	30%	35%
Experiencing destination's nightlife	27%	32%	35%	31%	38%	32%	35%
Attending sport events	24%	30%	31%	27%	34%	26%	31%
Learning new skills	23%	28%	31%	29%	36%	25%	30%
Playing sports	21%	27%	27%	26%	32%	21%	27%

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 = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)

Saffron Walden: ©VisitBritain/ Herewegoagain.blog

Key Takeaways

What has changed since March 2021?

Key Takeaways – Overall travel sentiment

1. **Desire to travel internationally remains very high** and has increased in all markets surveyed. **8 in 10 respondents** now intend to travel internationally certainly or probably in the coming 12 months, accelerated by vaccination and an improved spending power.
2. With more bookings made, travel plans are **becoming more concrete**, however **destination choice remains very open in consumers' mind**.
3. **4 in 10 respondents in SH markets envisage a trip by the end of the year**, including in shoulder or summer season and the festive season. 2022 spring and summer are also already in mind. LH markets are also looking at the festive season.
4. The vaccination continues to be a trigger of travel among LH markets but the **gap of intention between vaccinated and non-vaccinated consumers has diminished** in SH markets where 8 in 10 non-vaccinated people envisage a trip abroad (vs 7 in 10 before summer).
5. The younger generation still shows the highest propensity to travel internationally across most markets, however with vaccination widely adopted across all age groups, sentiment towards travel grows in older generations. Younger people are also less decided in the destination choice and booking.
6. While Health factors still act as key activators for a trip planning, **the *money-centric* attitude is high** too with consumers looking for **money-back guarantees** and attractive deals. They also pay more attention to **insurance for COVID-19 travel**.
7. **The "money factor"** is an **important trigger for travel intentions to Britain** as affordability is a common obstacle to visit.
8. Travellers' intentions show **increasing expectations for living the full destination experience**, including **socialising activities** and a high demand for **food-related experiences**.
9. Attitudes towards a more **responsible and sustainable travel** are confirmed. However, with primary concerns expressed on "other people not respecting the rules" (visible this summer in reopening destinations), **a gap between attitudes and effective behaviours remains** accelerating the potential **challenges in offering a full, immersive and safe experience**.
10. While socialising is expected as integral part of the experience at the next destination, **6 in 10 travellers express concerns about locals' attitudes towards international tourists**.

Key Takeaways – perceptions of destinations/Britain

1. **Europe** further consolidates its **status as the favourite region** in most markets.
2. Britain, like most large destinations in Europe, is less considered while smaller destinations are driving more interest, yet it now rivals Italy and Spain and surpasses Germany significantly, fuelled by a **continuous improvement of its COVID-19 sanitary image.**
3. Providing pre-COVID-19 volumes of visits, intention levels and COVID-19 image, the competitive position of Britain is summarised as follows:
   - **1 market in a highly favourable competitive position:** China
   - **6 markets in favourable competitive positions:** India, Italy, Sweden, Norway, Australia and the Republic of Ireland
   - **5 markets in average competitive positions:** the US, Canada, Spain, Germany and the Netherlands
   - **1 market in an at-risk competitive position:** France
4. Among the 13 markets surveyed in August 2021:
   - **4 markets have improved their competitive positions:** Norway, Sweden, Italy and the Netherlands
   - **5 markets have kept a favourable competitive position**: the Republic of Ireland, Spain, China, India and Australia
   - **2 markets remain competitive** but have **lost their places in the ranking**: the US and Canada
   - **2 markets have become or remain at risk:** France (despite higher intentions) and Germany

Key Takeaways – Potential targets

Confirmed prioritised motivations and experiences to promote for Britain

- **Foodies** and hybrid experiences including **culinary activities**
- Shoulder or summer season - **Last-minute deals on thematic trips** (Golf, Spas, Fine dining, Active/ Outdoor packages…)
- “Under sanitary control” **2021/22 festive events / New-Year Holidays**
- **City break deals** (London, Edinburgh…) – **Friendship reconnection** in a lively urban environment / “socialising bubbles”
- Couples / **Young parents / Family / Friends trips for reconnecting (London and large cities)**
- Secondary destinations explorers / **Crowd-escapers / Responsible travel experiences**
- **Cross-UK “no borders” touring families** / Van / Motorhome trips offering **Slow / Micro adventure**
- **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
- **Lovers of stays in historic houses** for long week-ends / mid-weeks
- **VFR** combined/extended trips
- **'Workation’ deals** in remote destinations for **digital nomads**
- … and other **niche / passion-based tourism** known for being very efficient in boosting the reputation of destinations in COVID-19 times:
    - Film locations
    - Wineries/Breweries/Whiskey producer 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** still well considered across all SH markets and among younger generations too.
2. **Intermediaries overall are seen as trusted channels** in times of uncertainties and should offer **flexible cancellation policies**.
3. **Official destination websites influential** in the trip planning process as trusted sources on both COVID-19-safety (simplified) information and guidance on the "full experience" promotion.
4. **Promoting best rated performers** (hotels, attractions) **in terms of Health Precaution** is recommended, as well as a timely inventory of what is open and not at destination (Google status).
5. Promoting **secret British spots** to LH markets who have already visited Britain in the past.
6. Offering **guidance and info-mediation** in relation to **travel Insurance in COVID time**.
7. Providing **timely information** on when to visit attractions so as to **mitigate concerns on flow management/crowding issues**.
8. **"Experiential Packages"** including guided / self-guided excursions for roaming travellers in search of maximising the full experience
9. **SoMe and digital marketing** can generate fast ROI as **Millennials plan to travel sooner than other generations**.
10. **Transport operators** are expected to offer the most flexible cancellation policies possible. This also applies to Travel Packages.
11. **Travel comparison websites** have a massive influence in short-haul markets, as consumers are trying to best inform their decision.
12. **Consistent and timely pre-trip visitor information is** required for both end-consumers and particularly the Trade in LH markets.
13. **Promoting multi-modal transport flexibility** while travellers now have trust in flights, trains, ferries and public transport.
14. Providing clear **itineraries and road maps** (on destination apps) for **roaming travellers using their own/rented cars.**


Giants Causeway: ©VisitBritain/Ben Selway

Appendix

Paddleboarding: ©VisitBritain/Matthew Williamson Ellis

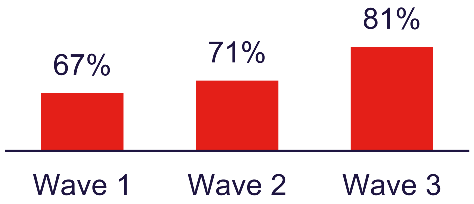
Market Summaries

Short-Haul Markets Summary

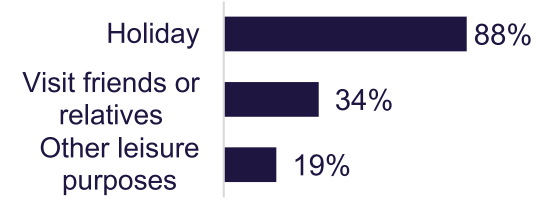
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

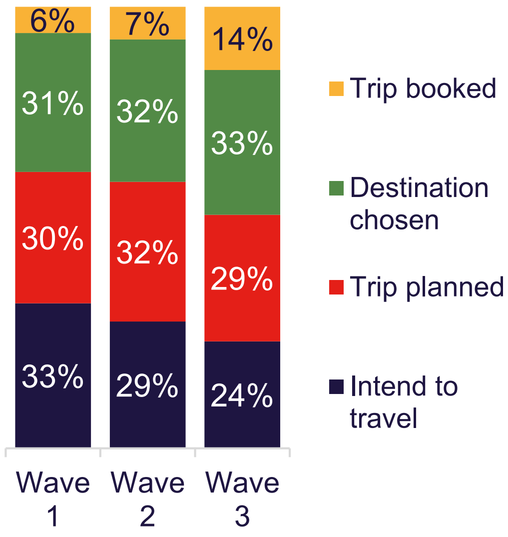
Intending to travel abroad for leisure*



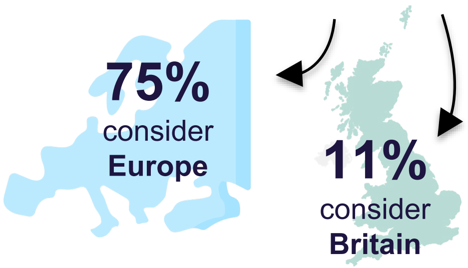
Journey purpose



Planning stage



Among leisure trip intenders:



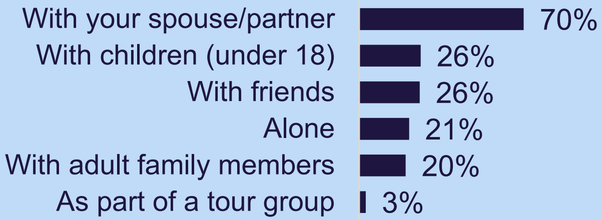
Among Britain intenders:

49% consider England
36% consider Scotland
22% consider London
11% consider Wales

Travel preferences

Top activities

Top Travel Companions

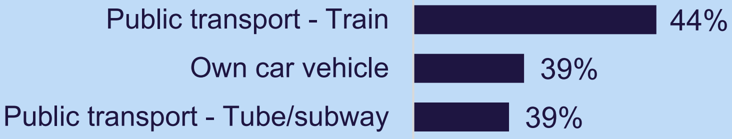


Top Accommodation

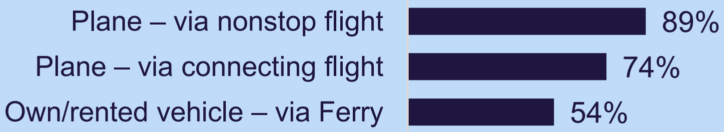
Destination types

36% Coastline
44% Large city
26% Small/mid-sized city/town
31% Will roam around
18% Mountains or hills
19% Country/ village

Top modes of transport within Britain



Top modes of transport to Britain



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

Short-Haul Markets Summary

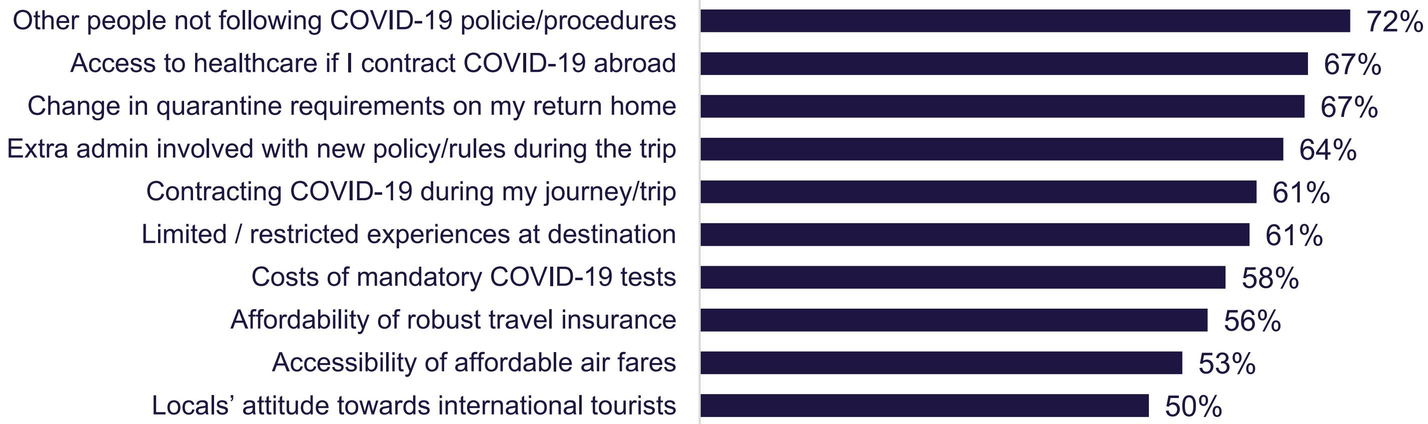
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Top travel drivers

…for any international trip

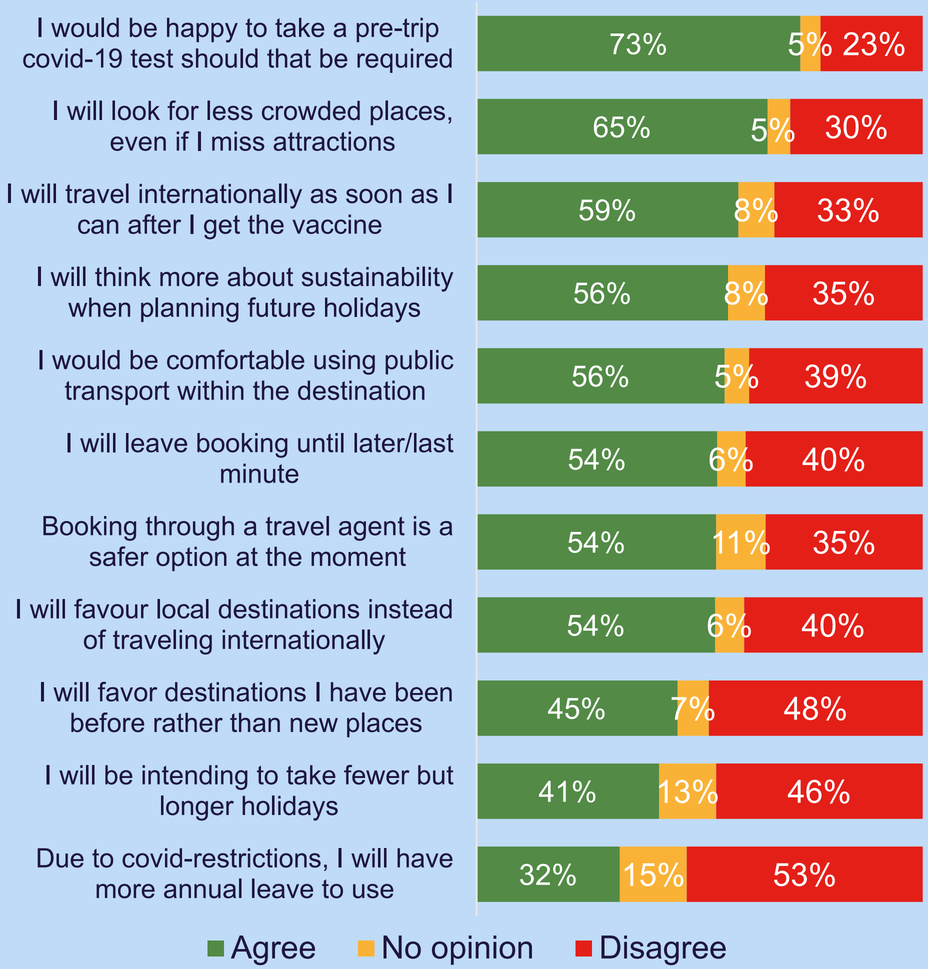
…for a trip to Britain

*Travel Concerns – for travel to Britain**



*% very & somewhat concerned
**% completely & somewhat agree

*Travel attitudes***



Long-Haul Markets Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3
71%	75%	80%

Journey purpose

Holiday	85%
Visit friends or relatives	34%
Other leisure purposes	31%

Planning stage

	Wave 1	Wave 2	Wave 3
Trip booked	9%	9%	12%
Destination chosen	30%	27%	27%
Trip planned	29%	39%	36%
Intend to travel	31%	25%	25%

Among leisure trip intenders:

48% consider **Europe**

15% consider **Britain**

Among Britain intenders:

62% consider England
43% consider Scotland
25% consider Wales
21% consider London

Travel preferences

Top activities

History and heritage	53%
Iconic tourist attractions	53%
Outdoor nature activities	49%
Dining out	49%
Visiting cultural attractions	48%

Destination types

- 44% Will roam around
- 52% Large city
- 33% Country/village
- 40% Coastline
- 31% Mountains or hills
- 33% Small/mid-sized city/town

Top Travel Companions

With your spouse/partner	73%
With children (under 18)	27%
With friends	20%
With adult family members	19%
Alone	16%
As part of a tour group	4%

Top modes of transport within Britain

Domestic flight	48%
Rented car/vehicle	42%
Public transport - Tube/subway	40%
Public transport - Train	39%
Taxi	34%
Public transport - Bus	32%
Own car vehicle	31%
Private coach/minibus	29%
Uber/other sharing app	28%

Top Accommodation

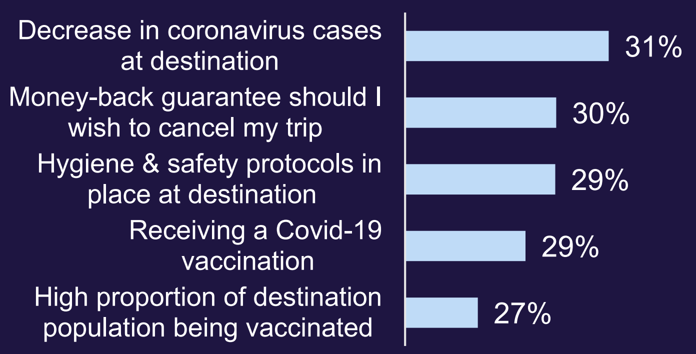
Hotel chain	57%
Boutique hotel	39%
Bed and breakfast	35%
Historic house/castle	31%
Private rental	29%

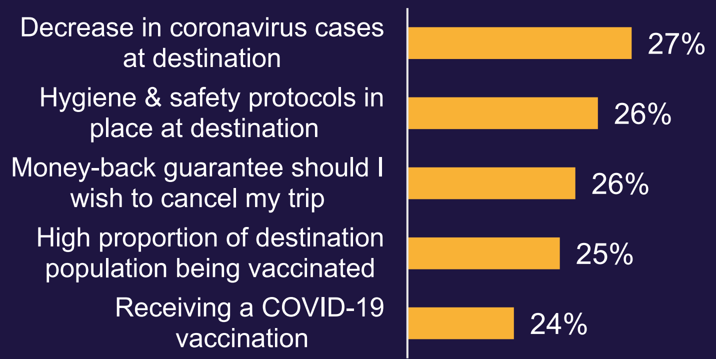
*(% definitely & probably) in the next 12 months

Long-Haul Markets Summary

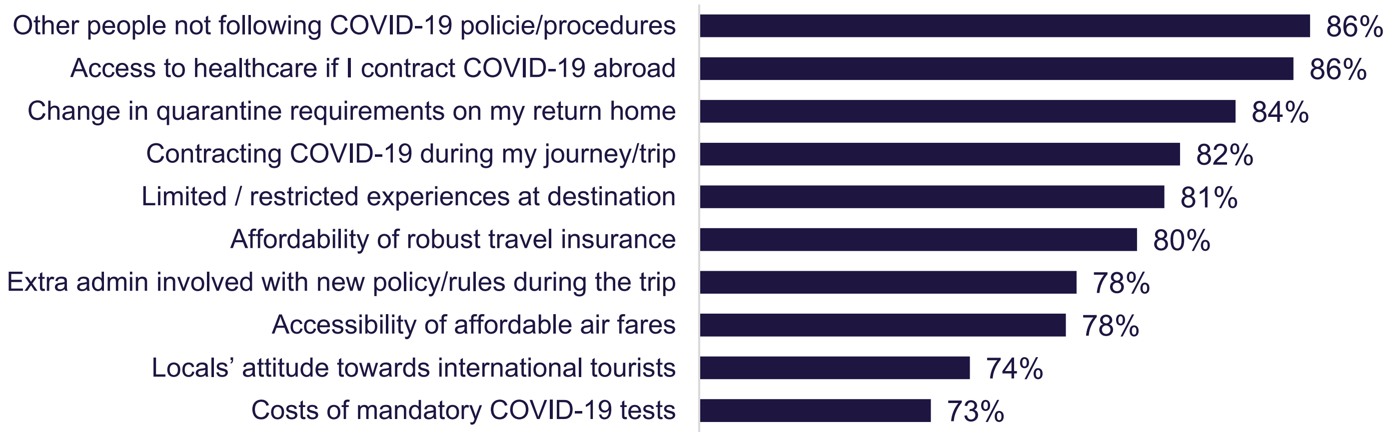
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Top travel drivers



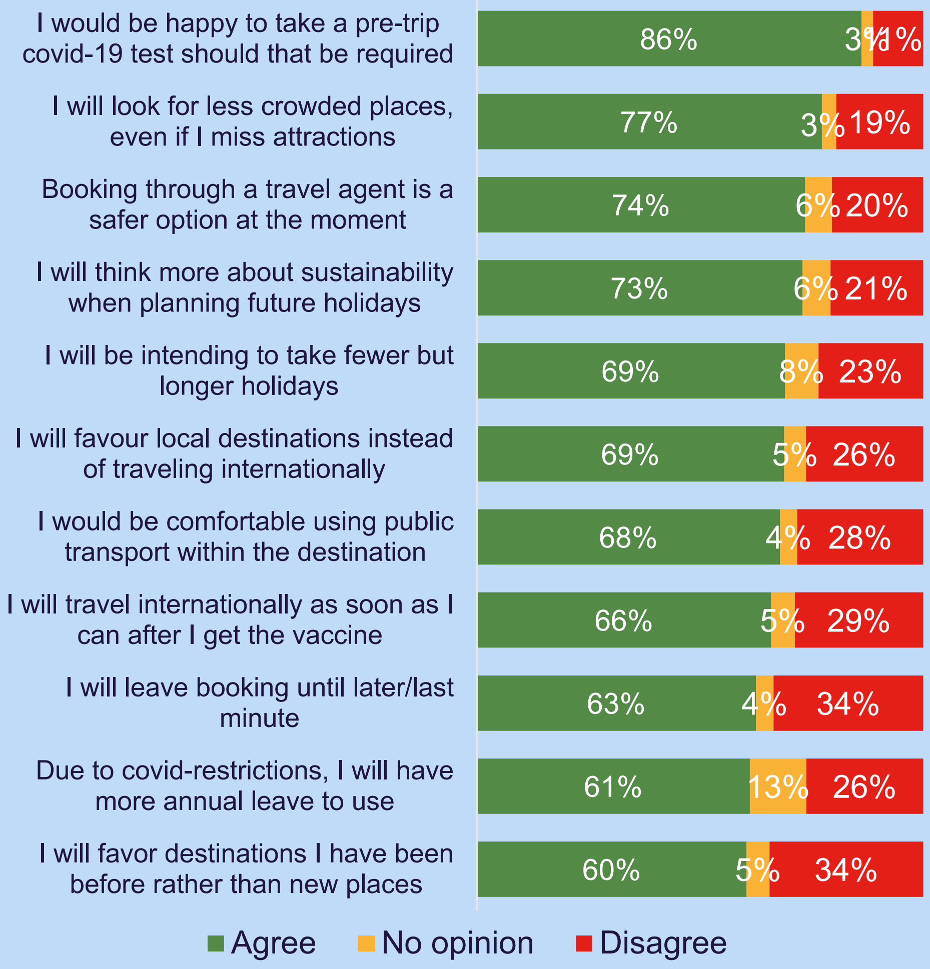


Travel Concerns – for travel to Britain*



*% very & somewhat concerned
**% completely & somewhat agree

Travel attitudes**



Australia Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3
62%	62%	63%

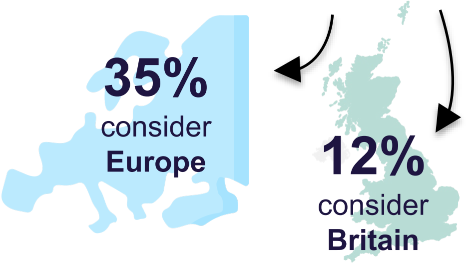
Journey purpose

Holiday	79%
Visit friends or relatives	48%
Other leisure purposes	22%

Planning stage

	Wave 1	Wave 2	Wave 3
Trip booked	7%	5%	6%
Destination chosen	28%	32%	32%
Trip planned	28%	31%	29%
Intend to travel	36%	32%	34%

Among leisure trip intenders:



Among Britain intenders:

64% consider England
38% consider Scotland
29% consider London
23% consider Wales

Travel preferences

Top activities

History and heritage	51%
Iconic tourist attractions	49%
Dining out	48%
Outdoor nature activities	44%
Visiting cultural attractions	41%

Top Travel Companions

With your spouse/partner	71%
With children (under 18)	22%
Alone	18%
With friends	16%
With adult family members	15%
As part of a tour group	3%

Top Accommodation

Hotel chain	70%
Boutique hotel	47%
Bed and breakfast	45%
Self catered property	37%
Private rental	36%

Destination types

46% Will roam around
49% Large city
35% Coastline
40% Country/ village
27% Mountains or hills
30% Small/mid-sized city/town

Top modes of transport within Britain

Rented car/vehicle	56%
Domestic flight	54%
Public transport - Train	49%
Public transport - Tube/subway	48%
Public transport - Bus	38%
Own car vehicle	33%
Private coach/minibus	32%
Taxi	32%
Uber/other sharing app	31%

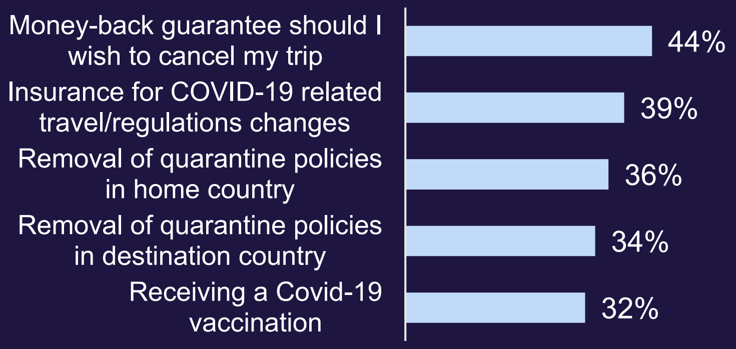
*(% definitely & probably) in the next 12 months

Australia Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Top travel drivers

…for any international trip

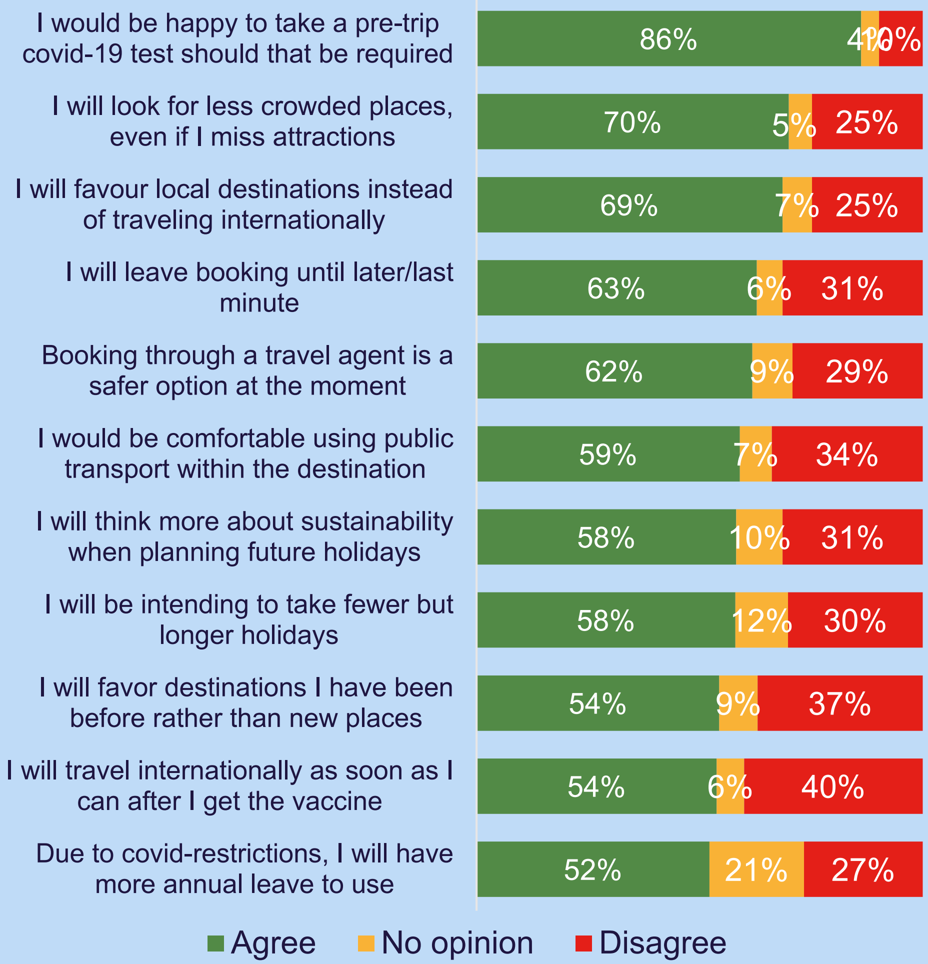


…for a trip to Britain

Travel Concerns – for travel to Britain*

*% very & somewhat concerned
**% completely & somewhat agree

Travel attitudes**

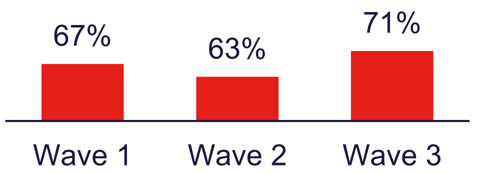


Canada Market Summary

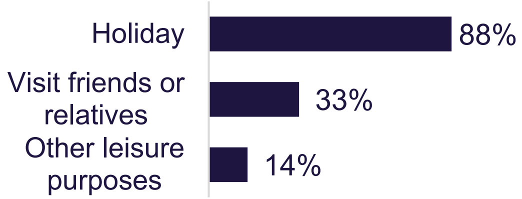
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

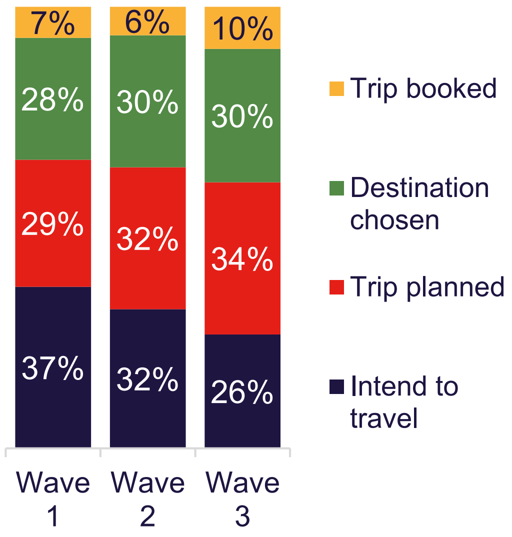
Intending to travel abroad for leisure*



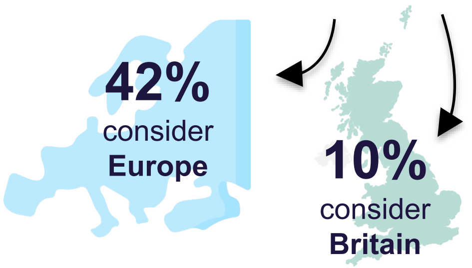
Journey purpose



Planning stage



Among leisure trip intenders:

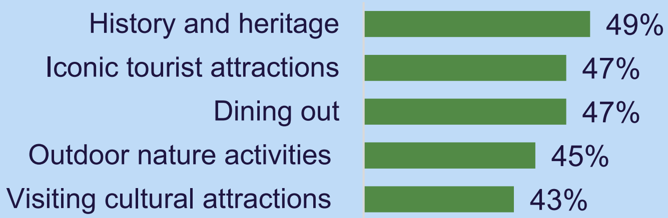


Among Britain intenders:

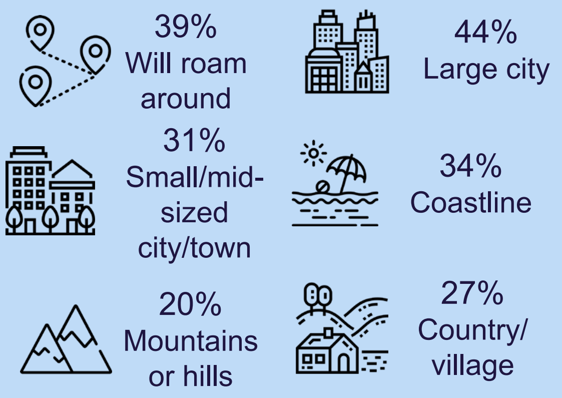
57% consider England
37% consider Scotland
21% consider London
16% consider Wales

Travel preferences

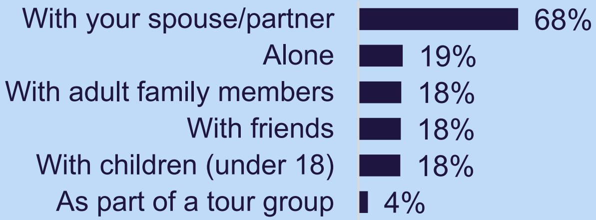
Top activities



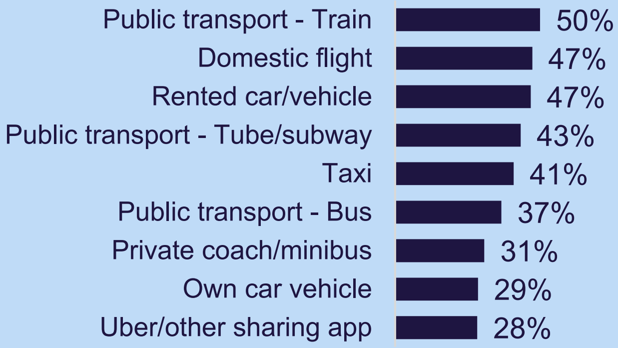
Destination types



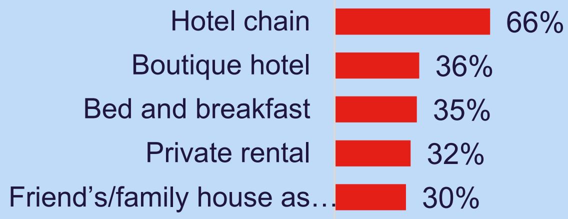
Top Travel Companions



Top modes of transport within Britain



Top Accommodation



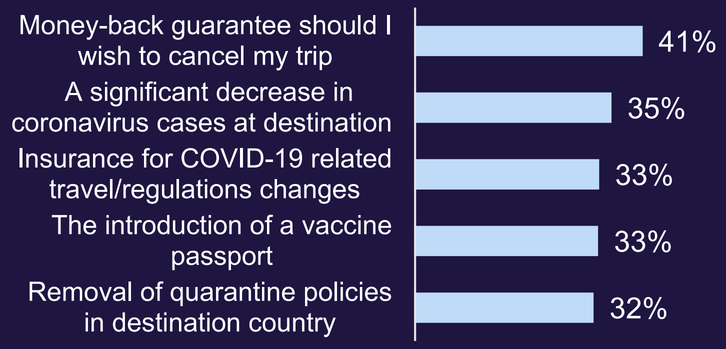
*(% definitely & probably) in the next 12 months

Canada Market Summary

Wave 1: 2^{nd}-16^{th} Dec 2020
Wave 2: 24^{th} Mar – 6^{th} Apr 2021
Wave 3: 23^{rd} Aug – 6^{th} Sept 2021
All data is from Wave 3, unless stated

Top travel drivers

…for any international trip

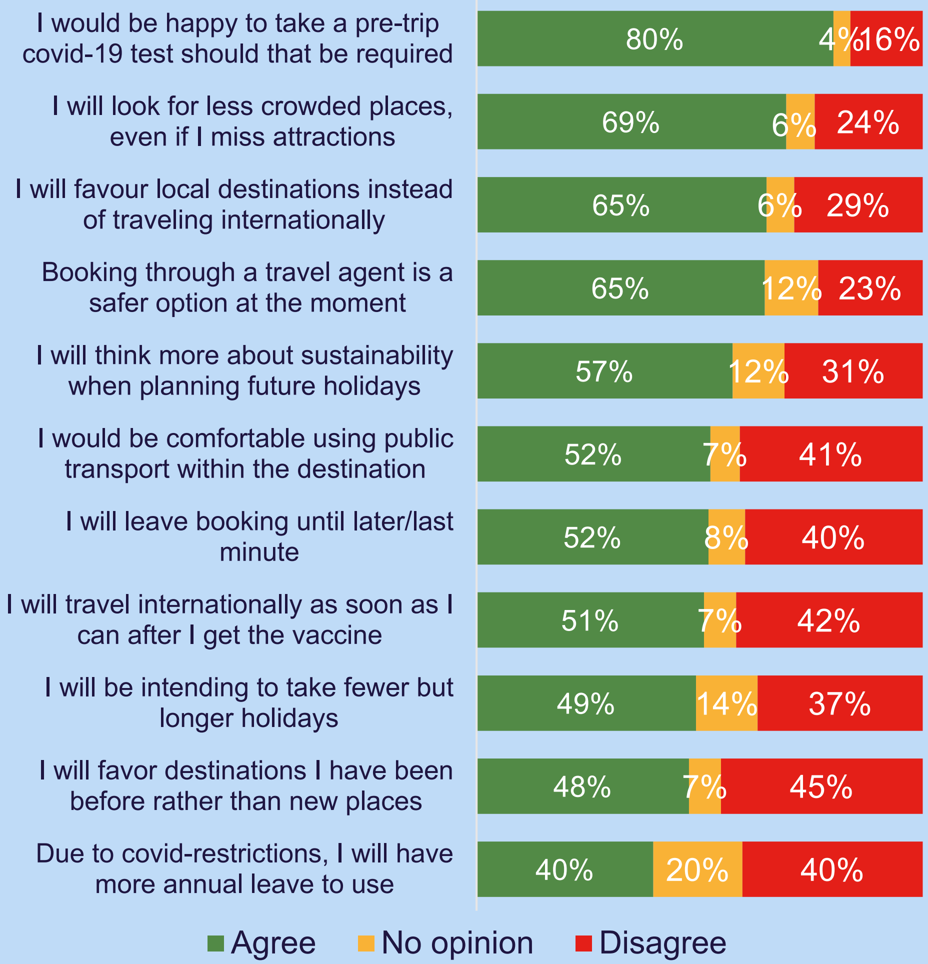


…for a trip to Britain

Travel Concerns – for travel to Britain*

*% very & somewhat concerned
**% completely & somewhat agree

Travel attitudes**



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Visit Scotland | Alba
VisitBritain

China Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3
69%	82%	84%

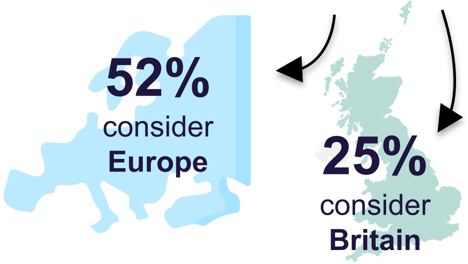
Journey purpose

Holiday	87%
Other leisure purposes	31%
Visit friends or relatives	17%

Planning stage

	Wave 1	Wave 2	Wave 3
Trip booked	3%	4%	5%
Destination chosen	35%	18%	22%
Trip planned	29%	55%	46%
Intend to travel	33%	23%	27%

Among leisure trip intenders:



Among Britain intenders:

50% consider England
49% consider Scotland
30% consider Wales
15% consider London

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

Travel preferences

Top activities

Iconic tourist attractions	45%
History and heritage	44%
Experiencing local lifestyle	42%
Visiting cultural attractions	42%
Shopping	41%

Top Travel Companions

With your spouse/partner	76%
With friends	22%
With adult family members	21%
With children (under 18)	20%
Alone	13%
As part of a tour group	3%

Top Accommodation

Hotel chain	42%
Holiday village/centre	40%
Boutique hotel	38%
Historic house/castle	31%
Bed and breakfast	27%

Destination types

Coastline	49%
Large city	55%
Small/mid-sized city/town	37%
Will roam around	47%
Mountains or hills	25%
Country/village	29%

Top modes of transport within Britain

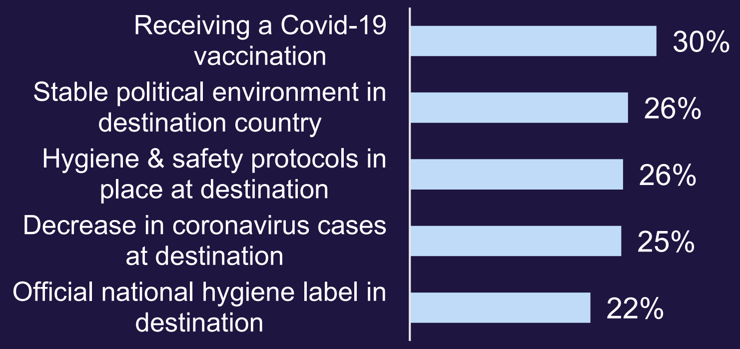
Public transport - Tube/subway	1%
Domestic flight	37%
Taxi	34%
Rented car/vehicle	32%
Public transport - Bus	31%
Public transport - Train	27%
Own car vehicle	27%
Private coach/minibus	21%
Uber/other sharing app	21%

China Market Summary

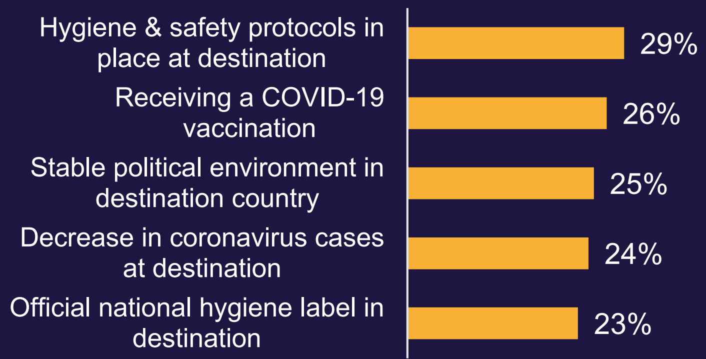
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Top travel drivers

…for any international trip

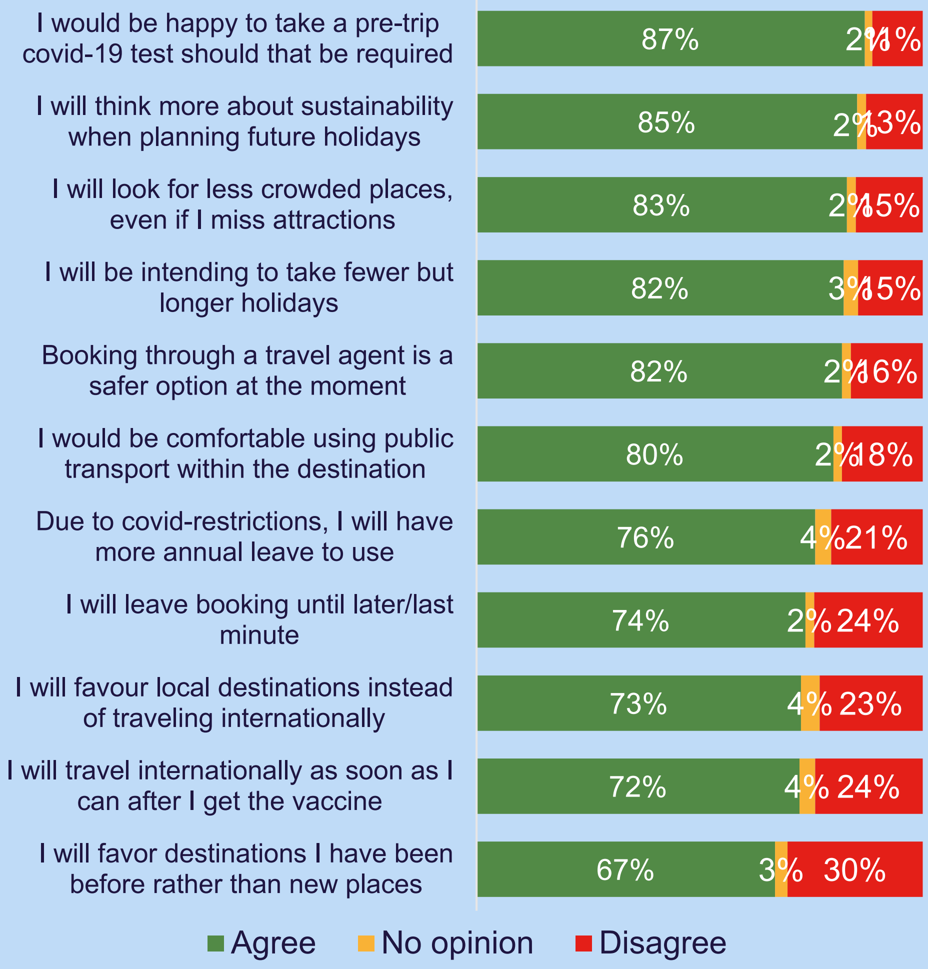


…for a trip to Britain



*Travel Concerns – for travel to Britain**

*Travel attitudes***



*% very & somewhat concerned
**% completely & somewhat agree

France Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3
79%	80%	87%

Journey purpose

Holiday	90%
Visit friends or relatives	29%
Other leisure purposes	19%

Planning stage

	Wave 1	Wave 2	Wave 3
Trip booked	7%	9%	12%
Destination chosen	28%	26%	30%
Trip planned	28%	30%	29%
Intend to travel	36%	36%	28%

Among leisure trip intenders:

67% consider **Europe**

7% consider **Britain**

Among Britain intenders:

47% consider England
38% consider Scotland
21% consider London
14% consider Wales

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

Travel preferences

Top activities

Outdoor nature activities	55%
Dining out	55%
Self-driving tours	51%
History and heritage	49%
Iconic tourist attractions	49%

Top Travel Companions

With your spouse/partner	67%
With children (under 18)	24%
With friends	21%
With adult family members	16%
Alone	14%
As part of a tour group	1%

Top Accommodation

Hotel chain	46%
Private rental	35%
Boutique hotel	34%
Bed and breakfast	27%
Self catered property	22%

Destination types

- 40% Coastline
- 39% Large city
- 23% Small/mid-sized city/town
- 36% Will roam around
- 15% Mountains or hills
- 21% Country/ village

Top modes of transport within Britain

Public transport - Train	48%
Public transport - Tube/subway	46%
Public transport - Bus	44%

Top modes of transport to Britain

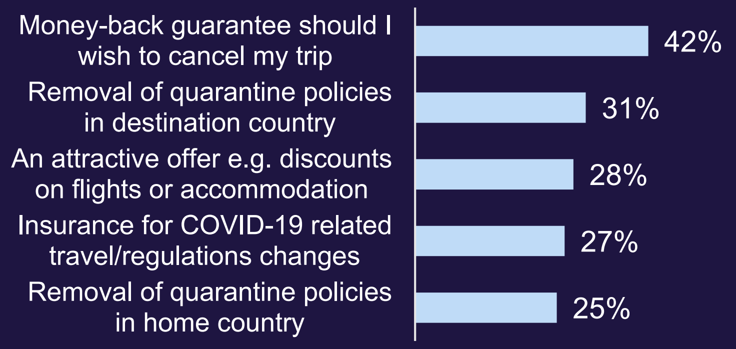
Plane – via nonstop flight	89%
Plane – via connecting flight	71%
Own/rented vehicle – via Ferry	63%

France Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Top travel drivers

…for any international trip

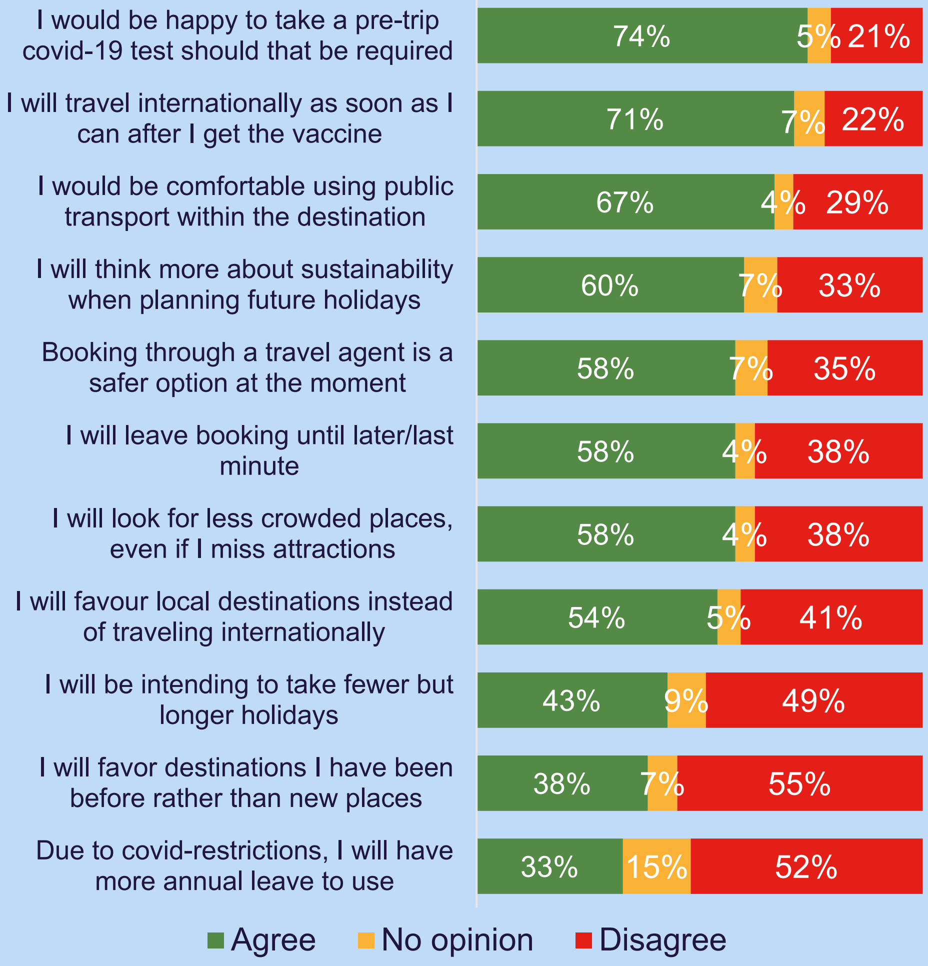


…for a trip to Britain

Travel Concerns – for travel to Britain*

*% very & somewhat concerned
**% completely & somewhat agree

Travel attitudes**



Germany Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

Intending to travel abroad for leisure*

	Wave 1	Wave 2	Wave 3
Intending to travel abroad for leisure*	65%	67%	81%

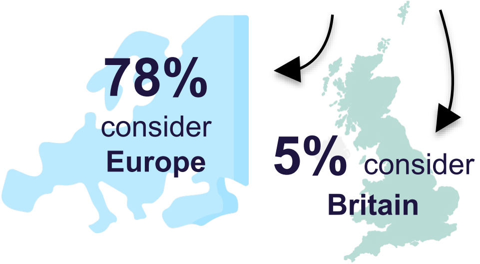
Journey purpose

Holiday	91%
Visit friends or relatives	27%
Other leisure purposes	13%

Planning stage

	Wave 1	Wave 2	Wave 3
Trip booked	8%	9%	19%
Destination chosen	26%	27%	27%
Trip planned	33%	37%	31%
Intend to travel	33%	27%	23%

Among leisure trip intenders:



Among Britain intenders:

40% consider Scotland
38% consider England
18% consider London
11% consider Wales

Travel preferences

Top activities

Dining out	52%
Outdoor nature activities	44%
History and heritage	42%
Iconic tourist attractions	42%
Outdoor activities	39%

Top Travel Companions

With your spouse/partner	68%
With children (under 18)	26%
With friends	23%
Alone	20%
With adult family members	14%
As part of a tour group	1%

Top Accommodation

Hotel chain	59%
Self catered property	47%
Bed and breakfast	38%
Friend's/family house (free guest)	31%
Boutique hotel	26%

Destination types

Large city	31%
Coastline	46%
Mountains or hills	25%
Will roam around	26%
Small/mid-sized city/town	21%
Country/ village	17%

Top modes of transport within Britain

Own car vehicle	38%
Public transport - Train	35%
Rented car/vehicle	30%

Top modes of transport to Britain

Plane – via nonstop flight	80%
Plane – via connecting flight	67%
Own/rented vehicle – via Channel Tunnel	60%

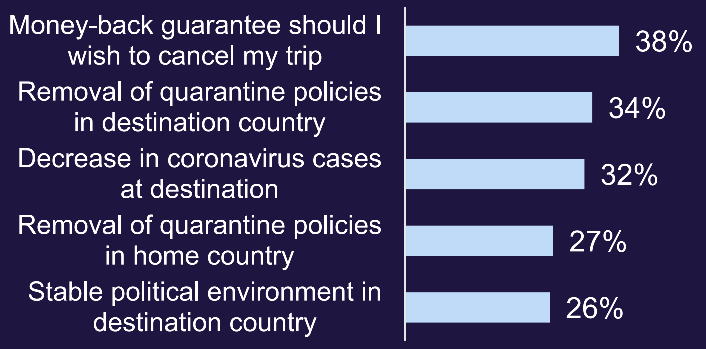
*(% definitely & probably) in the next 12 months

Germany Market Summary

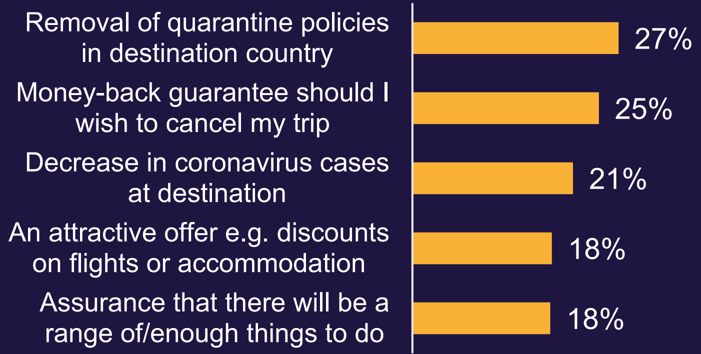
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Top travel drivers

…for any international trip



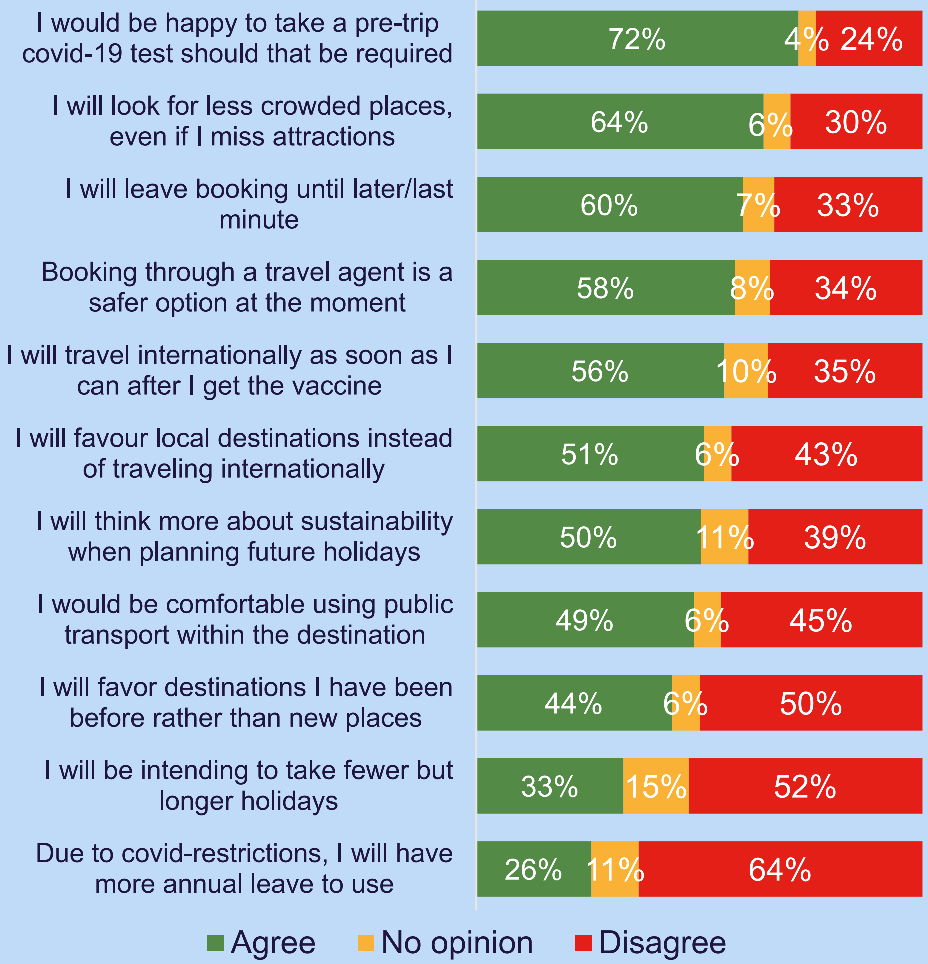
…for a trip to Britain



Travel Concerns – for travel to Britain*

*% very & somewhat concerned
**% completely & somewhat agree

Travel attitudes**



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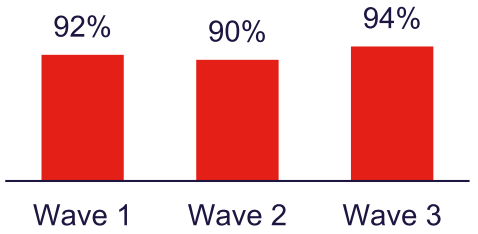
India Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

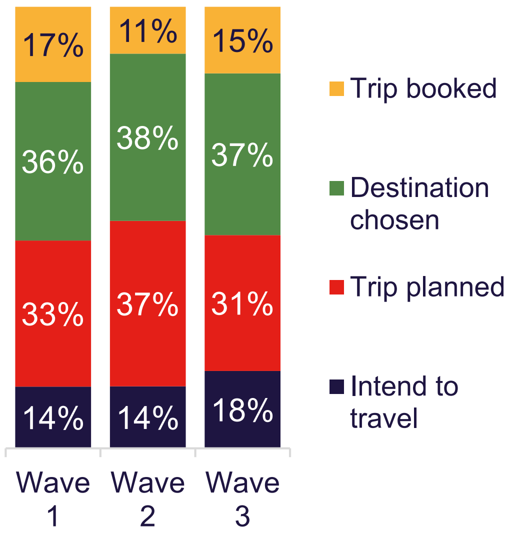
Travel intentions

Intending to travel abroad for leisure*

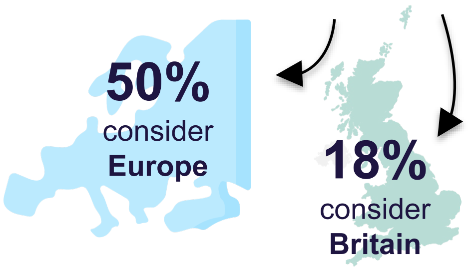


Journey purpose

Planning stage



Among leisure trip intenders:



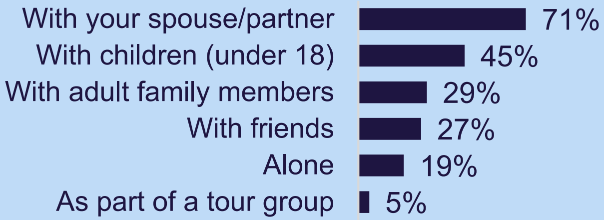
Among Britain intenders:

79% consider England
52% consider Scotland
31% consider Wales
22% consider London

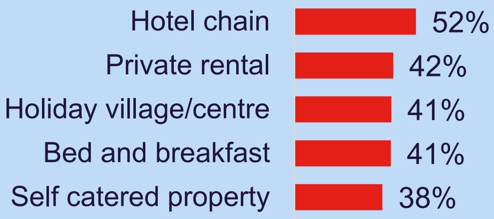
Travel preferences

Top activities

Top Travel Companions



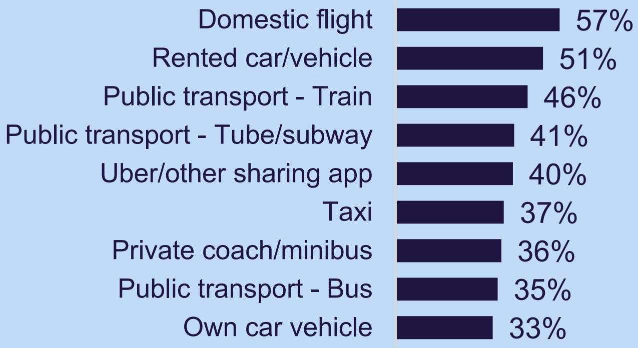
Top Accommodation



Destination types

62% Large city
63% Mountains or hills
48% Coastline
51% Will roam around
42% Small/mid-sized city/town
47% Country/ village

Top modes of transport within Britain



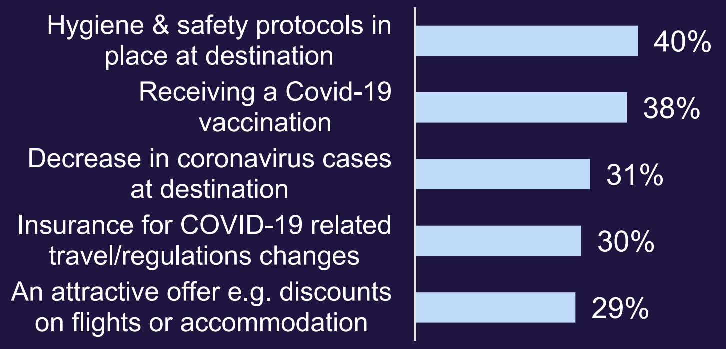
*(% definitely & probably) in the next 12 months

India Market Summary

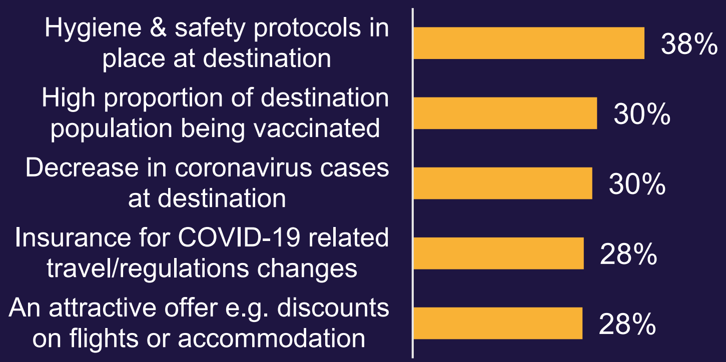
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Top travel drivers

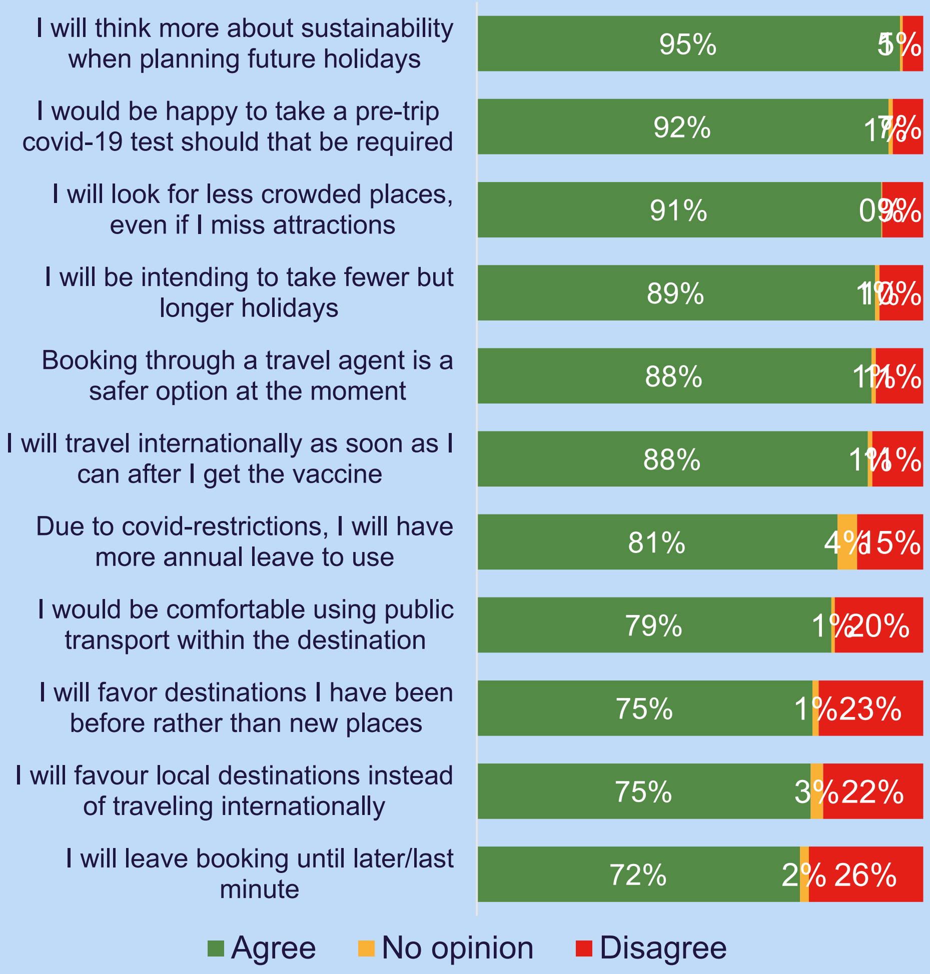
…for any international trip



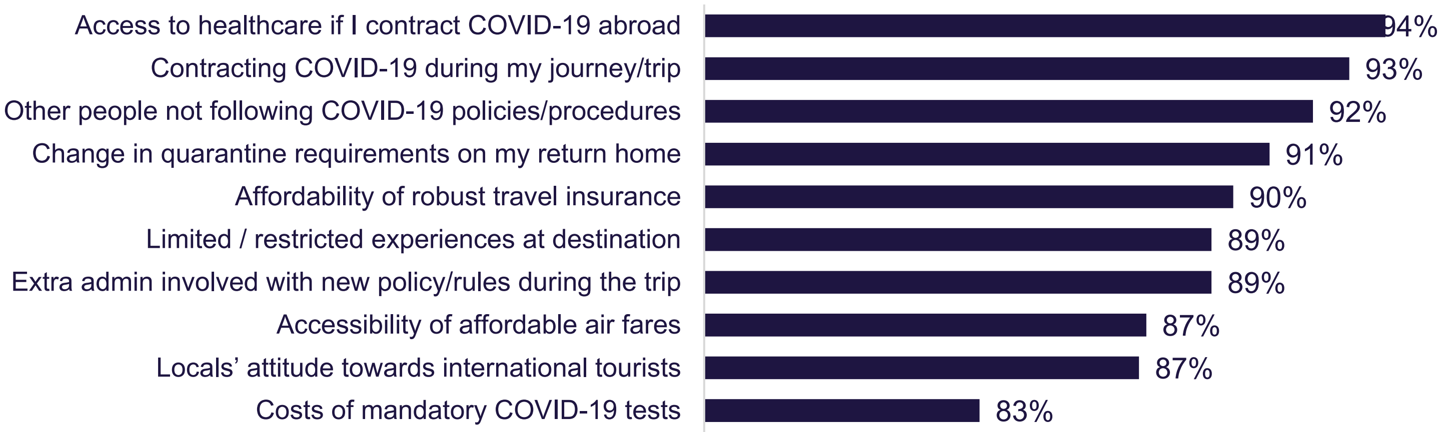
…for a trip to Britain



*Travel attitudes***



*Travel Concerns – for travel to Britain**



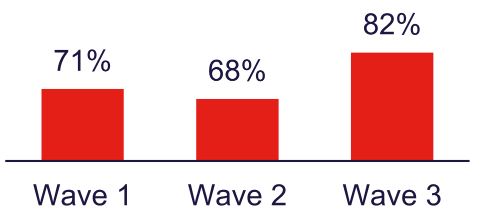
*% very & somewhat concerned
**% completely & somewhat agree

Irish Republic Market Summary

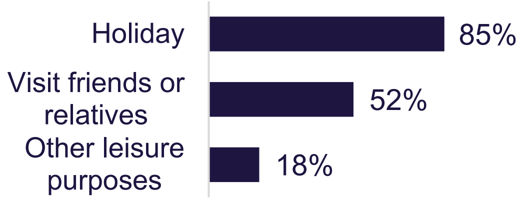
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

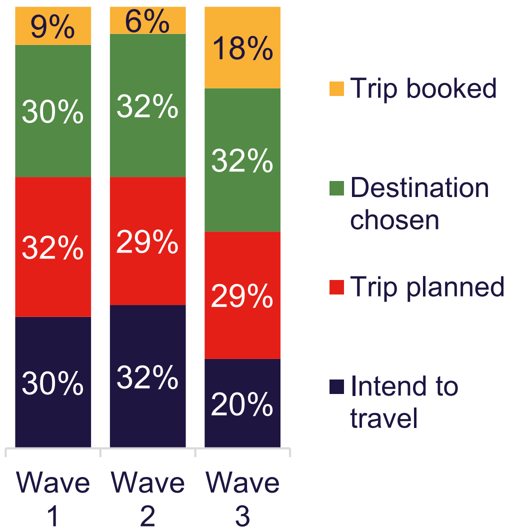
Intending to travel abroad for leisure*



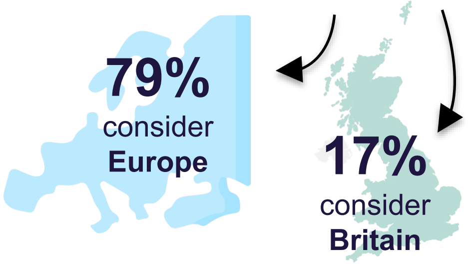
Journey purpose



Planning stage



Among leisure trip intenders:



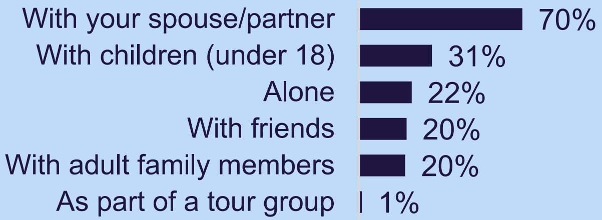
Among Britain intenders:

58% consider England
34% consider Scotland
24% consider London
11% consider Wales

Travel preferences

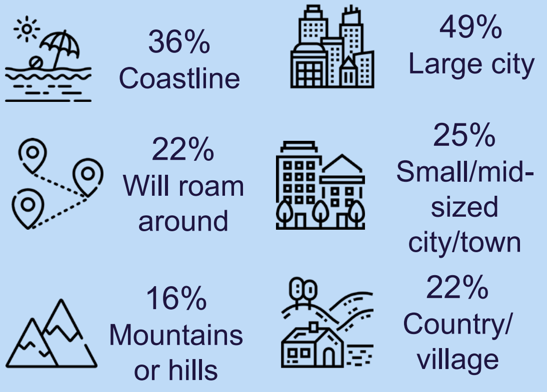
Top activities

Top Travel Companions

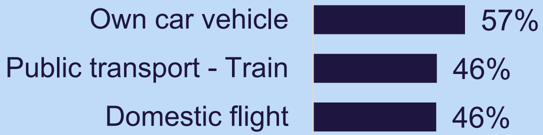


Top Accommodation

Destination types



Top modes of transport within Britain



Top modes of transport to Britain

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

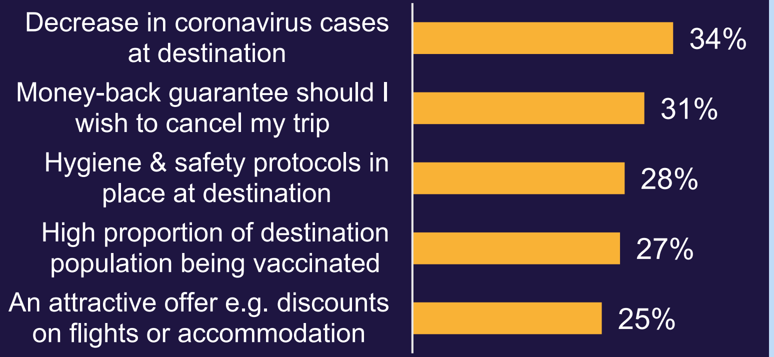
Irish Republic Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Top travel drivers

…for any international trip

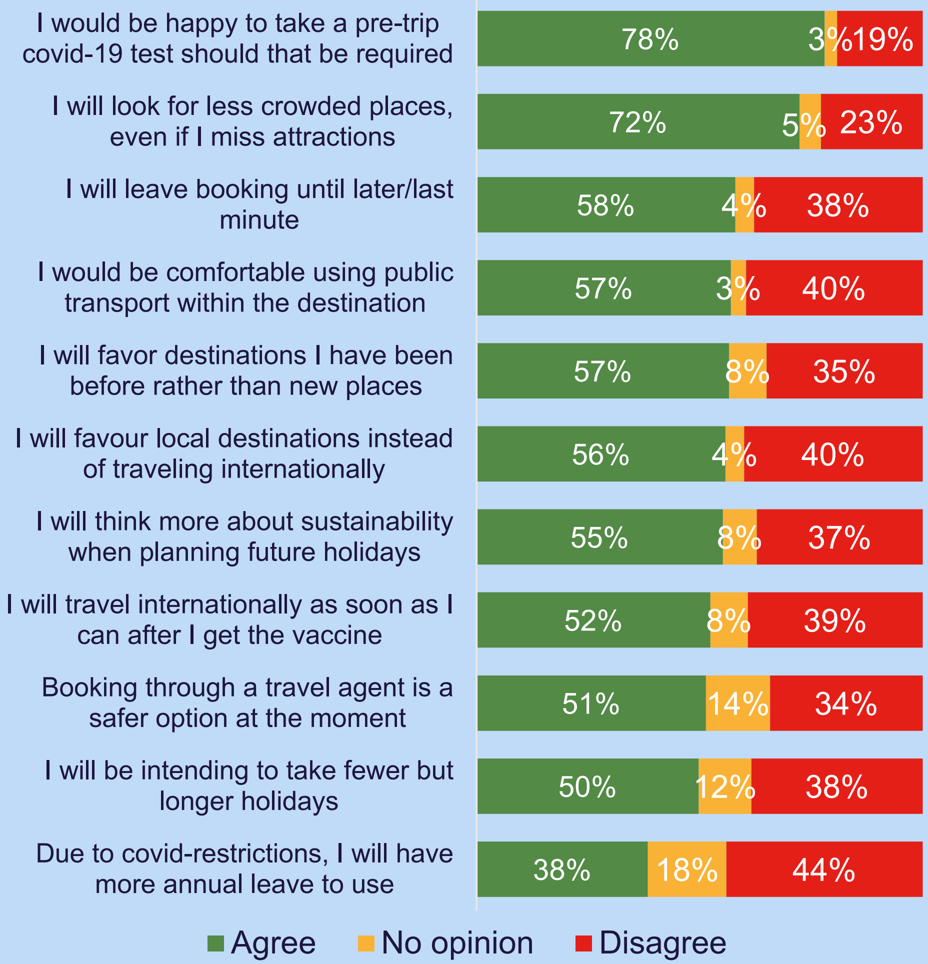
…for a trip to Britain



Travel Concerns – for travel to Britain*

*% very & somewhat concerned
**% completely & somewhat agree

Travel attitudes**



Italy Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3
77%	81%	87%

Journey purpose

Holiday	90%
Visit friends or relatives	32%
Other leisure purposes	26%

Planning stage

	Wave 1	Wave 2	Wave 3
Trip booked	3%	3%	10%
Destination chosen	40%	34%	36%
Trip planned	37%	41%	35%
Intend to travel	20%	21%	19%

Among leisure trip intenders:

75% consider **Europe**

15% consider **Britain**

Among Britain intenders:

55% consider England
47% consider Scotland
27% consider London
14% consider Wales

Travel preferences

Top activities

History and heritage	57%
Visiting cultural attractions	55%
Iconic tourist attractions	53%
Outdoor nature activities	49%
Dining out	49%

Top Travel Companions

With your spouse/partner	76%
With friends	23%
With children (under 18)	21%
Alone	14%
With adult family members	11%
As part of a tour group	2%

Top Accommodation

Hotel chain	64%
Bed and breakfast	54%
Self catered property	34%
Private rental	31%
Friend's/family house as…	26%

Destination types

51% Will roam around
53% Large city
29% Coastline
34% Small/mid-sized city/town
21% Mountains or hills
21% Country/village

Top modes of transport within Britain

Rented car/vehicle	47%
Public transport - Train	44%
Public transport - Tube/subway	44%

Top modes of transport to Britain

Plane – via nonstop flight	91%
Plane – via connecting flight	83%
Own/rented vehicle – via Ferry	62%

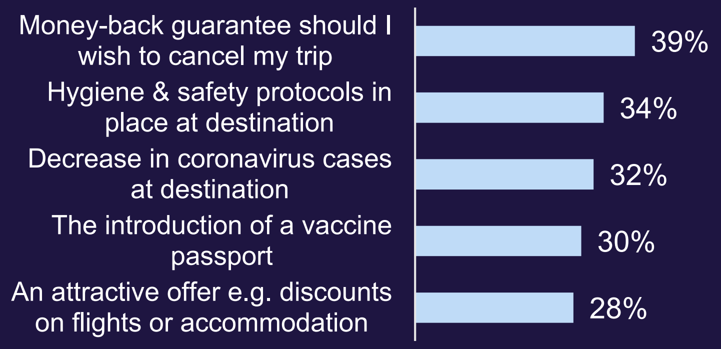
*(% definitely & probably) in the next 12 months

Italy Republic Market Summary

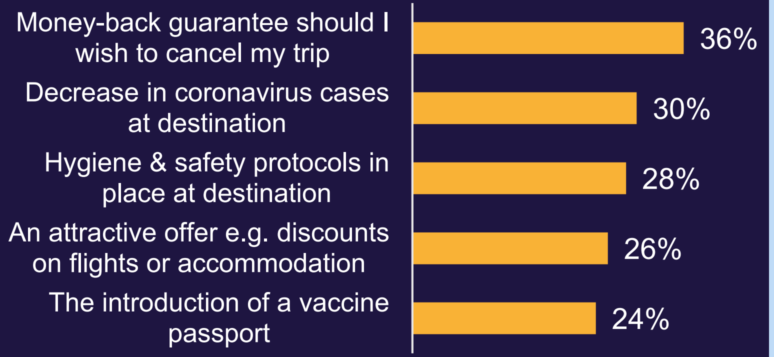
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Top travel drivers

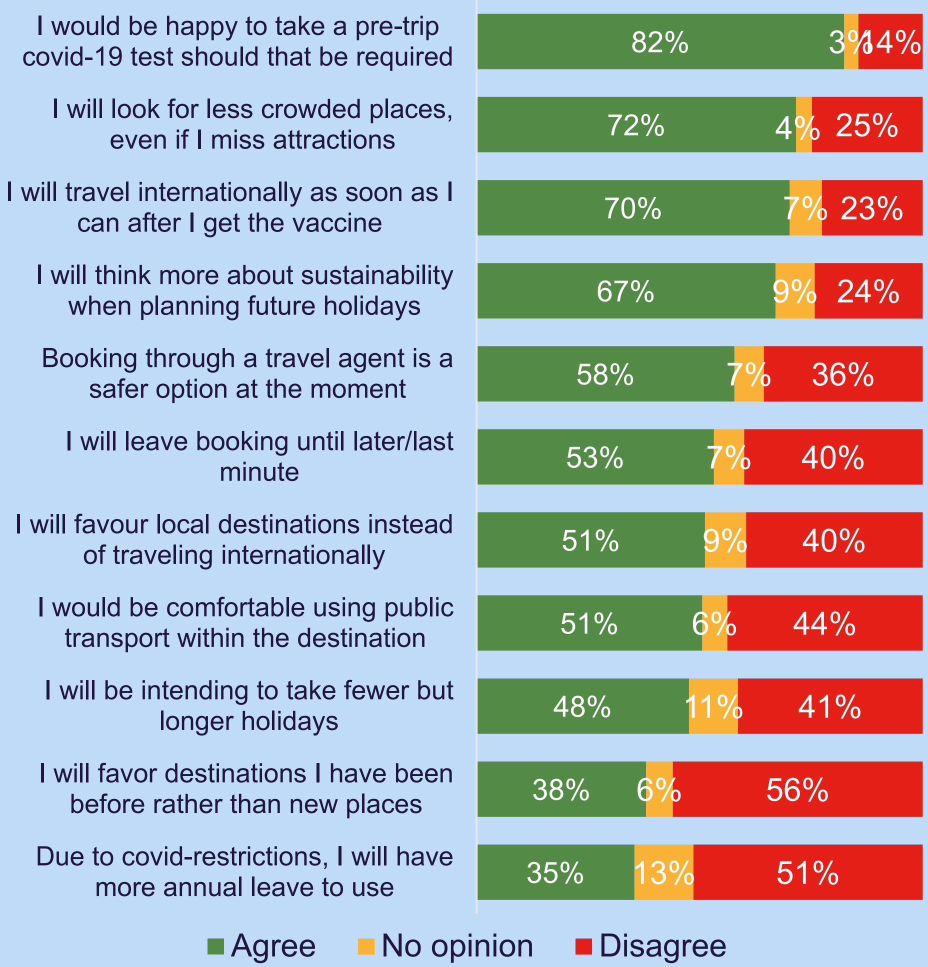
…for any international trip



…for a trip to Britain



Travel attitudes**



Travel Concerns – for travel to Britain*

*% very & somewhat concerned
**% completely & somewhat agree

Netherlands Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3
63%	72%	83%

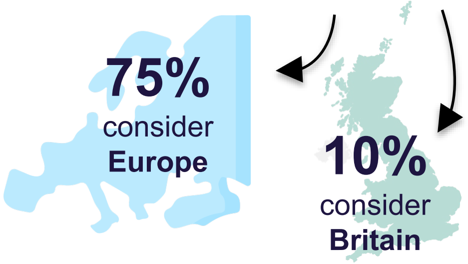
Journey purpose

Holiday	89%
Visit friends or relatives	33%
Other leisure purposes	19%

Planning stage

	Wave 1	Wave 2	Wave 3
Trip booked	8%	15%	20%
Destination chosen	24%	29%	27%
Trip planned	25%	28%	22%
Intend to travel	43%	28%	31%

Among leisure trip intenders:



Among Britain intenders:

48% consider England
32% consider Scotland
19% consider London
11% consider Wales

Travel preferences

Top activities

Dining out	57%
Outdoor activities	50%
Self-driving tours	44%
History and heritage	44%
Experiencing local lifestyle	43%

Top Travel Companions

With your spouse/partner	72%
With children (under 18)	28%
Alone	26%
With friends	26%
With adult family members	20%
As part of a tour group	3%

Top Accommodation

Hotel chain	64%
Bed and breakfast	43%
Self catered property	41%
Friend's/family house (free guest)	29%
Holiday village/centre	28%

Destination types

- 35% Coastline
- 36% Large city
- 27% Mountains or hills
- 33% Will roam around
- 22% Country/ village
- 24% Small/mid-sized city/town

Top modes of transport within Britain

Own car vehicle	46%
Public transport - Train	41%
Public transport - Tube/subway	36%

Top modes of transport to Britain

Plane – via nonstop flight	82%
Plane – via connecting flight	76%
Own/rented vehicle – via Channel Tunnel	57%

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

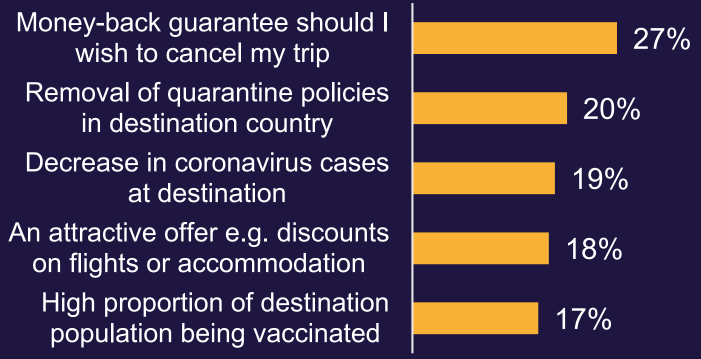
Netherlands Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

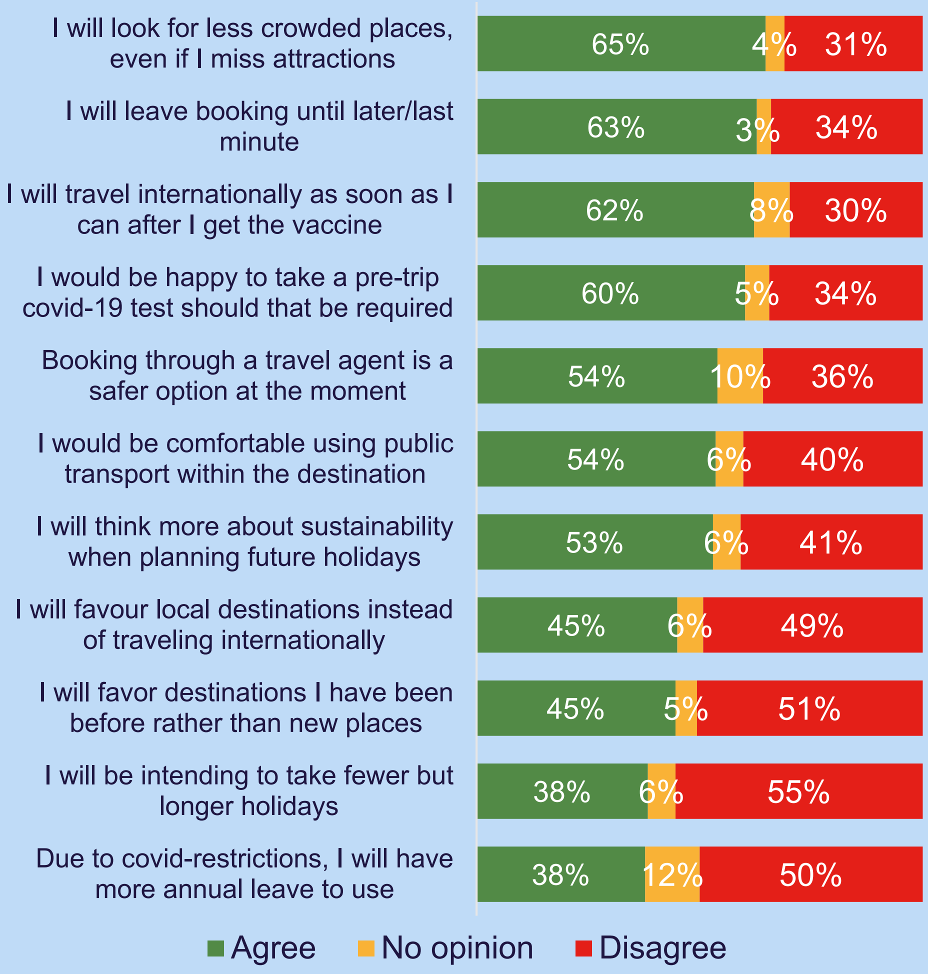
Top travel drivers

…for any international trip

…for a trip to Britain



Travel attitudes**



Travel Concerns – for travel to Britain*

*% very & somewhat concerned
**% completely & somewhat agree

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

Norway Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3
53%	53%	68%

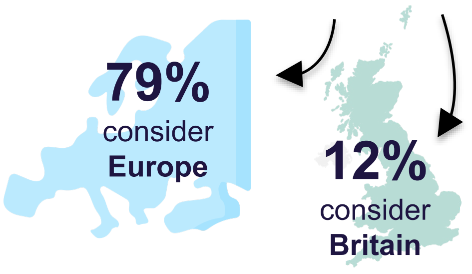
Journey purpose

Holiday	84%
Visit friends or relatives	37%
Other leisure purposes	14%

Planning stage

	Wave 1	Wave 2	Wave 3
Trip booked	5%	6%	12%
Destination chosen	33%	37%	40%
Trip planned	19%	20%	19%
Intend to travel	43%	36%	28%

Among leisure trip intenders:



Among Britain intenders:

49% consider England
25% consider Scotland
21% consider London
8% consider Wales

Travel preferences

Top activities

Dining out	53%
Outdoor nature activities	29%
Iconic tourist attractions	29%
History and heritage	29%
Shopping	27%

Top Travel Companions

With your spouse/partner	64%
With friends	33%
Alone	27%
With adult family members	26%
With children (under 18)	24%
As part of a tour group	6%

Top Accommodation

Hotel chain	69%
Bed and breakfast	40%
Self catered property	36%
Friend's/family house (free guest)	29%
Historic house/castle	28%

Destination types

38% Coastline
49% Large city
24% Small/mid-sized city/town
30% Will roam around
10% Mountains or hills
15% Country/ village

Top modes of transport within Britain

Public transport - Train	53%
Public transport - Tube/subway	37%
Public transport - Bus	32%

Top modes of transport to Britain

Plane – via nonstop flight	91%
Plane – via connecting flight	65%
Own/rented vehicle – via Channel Tunnel	35%

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

Norway Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Top travel drivers

…for any international trip

Removal of quarantine policies in destination country	34%
Removal of quarantine policies in home country	33%
Your Government's advice on international travel	32%
Money-back guarantee should I wish to cancel my trip	31%
Decrease in coronavirus cases at destination	28%

…for a trip to Britain

Decrease in coronavirus cases at destination	25%
Your Government's advice on international travel	25%
Removal of quarantine policies in home country	25%
Removal of quarantine policies in destination country	24%
Money-back guarantee should I wish to cancel my trip	23%

Travel Concerns – for travel to Britain*

Other people not following COVID-19 policies/procedures	71%
Extra admin involved with new policy/rules during the trip	67%
Change in quarantine requirements on my return home	64%
Access to healthcare if I contract COVID-19 abroad	62%
Contracting COVID-19 during my journey/trip	58%
Limited / restricted experiences at destination	49%
Affordability of robust travel insurance	47%
Costs of mandatory COVID-19 tests	46%
Accessibility of affordable air fares	45%
Locals' attitude towards international tourists	43%

Travel attitudes**

	Agree	No opinion	Disagree
I would be happy to take a pre-trip covid-19 test should that be required	74%	5%	21%
I will look for less crowded places, even if I miss attractions	62%	5%	33%
I would be comfortable using public transport within the destination	59%	7%	34%
I will travel internationally as soon as I can after I get the vaccine	52%	9%	39%
I will favor destinations I have been before rather than new places	52%	6%	42%
Booking through a travel agent is a safer option at the moment	51%	14%	35%
I will favour local destinations instead of traveling internationally	51%	6%	43%
I will think more about sustainability when planning future holidays	43%	11%	46%
I will leave booking until later/last minute	43%	9%	48%
I will be intending to take fewer but longer holidays	37%	22%	42%
Due to covid-restrictions, I will have more annual leave to use	21%	17%	62%

*% very & somewhat concerned
**% completely & somewhat agree

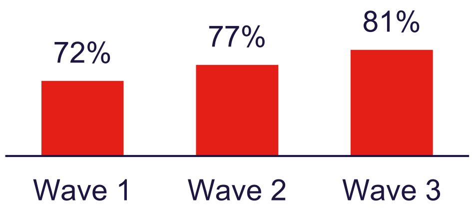
TCI Research Travel Competitive Intelligence | LONDON & PARTNERS | Llywodraeth Cymru Welsh Government | Visit Scotland Alba | VisitBritain

Spain Market Summary

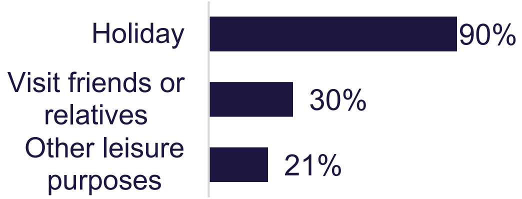
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

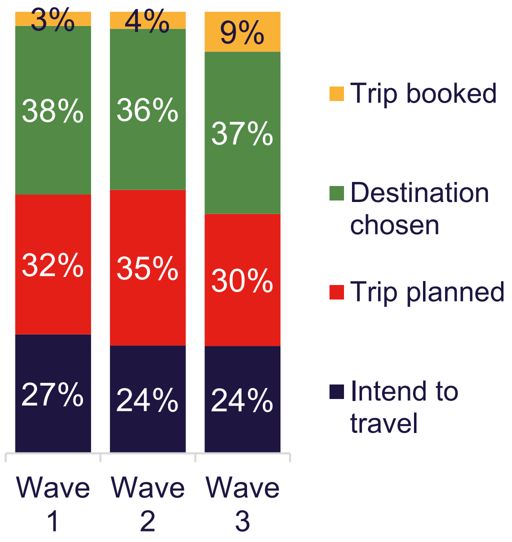
Intending to travel abroad for leisure*



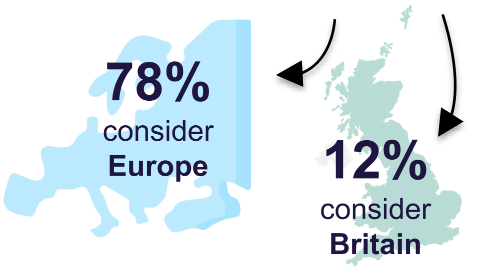
Journey purpose



Planning stage



Among leisure trip intenders:



Among Britain intenders:

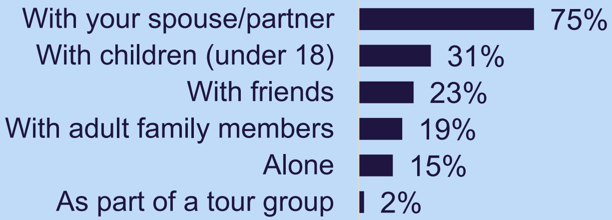
49% consider England
49% consider Scotland
26% consider London
16% consider Wales

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

Travel preferences

Top activities

Top Travel Companions

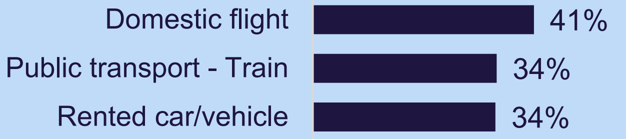


Top Accommodation

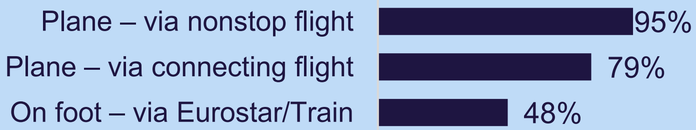
Destination types

32% Small/mid-sized city/town
56% Large city
25% Will roam around
29% Coastline
11% Country/ village
20% Mountains or hills

Top modes of transport within Britain



Top modes of transport to Britain



Spain Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Top travel drivers

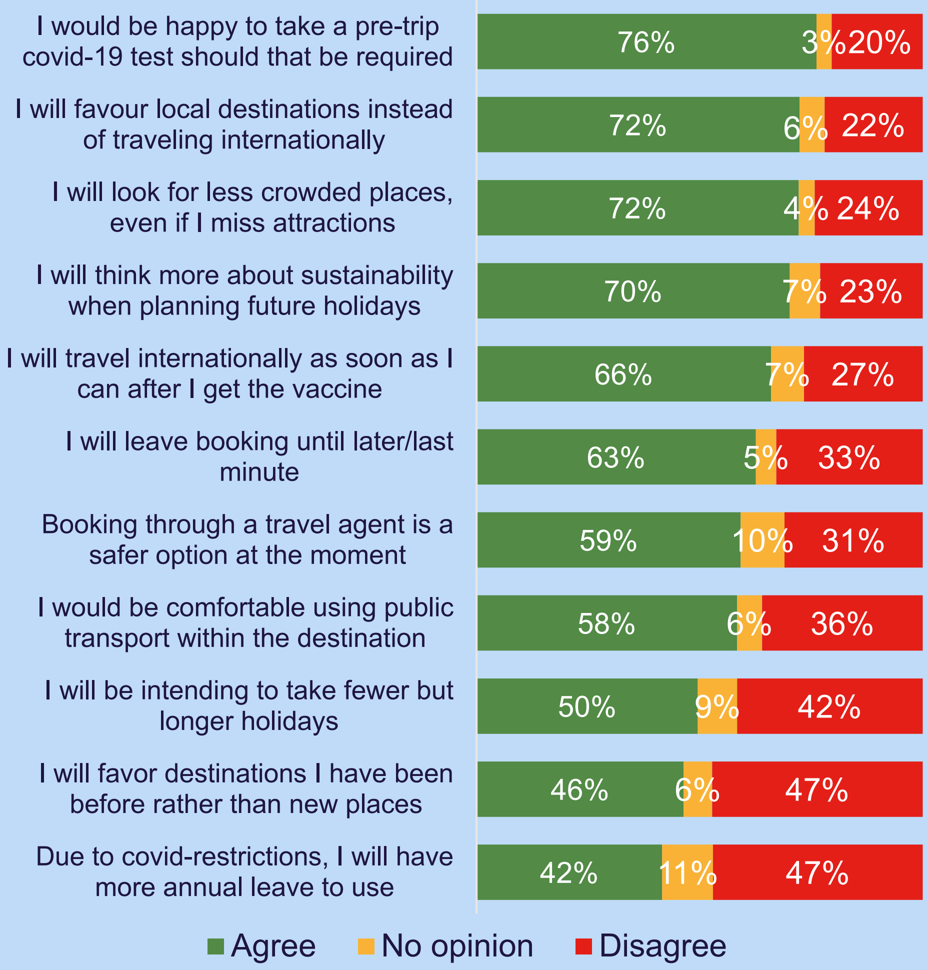
…for any international trip

…for a trip to Britain

Travel Concerns – for travel to Britain*

*% very & somewhat concerned
**% completely & somewhat agree

Travel attitudes**



Sweden Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3
55%	67%	75%

Journey purpose

Holiday	83%
Visit friends or relatives	33%
Other leisure purposes	20%

Planning stage

	Wave 1	Wave 2	Wave 3
Trip booked	5%	7%	15%
Destination chosen	32%	35%	32%
Trip planned	32%	34%	34%
Intend to travel	31%	24%	19%

Among leisure trip intenders:

74% consider **Europe**

13% consider **Britain**

Among Britain intenders:

46% consider England
25% consider Scotland
23% consider London
6% consider Wales

Travel preferences

Top activities

Dining out	58%
History and heritage	34%
Outdoor nature activities	34%
Experiencing local lifestyle	34%
Self-driving tours	32%

Top Travel Companions

With your spouse/partner	70%
With friends	38%
With adult family members	33%
Alone	32%
With children (under 18)	24%
As part of a tour group	7%

Top Accommodation

Hotel chain	77%
Bed and breakfast	47%
Self catered property	42%
Friend's/family house (free guest)	36%
Historic house/castle	35%

Destination types

Coastline	34%
Large city	43%
Will roam around	22%
Small/mid-sized city/town	23%
Mountains or hills	9%
Country/village	21%

Top modes of transport within Britain

Public transport - Train	53%
Public transport - Tube/subway	52%
Taxi	47%

Top modes of transport to Britain

Plane – via nonstop flight	91%
Plane – via connecting flight	78%
Own/rented vehicle – via Channel Tunnel	47%

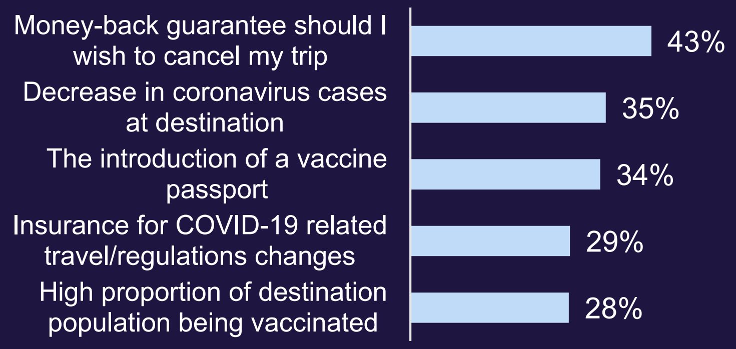
*(% definitely & probably) in the next 12 months

Sweden Market Summary

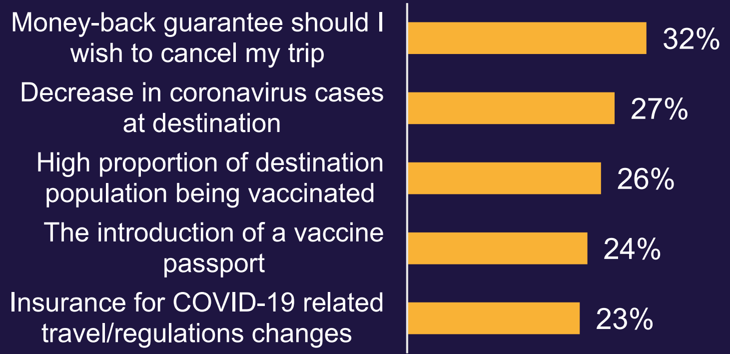
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Top travel drivers

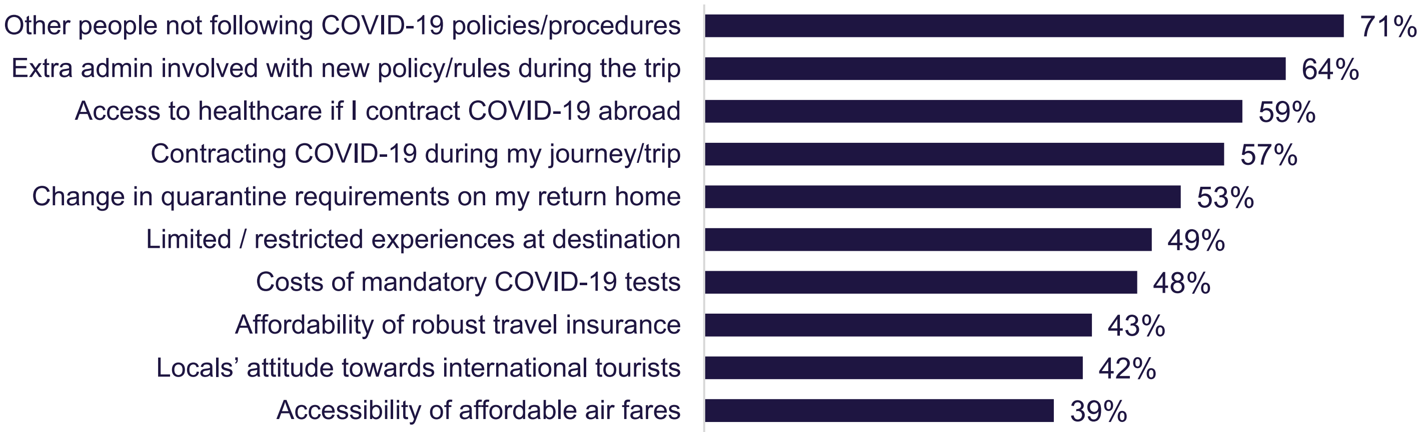
…for any international trip



…for a trip to Britain

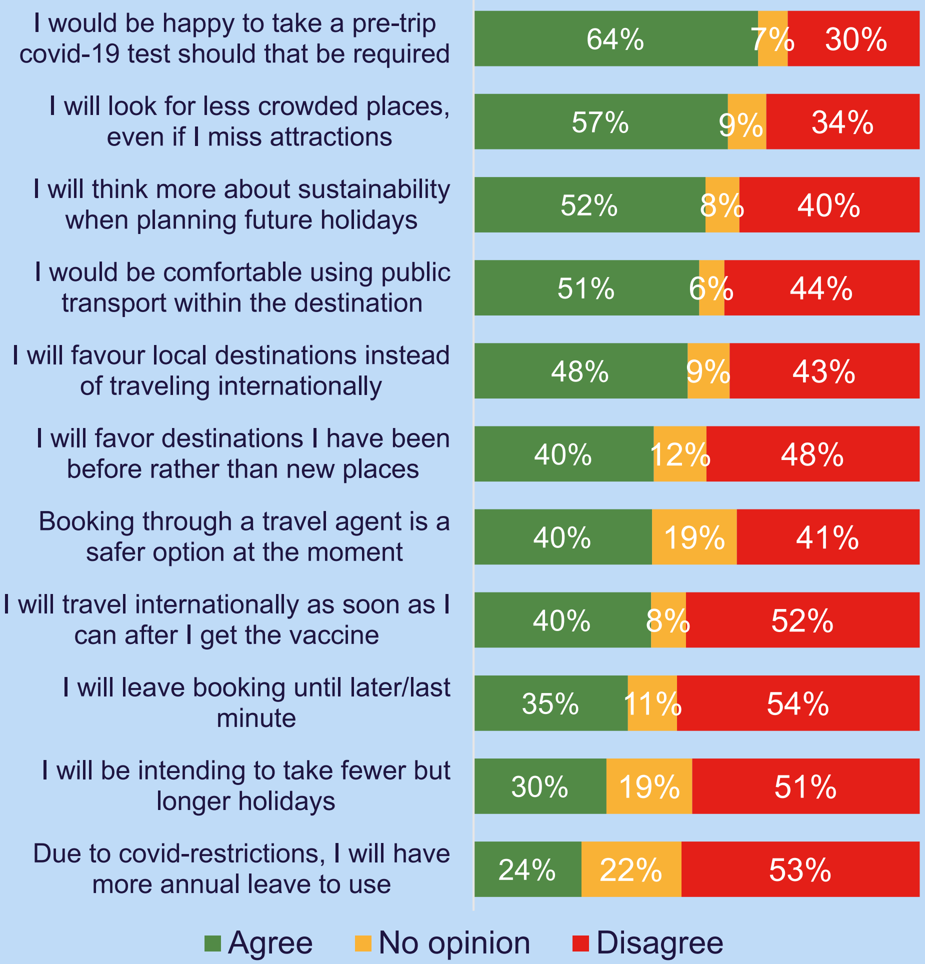


*Travel Concerns – for travel to Britain**



*% very & somewhat concerned
**% completely & somewhat agree

*Travel attitudes***

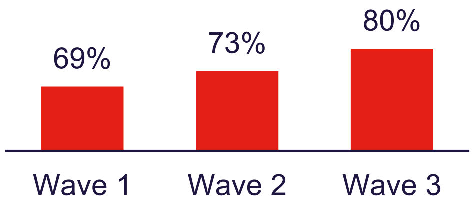


USA Market Summary

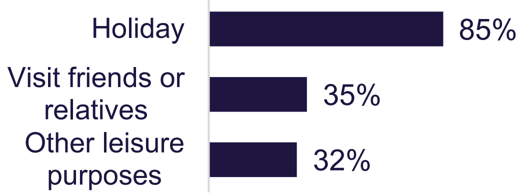
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

Travel intentions

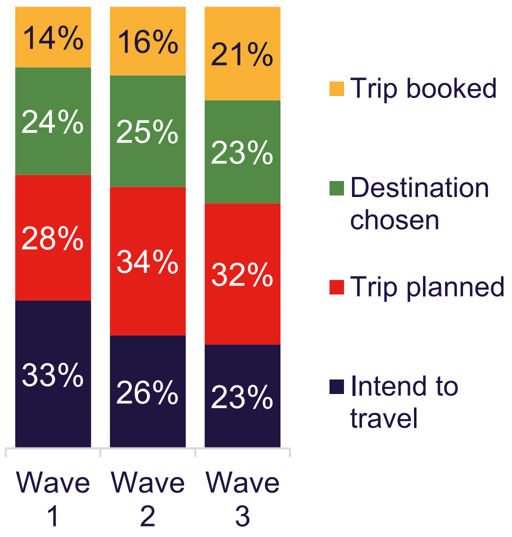
Intending to travel abroad for leisure*



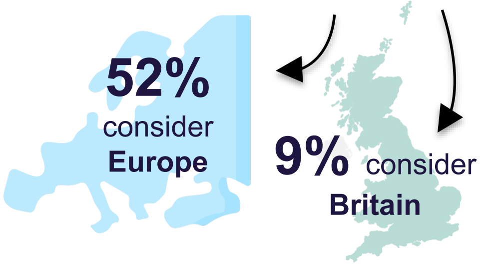
Journey purpose



Planning stage



Among leisure trip intenders:



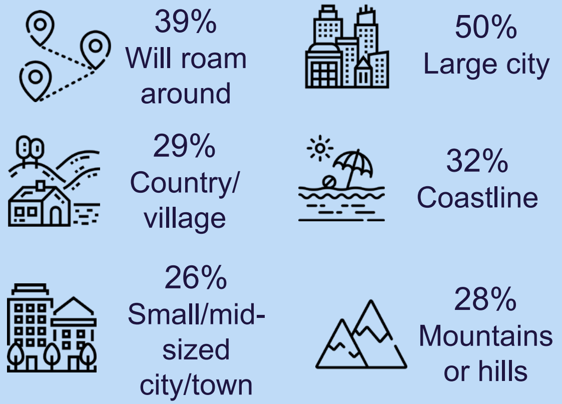
Among Britain intenders:

66% consider England
37% consider Scotland
22% consider London
22% consider Wales

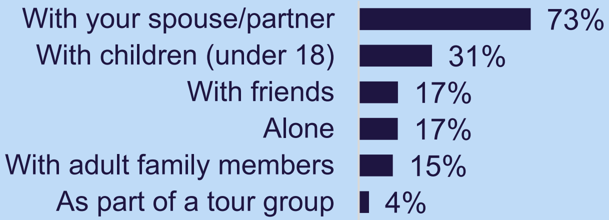
Travel preferences

Top activities

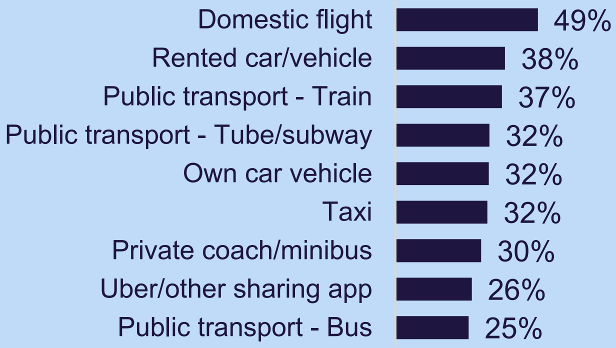
Destination types



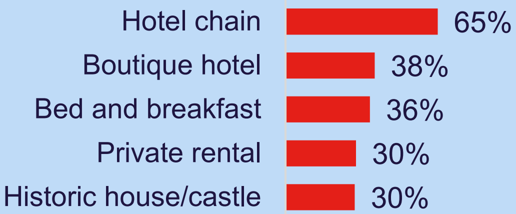
Top Travel Companions



Top modes of transport within Britain



Top Accommodation



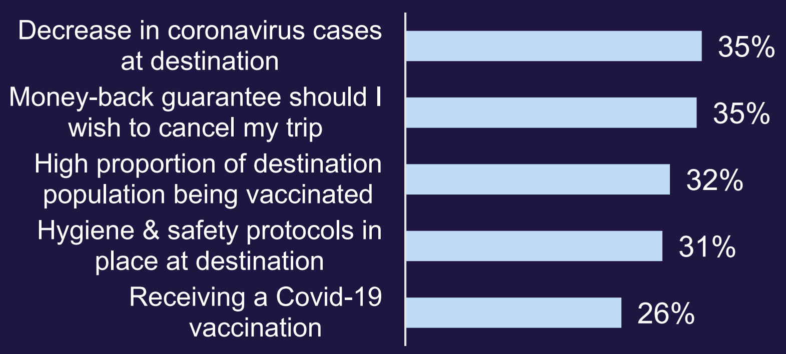
*(% definitely & probably) in the next 12 months

USA Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
All data is from Wave 3, unless stated

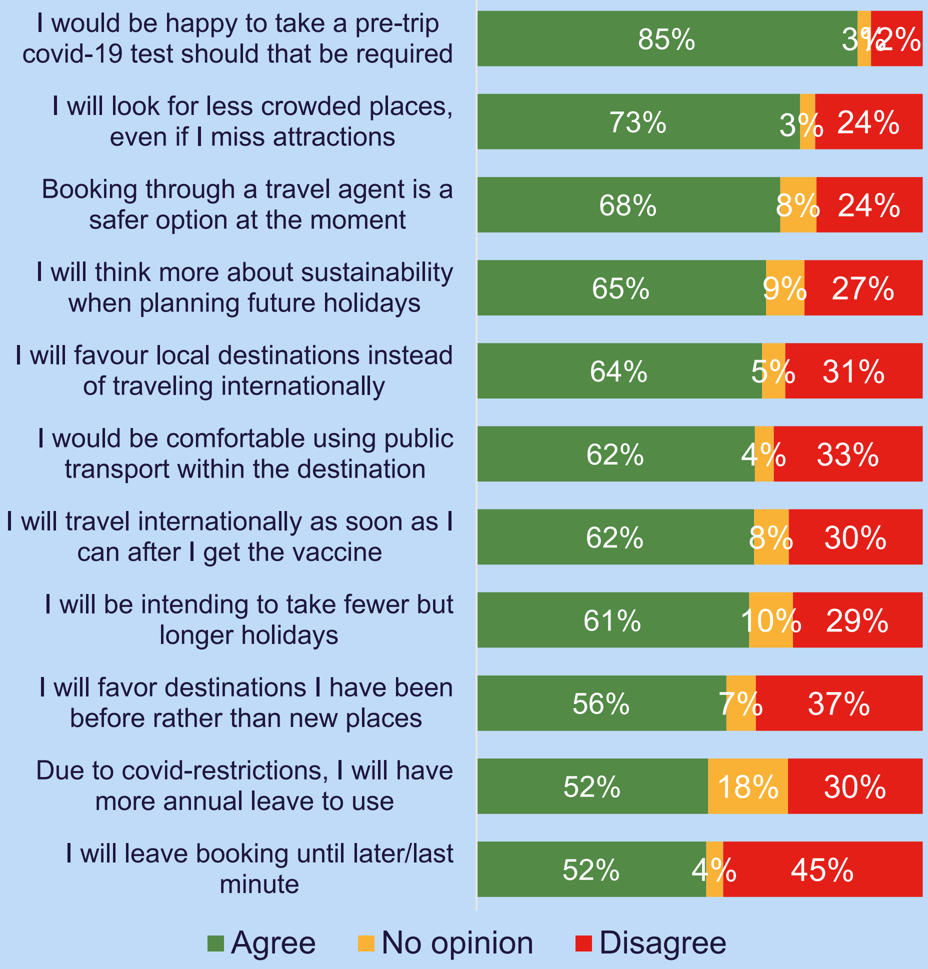
Top travel drivers

…for any international trip



…for a trip to Britain

*Travel attitudes***



*Travel Concerns – for travel to Britain**

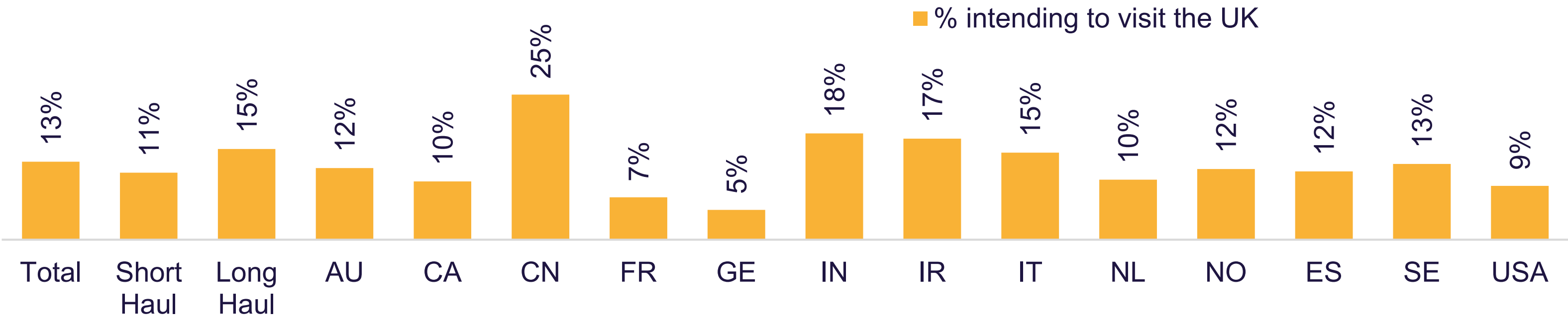
*% very & somewhat concerned
**% completely & somewhat agree


Loch Ness: ©VisitBritain/Andrew Pickett

Destination Summaries

Britain – Intenders Profile

Travel intentions & Profile



Channel booking

Airline/train/ferry operator	43%
TAs/TOs - Online	42%
Travel comparison website	40%
Destination website direct	37%
Accom. Provider direct	34%
TAs/TOs - Storefront	29%

Travel Party

With your spouse/partner	72%
With children (under 18)	29%
With friends	28%
With adult family members	24%
Alone	24%
As part of a tour group	3%

Age

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

Ever visited Britain

Several times	Once	No
43%	29%	27%

Britain travel drivers

Decrease in coronavirus cases at destination	32%
Money-back guarantee should I wish to cancel my trip	30%
Hygiene & safety protocols in place at destination	30%
High proportion of destination population being vaccinated	29%
Receiving a COVID-19 vaccination	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	75%
I will think more about sustainability and the environmental impact	73%
I would be comfortable using public transport within the destination	70%
Booking through a travel agent is a safer option at the moment	66%

Travel preferences

Top activities

History and heritage	56%
Iconic tourist attractions	54%
Visiting cultural attractions	53%
Dining out	53%
Outdoor nature activities	50%

Destination types

Country/ village	35%
Large city	66%
Will roam around	46%
Mountains or hills	28%
Small/mid-sized city/town	40%
Coastline	40%

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK on your next international leisure trip (n = 991)

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Britain – Intenders Profile (SH)

Travel intentions & Profile

% intending to visit the UK

Short Haul	FR	GE	IR	IT	NL	NO	ES	SE
11%	7%	5%	17%	15%	10%	12%	12%	13%

Channel booking

Airline/train/ferry operator	46%
Travel comparison website	41%
Accom. Provider direct	33%
TAs/TOs - Online	32%
Destination website direct	30%
TAs/TOs - Storefront	18%

Travel Party

With your spouse/partner	68%
With friends	32%
Alone	31%
With children (under 18)	30%
With adult family members	26%
As part of a tour group	3%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
45%	32%	23%

Ever visited Britain

Several times	Once	No
51%	29%	20%

Britain travel drivers

Decrease in coronavirus cases at destination	37%
Money-back guarantee should I wish to cancel my trip	35%
Removal of quarantine policies in destination country	33%
High proportion of destination population being vaccinated	32%
Hygiene & safety protocols in place at destination	27%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	77%
I will look for less crowded places, even if I miss attractions	67%
I will think more about sustainability and the environmental impact	62%
I would be comfortable using public transport within the destination	62%
I will travel internationally as soon as I can after I get the vaccine	60%

Travel preferences

Top activities

Dining out	57%
History and heritage	53%
Visiting cultural attractions	51%
Iconic tourist attractions	49%
Outdoor nature activities	48%

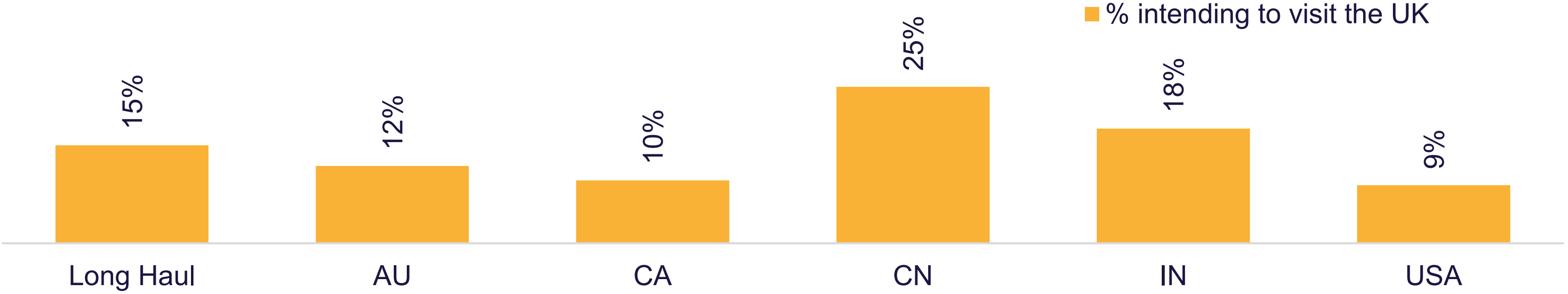
Destination types

24% Country/ village	18% Mountains or hills
65% Large city	33% Small/mid-sized city/town
36% Will roam around	30% Coastline

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK on your next international leisure trip (n = 454)

Britain – Intenders Profile (LH)

Travel intentions & Profile



Channel booking

TAs/TOs - Online	50%
Destination website direct	43%
Airline/train/ferry operator	41%
Travel comparison website	39%
TAs/TOs - Storefront	38%
Accom. Provider direct	35%

Travel Party

With your spouse/partner	76%
With children (under 18)	28%
With friends	24%
With adult family members	23%
Alone	18%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
39%	41%	19%

Ever visited Britain

Several times	Once	No
37%	30%	33%

Britain travel drivers

Receiving a COVID-19 vaccination	34%
Hygiene & safety protocols in place at destination	32%
Insurance for COVID-19 related travel/regulations changes	29%
High proportion of destination population being vaccinated	27%
Decrease in coronavirus cases at destination	27%

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	82%
I will look for less crowded places, even if I miss attractions	82%
I would be comfortable using public transport within the destination	77%
Booking through a travel agent is a safer option at the moment	77%

Travel preferences

Top activities

Iconic tourist attractions	59%
History and heritage	58%
Visiting cultural attractions	55%
Experiencing local lifestyle	52%
Outdoor nature activities	51%

Destination types

44% Country/village	68% Large city
37% Mountains or hills	46% Small/mid-sized city/town
54% Will roam around	49% Coastline

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK on your next international leisure trip (n = 537)

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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	13%	11%
Short Haul	11%	9%
Long Haul	15%	13%
AU	12%	11%
CA	10%	8%
CN	25%	18%
FR	7%	6%
GE	5%	4%
IN	18%	17%
IR	17%	15%
IT	15%	13%
NL	10%	9%
NO	12%	11%
ES	12%	9%
SE	13%	10%
USA	9%	8%

Channel booking

Airline/train/ferry operator	46%
TAs/TOs - Online	43%
Travel comparison website	42%
Destination website direct	39%
Accom. Provider direct	37%
TAs/TOs - Storefront	28%

Travel Party

With your spouse/partner	72%
With children (under 18)	30%
With friends	29%
With adult family members	26%
Alone	26%
As part of a tour group	3%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
44%	36%	20%

Ever visited Britain

Several times	Once	No
48%	30%	23%

Britain travel drivers

Decrease in coronavirus cases at destination	33%
Hygiene & safety protocols in place at destination	30%
Money-back guarantee should I wish to cancel my trip	30%
Receiving a COVID-19 vaccination	29%
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	84%
I will look for less crowded places, even if I miss attractions	75%
I will think more about sustainability and the environmental impact	73%
I would be comfortable using public transport within the destination	71%
I will travel internationally as soon as I can after I get the vaccine	68%

Travel preferences

Top activities

Iconic tourist attractions	56%
History and heritage	56%
Dining out	56%
Visiting cultural attractions	55%
Outdoor nature activities	51%

Destination types

- 35% Country/ village
- 70% Large city
- 47% Will roam around
- 29% Mountains or hills
- 41% Small/mid-sized city/town
- 40% 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 = 816)

England – Potential Visitors Profile (SH)

Travel intentions & Profile

	% intending to visit the UK	% of those intending to visit the UK who would consider visiting England
Short Haul	11%	9%
FR	7%	6%
GE	5%	4%
IR	17%	15%
IT	15%	13%
NL	10%	9%
NO	12%	11%
ES	12%	9%
SE	13%	10%

Channel booking

Airline/train/ferry operator	49%
Travel comparison website	42%
Accom. Provider direct	34%
TAs/TOs - Online	32%
Destination website direct	30%
TAs/TOs - Storefront	18%

Travel Party

With your spouse/partner	68%
Alone	33%
With friends	33%
With children (under 18)	29%
With adult family members	27%
As part of a tour group	2%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
45%	33%	22%

Ever visited Britain

Several times	Once	No
55%	27%	18%

Britain travel drivers

Decrease in coronavirus cases at destination	38%
Removal of quarantine policies in destination country	34%
Money-back guarantee should I wish to cancel my trip	33%
High proportion of destination population being vaccinated	33%
Hygiene & safety protocols in place at destination	26%

Travel attitudes (% completely & somewhat agree)

I would be happy to take a pre-trip COVID-19 test if required	76%
I will look for less crowded places, even if I miss attractions	66%
I would be comfortable using public transport within the destination	63%
I will travel internationally as soon as I can after I get the vaccine	62%
I will think more about sustainability and the environmental impact	62%

Travel preferences

Top activities

Dining out	59%
Visiting cultural attractions	50%
History and heritage	50%
Iconic tourist attractions	49%
Outdoor nature activities	46%

Destination types

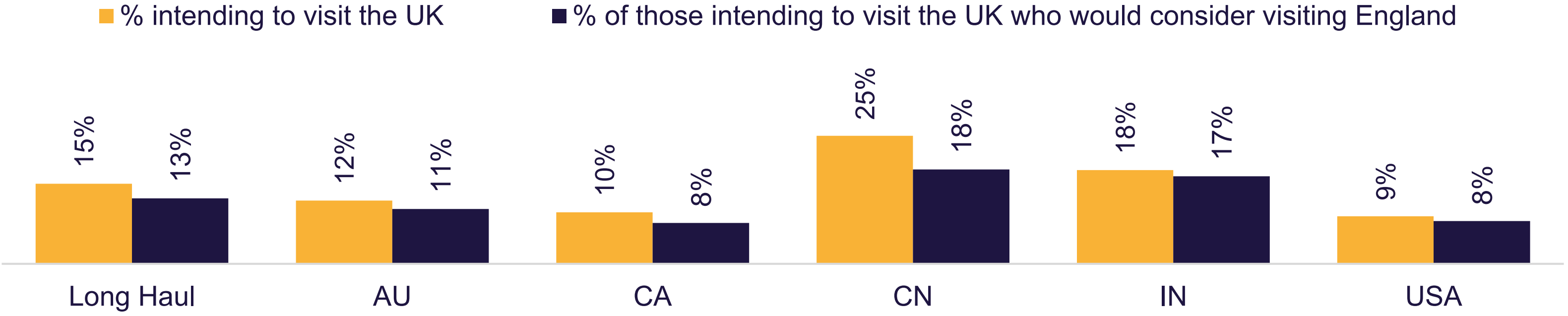
- 23% Country/village
- 69% Large city
- 34% Will roam around
- 16% Mountains or hills
- 33% Small/mid-sized city/town
- 29% Coastline

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 = 377)

England – Potential Visitors Profile (LH)

Travel intentions & Profile



Channel booking

TAs/TOs - Online	53%
Destination website direct	47%
Airline/train/ferry operator	43%
Travel comparison website	42%
Accom. Provider direct	38%
TAs/TOs - Storefront	38%

Travel Party

With your spouse/partner	75%
With children (under 18)	31%
With adult family members	26%
With friends	25%
Alone	19%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
43%	39%	18%

Ever visited Britain

Several times	Once	No
41%	32%	27%

Travel preferences

Top activities

Iconic tourist attractions	62%
History and heritage	61%
Visiting cultural attractions	59%
Experiencing local lifestyle	55%
Outdoor nature activities	54%

Destination types

45% Country/ village

70% Large city

58% Will roam around

40% Mountains or hills

48% Small/mid-sized city/town

50% Coastline

Britain travel drivers

Receiving a COVID-19 vaccination	36%
Hygiene & safety protocols in place at destination	33%
Insurance for COVID-19 related travel/regulations changes	28%
Decrease in coronavirus cases at destination	28%
Money-back guarantee should I wish to cancel my trip	26%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	91%
I will think more about sustainability and the environmental impact	84%
I will look for less crowded places, even if I miss attractions	82%
I would be comfortable using public transport within the destination	78%
Booking through a travel agent is a safer option at the moment	77%

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 = 439)

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%	7%
Short Haul	11%	4%
Long Haul	15%	9%
AU	12%	6%
CA	10%	5%
CN	25%	17%
FR	7%	3%
GE	5%	3%
IN	18%	12%
IR	17%	6%
IT	15%	7%
NL	10%	3%
NO	12%	3%
ES	12%	6%
SE	13%	4%
USA	9%	4%

Channel booking

TAs/TOs - Online	51%
Airline/train/ferry operator	42%
Travel comparison website	42%
Destination website direct	41%
Accom. Provider direct	37%
TAs/TOs - Storefront	35%

Travel Party

With your spouse/partner	76%
With children (under 18)	32%
With friends	28%
With adult family members	27%
Alone	21%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
43%	41%	17%

Ever visited Britain

Several times	Once	No
41%	30%	29%

Britain travel drivers

Receiving a COVID-19 vaccination	31%
Money-back guarantee should I wish to cancel my trip	30%
Insurance for COVID-19 related travel/regulations changes	29%
Hygiene & safety protocols in place at destination	29%
Decrease in coronavirus cases at destination	28%

Travel attitudes (% completely & somewhat agree)

I would be happy to take a pre-trip COVID-19 test if required	87%
I will look for less crowded places, even if I miss attractions	81%
I will think more about sustainability and the environmental impact	80%
I would be comfortable using public transport within the destination	74%
Booking through a travel agent is a safer option at the moment	72%

Travel preferences

Top activities

History and heritage	64%
Iconic tourist attractions	59%
Visiting cultural attractions	57%
Outdoor nature activities	56%
Experiencing local lifestyle	53%

Destination types

Country/ village	47%
Large city	66%
Will roam around	57%
Mountains or hills	42%
Small/mid-sized city/town	46%
Coastline	52%

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 = 493)

Scotland – Potential Visitors Profile (SH)

Travel intentions & Profile

	% intending to visit the UK	% of those intending to visit the UK who would consider visiting Scotland
Short Haul	11%	4%
FR	7%	3%
GE	5%	3%
IR	17%	6%
IT	15%	7%
NL	10%	3%
NO	12%	3%
ES	12%	6%
SE	13%	4%

Channel booking

Travel comparison website	42%
Airline/train/ferry operator	40%
Accom. Provider direct	38%
TAs/TOs - Online	38%
Destination website direct	30%
TAs/TOs - Storefront	21%

Travel Party

With your spouse/partner	72%
With children (under 18)	35%
With friends	32%
Alone	29%
With adult family members	24%
As part of a tour group	5%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
52%	31%	17%

Ever visited Britain

Several times	Once	No
47%	30%	23%

Britain travel drivers

Money-back guarantee should I wish to cancel my trip	37%
Decrease in coronavirus cases at destination	35%
Removal of quarantine policies in destination country	34%
Insurance for COVID-19 related travel/regulations changes	25%
High proportion of destination population being vaccinated	25%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	77%
I will look for less crowded places, even if I miss attractions	71%
I will think more about sustainability and the environmental impact	68%
I will favour local destinations in my home country instead of traveling	67%
I would be comfortable using public transport within the destination	64%

Travel preferences

Top activities

History and heritage	64%
Outdoor nature activities	57%
Visiting cultural attractions	55%
Dining out	54%
Iconic tourist attractions	52%

Destination types

Country/ village	35%
Large city	62%
Will roam around	50%
Mountains or hills	32%
Small/mid-sized city/town	35%
Coastline	38%

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 = 173)

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Scotland – Potential Visitors Profile (LH)

Travel intentions & Profile

	% intending to visit the UK	% of those intending to visit the UK who would consider visiting Scotland
Long Haul	15%	9%
AU	12%	6%
CA	10%	5%
CN	25%	17%
IN	18%	12%
USA	9%	4%

Channel booking

TAs/TOs - Online	58%
Destination website direct	47%
Airline/train/ferry operator	43%
TAs/TOs - Storefront	42%
Travel comparison website	42%
Accom. Provider direct	36%

Travel Party

With your spouse/partner	78%
With children (under 18)	30%
With adult family members	28%
With friends	25%
Alone	16%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
38%	46%	17%

Ever visited Britain

Several times	Once	No
38%	30%	32%

Britain travel drivers

Receiving a COVID-19 vaccination	35%
Hygiene & safety protocols in place at destination	32%
Insurance for COVID-19 related travel/regulations changes	31%
An attractive offer e.g. discounts on flights	28%
Money-back guarantee should I wish to cancel my trip	26%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	93%
I will think more about sustainability and the environmental impact	86%
I will look for less crowded places, even if I miss attractions	86%
I will be intending to take fewer but longer holidays	81%
I would be comfortable using public transport within the destination	80%

Travel preferences

Top activities

History and heritage	64%
Iconic tourist attractions	63%
Visiting cultural attractions	58%
Experiencing local lifestyle	57%
Outdoor nature activities	55%

Destination types

- 54% Country/ village
- 68% Large city
- 60% Will roam around
- 47% Mountains or hills
- 52% 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 = 320)

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%	4%
Short Haul	11%	2%
Long Haul	15%	6%
AU	12%	4%
CA	10%	2%
CN	25%	12%
FR	7%	2%
GE	5%	1%
IN	18%	9%
IR	17%	3%
IT	15%	2%
NL	10%	2%
NO	12%	2%
ES	12%	2%
SE	13%	1%
USA	9%	2%

Channel booking

TAs/TOs - Online	52%
Travel comparison website	52%
Destination website direct	49%
Airline/train/ferry operator	44%
Accom. Provider direct	41%
TAs/TOs - Storefront	37%

Travel Party

With your spouse/partner	85%
With children (under 18)	40%
With adult family members	30%
With friends	28%
Alone	20%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
41%	45%	14%

Ever visited Britain

Several times	Once	No
47%	30%	23%

Britain travel drivers

Receiving a COVID-19 vaccination	34%
Hygiene & safety protocols in place at destination	31%
Money-back guarantee should I wish to cancel my trip	30%
Decrease in coronavirus cases at destination	27%
Insurance for COVID-19 related travel/regulations changes	26%

Travel attitudes (% completely & somewhat agree)

I would be happy to take a pre-trip COVID-19 test if required	86%
I will think more about sustainability and the environmental impact	83%
I will look for less crowded places, even if I miss attractions	82%
I will be intending to take fewer but longer holidays	73%
I will travel internationally as soon as I can after I get the vaccine	72%

Travel preferences

Top activities

History and heritage	64%
Visiting cultural attractions	59%
Iconic tourist attractions	59%
Outdoor nature activities	55%
Experiencing local lifestyle	53%

Destination types

Country/ village	51%
Large city	74%
Will roam around	54%
Mountains or hills	47%
Small/mid-sized city/town	52%
Coastline	58%

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 = 288)

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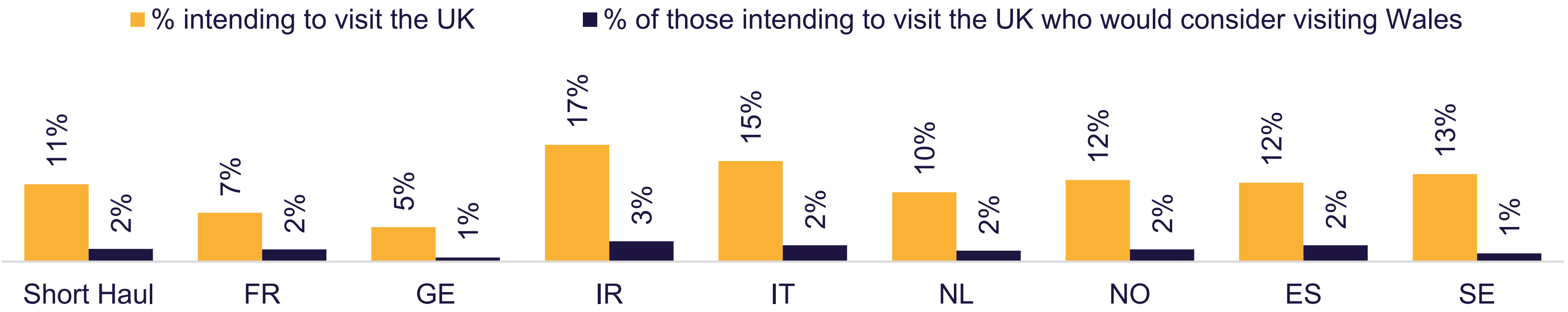
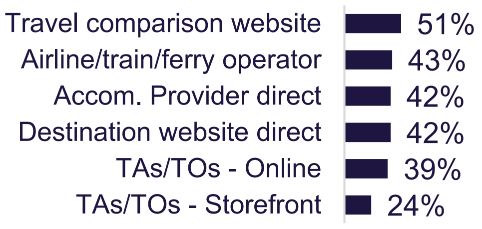
Wales – Potential Visitors Profile (SH)

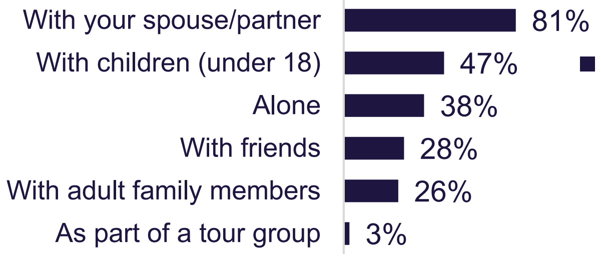
Travel intentions & Profile



Channel booking



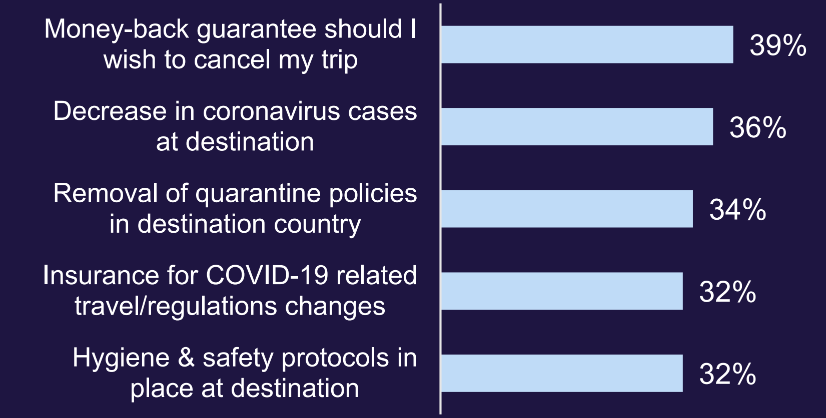
Travel Party



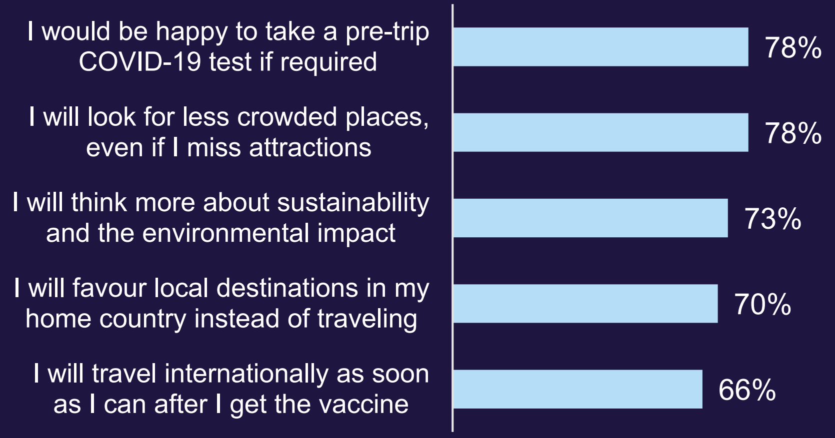
Age

Ever visited Britain

Britain travel drivers



Travel attitudes *(% completely & somewhat agree)*



Travel preferences

Top activities

Destination types

43% Country/ village

66% Large city

50% Will roam around

38% Mountains or hills

46% Small/mid-sized city/town

49% 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 = 74)

Wales – Potential Visitors Profile (LH)

Travel intentions & Profile

	% intending to visit the UK	% of those intending to visit the UK who would consider visiting Wales
Long Haul	15%	6%
AU	12%	4%
CA	10%	2%
CN	25%	12%
IN	18%	9%
USA	9%	2%

Channel booking

TAs/TOs - Online	57%
Travel comparison website	52%
Destination website direct	52%
Airline/train/ferry operator	44%
TAs/TOs - Storefront	41%
Accom. Provider direct	40%

Travel Party

With your spouse/partner	86%
With children (under 18)	37%
With adult family members	31%
With friends	28%
Alone	14%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
37%	50%	14%

Ever visited Britain

Several times	Once	No
43%	32%	26%

Britain travel drivers

Receiving a COVID-19 vaccination	39%
Hygiene & safety protocols in place at destination	30%
Money-back guarantee should I wish to cancel my trip	27%
The introduction of a vaccine passport	27%
High proportion of destination population being vaccinated	26%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	88%
I will think more about sustainability and the environmental impact	86%
I will look for less crowded places, even if I miss attractions	83%
I will be intending to take fewer but longer holidays	81%
Booking through a travel agent is a safer option at the moment	75%

Travel preferences

Top activities

History and heritage	65%
Iconic tourist attractions	63%
Visiting cultural attractions	58%
Experiencing local lifestyle	56%
Outdoor nature activities	54%

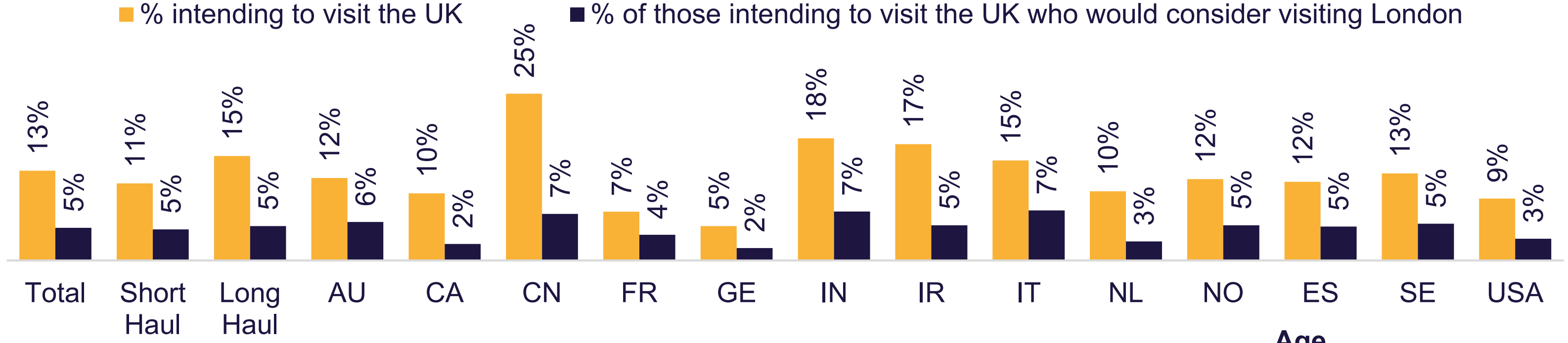
Destination types

- 53% Country/ village
- 77% Large city
- 55% Will roam around
- 50% Mountains or hills
- 54% Small/mid-sized city/town
- 62% Coastline

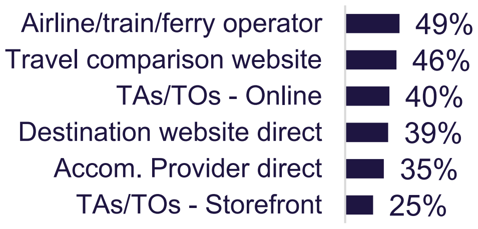
Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Wales in the next 12 months (n = 214)

London – Potential Visitors Profile

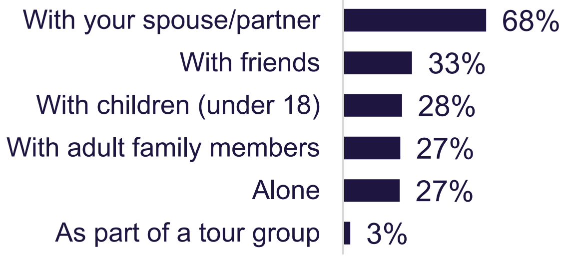
Travel intentions & Profile



Channel booking



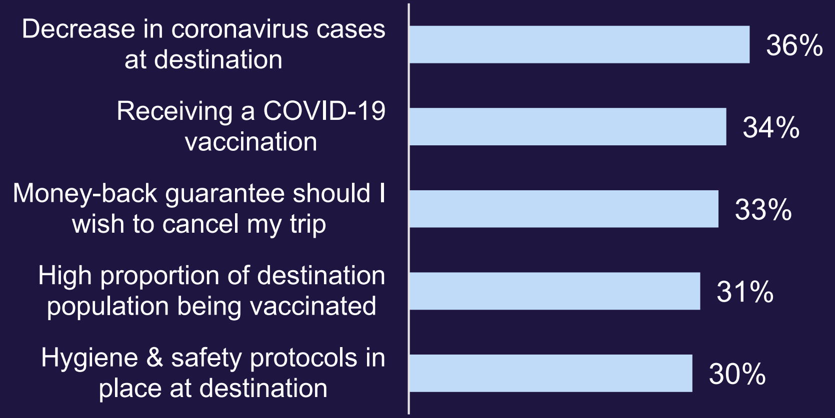
Travel Party



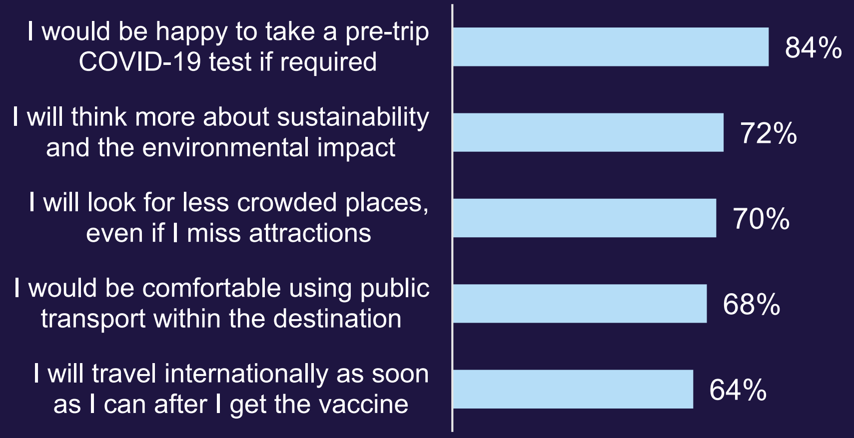
Age

Ever visited Britain

Britain travel drivers



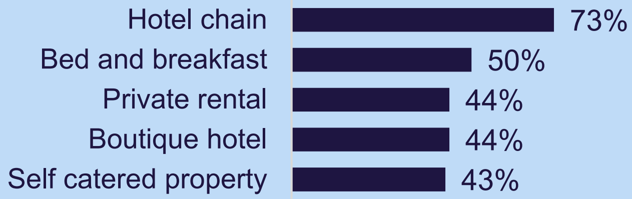
Travel attitudes (% completely & somewhat agree)



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 = 360)

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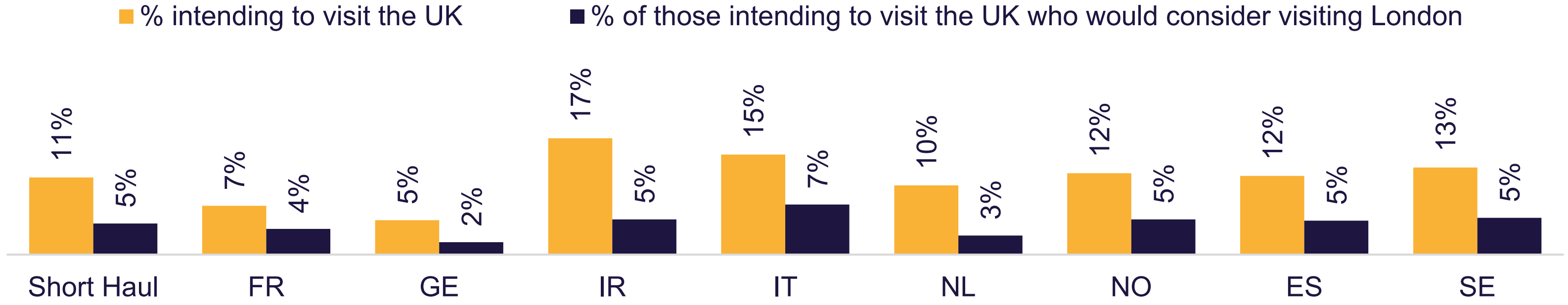
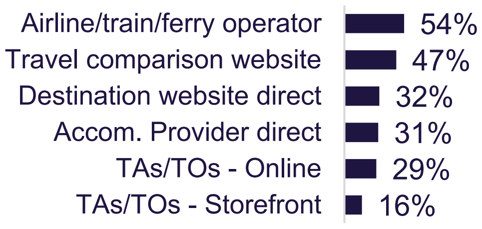
London – Potential Visitors Profile (SH)

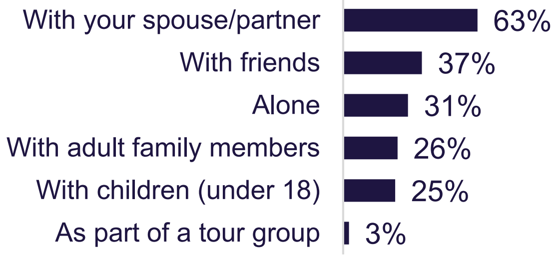
Travel intentions & Profile



Channel booking



Travel Party



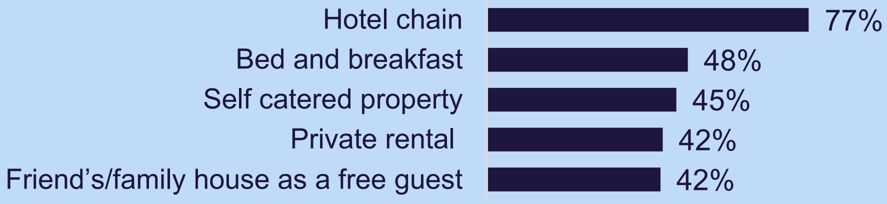
Age

Ever visited Britain

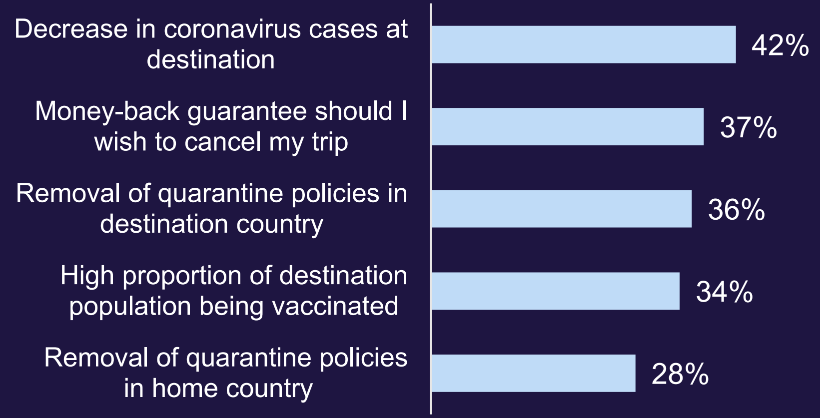
Travel preferences

Top activities

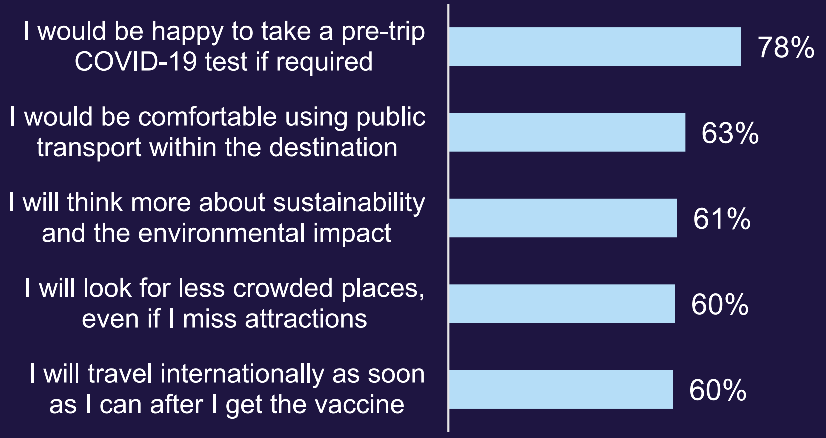
Accommodation



Britain travel drivers



Travel attitudes *(% completely & somewhat agree)*



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 = 183)

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London – Potential Visitors Profile (LH)

Travel intentions & Profile

	% intending to visit the UK	% of those intending to visit the UK who would consider visiting London
Long Haul	15%	5%
AU	12%	6%
CA	10%	2%
CN	25%	7%
IN	18%	7%
USA	9%	3%

Channel booking

TAs/TOs - Online	51%
Destination website direct	46%
Travel comparison website	46%
Airline/train/ferry operator	44%
Accom. Provider direct	40%
TAs/TOs - Storefront	35%

Travel Party

With your spouse/partner	72%
With children (under 18)	31%
With adult family members	28%
With friends	28%
Alone	23%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
50%	35%	15%

Ever visited Britain

Several times	Once	No
38%	35%	27%

Travel preferences

Top activities

Iconic tourist attractions	68%
History and heritage	60%
Experiencing local lifestyle	59%
Outdoor nature activities	59%
Visiting cultural attractions	58%

Accommodation

Hotel chain	68%
Boutique hotel	53%
Bed and breakfast	51%
Private rental	45%
Holiday village/centre	42%

Britain travel drivers

Receiving a COVID-19 vaccination	46%
Hygiene & safety protocols in place at destination	35%
Decrease in coronavirus cases at destination	31%
Money-back guarantee should I wish to cancel my trip	29%
The introduction of a vaccine passport	28%

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	84%
I will look for less crowded places, even if I miss attractions	80%
I will be intending to take fewer but longer holidays	75%
I would be comfortable using public transport within the destination	72%

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 = 177)

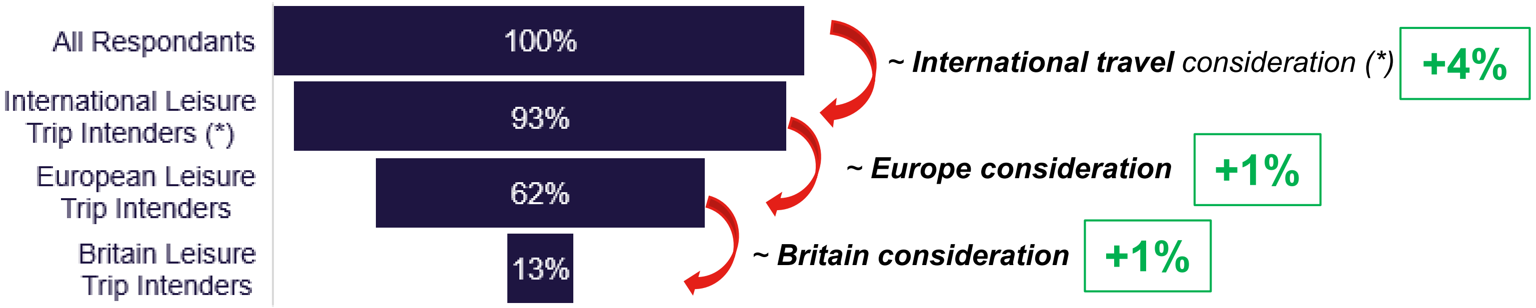
Glyder Fach: ©VisitBritain/Kris Williams

Funnels
Travel Horizons
Sample profile

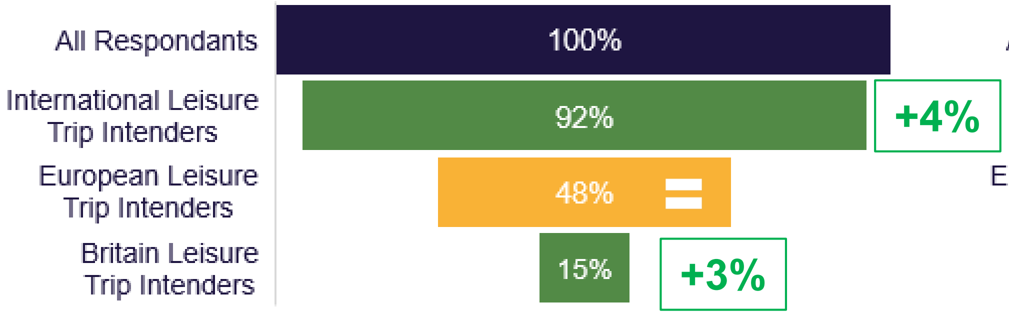
Trends: March 2021 vs August 2021

Market: All

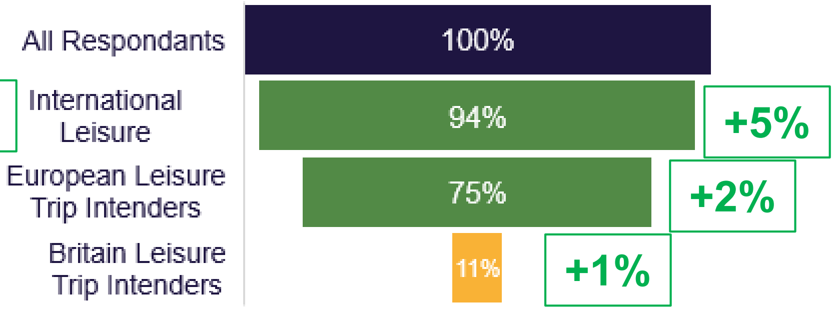
What conversion funnels measure



Market: long-haul



Market: short-haul



High conversion rate

Medium conversion rate

Low conversion rate

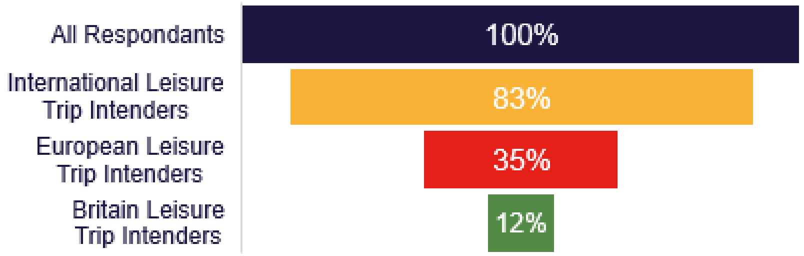
(*) Would definitely, probably or maybe consider an international leisure trip for more than one night in the next 12 months
Base: All Respondents (n = 7,500)

Conversion Funnel summary

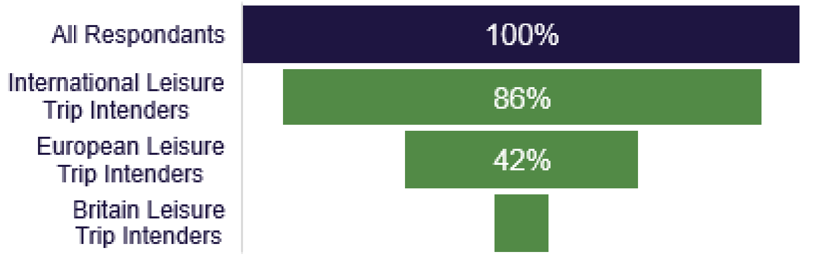
High conversion rate
Medium conversion rate
Low conversion rate

Long-haul markets

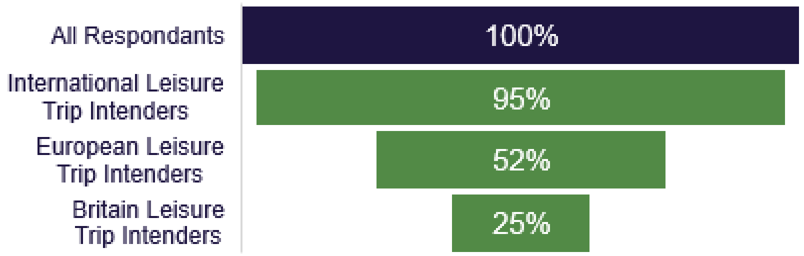
Market: Australia



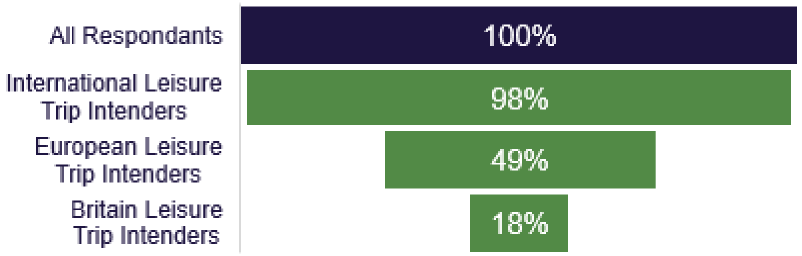
Market: Canada



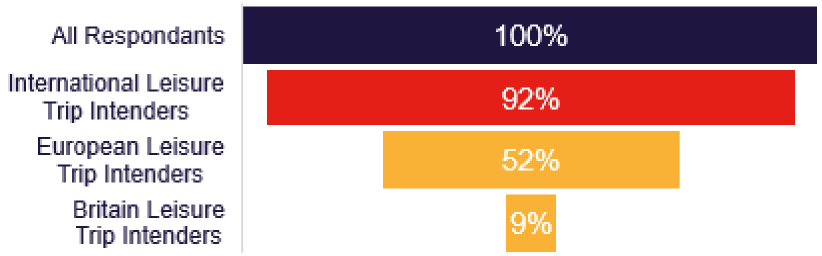
Market: China



Market: India



Market: USA



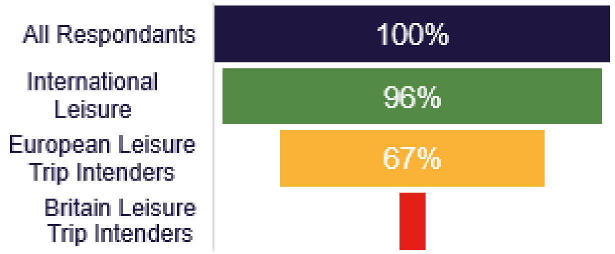
Q: /
Base: All Respondents (n = 7,500)

Conversion Funnel summary

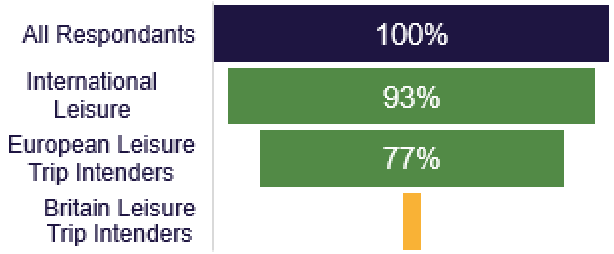
High conversion rate
Medium conversion rate
Low conversion rate

Short-haul markets

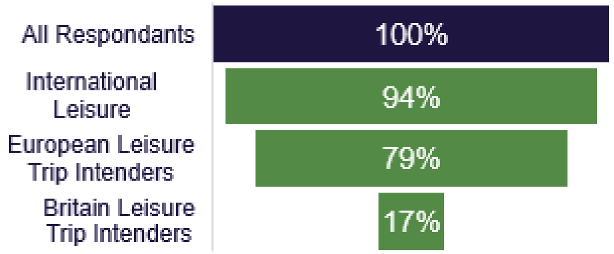
Market: France



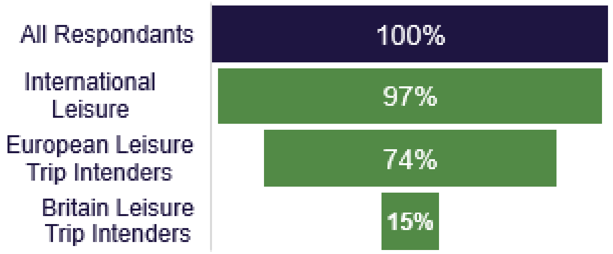
Market: Germany



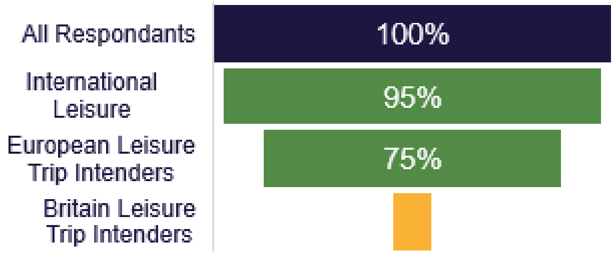
Market: Irish Republic



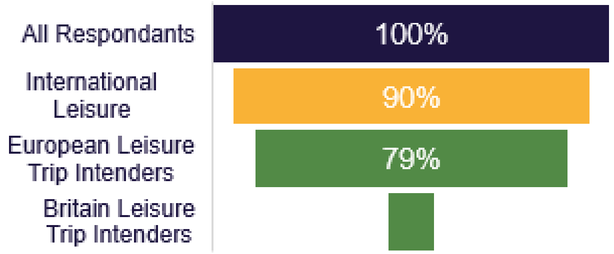
Market: Italy



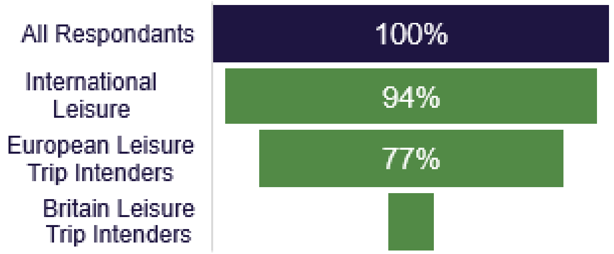
Market: Netherlands



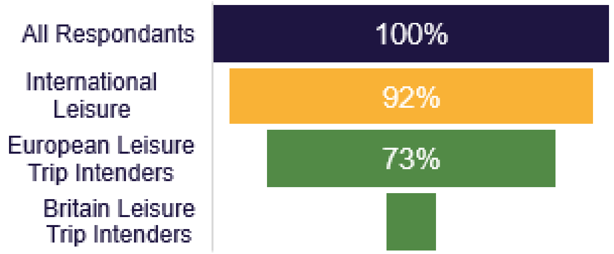
Market: Norway



Market: Spain



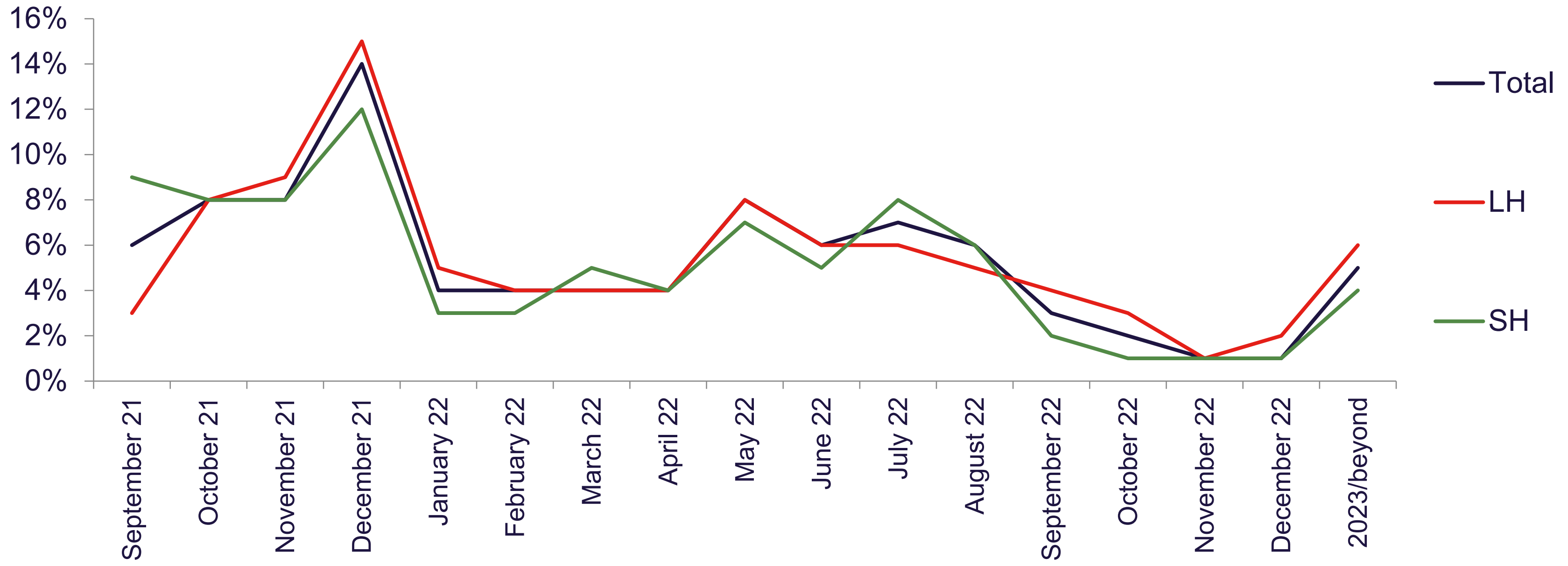
Market: Sweden



Q: /
Base: All Respondents (n = 7,500)

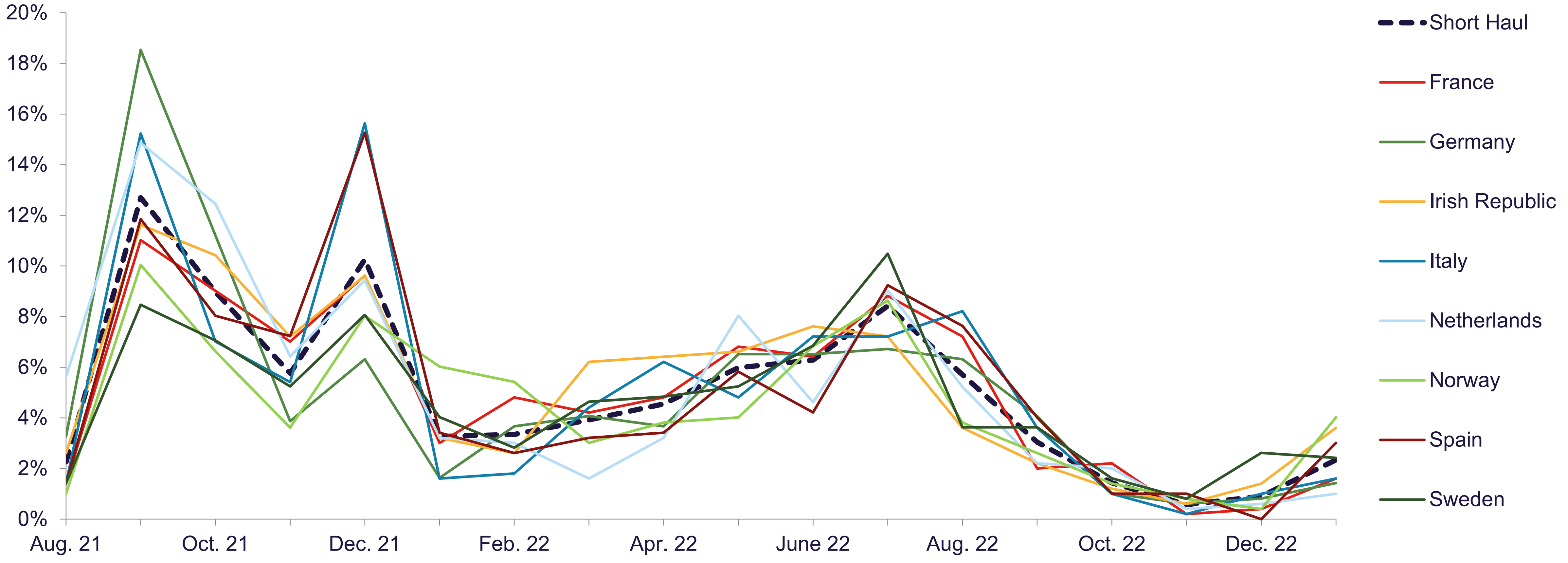
Britain Intenders – Travel Horizons

Britain Intenders	Short-haul (n = 454)	Long-haul (n = 537)	Total (n = 991)
Sept. 21 - Dec. 21	36%	35%	36%
Jan. 22 - March 22	11%	13%	12%
Apr. 22 - June 22	16%	18%	17%
July 22 - Aug. 22	15%	11%	13%
Sept. 22 - Dec. 22	5%	10%	8%
2023:beyond	4%	6%	5%



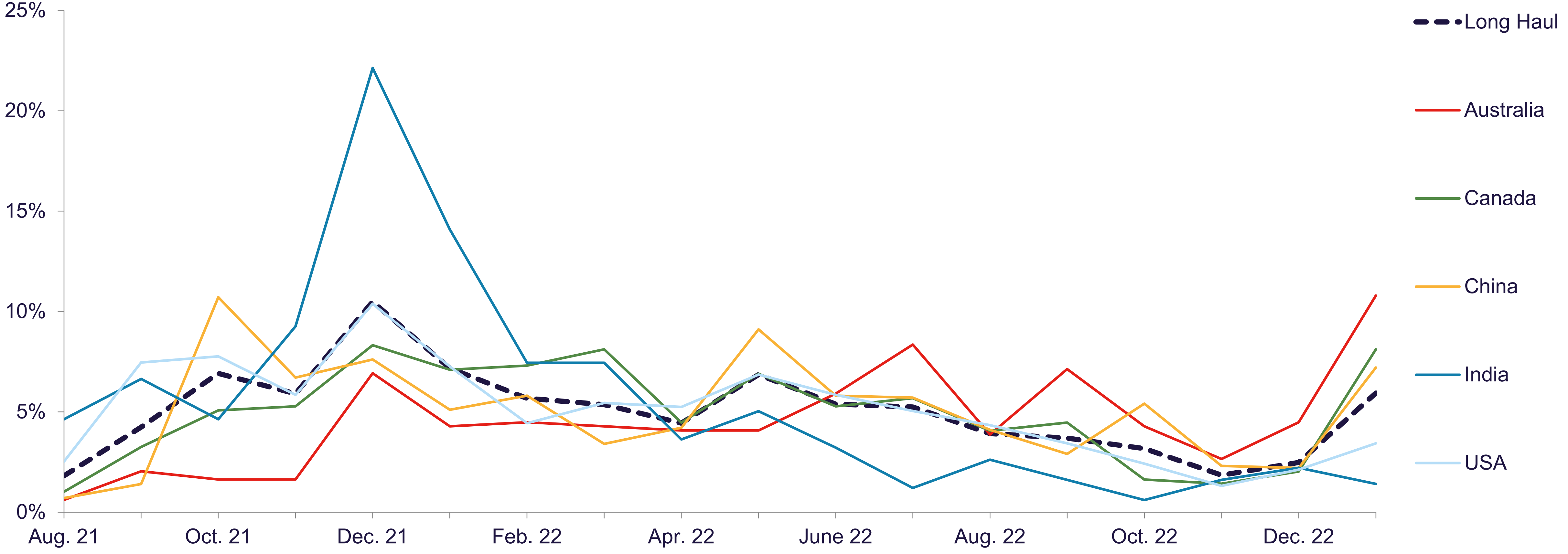
Base: Respondents who plan on taking a leisure trip in Britain (n = 991)

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 the next 12 months (n = 7450)

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 the next 12 months (n = 7450)

Sample description

Gender	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Rep.	Italy	Neths.	Norway	Spain	Sweden	USA
Male	50%	50%	50%	49%	50%	50%	50%	50%	52%	50%	50%	50%	50%	50%	49%	50%
Female	50%	50%	50%	51%	50%	50%	50%	50%	48%	50%	50%	50%	50%	50%	51%	50%

Age	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Rep.	Italy	Neths.	Norway	Spain	Sweden	USA
Less than 35	34%	33%	36%	29%	29%	40%	35%	32%	45%	37%	35%	35%	28%	35%	28%	35%
From 35 to 54	37%	38%	37%	35%	35%	43%	40%	38%	38%	38%	41%	36%	35%	40%	35%	32%
55 and over	28%	29%	27%	36%	36%	17%	25%	30%	17%	26%	24%	29%	37%	25%	38%	34%

Status	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Rep.	Italy	Neths.	Norway	Spain	Sweden	USA
Working full-time	65%	61%	71%	54%	57%	92%	69%	62%	84%	63%	66%	55%	48%	72%	53%	57%
Working part-time	10%	12%	8%	16%	9%	3%	7%	13%	7%	13%	8%	19%	12%	10%	13%	9%
Retired	15%	15%	14%	19%	25%	1%	14%	15%	3%	14%	9%	14%	26%	8%	20%	25%
Homemaker	3%	3%	3%	5%	4%	1%	2%	4%	2%	4%	5%	4%	4%	2%	1%	3%
Unemployed	3%	4%	2%	4%	3%	0%	4%	2%	1%	3%	5%	2%	4%	4%	6%	3%
Student	4%	5%	2%	2%	2%	2%	5%	5%	3%	2%	6%	5%	5%	3%	6%	2%

Financial Situation	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Rep.	Italy	Neths.	Norway	Spain	Sweden	USA
Not impacted	62%	57%	68%	58%	63%	71%	57%	63%	69%	54%	39%	73%	65%	42%	63%	73%
Uncertain	32%	35%	28%	34%	32%	27%	36%	32%	27%	35%	52%	24%	28%	47%	28%	23%
Impacted negatively	6%	8%	4%	8%	6%	2%	7%	5%	4%	11%	9%	3%	7%	11%	9%	4%

Base: All Respondents (n = 7,500)

Segmentation

Among international trip Intenders

Segment	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Buzzseekers	29%	22%	36%	24%	20%	37%	32%	18%	52%	22%	27%	22%	17%	23%	18%	41%
Culture Buffs	20%	18%	23%	17%	22%	39%	14%	21%	16%	19%	15%	16%	18%	23%	18%	13%
Explorers	20%	25%	14%	23%	19%	11%	19%	32%	8%	27%	22%	23%	30%	19%	27%	14%
Adventurers	19%	20%	17%	23%	22%	7%	25%	15%	19%	18%	24%	25%	17%	19%	20%	22%
Sightseers	12%	14%	10%	13%	17%	6%	10%	14%	5%	13%	13%	14%	18%	16%	17%	10%

Base: Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7450)

Among Europe Intenders

Segment	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Buzzseekers	28%	22%	38%	29%	24%	37%	34%	16%	54%	22%	29%	22%	17%	22%	16%	40%
Explorers	21%	26%	13%	22%	15%	13%	18%	34%	6%	28%	21%	24%	31%	21%	28%	13%
Culture Buffs	20%	19%	23%	17%	20%	38%	15%	22%	18%	19%	17%	17%	20%	22%	18%	13%
Adventurers	18%	19%	17%	22%	23%	7%	22%	15%	17%	17%	20%	23%	17%	19%	21%	22%
Sightseers	13%	15%	9%	10%	18%	5%	10%	14%	5%	14%	14%	14%	16%	17%	17%	11%

Base: Respondents who plan on taking a leisure trip in Europe (n = 4664)

Among Britain Intenders

Segment	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Buzzseekers	32%	29%	35%	20%	18%	34%	42%	16%	53%	22%	46%	33%	17%	29%	22%	40%
Culture Buffs	24%	22%	26%	15%	14%	40%	25%	20%	16%	23%	11%	16%	30%	26%	23%	12%
Adventurers	17%	18%	16%	23%	27%	7%	14%	16%	22%	15%	15%	24%	15%	21%	25%	24%
Explorers	16%	19%	15%	27%	20%	14%	11%	36%	4%	27%	22%	14%	13%	12%	16%	15%
Sightseers	10%	13%	8%	15%	20%	4%	8%	12%	4%	13%	7%	14%	25%	12%	14%	9%

Base: Respondents who plan on taking a leisure trip in Britain (n = 991)

in conjunction with

International Recovery Research

Wave 3 – September 2021

Fieldwork: 23rd August – 6th September 2021

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

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