VisitScotland | Alba
LONDON & PARTNERS
Llywodraeth Cymru Welsh Government
VisitBritain

in conjunction with TCI Research Travel Competitive Intelligence

Inbound COVID-19 Sentiment Tracker

Wave 4 – March 2022

Fieldwork: 10th – 23rd February 2022

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

Bristol Balloon Fiesta: Destination Bristol ©Gary Newman

Content

Methodology

Survey specifications

- **Markets surveyed**: Australia, Brazil, Canada, China, Denmark, France, Germany, India, Republic of Ireland, Italy, Japan, the Netherlands, Norway, Russia, Saudi Arabia, South Korea, Spain, Sweden, UAE, USA
- **Target**: Males and females aged 18 and older who have travelled abroad in the past 5 years
- **Fieldwork period (Wave 4): 10th – 23rd February 2022**
- **Data collection**: online interviews on Access Panel; Quotas on gender, age and regions, same questionnaire basis as for waves 1, 2 and 3with some additional questions
- **Sample size**: 11,000 interviews. Trended data is calculated at a constant perimeter (based on the 13 markets* surveyed in Wave 1, 2 and 3) – Links to Wave 1 report / Wave 2 report / Wave 3 report
  - *(Australia, Canada, China, France, Germany, India, Republic of Ireland, Italy, the Netherlands, Norway, Spain, Sweden, USA)
- *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 these cultural factors in cross-market analysis, particularly between long-haul and short-haul results.*

Useful definitions:

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

General guidance on statistical confidence level:

Sample Size	100	200	300	400	500	700	1,000
Margin of error	+/- 8%	+/- 6%	+/- 5%	+/- 4%	+/- 4%	+/- 4%	+/- 3%

Sample sizes:

	Sample size
Australia	502
Brazil	503
Canada	500
China	1,001
India	501
Japan	501
Saudi Arabia	503
South Korea	500
UAE	505
USA	1,028
Total long-haul	**6,044**
Denmark	501
France	500
Germany	502
Republic of Ireland	500
Italy	500
The Netherlands	500
Norway	501
Russia	509
Spain	500
Sweden	501
Total short-haul	**5,013**
Total	**11,057**

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 causes of travel, measuring the competitive position of Britain's destinations in consumers' minds and mapping drivers of a visit to Britain. Data must help stakeholders prioritize marketing efforts in 2022.
- This report shows results of the fourth wave, which took place **10th – 23rd February 2022**. It includes data trends vs wave 1 conducted from 4th to 15th December 2020, wave 2 conducted from 24th March to 5th April 2021 and wave 3 conducted from 23rd August to 6th September 2021.

Interpreting the survey results in a changing travel context

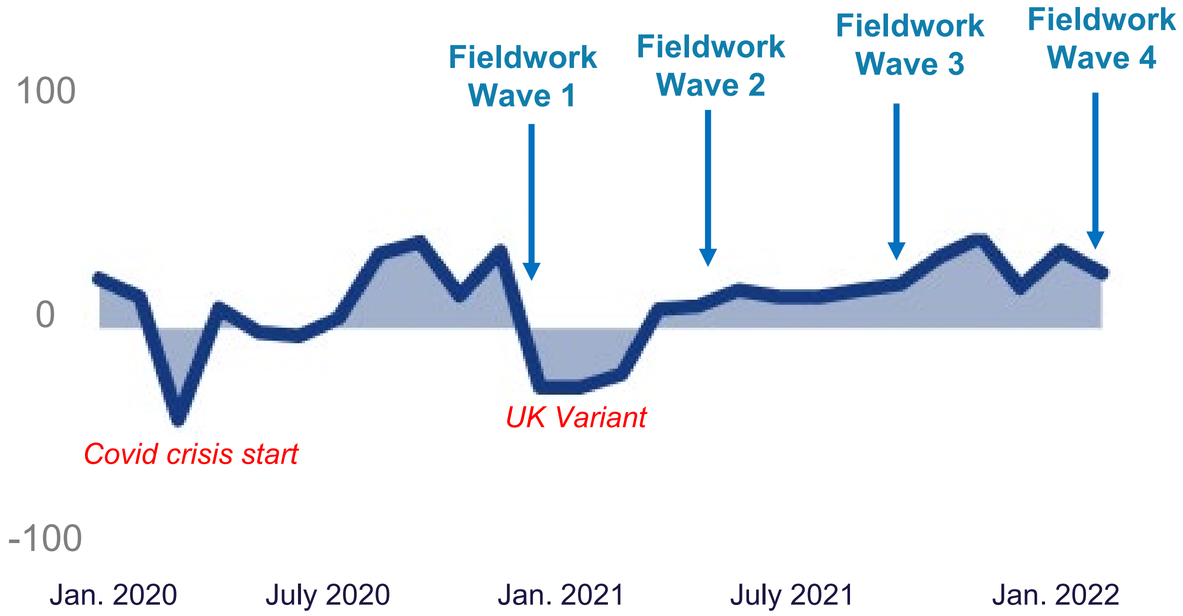
- Consumers' sentiments are in essence subject to the context evolution and particularly the sanitary and geopolitical environment impacting travel restrictions and effective choices of destinations available to consumers, which are changing almost every week. Travel intent should therefore be interpreted 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 comparable to the level observed in Wave 3 (positive, but slightly below the European average). The war in Ukraine (24th Feb) started right after the fieldwork ended with the completion of the very last interviews (23rd Feb), therefore the unstable geopolitical environment in Europe had a limited impact in answers collected. Data from the Russian market should obviously be taken as a pre-war state of opinion.
- 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 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)



2022

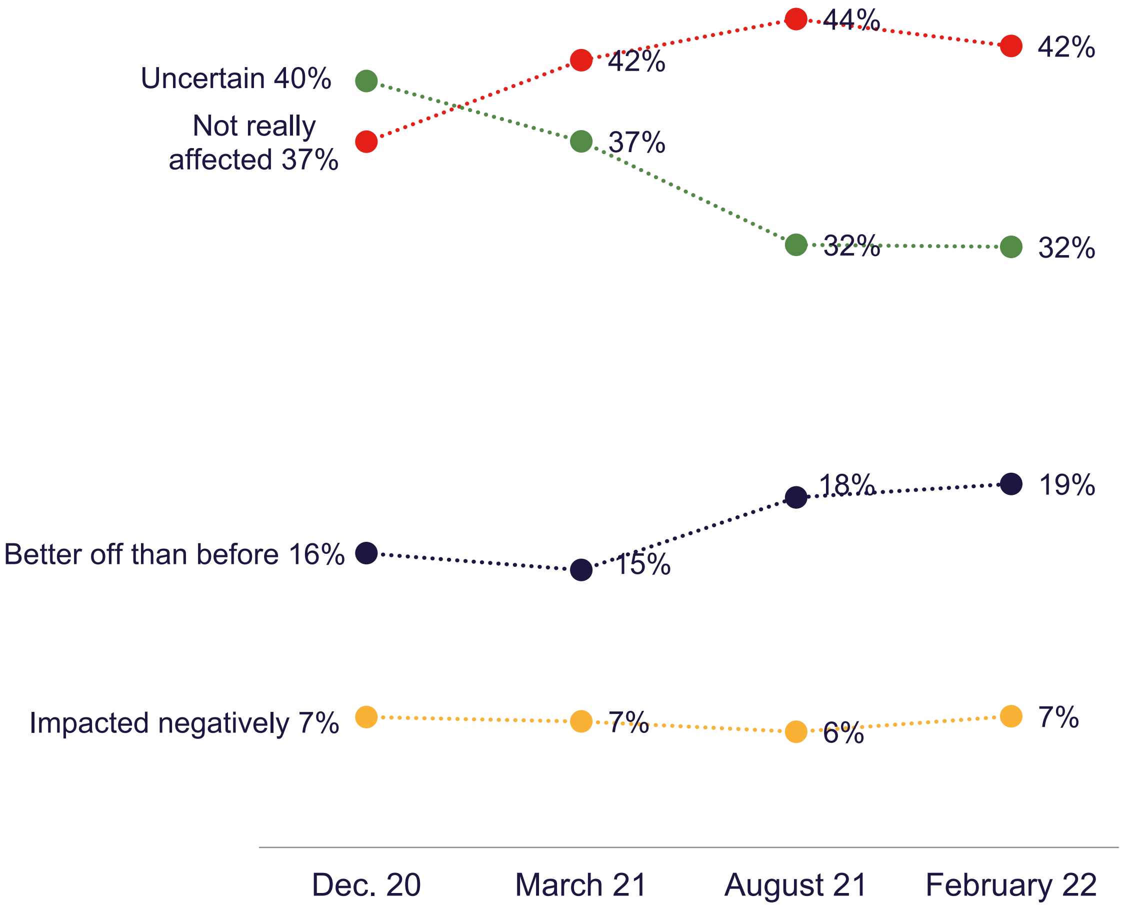
Country	Jan	Feb	YTD
China	25	33	29
France	33	36	34
Germany	48	21	35
Italy	61	52	57
Mexico	27	39	33
Spain	32	42	37
Thailand	50	60	55
Turkey	15	32	23
United Kingdom	24	17	20
United States	23	27	25
World	37	39	38

Region	Jan	Feb	YTD
Africa	39	48	43
Americas	18	22	20
Asia and the Pacific	34	48	41
Europe	49	34	41
Middle East	54	61	57
World	37	39	38

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 of travellers' planning alone, BUT a positive e-reputation is essential to generate favourability towards destinations and travel brands, particularly in a post-crisis management context.

Respondents' financial situation (Trends)

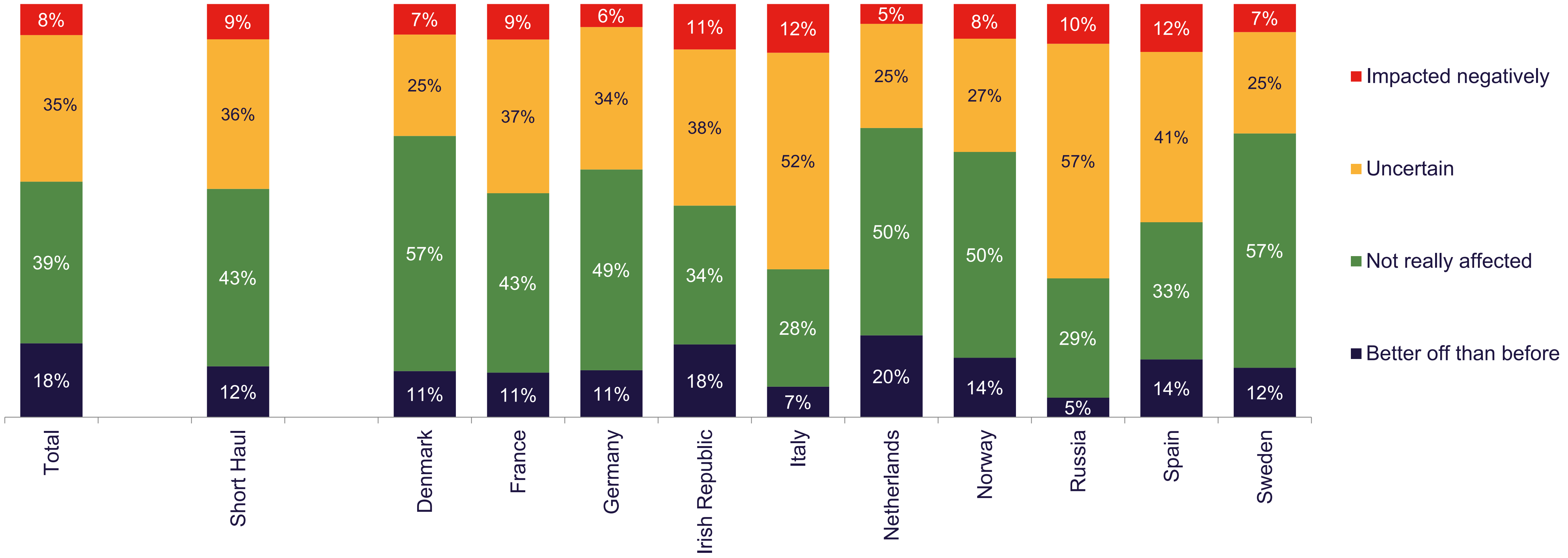
Attitudes in relation to consumers' spending power are quite stable, with the majority of respondents not really affected or even better off than before.



Q25. How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Trend calculated at constant perimeter (13 markets consolidated)

Respondents' financial situation (Short-haul)

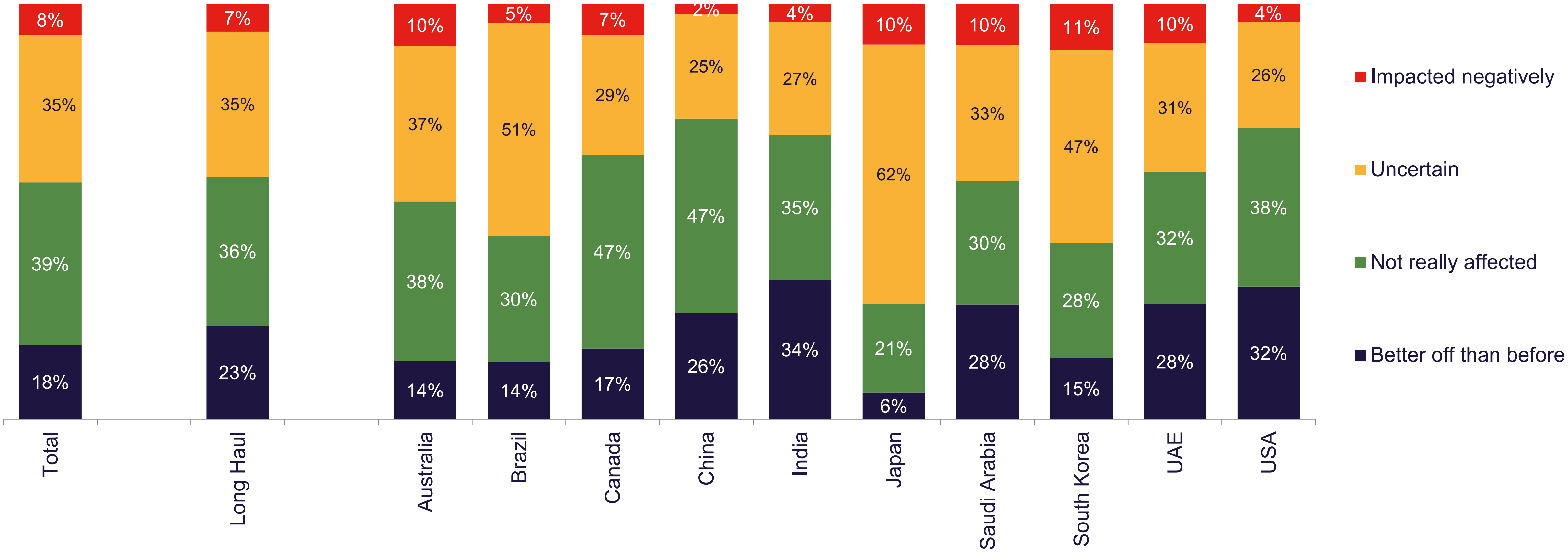
Spending power uncertainties remain visible in Southern European markets surveyed, while Nordic markets and the Netherlands show more optimism about their financial situation.



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 = 11,057)

Respondents' financial situation (Long-haul)

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



Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: All respondents (n = 11,057)

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

Overall travel intentions

River Thames/Tower Bridge: ©VisitBritain/Luca Micheli

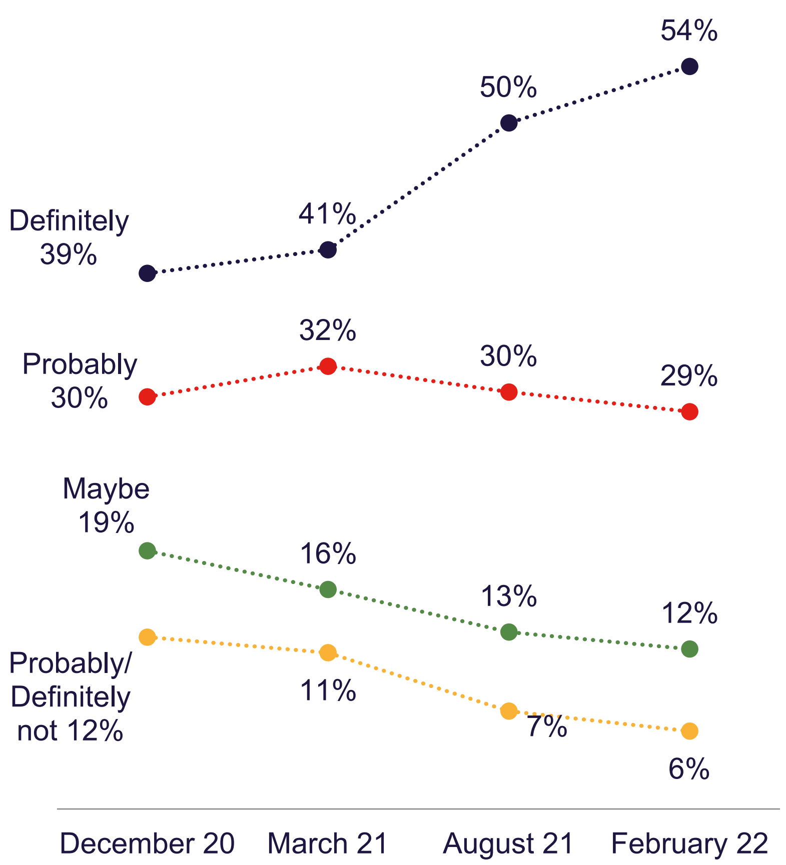
Overall travel intentions: summary

- While the choice of the destination remains open among most planners, the overall travel intentions continue increasing with more than half of respondents definitely planning a trip abroad in the coming 12 months.
- Beyond holiday motivations, visiting friends and relatives is still a significant purpose of travel for a third of respondents on average.
- Half of SH intenders consider May to September for the next trip abroad. Travel planning spans over a larger window among LH travellers, however, in several markets a trip by the end of summer is also considered.
- The younger generation again shows the highest propensity to travel internationally across most SH and LH markets.
- 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 shift from health-centric to money-centric attitudes is accelerating with a greater focus on money-back cancellation guarantees, attractive deals (ranked #2 in SH markets!) and insurance for COVID-19 travel. Expectations for a full and safe experience at destinations grow, with stable sanitary and political environment and higher freedom of movement (removal of quarantine policies) remains key for LH markets in particular.
- As part of trip activators, the money "factor" is even more important for potential visitors to Britain. Respect for COVID-19 rules by other people, access to healthcare, risks of contracting COVID-19, and change in quarantine requirements are frequent concerns among those wishing to go to Britain.
- Booking last-minute for adapting travel uncertainties is less dominant in attitudes as consumers gain confidence, confirming a shift towards pre-pandemic attitudes related to travel.
- Respondents express further interest in sustainable and responsible travel, while feeling more confident in visiting must-see sites.
  A sentiment of "catching up" the lost time suggest possibilities of longer stay for a next trip in several markets.

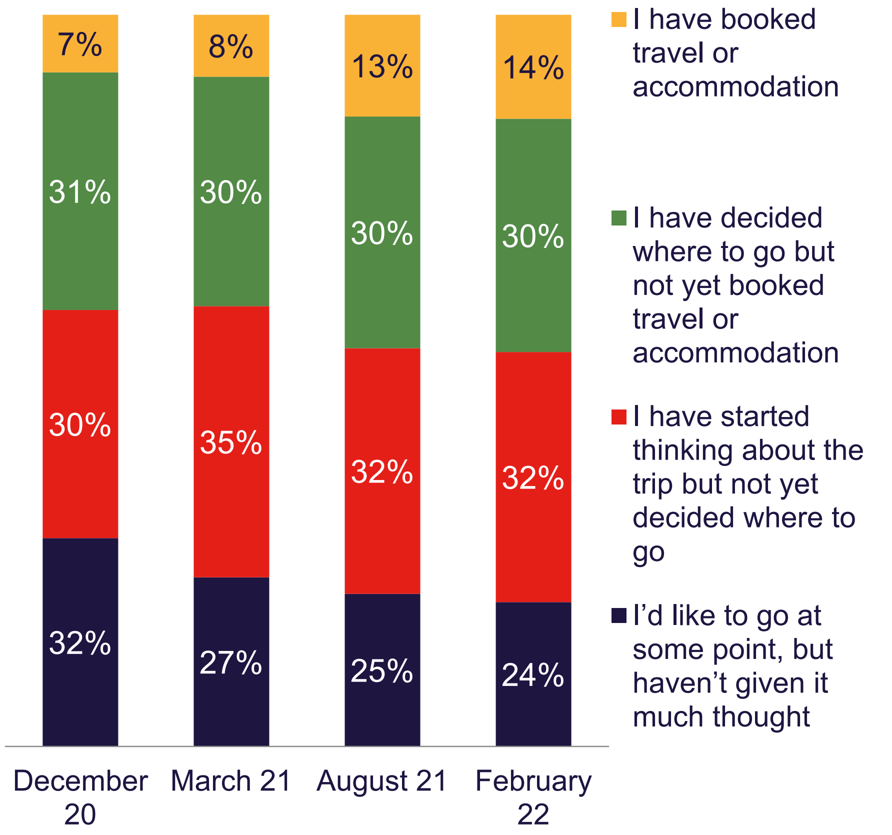
Data trends

The overall travel intentions continue increasing with more than half of respondents definitely planning a trip abroad in the coming 12 months. As booking rates are stable, the choice of destination remains open among most planners.

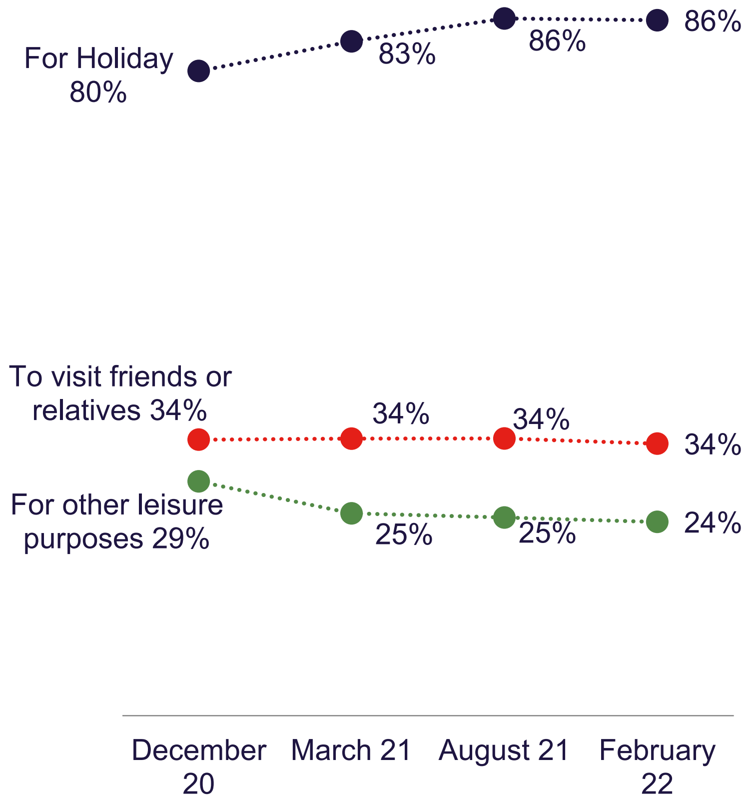
Travel consideration



Trip planning stage



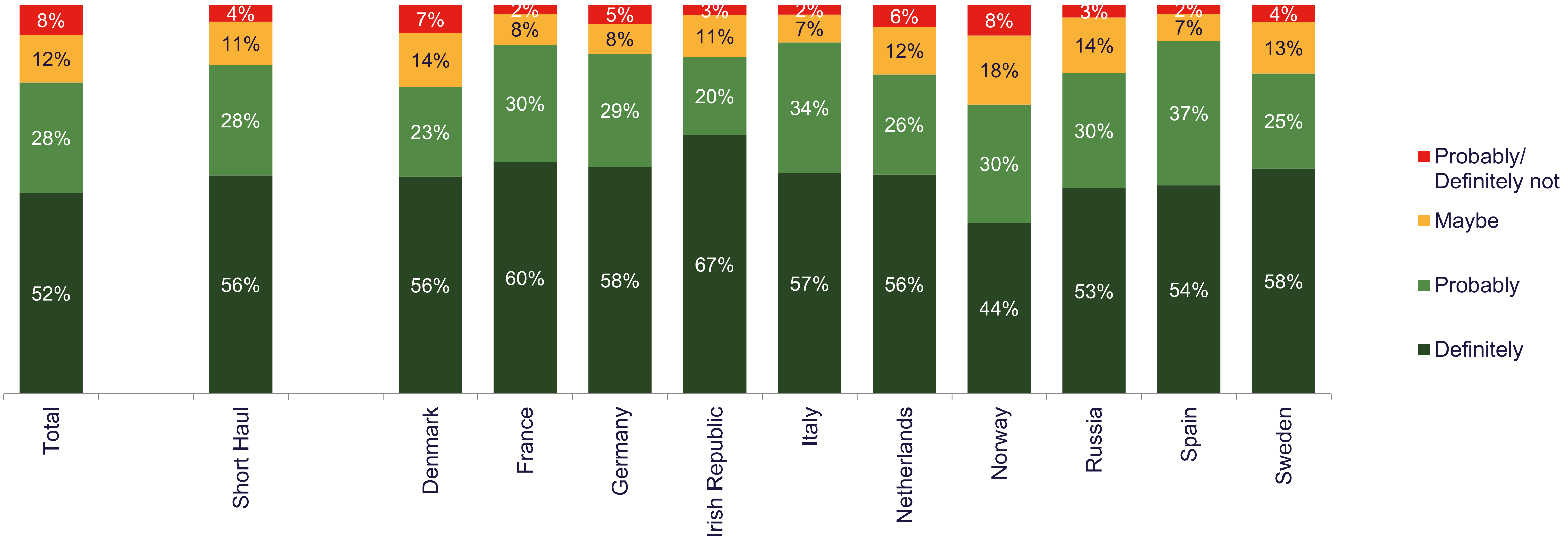
Purpose of leisure travel



Trend calculated at constant perimeter (13 markets consolidated)

Travel consideration for an international leisure trip (SH)

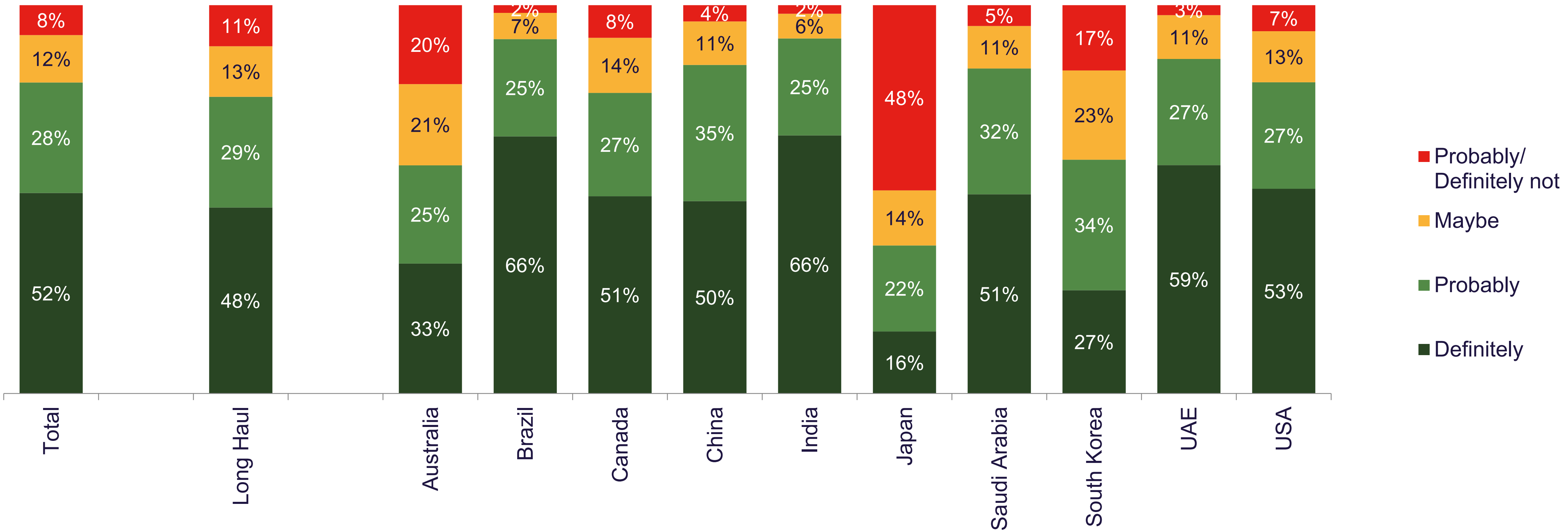
Overall, 8 in 10 respondents would consider an international leisure trip in the next 12 months, confirming a steady desire to travel despite pandemic prolonged uncertainties. While Norway show slightly less definite intentions (unlike other Nordic markets), France, Italy, Spain and the Republic of Ireland show the most positive sentiment towards travelling abroad.



Q5: How likely would you consider an international leisure trip for more than one night in the next 12 months?
Base: All respondents (n = 11,057)

Travel consideration for an international leisure trip (LH)

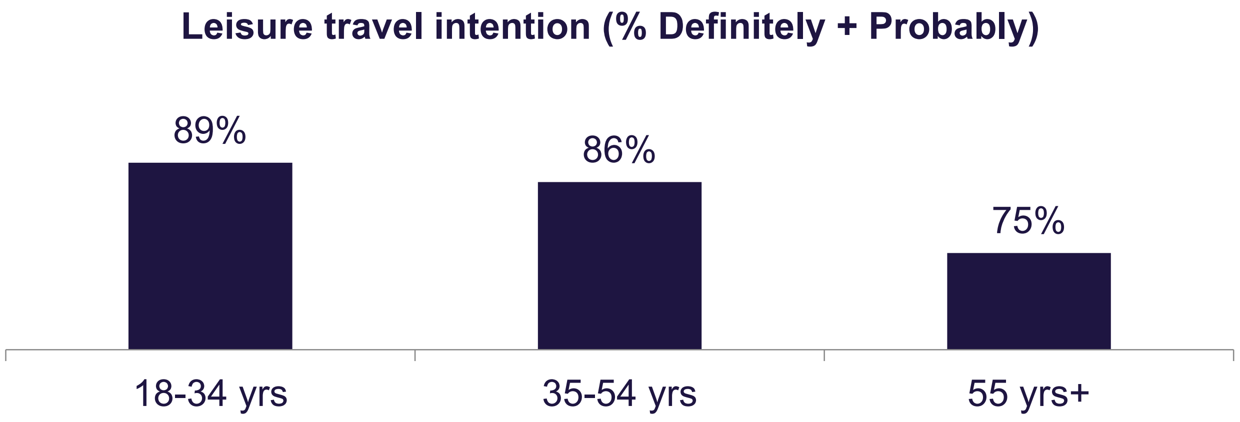
In LH markets, Japan and (to a lesser extent) South Korea and Australia are the most hesitant markets. The US, India, Brazil and Gulf countries express a strong willingness to travel.



Q5: How likely would you consider an international leisure trip for more than one night in the next 12 months?
Base: All respondents (n = 11,057)

Impact of age on propensity to travel to Europe (SH)

The younger generation shows again the highest propensity to travel internationally across most markets, excepted in Sweden and Denmark where the sentiment towards international travel is equal or higher in older generations.

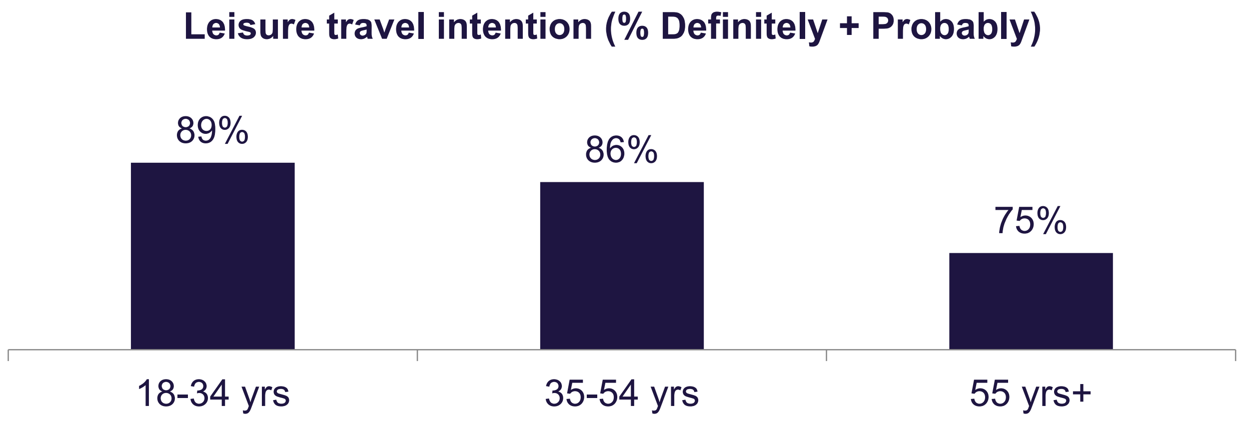


(% Definitely + Probably)	SH	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
18 - 34 y.o.	90%	76%	96%	92%	90%	96%	91%	86%	88%	96%	83%
35 - 54 y.o.	86%	83%	92%	88%	88%	91%	80%	74%	90%	91%	84%
55+ y.o.	80%	80%	82%	83%	82%	90%	75%	71%	72%	85%	84%

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 = 6,411)

Impact of age on propensity to travel to Europe (Long-haul)

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



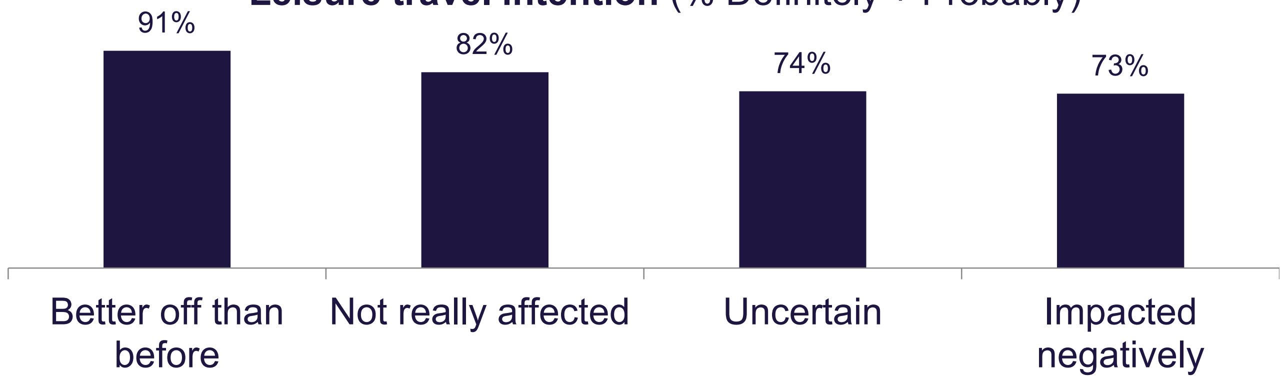
(% Definitely + Probably)	LH		Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
18 - 34 y.o.	89%		83%	98%	86%	93%	96%	48%	89%	71%	92%	94%
35 - 54 y.o.	86%		65%	94%	85%	93%	99%	49%	89%	63%	92%	90%
55+ y.o.	67%		59%	81%	64%	89%	88%	32%	100%	46%	83%	70%

Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?,?
Base: Respondents who plan on taking a European leisure trip in the next 12 months (n = 6,411)

Impact of financial situation on propensity to travel (SH)

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 (82% of SH markets stating financial uncertainties still intend to travel). The financial factor seems less important in France, Italy or Germany. Financial uncertainties act more as an obstacle in the Netherlands and Nordic markets.

Leisure travel intention (% Definitely + Probably)

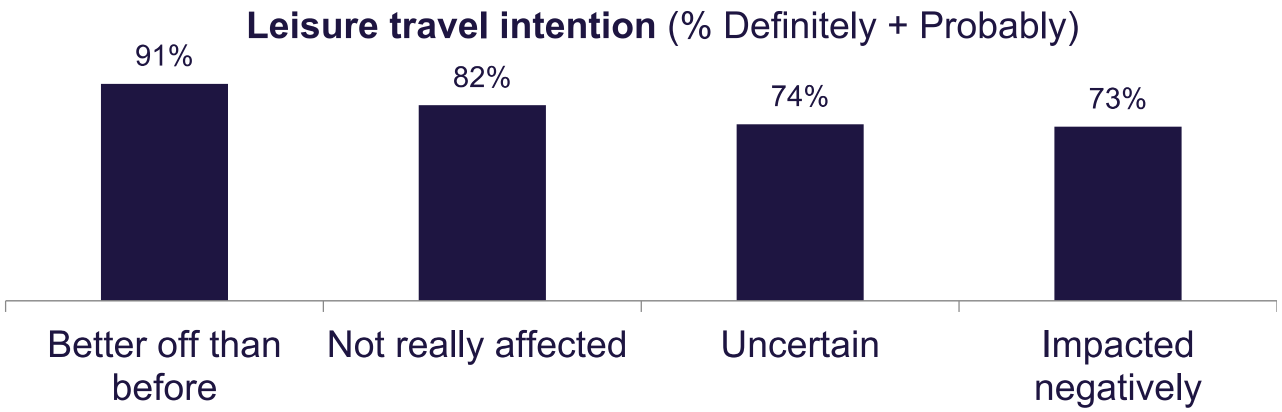


(% Definitely + Probably)	Total	SH	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Not impacted	85%	87%	82%	90%	89%	91%	92%	87%	77%	85%	95%	86%
Uncertain	74%	82%	72%	90%	85%	81%	91%	72%	72%	81%	86%	76%
Impacted negatively	73%	80%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?
Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: All respondents (n = 11,057)

Impact of financial situation on propensity to travel (LH)

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

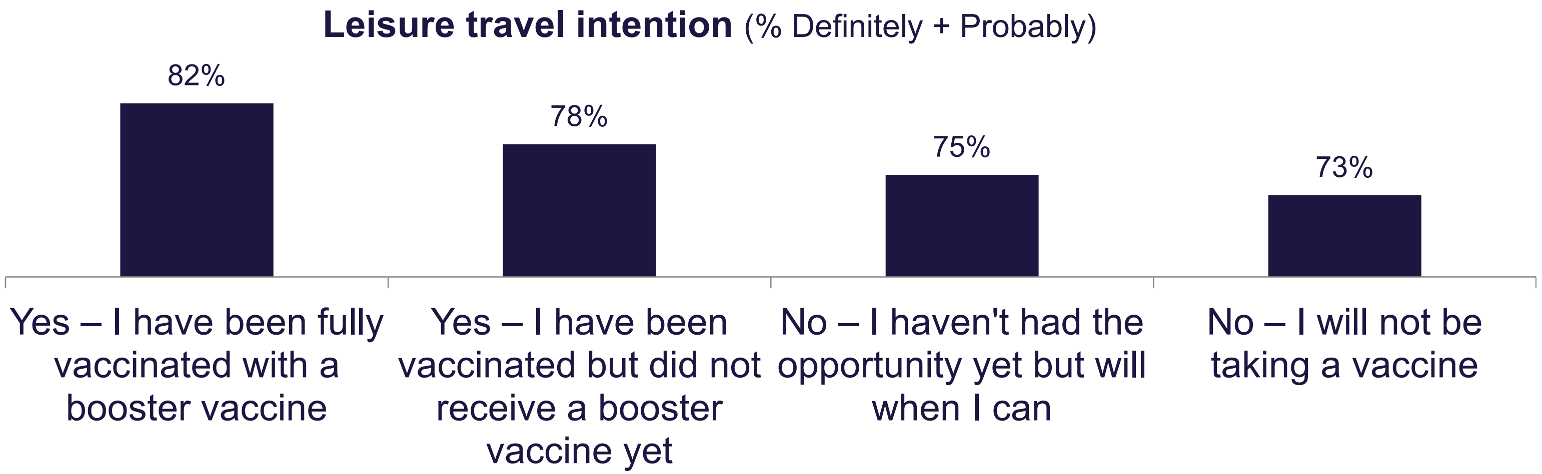


(% Definitely + Probably)	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Not impacted	85%	83%	67%	94%	79%	86%	92%	49%	87%	71%	90%	84%
Uncertain	74%	68%	49%	91%	72%	79%	88%	35%	84%	50%	83%	71%
Impacted negatively	73%	65%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?
Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: All respondents (n = 11,057)

Impact of vaccination on propensity to travel

Vaccination – particularly when including the booster vaccine – encourages international travel from long-haul markets. In short-haul markets, even a partial vaccination acts as a driver of travel.

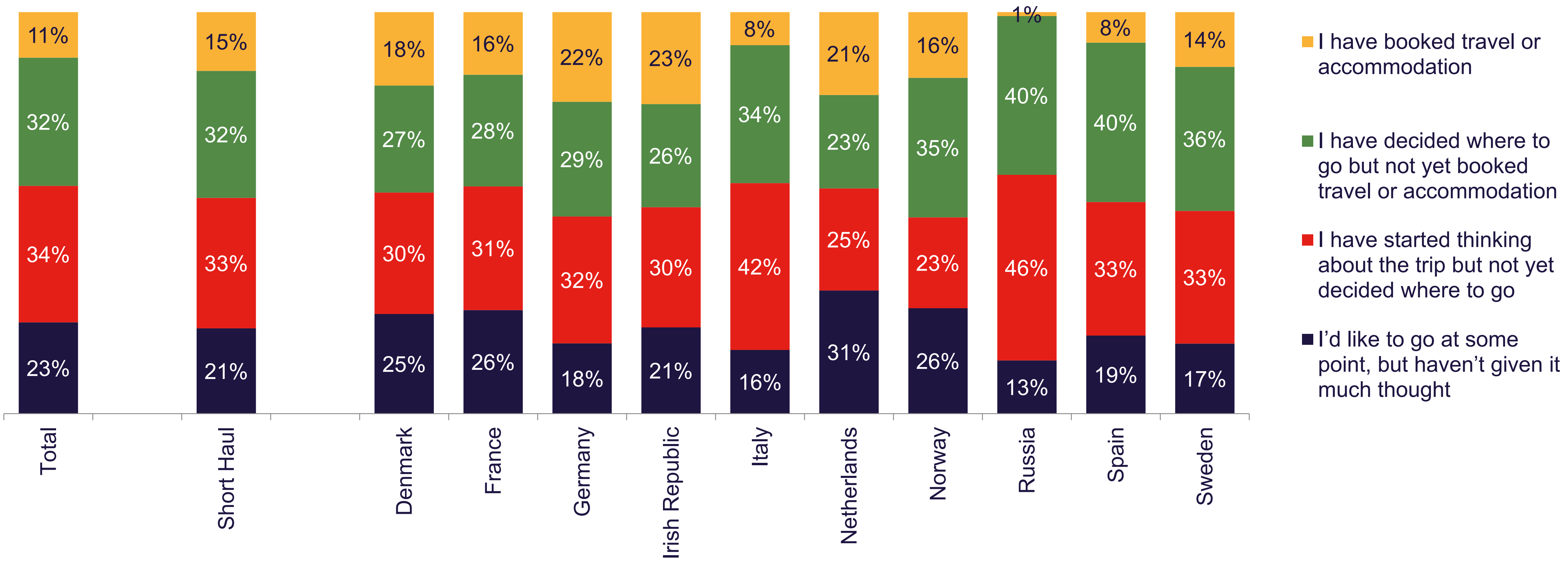


Intention to travel internationally (% Definitely + Probably)	SH	LH
Yes – I have been fully vaccinated with a booster vaccine	85%	79%
Yes – I have been vaccinated but did not receive a booster vaccine yet	87%	72%
No – I haven't had the opportunity yet but will when I can	83%	68%
No – I will not be taking a vaccine	78%	62%

Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?
Q26: Have you had a COVID-19 vaccination?
Base: All respondents (n = 11,057)

Trip planning stage per market (SH)

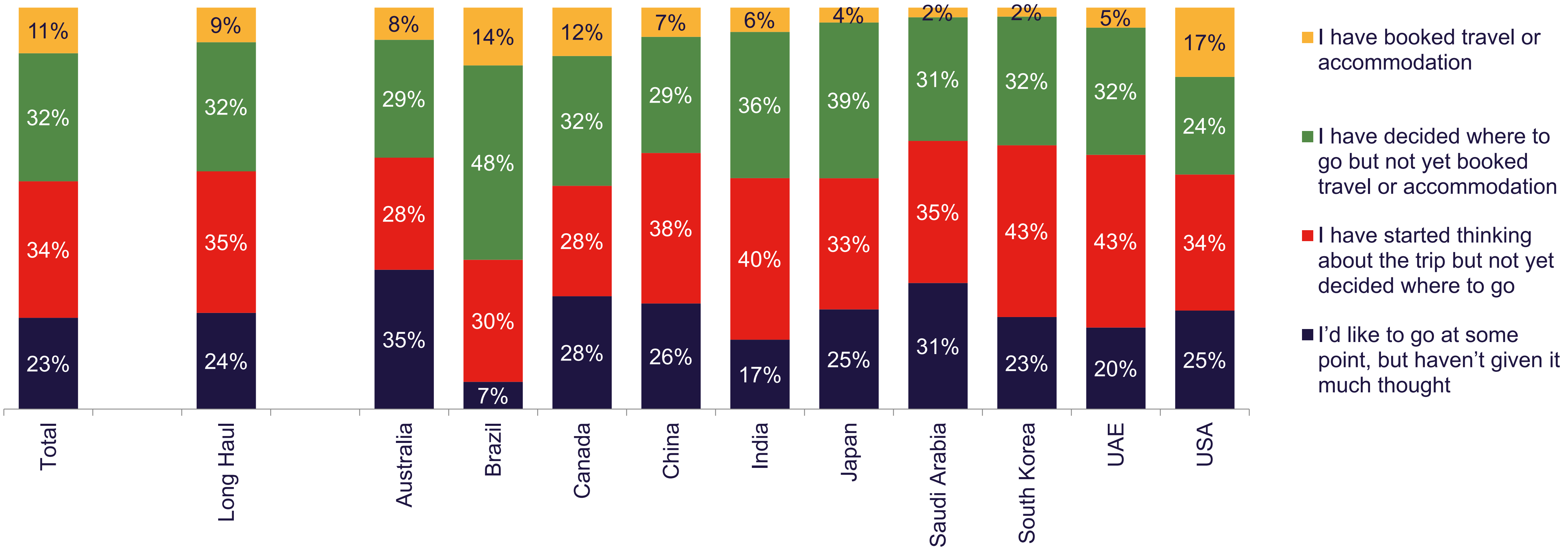
Europeans have not advanced much towards the booking stage as more than half remain in the early stages of planning - an opportunity for Britain destinations to market hesitant planners. The Netherlands, Germany and the Republic of Ireland have the highest levels of booking rate among markets surveyed (over 1 in 5 have booked travel or accommodation). Spaniards and Italians – though showing a strong desire for travel - 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 = 10,954)

Trip planning stage per market (LH)

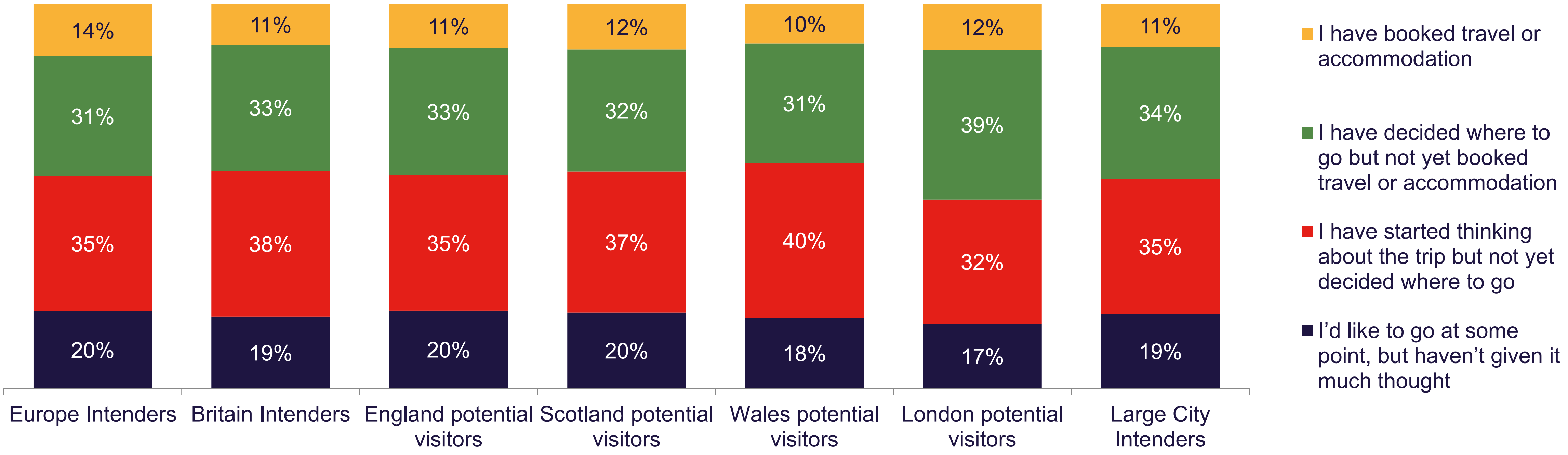
The US again has the highest levels of booking rate among markets surveyed, followed by Brazilians and Canadians. Except for Brazil, where more than half of planners have decided where to go, the choice of destination is still very open across all LH markets, notably in the UAE markets, South Korea and China.



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 = 10,954)

Trip planning stage among Intenders to Europe

Among leisure travel intenders considering Britain, the consideration for a wider set of possible destinations remains high. Potential visitors to London seem more decided than average intenders to Britain.



Q8: Which of the following best describes where you stand with your plans for your next international leisure trip?
Base: Europe Int. (n = 6,411) – Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588) – Large City Int. (n = 5,398)

Travel horizon for next international leisure trip (SH)

Summer 2022 is on top of mind of most SH markets, with half of intenders considering May to September for a next trip abroad. A late summer experience in September is a popular option too for Spaniards and Germans, while early trips in Spring are well considered by the Irish. In short haul markets overall the consideration for May and June is at the same level, offering opportunities of last-minute promotions for (late) Spring.

	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
Feb-22	2%	3%	4%	2%	2%	4%	1%	6%	2%	0%	1%	2%
March-22	5%	6%	6%	6%	7%	9%	5%	7%	6%	5%	6%	7%
April-22	7%	7%	8%	9%	8%	10%	6%	6%	7%	4%	9%	6%
May-22	9%	10%	9%	7%	11%	13%	10%	13%	7%	13%	6%	8%
June-22	9%	10%	8%	11%	11%	7%	11%	7%	14%	9%	10%	12%
July-22	12%	14%	15%	17%	14%	11%	16%	13%	16%	12%	13%	15%
Aug-22	11%	13%	12%	16%	14%	10%	19%	13%	11%	16%	15%	8%
Sept-22	9%	11%	7%	11%	13%	9%	12%	11%	7%	16%	14%	8%
Oct-22	6%	4%	4%	4%	3%	5%	2%	5%	4%	5%	5%	5%
Nov-22	3%	2%	2%	1%	1%	2%	2%	2%	2%	3%	3%	2%
Dec-22	4%	2%	1%	2%	1%	3%	1%	3%	1%	2%	2%	2%
Jan-March 23	4%	2%	3%	2%	1%	3%	1%	1%	1%	1%	1%	2%
April-June 23	2%	2%	3%	2%	2%	2%	2%	2%	1%	1%	2%	1%
July-Sept 23	3%	3%	3%	3%	2%	3%	3%	2%	3%	4%	3%	3%
Oct-Dec 23	2%	1%	0%	1%	0%	1%	1%	0%	1%	1%	2%	1%
2024/beyond	2%	1%	1%	1%	0%	0%	0%	0%	2%	1%	1%	2%
Don't know	10%	9%	14%	7%	6%	7%	6%	9%	15%	9%	6%	14%

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 = 10,954)

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

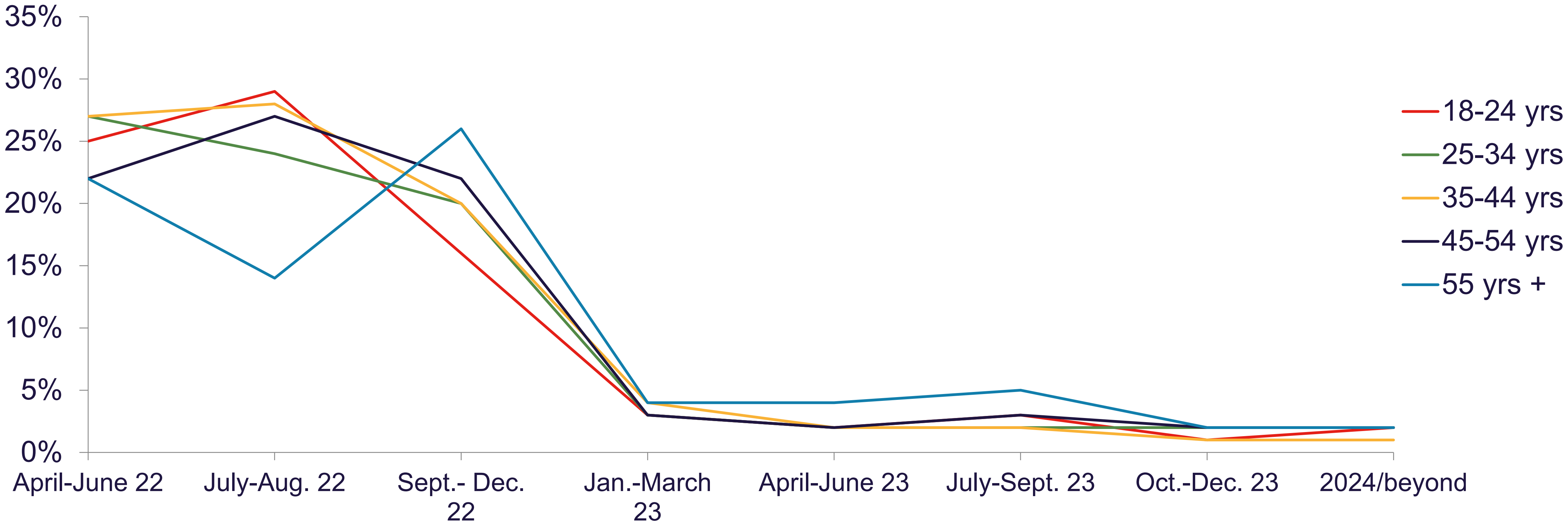
Travel planning spans over a larger window among LH travellers, however willingness to travel in the short term (by the end of summer) is higher (>50%) in GCC markets, the US, Brazil, and China. South Korea also has plans for 2023 and beyond. (Post) Ramadan is on the agenda of GCC markets in April/May.

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Feb-22	2%	2%	1%	1%	4%	1%	3%	0%	3%	1%	3%	4%
March-22	5%	5%	2%	6%	8%	4%	5%	0%	5%	2%	6%	7%
April-22	7%	6%	3%	7%	6%	8%	9%	2%	6%	3%	9%	8%
May-22	9%	8%	4%	6%	6%	16%	8%	2%	10%	4%	10%	8%
June-22	9%	8%	4%	12%	6%	10%	11%	2%	10%	3%	12%	8%
July-22	12%	10%	4%	17%	9%	11%	7%	3%	16%	6%	18%	12%
Aug-22	11%	9%	6%	3%	6%	11%	9%	7%	14%	10%	10%	11%
Sept-22	9%	7%	9%	6%	6%	7%	11%	2%	6%	6%	6%	7%
Oct-22	6%	8%	6%	7%	6%	14%	9%	5%	8%	9%	7%	7%
Nov-22	3%	4%	6%	8%	6%	3%	4%	2%	2%	4%	5%	3%
Dec-22	4%	5%	7%	8%	4%	3%	9%	4%	3%	6%	6%	4%
Jan-March 23	4%	5%	9%	8%	9%	3%	6%	7%	3%	10%	1%	4%
April-June 23	2%	3%	6%	4%	3%	1%	1%	5%	1%	6%	1%	3%
July-Sept 23	3%	3%	7%	2%	4%	1%	2%	5%	1%	9%	1%	3%
Oct-Dec 23	2%	2%	4%	2%	2%	1%	2%	1%	0%	6%	1%	2%
2024/beyond	2%	3%	4%	1%	3%	1%	1%	8%	1%	8%	1%	2%
Don't know	10%	11%	18%	2%	12%	8%	2%	44%	12%	10%	3%	8%

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 = 10,954)

Impact of age on travel horizon

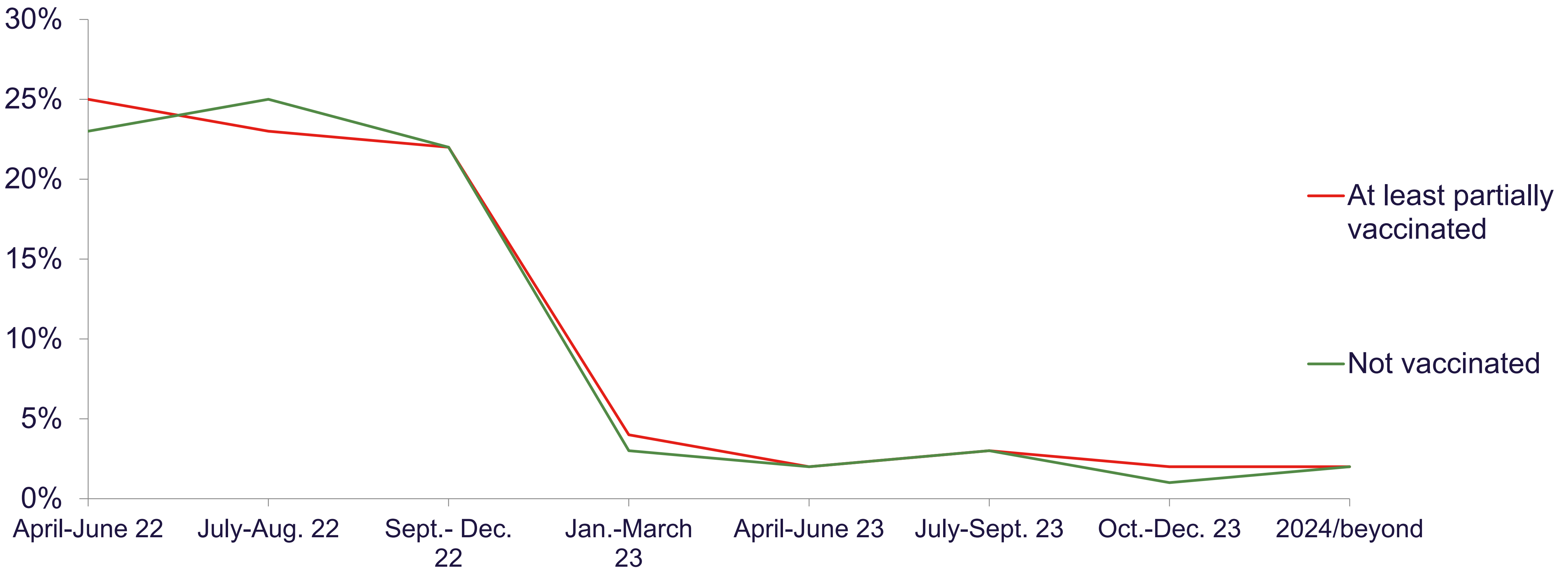
Propensity to travel in the very short term remains higher among younger potential travellers. Older demographics show high interest in holidaying after the summer peak season.



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 = 10,954)

Impact of vaccination on travel horizon

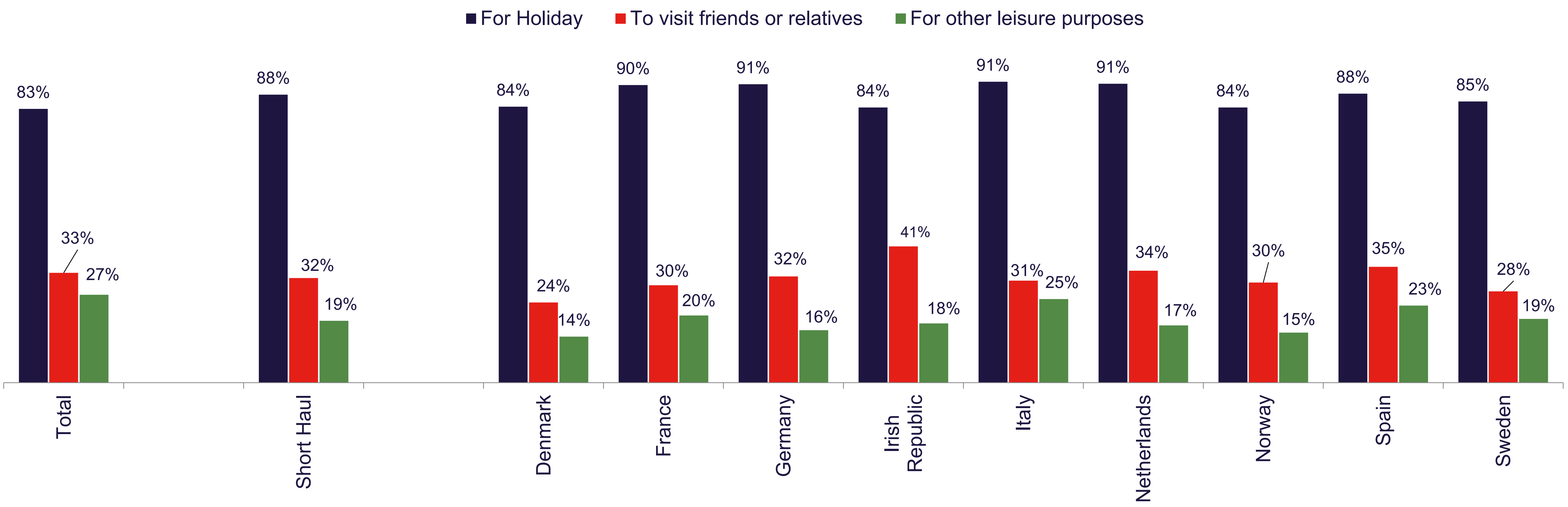
The impact of vaccination on the travel horizon is now limited.



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 = 10,954)

Purpose of leisure travel (SH)

While holiday motivations remain mainstream for Europeans, the need for reconnecting with friends and relatives remains for a third of respondents on average with higher rates in the Republic of Ireland.

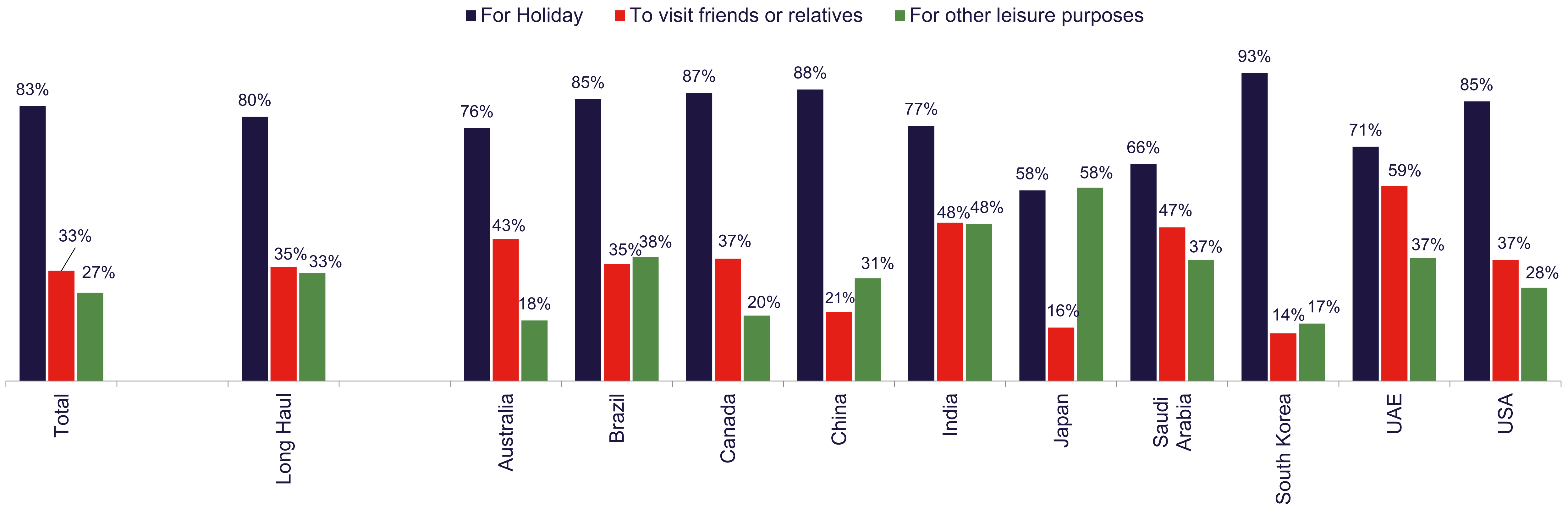


* Russia is not included due to limited data comparability, however the VFR motivation reaches 22,4% in this market.

Q6: Considering your next international leisure trip, for what purpose(s) would you travel? (Multiple Answers)
Base: All respondents (n = 11,057)

Purpose of leisure travel (LH)

Willingness to visit relatives remains a core purpose of next travel among Gulf markets, but also in India, Australia and (to a lesser extend) North America.

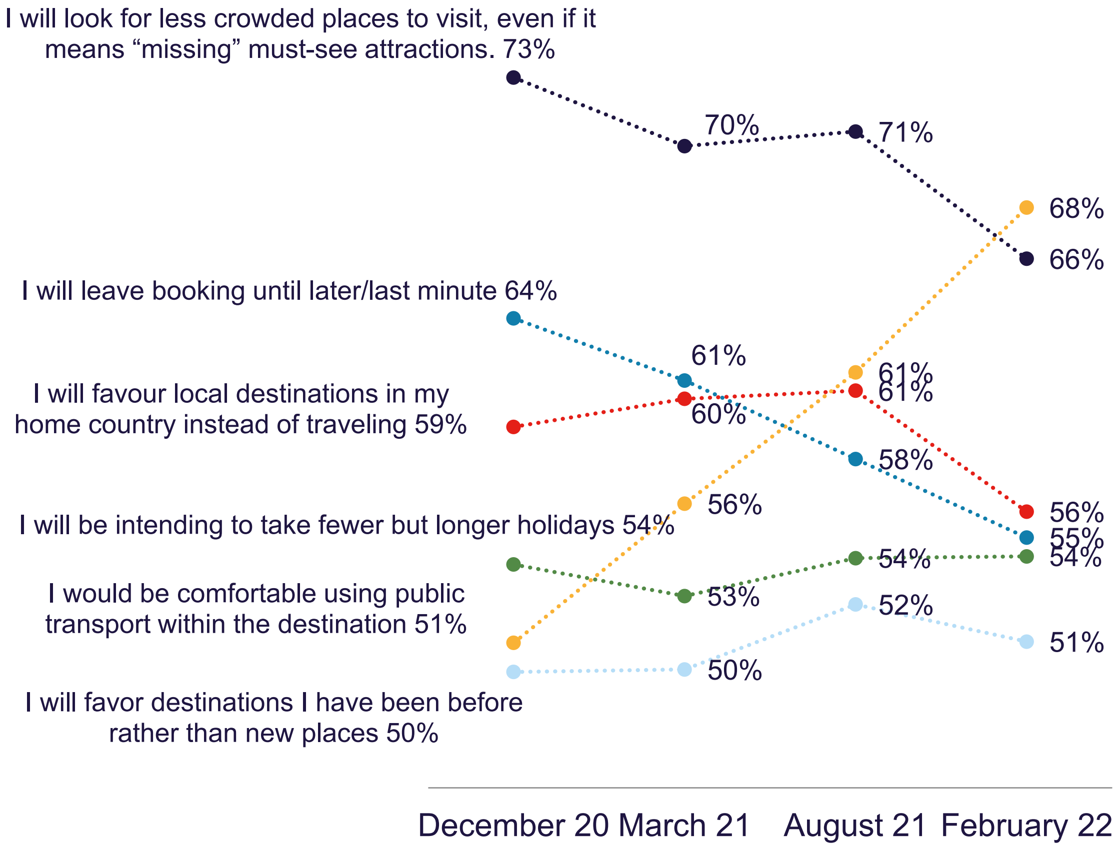


Q6: Considering your next international leisure trip, for what purpose(s) would you travel? (Multiple Answers)
Base: All respondents (n = 11,057)

Data trends

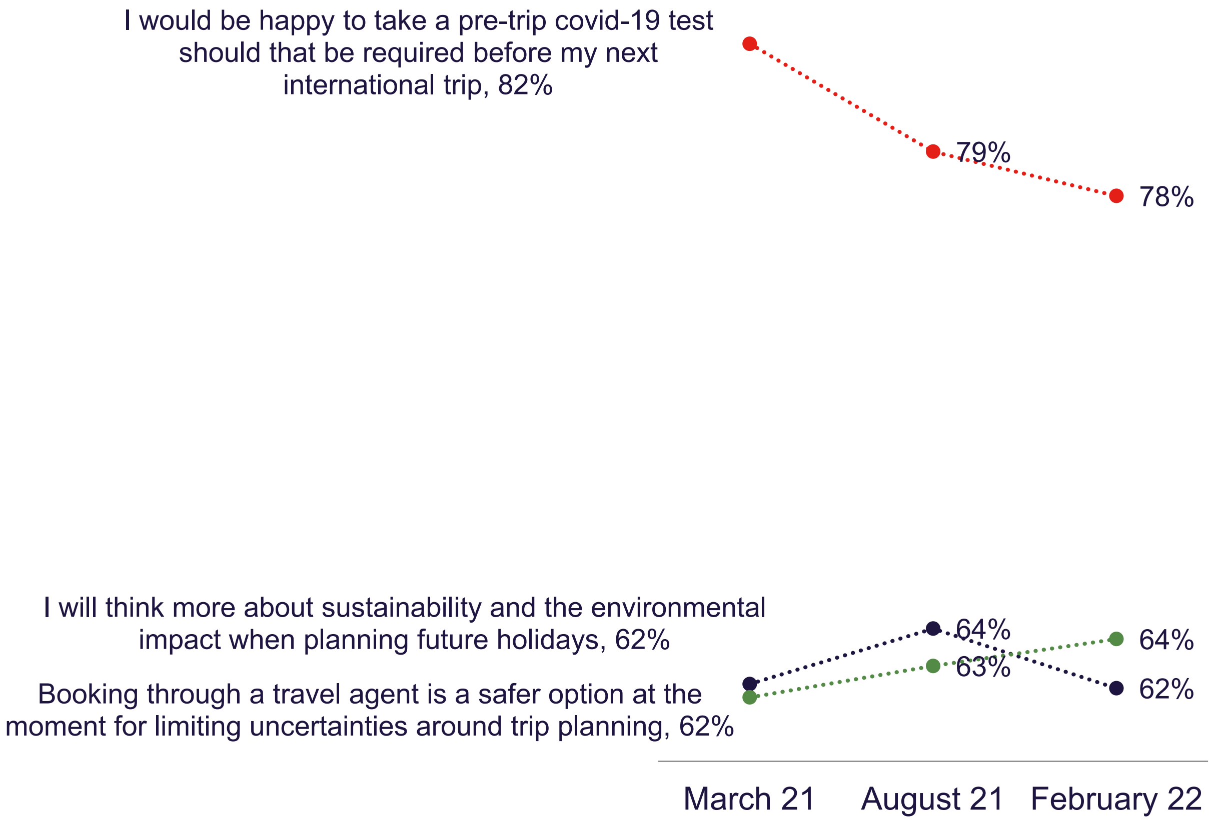
Booking last-minute for adapting travel uncertainties is less dominant in attitudes as consumers gain confidence and are offered more flexible cancellation guarantees. Trust in using public transport has jumped and crowd-averse attitudes decline, confirming a continued shift to pre-pandemic attitudes. The overall consumer mind remains 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 (SH)

The shift from *health-centric* to *money-centric* attitudes is accelerating with greater focus on money-back cancellation guarantees, attractive deals (ranked #2!) and insurance for COVID-19 travel. Expectations for a full and safe experience at destination grow, with stable sanitary and political environments and higher freedom of movement (removal of quarantine policies).

	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
Money-back guarantee should I wish to cancel my trip	34%	41%	43%	40%	39%	42%	41%	37%	40%	41%	43%	48%
An attractive offer e.g. discounts on flights or accommodation	30%	33%	32%	29%	22%	37%	34%	24%	38%	43%	40%	34%
Removal of quarantine policies in destination country	30%	32%	37%	26%	34%	29%	26%	29%	37%	43%	31%	32%
A significant decrease in coronavirus cases at destination	29%	25%	21%	23%	26%	26%	32%	20%	23%	22%	29%	29%
Insurance for COVID-19 related travel changes/changes to regulations	25%	25%	28%	28%	16%	25%	28%	20%	23%	20%	27%	35%
Hygiene & safety protocols in place at destination	23%	19%	10%	16%	25%	27%	32%	17%	12%	12%	27%	7%
Stable political environment in destination country	23%	24%	20%	28%	30%	18%	25%	20%	22%	30%	28%	23%
Removal of quarantine policies in home country	23%	23%	14%	25%	26%	19%	21%	21%	30%	36%	22%	19%
A high proportion of the population being vaccinated in the destination country	20%	17%	17%	12%	16%	23%	19%	13%	20%	9%	16%	23%
Welcoming locals in destination country	19%	20%	19%	28%	21%	14%	17%	22%	29%	21%	18%	15%
Assurance that there will be a range of/enough things to do	17%	17%	16%	26%	25%	13%	15%	21%	8%	17%	23%	7%
Receiving a booster COVID-19 vaccination	16%	10%	7%	7%	16%	15%	8%	13%	6%	6%	12%	6%
Your Government's advice on international travel	16%	16%	17%	8%	12%	21%	13%	19%	28%	7%	11%	20%
Voucher-back guarantee should I wish to cancel my trip	15%	16%	18%	11%	11%	18%	26%	19%	8%	10%	25%	10%
The introduction of a vaccine passport	14%	11%	8%	12%	9%	12%	16%	8%	12%	4%	11%	13%
Official national hygiene label in accommodation and attractions in destination	12%	8%	6%	7%	9%	10%	9%	10%	6%	7%	7%	5%
Mandatory coronavirus testing at some point during the trip	11%	8%	4%	9%	10%	8%	13%	8%	5%	5%	9%	6%
Relaxation of visa requirements	7%	4%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	40%	N/A	N/A

Q20: What would make you more likely to travel internationally for leisure in the next 12 months? (Multiple Answers)
Base: All respondents (n = 11,057)

Activators for an international leisure trip (LH)

LH markets still give priority to the pandemic control at destination (notably Asian markets), however, many markets are now determined by money-centric issues (Australians, Brazilians, North Americans and Gulf countries). Political stability is an important activator for China and Japan, while Visa requirements are key factors for Gulf markets.

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Money-back guarantee should I wish to cancel my trip	34%	27%	40%	38%	47%	13%	25%	25%	17%	23%	23%	32%
An attractive offer e.g. discounts on flights or accommodation	30%	28%	24%	44%	27%	19%	26%	25%	35%	25%	32%	28%
Removal of quarantine policies in destination country	30%	28%	32%	16%	35%	24%	27%	36%	28%	29%	28%	27%
A significant decrease in coronavirus cases at destination	29%	31%	28%	39%	31%	24%	29%	53%	24%	42%	27%	28%
Insurance for COVID-19 related travel changes/changes to regulations	25%	24%	37%	34%	37%	21%	28%	15%	13%	24%	20%	22%
Hygiene & safety protocols in place at destination	23%	27%	25%	33%	25%	28%	42%	19%	16%	32%	25%	27%
Stable political environment in destination country	23%	22%	12%	25%	19%	28%	20%	27%	22%	18%	23%	22%
Removal of quarantine policies in home country	23%	22%	26%	12%	29%	19%	22%	38%	17%	23%	22%	20%
A high proportion of the population being vaccinated in the destination country	20%	22%	22%	30%	29%	21%	23%	17%	15%	21%	18%	25%
Welcoming locals in destination country	19%	18%	12%	21%	12%	20%	20%	17%	20%	17%	22%	18%
Assurance that there will be a range of/enough things to do	17%	16%	8%	21%	10%	18%	19%	18%	17%	16%	18%	16%
Receiving a booster COVID-19 vaccination	16%	22%	17%	25%	15%	24%	28%	20%	26%	22%	22%	18%
Your Government's advice on international travel	16%	17%	22%	10%	18%	21%	25%	13%	14%	16%	14%	14%
Voucher-back guarantee should I wish to cancel my trip	15%	14%	13%	21%	14%	11%	13%	11%	16%	10%	17%	16%
The introduction of a vaccine passport	14%	16%	21%	25%	15%	12%	14%	19%	9%	18%	13%	18%
Official national hygiene label in accommodation and attractions in destination	12%	15%	10%	18%	7%	27%	21%	15%	12%	14%	12%	10%
Mandatory coronavirus testing at some point during the trip	11%	14%	15%	12%	11%	15%	19%	12%	14%	11%	16%	15%
Relaxation of visa requirements	7%	10%	N/A	N/A	N/A	14%	28%	N/A	32%	N/A	34%	N/A

Q20: What would make you more likely to travel internationally for leisure in the next 12 months? (Multiple Answers)
Base: All respondents (n = 11,057)

Activators for a leisure trip to Britain (SH)

Money-centric factors and removal of quarantine policies are the most frequent activators mentioned by SH markets for a potential trip to Britain. Deals have moved up from fourth to second consideration in the short-haul markets. Germans, French and Spaniards would also be sure about living the full experience at destination.

	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
An attractive offer e.g. discounts on flights or accommodation	28%	30%	27%	28%	19%	33%	34%	19%	33%	39%	38%	29%
Money-back guarantee should I wish to cancel my trip	27%	31%	30%	33%	30%	29%	40%	26%	30%	30%	33%	33%
A significant decrease in coronavirus cases at destination	24%	21%	17%	19%	20%	24%	30%	16%	20%	17%	24%	19%
Removal of quarantine policies in destination country	24%	24%	25%	23%	25%	21%	24%	22%	22%	27%	29%	23%
Hygiene & safety protocols in place at destination	20%	15%	8%	13%	14%	23%	30%	12%	11%	11%	22%	6%
Insurance for COVID-19 related travel changes/changes to regulations	20%	18%	22%	19%	15%	19%	21%	14%	17%	15%	21%	23%
Removal of quarantine policies in home country	18%	17%	9%	16%	18%	18%	20%	14%	16%	24%	21%	10%
A high proportion of the population being vaccinated in the destination country	18%	14%	11%	12%	13%	17%	20%	12%	17%	7%	16%	16%
Welcoming locals in destination country	17%	16%	12%	21%	15%	14%	16%	14%	21%	18%	18%	9%
Stable political environment in destination country	16%	13%	13%	12%	17%	10%	14%	8%	11%	16%	16%	13%
Assurance that there will be a range of/enough things to do	16%	14%	13%	18%	22%	10%	14%	14%	7%	16%	20%	8%
Your Government's advice on international travel	14%	12%	13%	8%	9%	16%	11%	13%	20%	7%	12%	15%
Receiving a booster COVID-19 vaccination	14%	8%	5%	6%	11%	14%	7%	10%	6%	5%	9%	6%
Voucher-back guarantee should I wish to cancel my trip	14%	14%	16%	10%	10%	17%	22%	12%	9%	10%	26%	12%
Official national hygiene label in accommodation and attractions in destination	12%	8%	8%	8%	9%	11%	8%	8%	8%	7%	9%	4%
The introduction of a vaccine passport	11%	9%	7%	10%	6%	11%	14%	8%	6%	3%	9%	11%
Mandatory coronavirus testing at some point during the trip	10%	7%	5%	10%	11%	8%	9%	7%	5%	3%	7%	7%
Relaxation of visa requirements	7%	4%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	43%	N/A	N/A

Q20: What would make you more likely to travel to Britain (England, Scotland, Wales) for leisure in the next 12 months? (Multiple Answers)
Base: All respondents (n = 11,057)

Activators for a leisure trip to Britain (LH)

LH markets express more focus on the pandemic-related factors (number of cases in Britain) yet scrutinize deals, particularly from Brazil and the Gulf markets. The political stability and potential concerns around locals' hospitality are often mentioned in China too.

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
An attractive offer e.g. discounts on flights or accommodation	28%	26%	22%	40%	26%	18%	28%	21%	31%	22%	30%	27%
Money-back guarantee should I wish to cancel my trip	27%	24%	33%	32%	36%	14%	23%	23%	16%	21%	22%	25%
A significant decrease in coronavirus cases at destination	24%	27%	23%	32%	28%	26%	23%	42%	19%	34%	22%	26%
Removal of quarantine policies in destination country	24%	24%	26%	13%	28%	22%	29%	30%	19%	25%	23%	23%
Hygiene & safety protocols in place at destination	20%	24%	18%	28%	21%	28%	37%	19%	19%	26%	22%	23%
Insurance for COVID-19 related travel changes/changes to regulations	20%	21%	27%	27%	30%	21%	25%	15%	14%	22%	18%	18%
Removal of quarantine policies in home country	18%	19%	24%	11%	25%	17%	19%	31%	16%	20%	21%	17%
A high proportion of the population being vaccinated in the destination country	18%	20%	21%	27%	23%	20%	24%	13%	15%	19%	18%	23%
Welcoming locals in destination country	17%	19%	9%	26%	13%	26%	23%	14%	16%	17%	21%	17%
Stable political environment in destination country	16%	19%	8%	23%	12%	26%	19%	19%	19%	17%	20%	19%
Assurance that there will be a range of/enough things to do	16%	17%	8%	19%	10%	19%	22%	20%	16%	19%	22%	15%
Your Government's advice on international travel	14%	15%	14%	9%	15%	20%	22%	9%	14%	17%	16%	14%
Receiving a booster COVID-19 vaccination	14%	19%	11%	26%	12%	22%	26%	17%	20%	20%	19%	17%
Voucher-back guarantee should I wish to cancel my trip	14%	14%	12%	22%	14%	12%	12%	12%	15%	10%	14%	15%
Official national hygiene label in accommodation and attractions in destination	12%	16%	10%	18%	8%	24%	23%	14%	11%	17%	15%	14%
The introduction of a vaccine passport	11%	13%	13%	17%	10%	12%	16%	16%	9%	16%	11%	13%
Mandatory coronavirus testing at some point during the trip	10%	13%	10%	13%	8%	16%	17%	9%	10%	11%	17%	13%
Relaxation of visa requirements	7%	9%	N/A	N/A	N/A	13%	28%	N/A	26%	N/A	32%	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 = 11,057)

Concerns about next international leisure trip (Short-haul)

The access to healthcare at destination and lack of respect for COVID-19 rules by other people are still driving concerns among travellers, along with uncertainties implied with planning (extra admin during the trip, changes in quarantine requirements, restricted experience at destination…). The cost to reach the destination is also a significant concern for Spaniards, the Irish and French.

(% Very + Somewhat concerned)	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
Access to healthcare if I contract COVID-19 abroad	73%	65%	57%	70%	44%	74%	72%	57%	53%	83%	84%	52%
Other people not following COVID-19 policies and procedures during the journey and in destination	73%	64%	59%	64%	46%	77%	67%	61%	57%	73%	76%	62%
Contracting COVID-19 during my journey/trip	71%	61%	53%	64%	40%	71%	66%	59%	52%	77%	77%	50%
Change in quarantine requirements on my return home	70%	61%	52%	67%	48%	71%	63%	56%	46%	78%	82%	51%
Limited / restricted experiences at destination	69%	61%	50%	65%	46%	69%	66%	52%	46%	89%	82%	45%
Extra admin involved with new policy/rules during the trip	69%	63%	51%	69%	34%	65%	60%	64%	59%	84%	83%	58%
Affordability of robust travel insurance (to cover COVID-19 related travel changes)	66%	56%	44%	61%	36%	69%	55%	51%	38%	82%	77%	44%
Costs of mandatory COVID-19 tests	65%	58%	47%	62%	35%	70%	54%	55%	48%	83%	79%	44%
Accessibility of affordable air fares	63%	55%	41%	65%	39%	74%	52%	48%	42%	74%	80%	38%
Locals' attitude towards international tourists	59%	46%	37%	50%	25%	57%	41%	43%	39%	70%	67%	32%

Q23: How concerned are you about the following when thinking about your next international trip?
Base: All Respondents (n = 11,057)

Concerns about next international leisure trip (Long-haul)

LH markets are mostly concerned about COVID-19-related risks and access to healthcare.

(% Very + Somewhat concerned)	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Access to healthcare if I contract COVID-19 abroad	73%	80%	81%	83%	78%	90%	91%	89%	63%	87%	68%	73%
Other people not following COVID-19 policies and procedures during the journey and in destination	73%	81%	79%	83%	77%	90%	88%	84%	70%	85%	72%	75%
Contracting COVID-19 during my journey/trip	71%	79%	76%	82%	71%	89%	89%	90%	67%	88%	64%	71%
Change in quarantine requirements on my return home	70%	78%	80%	76%	77%	88%	88%	85%	64%	80%	67%	72%
Limited / restricted experiences at destination	69%	76%	74%	76%	72%	89%	86%	83%	58%	72%	63%	73%
Extra admin involved with new policy/rules during the trip	69%	74%	70%	73%	73%	89%	86%	76%	56%	80%	59%	67%
Affordability of robust travel insurance (to cover COVID-19 related travel changes)	66%	74%	84%	77%	73%	88%	87%	72%	62%	68%	64%	64%
Costs of mandatory COVID-19 tests	65%	72%	73%	66%	76%	82%	83%	78%	60%	73%	60%	62%
Accessibility of affordable air fares	63%	70%	78%	73%	73%	82%	87%	64%	55%	49%	59%	67%
Locals' attitude towards international tourists	59%	70%	53%	68%	58%	88%	86%	82%	53%	76%	59%	63%

Q23: How concerned are you about the following when thinking about your next international trip?
Base: All Respondents (n = 11,057)

Concerns among Britain Intenders

Respect for COVID-19 rules by other people, access to healthcare, risks of contracting COVID-19 and change in quarantine requirements are the most frequent concerns among those wishing to go to Britain. Possible restrictions of the experience at destination also rise concerns.

(% 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	71%	80%	75%	75%	77%	74%	76%
Access to healthcare if I contract COVID-19 abroad	71%	79%	76%	76%	77%	75%	76%
Change in quarantine requirements on my return home	69%	77%	73%	73%	75%	72%	73%
Contracting COVID-19 during my journey/trip	69%	78%	73%	72%	74%	72%	74%
Extra admin involved with new policy/rules during the trip	68%	77%	71%	72%	73%	70%	71%
Limited / restricted experiences at destination	68%	77%	72%	73%	75%	72%	72%
Affordability of robust travel insurance (to cover COVID-19 related travel changes)	64%	74%	69%	68%	73%	66%	68%
Costs of mandatory COVID-19 tests	63%	71%	67%	68%	71%	65%	67%
Accessibility of affordable air fares	61%	70%	66%	67%	69%	63%	65%
Locals' attitude towards international tourists	56%	66%	62%	63%	68%	58%	62%

Q23: How concerned are you about the following when thinking about your next international trip?
Base: Europe Int. (n = 6,411) – Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588) – Large City Int. (n = 5,398)

Attitudes to travel (SH)

The role of travel agents is still valued as a safe option across most markets. Search for less crowded places to visit is popular among Germans, the Irish and Spaniards, while a preference to local destinations vs international tend to become less mainstream in opinions. Care about sustainable travel is notably found among Spaniards and Italians. A short-notice booking pattern is still most pronounced in Spain and the Netherlands whilst it has started to ease in other destinations and is less of a thing now for Norwegians and Swedes.

(% Very + Somewhat agree)	Total	SH	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
I would be happy to take a pre-trip COVID-19 test should that be required before my next international trip	78%	73%	83%	73%	81%	75%	80%	63%	82%	62%	72%	60%
I would be comfortable using public transport within the destination	68%	64%	62%	70%	56%	69%	63%	61%	74%	60%	68%	58%
Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning	65%	57%	60%	57%	60%	54%	56%	60%	54%	66%	60%	46%
I will look for less crowded places to visit, even if it means 'missing' must-see attractions	65%	59%	56%	54%	66%	68%	62%	61%	54%	51%	65%	49%
I will delay my next international trip until the sanitary context with Omicron is under control	63%	53%	51%	44%	46%	52%	58%	54%	54%	49%	62%	55%
I will think more about sustainability and the environmental impact when planning future holidays	63%	54%	44%	59%	56%	53%	70%	52%	43%	46%	68%	52%
I will favor international destinations closer to my home country	60%	56%	49%	66%	61%	63%	59%	53%	55%	42%	68%	44%
I will be intending to take fewer but longer holidays	56%	42%	39%	43%	39%	48%	44%	41%	39%	45%	52%	34%
I will leave booking until later/last minute	54%	51%	53%	53%	55%	51%	49%	58%	38%	50%	62%	40%
I will favour local destinations in my home country instead of traveling internationally	54%	46%	38%	51%	42%	48%	43%	46%	46%	33%	66%	43%
I will favor destinations I have been before rather than new places	49%	43%	39%	42%	46%	53%	32%	48%	47%	32%	49%	42%

Q22: Some people have expressed various opinions about the coronavirus outbreak and their travel plans and preferences. To what extent do you agree with the following statements?
Base: All respondents (n = 11,057)

Attitudes to travel (LH)

LH markets continue to express more contrasted attitudes including higher preference for domestic tourism in Australia, the US and South Korea, a higher sensitivity to sustainability in Asia (except for Japan) and the Gulf markets and willingness to take a longer vacation in the Gulf markets, Japan, China and India.

(% Very + Somewhat agree)	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
I would be happy to take a pre-trip COVID-19 test should that be required before my next international trip	78%	83%	79%	87%	72%	85%	88%	80%	86%	81%	81%	83%
I would be comfortable using public transport within the destination	68%	70%	61%	63%	62%	78%	82%	82%	70%	59%	72%	69%
Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning	65%	72%	62%	72%	60%	82%	86%	65%	77%	66%	75%	68%
I will look for less crowded places to visit, even if it means 'missing' must-see attractions	65%	70%	65%	59%	59%	80%	85%	58%	77%	70%	71%	71%
I will delay my next international trip until the sanitary context with Omicron is under control	63%	71%	72%	62%	69%	77%	82%	84%	72%	69%	63%	65%
I will think more about sustainability and the environmental impact when planning future holidays	63%	70%	52%	69%	51%	82%	87%	64%	74%	74%	74%	63%
I will favor international destinations closer to my home country	60%	63%	57%	47%	52%	72%	80%	50%	75%	58%	69%	60%
I will be intending to take fewer but longer holidays	56%	68%	54%	52%	53%	80%	85%	80%	77%	59%	75%	61%
I will leave booking until later/last minute	54%	57%	53%	37%	54%	71%	65%	65%	59%	53%	57%	51%
I will favour local destinations in my home country instead of traveling internationally	54%	61%	66%	44%	54%	67%	69%	47%	62%	66%	58%	65%
I will favor destinations I have been before rather than new places	49%	54%	51%	43%	45%	63%	70%	43%	59%	42%	56%	55%

Q22: Some people have expressed various opinions about the coronavirus outbreak and their travel plans and preferences. To what extent do you agree with the following statements?
Base: All respondents (n = 11,057)

Attitudes to travel among Britain intenders

Acceptance of a pre-trip COVID-19 test, if required, is still widely positive across all of those wishing to travel to British destinations (notably to London). Over 7 in 10 Britain intenders will think more about sustainability for their future holidays. A similar share would delay their trip until the sanitary context with Omicron is under control.

(% 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	79%	84%	81%	81%	81%	81%	81%
I would be comfortable using public transport within the destination	69%	78%	73%	71%	74%	73%	73%
I will look for less crowded places to visit, even if it means 'missing' must-see attractions	65%	72%	67%	68%	71%	62%	66%
Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning	64%	71%	69%	68%	72%	65%	68%
I will think more about sustainability and the environmental impact when planning future holidays	62%	72%	68%	67%	70%	64%	67%
I will delay my next international trip until the sanitary context with Omicron is under control	60%	70%	65%	64%	68%	61%	64%
I will favor international destinations closer to my home country	60%	65%	63%	61%	64%	57%	62%
I will leave booking until later/last minute	54%	60%	56%	57%	60%	52%	55%
I will be intending to take fewer but longer holidays	54%	65%	62%	58%	66%	57%	61%
I will favour local destinations in my home country instead of traveling internationally	52%	58%	56%	55%	60%	49%	55%
I will favor destinations I have been before rather than new places	48%	55%	52%	47%	54%	45%	51%

Q22: Some people have expressed various opinions about the coronavirus outbreak and their travel plans and preferences. To what extent do you agree with the following statements?
Base: Europe Int. (n = 6,411) – Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588) – Large City Int. (n = 5,398)

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

Destination Planning

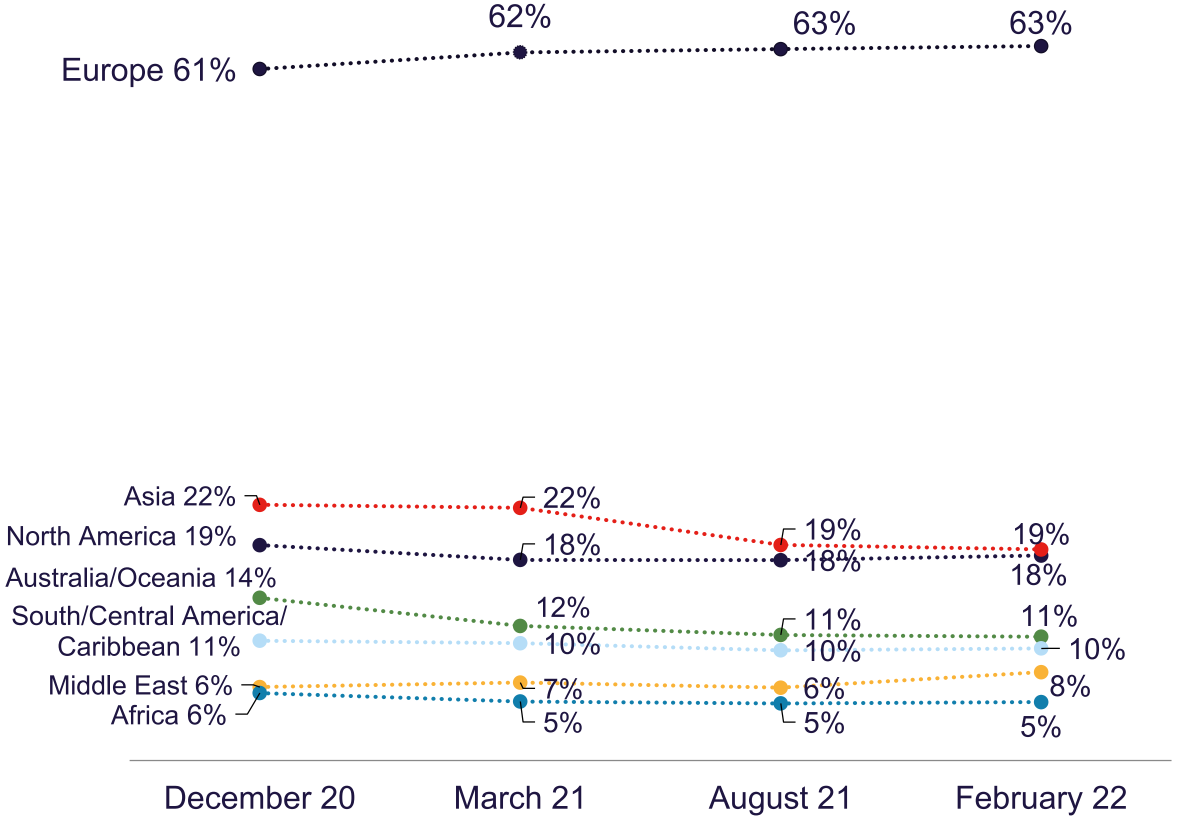
Destination planning: summary

- Europe consolidates its pole position, considered by 3 in 4 SH planners and nearly 1 in 2 LH planners.
- Britain has gained 1.5 points of intention in 6 months and has improved its competitive position, matching France and Spain. The competitive gap vs Italy and Germany is also higher today.
- The COVID-19 safety image has continued to improve significantly for all British destinations.
- Reflecting a general pattern for travel overall, age is confirmed to be a driver of visiting Britain, though it appears more obvious for SH markets and for England and London. Interest in Wales and Scotland is more evenly spread across age groups.
- In SH markets, England remains the top nation on the list for a potential visit to Britain, but Scotland and Wales are still well considered in several markets. For LH prospects, a possible trip to Britain would include England first but not exclusively, showing open attitudes to visiting multiple destinations across Britain, beyond iconic places.
- Beyond an obvious interest for capital cities, other lesser-known destinations generate attractiveness both in SH and LH markets, confirming a potential appetite for visiting secondary cities in all Britain destinations.
- Flight remains a confident transport option for 9 in 10 potential visitors to Britain on average, while ferry and tunnel are still equally considered in the closest markets. The Train/Eurostar is also a confident option for closer markets. LH markets feel comfortable using all types of transportation means to get to Britain including car rental and Eurostar/Train as part of a possible trip involving multiple countries.
- The increased level of trust for public and collective transportation means is favorable for exploring rural and urban environments and planning multiple destinations within Britain. LH markets have no obstacle in using / combining various types of transportation at destination, including public transport or taxi services.
- Coming back to pre-pandemic attitudes, travellers consider a large variety of channels to plan their next trip. Online travel agents/tour operators and travel comparison websites are popular, while official destination websites, transport and accommodation providers play a significant role in the booking process across many markets.

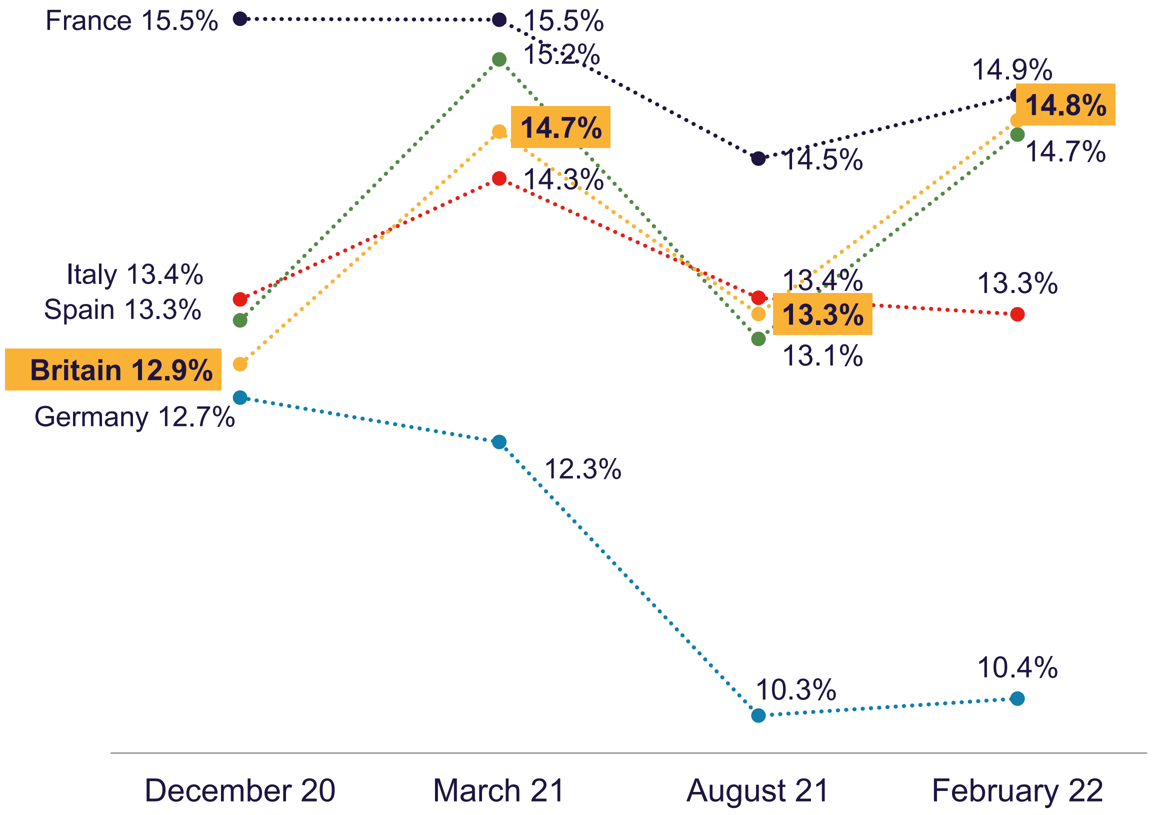
Data trends

Europe consolidates its pole position on top of regions envisaged among trip planners. Britain has gained 1.5 points of intention in 6 months and has improved its competitive position, matching France and Spain. The competitive gap vs Italy and Germany is also higher.

Destinations envisaged



European destinations envisaged (TOP 5)



Trend calculated at constant perimeter (13 markets consolidated)

Data trends per market (gap of %)

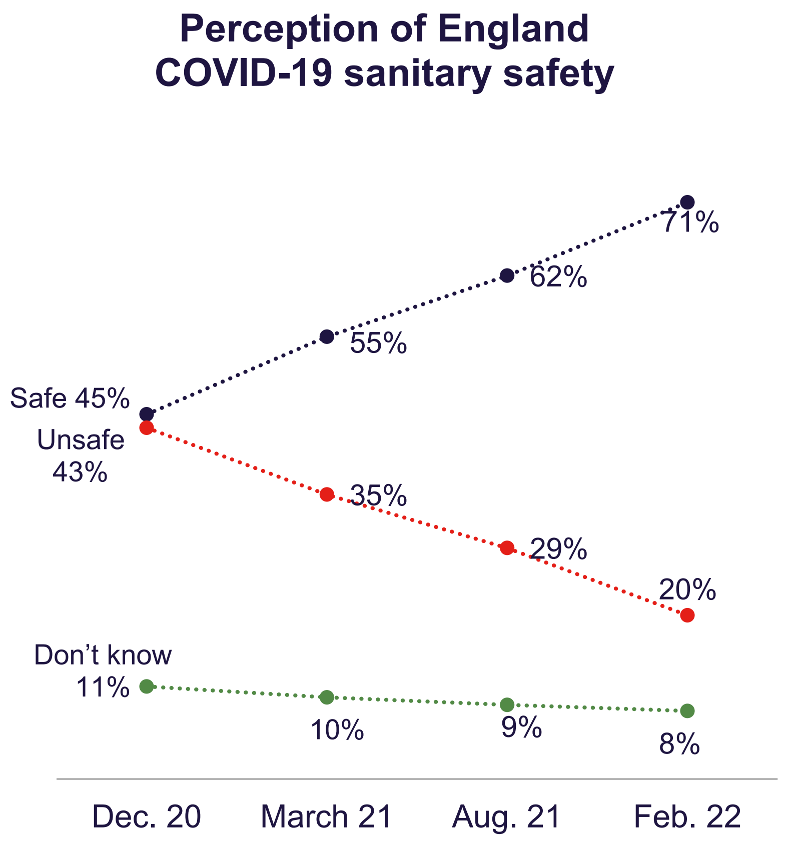
Britain has gained very significant consideration shares in China and is more considered in the US, Spain, Norway, Germany and France. Britain has lost some individuals wishing to travel from India, Sweden and the Irish Republic compared to 6 months ago.

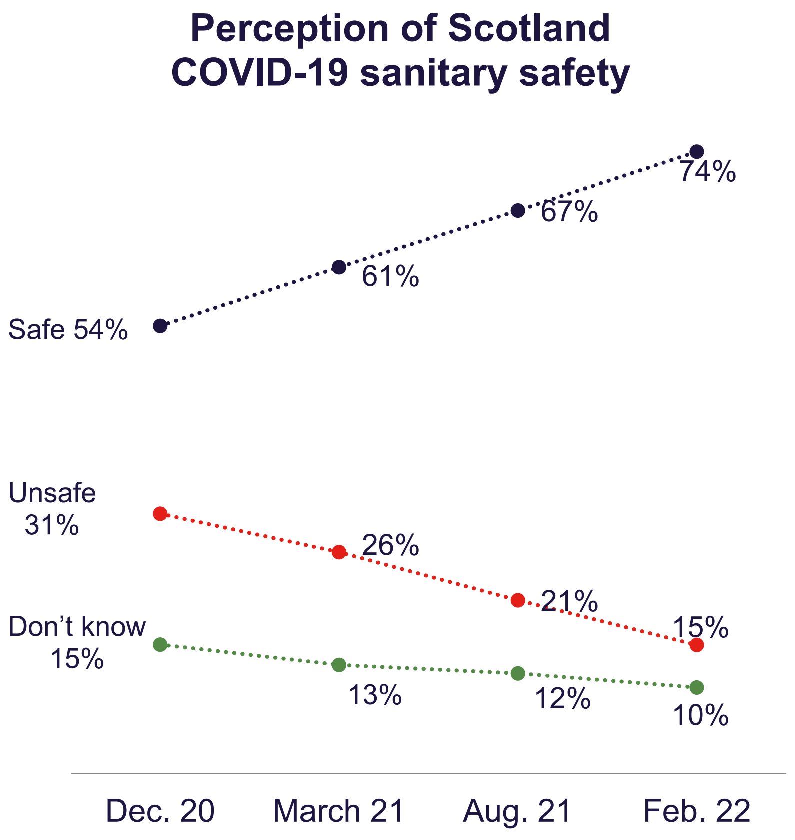
Destination	Total	SH	LH	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Britain	1.5%	0.2%	2.8%	0.1%	0.7%	10.3%	1.2%	2.0%	-5.2%	-3.8%	-0.4%	-0.6%	2.7%	3.0%	-2.1%	2.2%
Austria	-0.4%	0.1%	-0.9%	1.0%	-0.4%	0.5%	-0.8%	0.2%	-5.2%	-2.0%	-1.4%	0.4%	1.6%	-0.6%	3.0%	-1.4%
Belgium	0.2%	0.8%	-0.5%	-0.2%	1.2%	0.7%	0.8%	0.4%	-3.6%	-2.2%	0.0%	1.6%	1.8%	2.6%	1.8%	-1.0%
Croatia	-0.2%	0.4%	-0.8%	-0.4%	-0.8%	0.7%	-2.6%	2.3%	-3.0%	-2.2%	3.0%	1.4%	-1.8%	1.0%	2.2%	-1.5%
Denmark	-0.2%	0.1%	-0.4%	-0.2%	-1.6%	0.6%	-1.8%	-0.9%	-1.2%	1.0%	-2.2%	3.0%	1.9%	0.2%	-0.7%	-0.4%
Finland	-0.5%	0.3%	-1.4%	0.2%	-0.8%	-2.4%	-1.2%	0.2%	-3.8%	0.6%	0.4%	1.8%	0.0%	-0.4%	1.0%	-0.4%
France	0.5%	-0.3%	1.4%	-2.2%	1.3%	6.6%		-3.0%	-5.0%	1.2%	0.0%	-2.2%	2.1%	-3.1%	3.0%	1.3%
Germany	0.1%	-0.1%	0.4%	1.5%	-1.5%	4.8%	-0.6%		-4.6%	-2.8%	-1.4%	2.8%	2.1%	-1.8%	2.1%	-1.2%
Greece	-0.1%	1.0%	-1.4%	-0.2%	-1.7%	-1.6%	-2.8%	1.5%	-2.8%	0.8%	0.8%	3.2%	3.3%	0.8%	0.5%	-1.0%
Italy	-0.1%	-0.4%	0.2%	-0.1%	3.1%	1.3%	-0.8%	2.2%	-4.6%	-2.8%		1.2%	0.9%	-5.5%	1.7%	0.0%
Netherlands	0.6%	1.2%	-0.1%	0.4%	-1.0%	0.8%	-1.0%	0.9%	-0.4%	-1.0%	2.6%		1.2%	0.2%	2.0%	-0.8%
Portugal	-0.2%	0.1%	-0.4%	-0.4%	-1.1%	0.3%	-2.0%	0.1%	-0.8%	0.2%	2.0%	2.0%	-0.2%	-2.4%	1.0%	-0.7%
Spain	1.5%	2.1%	0.9%	1.7%	3.8%	1.5%	-1.4%	1.6%	-2.6%	-2.2%	8.1%	-2.6%	3.4%		9.1%	0.2%
Sweden	0.3%	0.3%	0.2%	0.8%	-1.0%	0.6%	0.0%	0.0%	-0.4%	0.6%	0.6%	1.4%	-0.5%	-1.4%		0.5%
Switzerland	-0.4%	-0.1%	-0.7%	-2.4%	-0.5%	1.5%	-0.4%	0.6%	-4.6%	0.0%	-2.2%	0.4%	0.0%	-0.6%	1.8%	-0.1%
Turkey	0.4%	0.6%	0.1%	0.4%	0.0%	-0.1%	1.4%	1.4%	-1.0%	-0.8%	0.4%	0.2%	2.2%	-2.2%	2.6%	0.8%

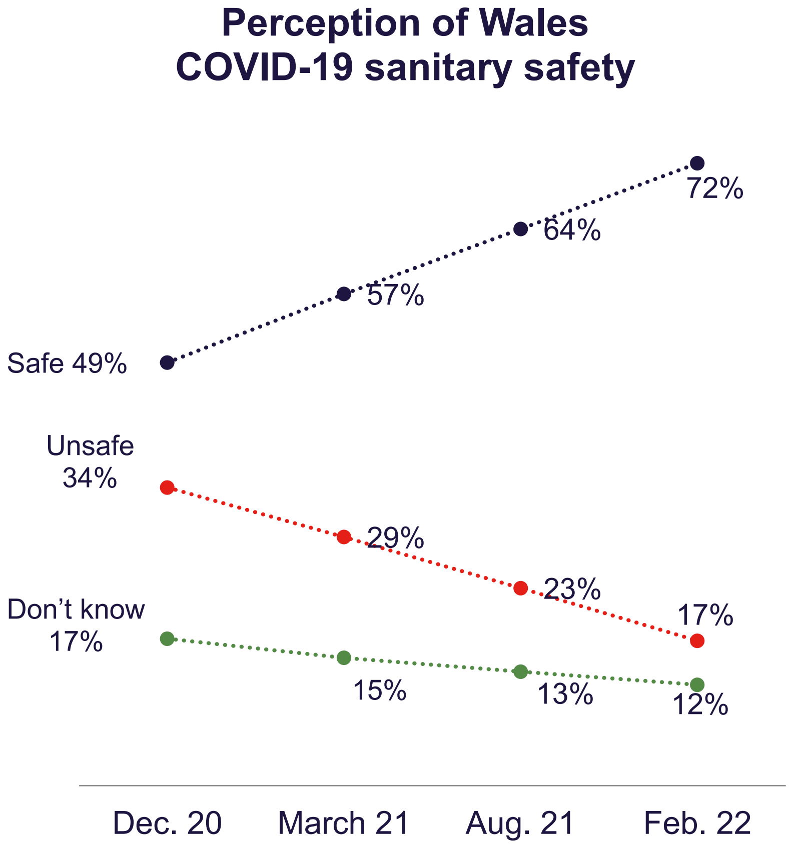
Q10. To which destination(s) in Europe in particular? (Multiple Answers - among leisure trip intenders)

Data trends

The COVID-19 perception of safety has continued improving widely for all British destinations, with nearly ¾ of respondents now rating the destination as COVID-19 safe.







Trend calculated at constant perimeter (13 markets consolidated)

Trends: August 2021 vs February 2022 (gap of %)

The COVID-19 perception of safety of Britain has improved further compared to the average destinations and sees its reputation massively improved in Sweden and Norway. The increase in safety image is more significant in SH markets.

W4/W3 Evolution (+/-)

(Very Safe + Safe %)	Total	SH	LH	Australia	Canada	China	France	Germany	India	Rep. of Ireland	Italy	Neths.	Norway	Spain	Sweden	USA
England	9.1%	14.3%	3.0%	1.4%	10.0%	1.2%	8.8%	6.8%	-3.0%	16.2%	12.4%	16.4%	25.0%	10.2%	19.1%	4.9%
Scotland	7.0%	10.5%	3.0%	0.0%	9.0%	1.3%	5.0%	5.5%	-1.4%	12.6%	8.6%	10.6%	19.4%	6.8%	15.9%	5.4%
Wales	7.6%	11.4%	3.2%	2.6%	12.0%	2.5%	6.6%	8.6%	-4.0%	14.8%	10.6%	13.6%	17.8%	5.6%	13.9%	3.2%
Benchmark	7.9%	7.4%	2.7%	3.5%	12.4%	6.1%	8.2%	8.1%	-1.7%	16.4%	11.1%	12.2%	18.5%	7.2%	16.5%	5.3%

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?

Regional destinations for a next international leisure trip (SH)

Europe remains by far the most attractive region for 3 in 4 travellers from SH European markets. Asia and the Middle East are gaining further interest for Europeans. Europe enjoys very high levels of consideration for Nordic markets. France continues to also look outside Europe in North America and Asia.

	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
Europe	59%	74%	82%	66%	76%	77%	78%	75%	81%	56%	73%	80%
Asia	22%	12%	7%	12%	10%	8%	12%	12%	9%	27%	8%	11%
North America	18%	10%	7%	14%	9%	16%	13%	16%	9%	3%	12%	7%
Australia/Oceania	11%	4%	3%	4%	4%	3%	4%	6%	3%	4%	3%	3%
Middle East	9%	5%	4%	5%	6%	4%	10%	7%	3%	10%	3%	3%
South/Central America/Caribbean	9%	7%	2%	9%	5%	5%	10%	7%	4%	5%	15%	4%
Africa	6%	6%	4%	10%	7%	2%	6%	8%	3%	14%	4%	2%
I don't know yet	5%	5%	4%	6%	4%	3%	3%	4%	5%	8%	4%	6%

Q9: Where do you plan to travel on your next international leisure trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)

Regional destinations for a next international leisure trip (LH)

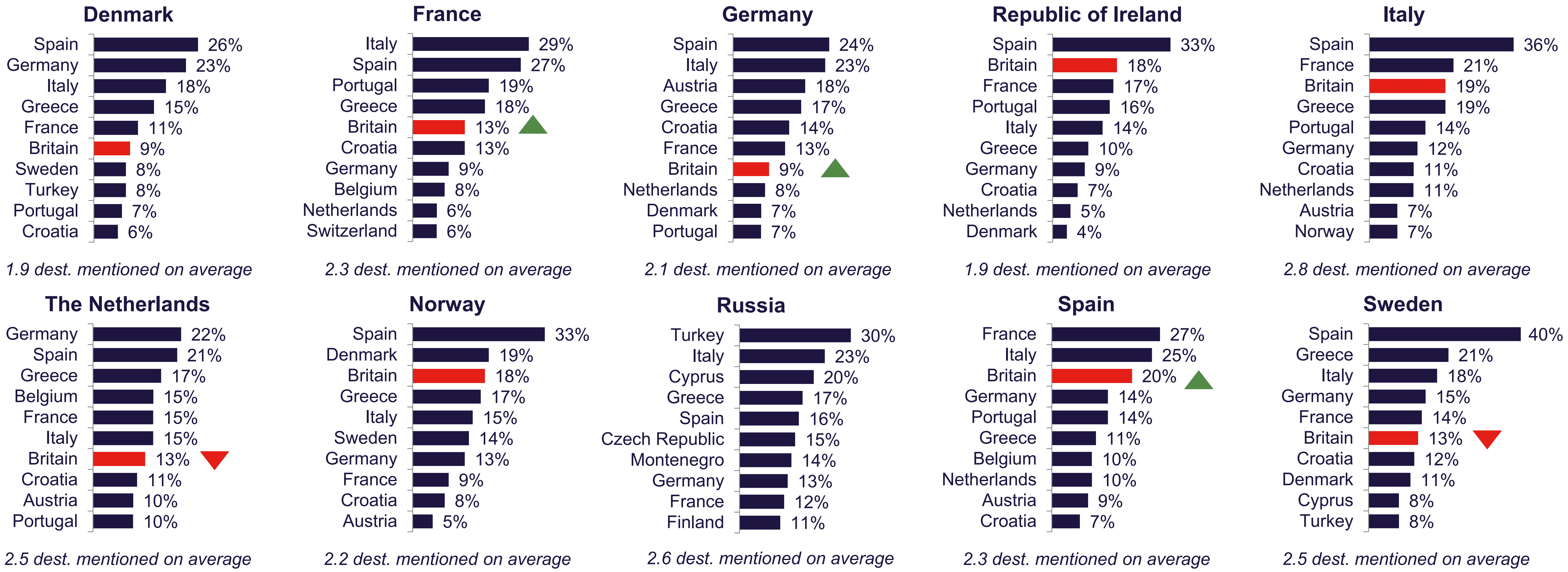
Europe still enjoys high levels of consideration for long-haul travellers too, with interest rates exceeding 50% in Brazil, China, and the US. The regional competition vs Europe is higher in Japan, South Korea, Australia and Saudi Arabia.

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Europe	59%	45%	32%	62%	45%	58%	40%	40%	27%	36%	41%	53%
Asia	22%	31%	32%	6%	17%	44%	36%	49%	22%	60%	40%	12%
North America	18%	23%	16%	36%	30%	23%	30%	27%	7%	24%	11%	26%
Australia/Oceania	11%	17%	25%	7%	7%	25%	28%	25%	4%	29%	10%	12%
Middle East	9%	13%	4%	4%	3%	15%	24%	5%	33%	4%	28%	7%
South/Central America/Caribbean	9%	11%	6%	24%	24%	6%	10%	5%	2%	6%	4%	19%
Africa	6%	7%	3%	3%	4%	7%	6%	2%	26%	2%	12%	4%
I don't know yet	5%	6%	10%	2%	5%	7%	2%	12%	11%	4%	3%	6%

Q9: Where do you plan to travel on your next international leisure trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)

Top European destinations for travelers in SH markets

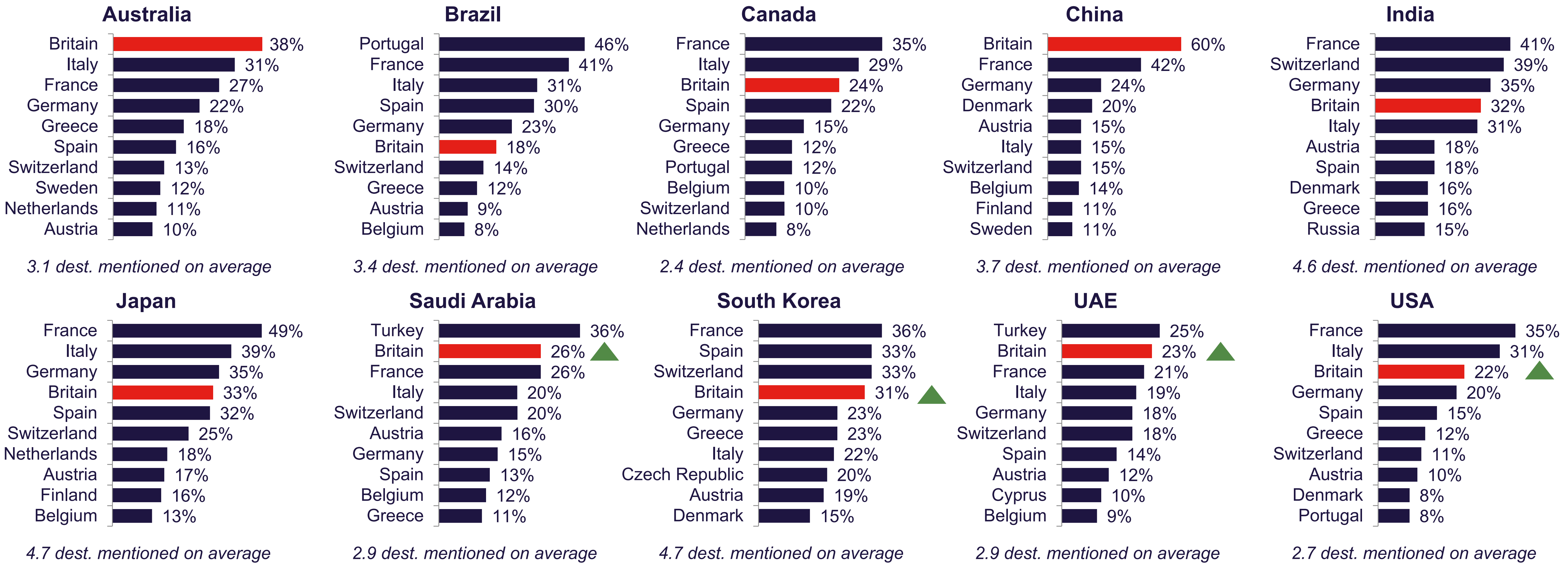
Britain has increased its competitive ranking in France, Spain and Germany. A drop of intentions or rank is measured in Sweden and the Netherlands. Britain was not considered much in Russia before conflict with Ukraine started.



Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking a European leisure trip in the next 12 months (n=6,411)

Top European destinations for travelers in LH markets

The competitive position of Britain is steady in all LH markets and has reverted back to 3rd place in the US, in the Gulf markets and in South Korea. Britain remains the favourite destination envisaged in China and Australia.

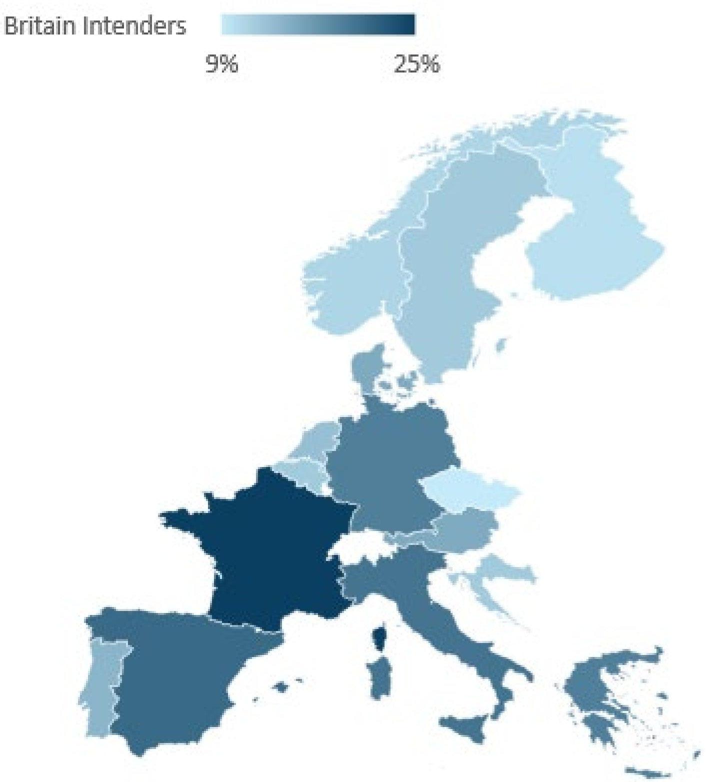


Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking a European leisure trip in the next 12 months (n=6,411)

Other European destinations considered by Britain intenders

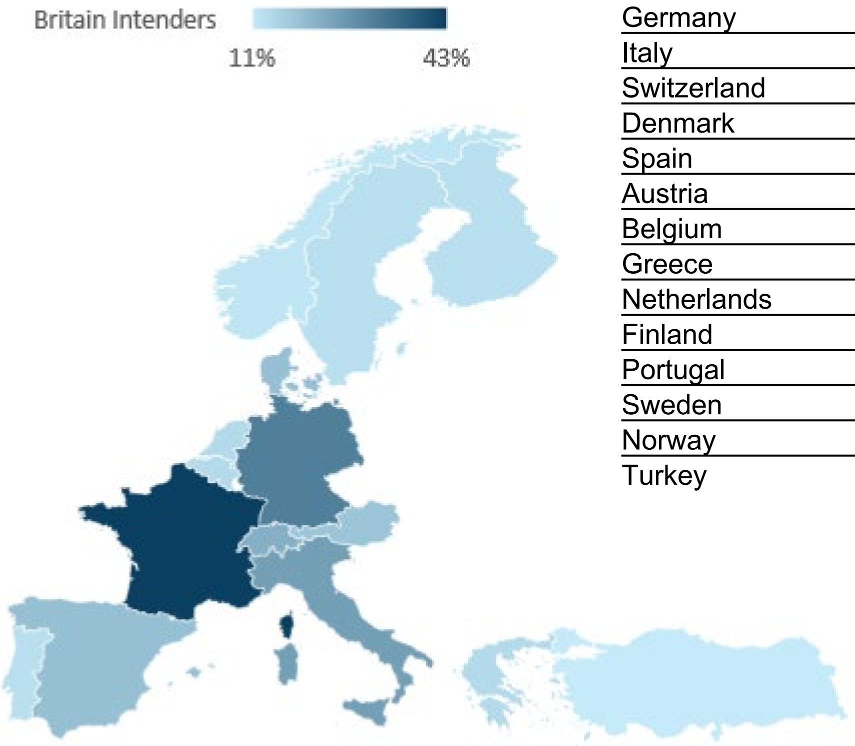
Britain intenders have a broad competitive set in mind, including various European gataways, with France dominating the list of alternatives envisaged from LH and SH markets. Germany, Italy and Switzerland are more present in mind in LH markets while Southern European destinations (Spain, Greece) remain popular in SH markets.

Short Haul Markets



France	25%
Spain	21%
Italy	20%
Germany	19%
Greece	19%
Austria	15%
Denmark	15%
Portugal	14%
Netherlands	13%
Belgium	12%
Croatia	12%
Sweden	12%
Norway	11%
Finland	10%
Czech Republic	9%

Long Haul Markets



France	43%
Germany	31%
Italy	25%
Switzerland	22%
Denmark	19%
Spain	19%
Austria	18%
Belgium	14%
Greece	14%
Netherlands	14%
Finland	13%
Portugal	13%
Sweden	13%
Norway	12%
Turkey	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 = 1,403)

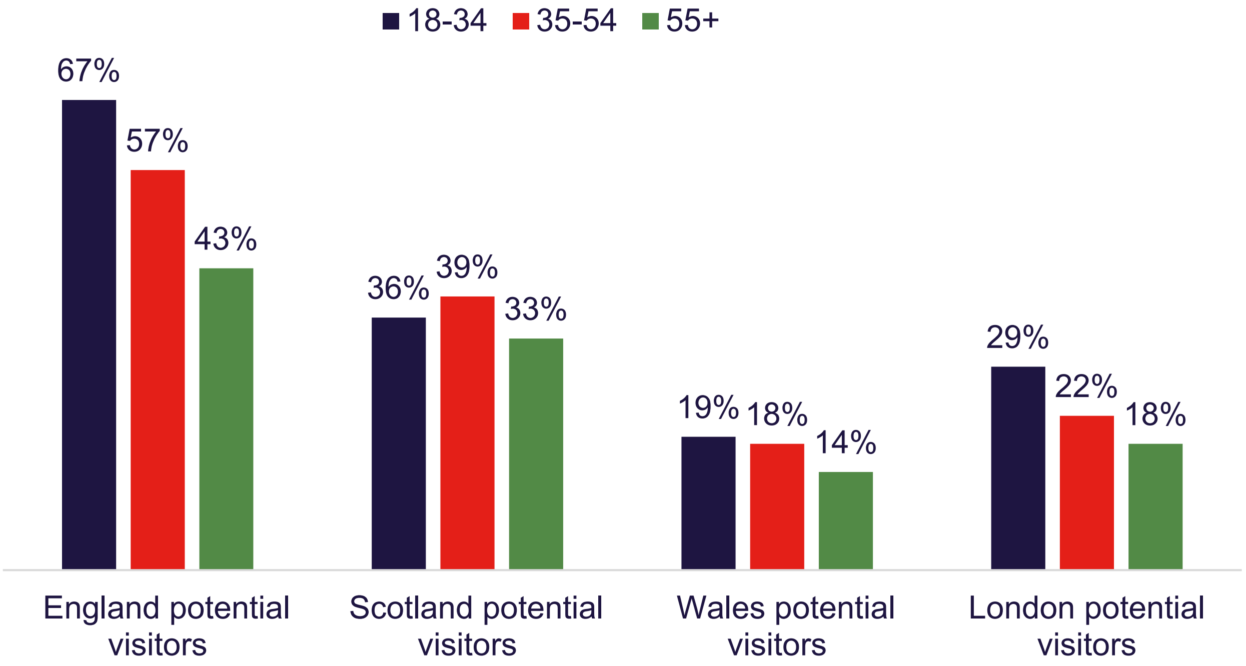
Impact of age and gender on propensity to consider Britain

Reflecting a general pattern for travel overall, age is confirmed to be a driver of visiting Britain, though it appears more obvious for SH markets and 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	13%	13%	14%	13%	11%
SH	10%	11%	12%	10%	8%
LH	16%	14%	15%	15%	15%

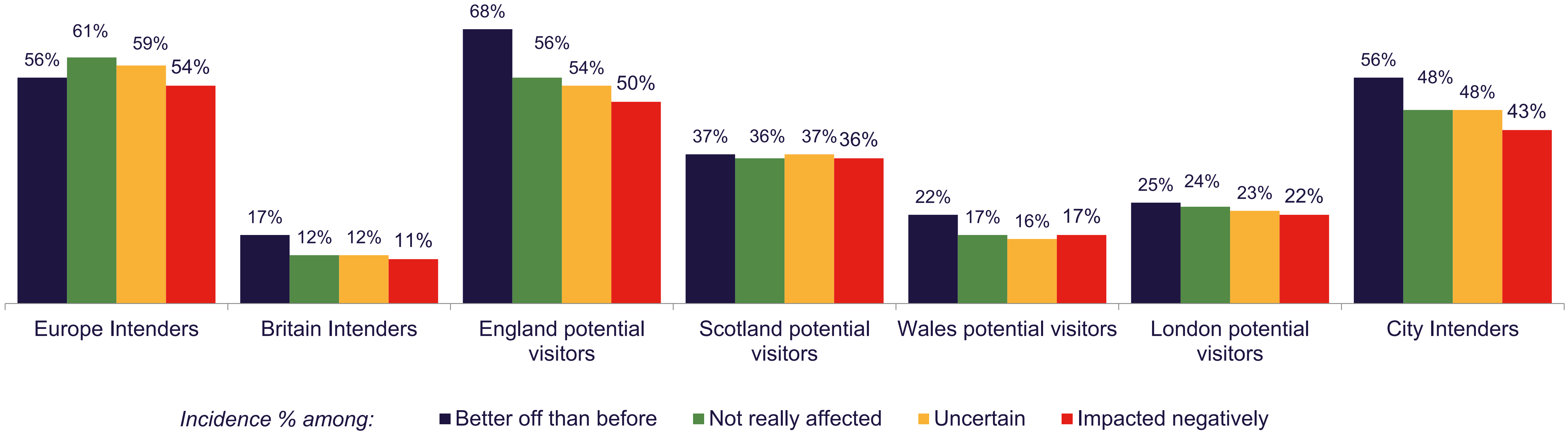
Incidence % among:



Q10. To which destination(s) in Europe in particular?
Base: Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588)

Impact of financial situation on propensity to consider Britain

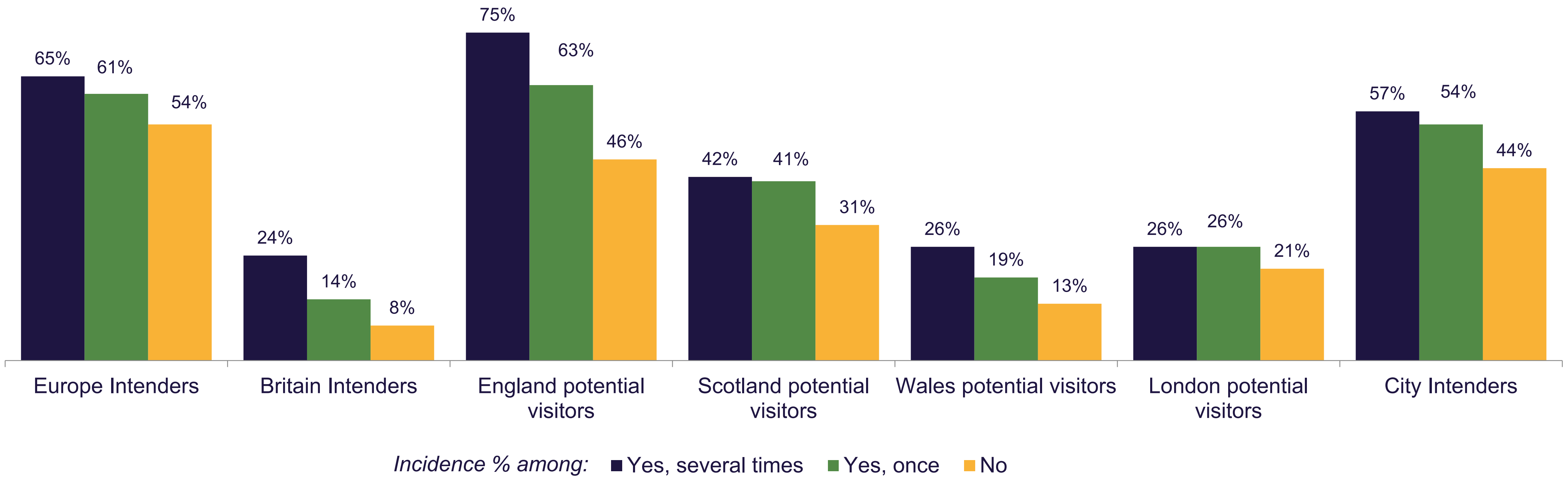
The financial situation is a determinant of travel to England more so than to European destinations, with opportunity confirmed for marketing to affluent travellers who are better off than before. The gap is more visible for potential visitors to England than Scotland or Wales.



Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: Europe Int. (n = 6,411) – Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588) – Large City Int. (n = 5,398)

Impact of previous visit on propensity to consider Britain

Propensity to consider Britain increases with past experiences of the destinations.

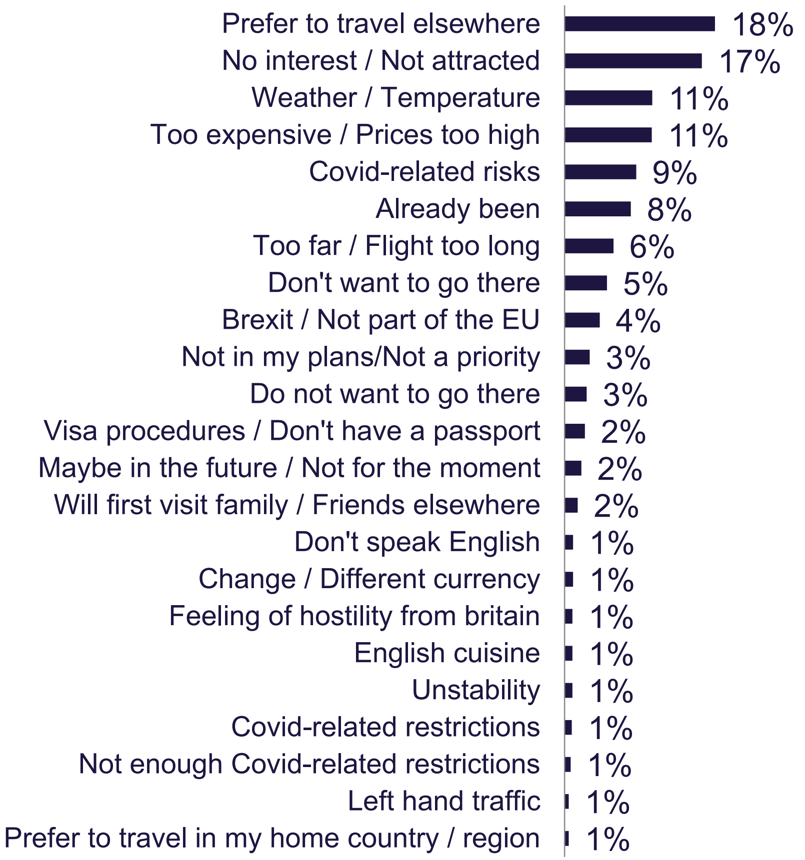


Q27. Have you visited Britain (England, Scotland, Wales) for a leisure trip for more than one night in the past five year?
Base: Europe Int. (n = 6,411) – Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588) – Large City Int. (n = 5,398)

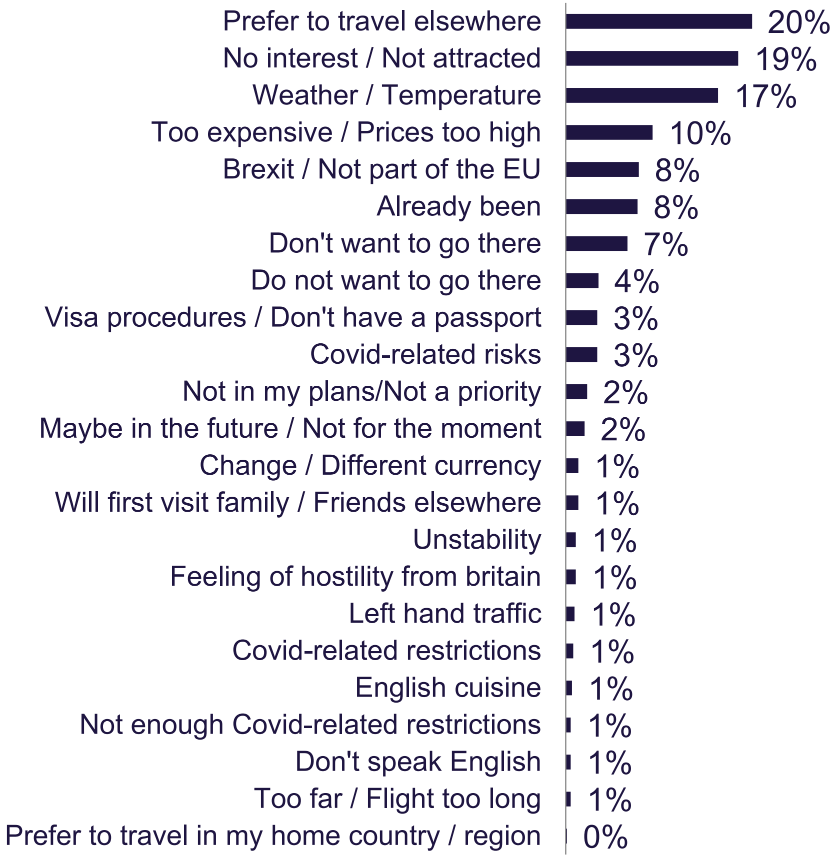
Reasons for not considering a trip in Britain (open end)

The sanitary safety is no longer in the TOP3 reasons for not choosing Britain, however COVID-related risks are still frequently mentioned in LH markets. Other barriers spontaneously mentioned include usual references to the destinations (climate, distance from LH markets, costs, Brexit context) or a basic preference for other destinations. The image of a pricy destination would encourage further promotional actions.

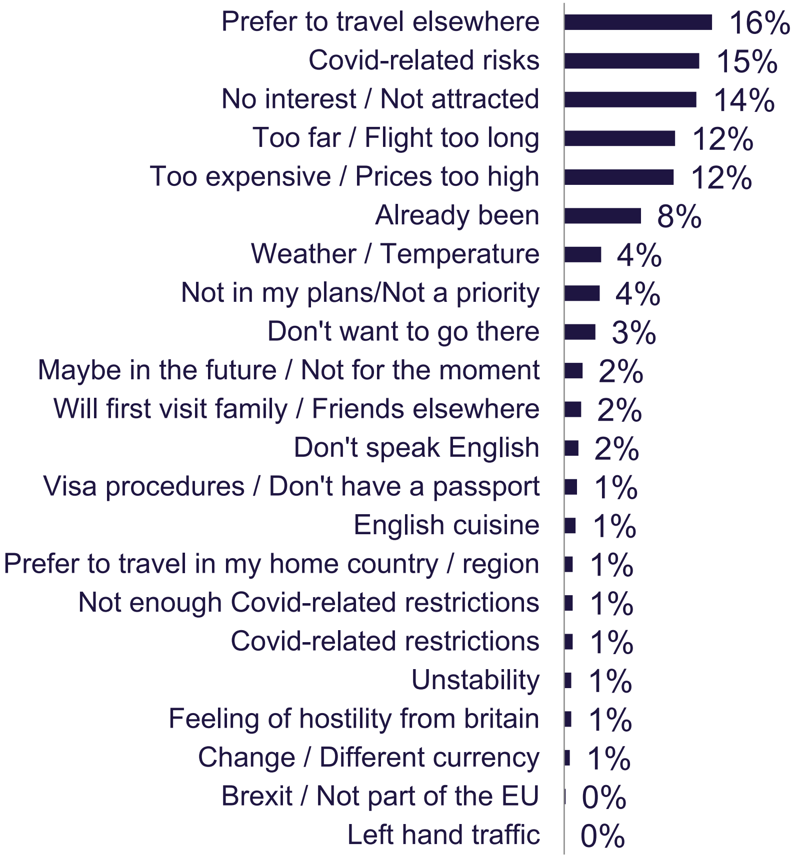
Total



Short Haul



Long Haul



Q11b. Why wouldn't you consider a trip to Britain (England, Scotland, Wales) in the short term? (Open Question)
Base: Respondents who responded "I wouldn't consider a trip to Britain" at Q11a. (n = 1367)

Destinations in Britain considered for a leisure trip (SH)

In SH markets, England remains the top nation on the list for a potential visit to Britain, but Scotland and Wales are still well considered, particularly among French, Germans, Italians and Spaniards. London is considered by nearly 1 in 2 potential SH visitors to England and special affinities exist with markets such as South-Eastern cities considered by Italians, East, South-Eastern and North-Western destinations from Spain

	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
England	57%	51%	46%	49%	45%	57%	60%	48%	57%	45%	52%	46%
Scotland	36%	37%	28%	44%	40%	31%	53%	38%	32%	34%	43%	27%
Wales	18%	13%	7%	14%	14%	12%	20%	14%	10%	14%	13%	8%
I wouldn't consider a trip to Britain	12%	15%	21%	13%	18%	14%	4%	14%	13%	20%	7%	21%
I don't know yet	8%	8%	11%	5%	10%	4%	3%	11%	7%	9%	7%	12%

	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
London	41%	47%	45%	46%	58%	38%	52%	37%	47%	54%	46%	52%
North West (e.g. Manchester, Liverpool, Lake District)	33%	28%	20%	23%	34%	24%	31%	23%	33%	36%	34%	21%
East of England (e.g. Cambridge, Norfolk Broads, Norwich)	30%	21%	14%	22%	18%	17%	28%	20%	16%	23%	31%	22%
South East (e.g. Brighton, Oxford, Kent, Windsor)	29%	28%	24%	30%	28%	20%	40%	22%	25%	27%	32%	26%
East Midlands (e.g. Leicester, Derby, Peak District)	20%	15%	11%	15%	8%	14%	21%	17%	13%	18%	17%	11%
South West (e.g. Bristol, Bath, Devon, Cornwall)	20%	18%	12%	17%	26%	12%	27%	15%	14%	20%	20%	17%
West Midlands (e.g. Birmingham, Stratford Upon Avon, Coventry)	18%	13%	9%	12%	12%	11%	19%	13%	11%	15%	16%	10%
Yorkshire & the Humber (e.g. Leeds, York, Yorkshire Dales)	16%	12%	7%	13%	13%	10%	15%	15%	9%	15%	12%	10%
North East (e.g. Newcastle, Durham)	14%	10%	6%	11%	12%	4%	13%	13%	8%	9%	10%	10%
I don't know yet	10%	9%	13%	14%	6%	7%	5%	13%	12%	9%	5%	11%

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 = 10,954)

Q12: Which destination(s) in England? (Multiple Answers)
Base: Respondents who have chosen England in Q11a (n = 6,246)

Destinations in Britain considered for a leisure trip (LH)

For LH prospects, a possible trip to Britain would include England first but not exclusively, showing an open attitude to visiting multiple destinations across Britain, beyond iconic places. Regarding England, the affinity of China with the Cambridge region is confirmed, while North-West England would attract Gulf markets, Brazil, India and most Asian markets (notably South Korea).

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
England	57%	62%	59%	79%	57%	64%	74%	53%	52%	57%	59%	65%
Scotland	36%	36%	33%	34%	36%	47%	44%	37%	16%	34%	30%	37%
Wales	18%	22%	22%	18%	16%	33%	25%	20%	16%	13%	21%	22%
I wouldn't consider a trip to Britain	12%	11%	17%	4%	16%	5%	4%	23%	15%	18%	8%	8%
I don't know yet	8%	9%	10%	3%	8%	9%	2%	11%	18%	10%	8%	8%

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
London	41%	37%	38%	46%	47%	41%	32%	45%	24%	32%	34%	34%
North West (e.g. Manchester, Liverpool, Lake District)	33%	36%	35%	45%	28%	32%	42%	39%	38%	44%	45%	28%
East of England (e.g. Cambridge, Norfolk Broads, Norwich)	30%	36%	30%	37%	19%	54%	41%	43%	26%	37%	32%	28%
South East (e.g. Brighton, Oxford, Kent, Windsor)	29%	31%	35%	35%	31%	37%	33%	38%	18%	28%	27%	24%
East Midlands (e.g. Leicester, Derby, Peak District)	20%	23%	23%	18%	14%	34%	33%	23%	18%	23%	26%	16%
South West (e.g. Bristol, Bath, Devon, Cornwall)	20%	21%	34%	15%	24%	29%	26%	17%	10%	11%	18%	18%
West Midlands (e.g. Birmingham, Stratford Upon Avon, Coventry)	18%	21%	23%	14%	14%	28%	28%	28%	16%	22%	22%	15%
Yorkshire & the Humber (e.g. Leeds, York, Yorkshire Dales)	16%	18%	24%	13%	16%	24%	27%	18%	11%	15%	19%	13%
North East (e.g. Newcastle, Durham)	14%	17%	16%	12%	15%	24%	19%	11%	16%	16%	25%	14%
I don't know yet	10%	11%	14%	8%	14%	8%	5%	11%	19%	6%	9%	17%

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 = 10,954)

Q12: Which destination(s) in England? (Multiple Answers)
Base: Respondents who have chosen England in Q11a (n = 6,246)

Cities in Britain considered for a leisure trip (SH)

Beyond an obvious interest for capital cities, other lesser-known destinations generate attractiveness, confirming a potential demand for visiting must-see and secondary places in Britain.

		Total	SH	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
England	London	77%	80%	79%	85%	80%	65%	90%	68%	79%	88%	83%	81%
	Liverpool	41%	38%	24%	38%	44%	28%	42%	40%	34%	53%	51%	32%
	Manchester	41%	36%	24%	35%	43%	30%	38%	37%	35%	46%	46%	32%
	Oxford	34%	28%	18%	29%	30%	14%	35%	29%	22%	44%	43%	20%
	Cambridge	33%	26%	14%	28%	32%	13%	31%	28%	16%	46%	43%	15%
	Birmingham	21%	19%	11%	26%	19%	11%	19%	21%	12%	25%	27%	17%
	York	17%	15%	11%	9%	17%	10%	18%	23%	16%	17%	18%	13%
	Brighton	16%	17%	16%	19%	20%	9%	18%	19%	16%	16%	22%	20%
	Bristol	14%	13%	7%	11%	16%	9%	17%	16%	9%	21%	21%	10%
	Bath	11%	10%	9%	7%	8%	9%	10%	15%	12%	8%	10%	10%
	None of these	2%	2%	4%	1%	1%	7%	1%	3%	3%	0%	1%	1%
Scotland	Edinburgh	80%	81%	80%	77%	81%	81%	81%	72%	81%	87%	89%	85%
	Glasgow	62%	56%	43%	68%	61%	45%	58%	67%	50%	57%	53%	52%
	None of these	3%	4%	8%	2%	5%	3%	2%	7%	9%	2%	1%	4%
Wales	Cardiff	76%	78%	79%	85%	72%	70%	87%	83%	65%	76%	84%	61%
	Swansea	60%	50%	50%	34%	58%	41%	41%	66%	53%	58%	46%	66%
	None of these	7%	8%	12%	4%	14%	15%	4%	6%	18%	7%	2%	10%

Q12b. More specifically, which cities in England would you be interested in visiting? (Multiple Answers)
Base: Respondents who have chosen England in Q11a (n = 6,246)

Q12c: More specifically, which cities in Scotland would you be interested in visiting? (Multiple Answers)
Base: Respondents who have chosen Scotland in Q11a (n = 3,984)

Q12d. More specifically, which cities in Wales would you be interested in visiting? (Multiple Answers)
Base: Respondents who have chosen Wales in Q11a (n = 1,917)

Cities in Britain considered for a leisure trip (LH)

The level of curiosity for visiting other places outside British must-see capital cities is also clear in LH markets. Oxford and Cambridge in China and India, for example, have a strong power of seduction. Glasgow also generates interest in many markets.

		Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
England	London	77%	75%	75%	87%	80%	69%	80%	87%	67%	71%	72%	72%
	Liverpool	41%	43%	38%	61%	41%	37%	44%	42%	51%	40%	42%	38%
	Manchester	41%	43%	41%	57%	36%	33%	52%	45%	43%	53%	53%	35%
	Oxford	34%	37%	32%	44%	33%	48%	48%	38%	28%	36%	35%	27%
	Cambridge	33%	38%	33%	37%	33%	50%	51%	40%	28%	39%	38%	28%
	Birmingham	21%	22%	24%	17%	18%	24%	35%	32%	16%	23%	30%	13%
	York	17%	18%	27%	19%	23%	17%	23%	11%	7%	12%	16%	19%
	Brighton	16%	14%	25%	18%	16%	14%	15%	9%	7%	14%	12%	13%
	Bristol	14%	14%	19%	12%	14%	15%	23%	7%	7%	11%	12%	13%
	Bath	11%	12%	27%	6%	15%	15%	9%	8%	5%	6%	10%	13%
	None of these	2%	1%	3%	0%	2%	0%	0%	4%	0%	1%	0%	1%
Scotland	Edinburgh	80%	79%	88%	79%	77%	86%	74%	79%	64%	83%	63%	77%
	Glasgow	62%	66%	66%	69%	71%	66%	69%	62%	62%	54%	64%	69%
	None of these	3%	3%	3%	2%	2%	2%	1%	7%	5%	3%	4%	3%
Wales	Cardiff	76%	75%	77%	77%	86%	74%	84%	71%	72%	78%	68%	74%
	Swansea	60%	65%	66%	69%	58%	77%	66%	49%	55%	66%	56%	60%
	None of these	7%	6%	8%	5%	4%	2%	2%	19%	4%	3%	5%	9%

Q12b. More specifically, which cities in England would you be interested in visiting? (Multiple Answers)
Base: Respondents who have chosen England in Q11a (n = 6,246)

Q12c: More specifically, which cities in Scotland would you be interested in visiting? (Multiple Answers)
Base: Respondents who have chosen Scotland in Q11a (n = 3,984)

Q12d. More specifically, which cities in Wales would you be interested in visiting? (Multiple Answers)
Base: Respondents who have chosen Wales in Q11a (n = 1,917)

Comfort levels with transport to get to Britain (SH)

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

(% Very + Quite comfortable)	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
Plane – via nonstop flight	91%	92%	91%	91%	86%	94%	93%	87%	92%	99%	96%	92%
Plane – via connecting flight	79%	75%	68%	75%	68%	76%	86%	82%	64%	69%	81%	78%
Own/rented vehicle – via Ferry	51%	48%	36%	54%	59%	66%	59%	60%	34%	26%	43%	38%
Own/rented vehicle – via Channel Tunnel	51%	46%	40%	56%	60%	53%	49%	59%	31%	31%	43%	39%
On foot – via Eurostar/Train	49%	43%	29%	62%	46%	50%	52%	58%	26%	13%	53%	36%
Coach – via Channel Tunnel	47%	39%	34%	54%	40%	42%	46%	47%	25%	33%	38%	32%
Coach – via Ferry	46%	39%	34%	55%	39%	47%	48%	46%	25%	26%	36%	31%
On foot – via Ferry	45%	41%	27%	58%	44%	63%	47%	50%	29%	13%	38%	33%

Q13: If you were to travel to Britain in the next 12 months, how comfortable would you feel using the following to get to Britain? (Multiple Answers)
Base: Respondents choosing either England, Scotland or Wales in Q11a (n = 8,671)

Comfort levels with transport to get to Britain (LH)

LH markets would feel comfortable using all types of transportation means to get to Britain including car rental (except for the Japanese) and Eurostar/Train as part of a possible trip involving multiple countries.

(% Very + Quite comfortable)	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Plane – via nonstop flight	91%	90%	77%	94%	92%	91%	90%	95%	97%	91%	89%	89%
Plane – via connecting flight	79%	82%	78%	83%	77%	75%	92%	70%	84%	81%	83%	88%
Own/rented vehicle – via Ferry	51%	54%	53%	48%	52%	63%	57%	29%	50%	48%	58%	58%
Own/rented vehicle – via Channel Tunnel	51%	55%	58%	52%	52%	64%	57%	30%	52%	50%	58%	59%
On foot – via Eurostar/Train	49%	54%	53%	45%	55%	61%	54%	48%	48%	43%	55%	59%
Coach – via Channel Tunnel	47%	53%	53%	42%	53%	62%	60%	26%	47%	41%	60%	59%
Coach – via Ferry	46%	51%	51%	37%	50%	62%	61%	25%	46%	36%	55%	59%
On foot – via Ferry	45%	48%	50%	31%	51%	61%	48%	31%	39%	29%	49%	56%

Q13: If you were to travel to Britain in the next 12 months, how comfortable would you feel using the following to get to Britain? (Multiple Answers)
Base: Respondents choosing either England, Scotland or Wales in Q11a (n = 8,671)

Perception of transport modes within Britain (SH)

The increased level of trust in public and collective transportation means is favorable for exploring rural and urban environments and planning multiple destinations within Britain, be that travelling on their own or via transportation means at their disposal. The preference for using their own car is still high in Ireland, the Netherlands, France and Germany. The positive sentiment in considering trains for journeys within Britain resonates well with the search for sustainable transports.

% of Consideration	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
Public transport - Train	46%	49%	52%	51%	38%	51%	52%	45%	59%	45%	37%	61%
Public transport - Tube/subway	44%	44%	41%	49%	36%	40%	55%	39%	46%	41%	36%	56%
Rented car/vehicle	38%	37%	39%	42%	36%	34%	44%	30%	31%	41%	33%	36%
Public transport - Bus	37%	41%	42%	46%	32%	39%	52%	32%	40%	48%	30%	52%
Domestic flight	36%	30%	22%	31%	18%	46%	37%	23%	27%	25%	40%	27%
Taxi	30%	30%	20%	26%	17%	38%	42%	22%	37%	33%	16%	47%
Own car vehicle	29%	33%	28%	38%	41%	49%	27%	46%	27%	19%	26%	27%
Uber/other sharing app	24%	16%	8%	21%	10%	17%	23%	15%	13%	16%	13%	27%
Private coach/minibus	21%	17%	15%	16%	14%	21%	25%	19%	13%	23%	11%	11%

Q14. Thinking about travelling within Britain, which of the following would you be comfortable with? (Multiple Answers)
Base: Respondents selecting England, Scotland or Wales in Q11a (n = 8,671)

Perception of transport modes within Britain (LH)

Among LH markets, there are still no particularly “new” or unusual obstacles in using / combining various types of transportation at destination, including public transport or taxi services.

% of Consideration	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Public transport - Train	46%	44%	48%	50%	54%	31%	45%	71%	41%	36%	42%	41%
Public transport - Tube/subway	44%	43%	41%	51%	49%	38%	41%	58%	38%	46%	44%	39%
Rented car/vehicle	38%	38%	49%	56%	51%	29%	42%	25%	31%	36%	35%	36%
Public transport - Bus	37%	34%	37%	35%	41%	29%	36%	49%	26%	31%	39%	29%
Domestic flight	36%	40%	48%	50%	47%	36%	51%	7%	38%	22%	36%	48%
Taxi	30%	31%	32%	37%	39%	28%	33%	33%	23%	23%	26%	32%
Own car vehicle	29%	26%	35%	26%	24%	38%	24%	7%	23%	13%	29%	27%
Uber/other sharing app	24%	30%	25%	52%	26%	26%	39%	11%	30%	22%	33%	29%
Private coach/minibus	21%	24%	28%	20%	30%	22%	30%	25%	14%	16%	22%	29%

Q14. Thinking about travelling within Britain, which of the following would you be comfortable with? (Multiple Answers)
Base: Respondents selecting England, Scotland or Wales in Q11a (n = 8,671)

Planned booking channels for an international trip (SH)

Coming back to pre-pandemic attitudes, travellers consider a large variety of channels to plan their next trip. Online travel agents/tour operators and travel comparison websites are popular channels reassuring some consumers in the still uncertain travel scenario for some. Official destination websites, transport and accommodation providers play a significant role in the booking process across most markets.

	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
Through a travel agent/tour operator online	36%	34%	45%	22%	41%	17%	25%	39%	40%	41%	25%	40%
A travel comparison website	36%	35%	31%	37%	38%	27%	55%	22%	33%	24%	43%	44%
Direct with airline/train/ferry operator	32%	31%	26%	22%	23%	44%	26%	29%	45%	24%	32%	39%
Direct from the official website of the destination	28%	25%	15%	25%	20%	35%	24%	29%	21%	25%	30%	24%
Direct with accommodation provider	27%	29%	23%	27%	37%	40%	20%	39%	23%	25%	31%	24%
Through a travel agent/tour operator at a storefront	25%	22%	14%	19%	25%	13%	17%	24%	15%	44%	23%	21%
Through friends and family in the in the destination country	14%	11%	6%	13%	11%	9%	9%	15%	11%	9%	13%	10%

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 = 10,954)

Planned booking channels for an international trip (LH)

The role of expert intermediaries is higher in LH markets (online and at a storefront in China and India). Direct booking with airlines and accommodation providers remain key in North America, while the large share of VFR travel intentions gives friends and relatives a significant role, notably for visitors from India, China and the Gulf markets. Brazil, Japan and South Korea rely a lot on comparison websites. In Australia, a wide array of channels are considered addressing needs of both independent travellers and consumers looking for intermediaries.

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Through a travel agent/tour operator online	36%	38%	33%	44%	28%	46%	42%	43%	28%	48%	35%	32%
A travel comparison website	36%	36%	28%	61%	33%	30%	47%	55%	27%	46%	25%	28%
Direct with airline/train/ferry operator	32%	32%	34%	43%	33%	25%	37%	30%	33%	23%	37%	34%
Direct from the official website of the destination	28%	31%	24%	37%	26%	42%	41%	18%	31%	21%	29%	30%
Direct with accommodation provider	27%	26%	35%	26%	30%	19%	30%	24%	14%	33%	24%	30%
Through a travel agent/tour operator at a storefront	25%	29%	28%	36%	26%	32%	34%	34%	25%	29%	23%	23%
Through friends and family in the in the destination country	14%	17%	13%	15%	12%	21%	31%	7%	19%	12%	23%	16%

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 = 10,954)

Planned booking channels for a trip to Britain

Options for using or combining diverse booking channels during the booking process prevail (including personal contacts in the UK). Therefore, destinations are encouraged to continue providing consistent promotional and informative content throughout all channels, particularly as travellers still have concerns around changing constraints and possible high level of administrative requirements. The role of official websites remains a key element of the journey planning in this respect.

	Total	SH	LH
A travel comparison website	45%	42%	46%
Through a travel agent/tour operator online	43%	33%	49%
Direct with airline/train/ferry operator	40%	45%	37%
Direct from the official website of the destination	38%	29%	43%
Direct with accommodation provider	33%	36%	31%
Through a travel agent/tour operator at a storefront	28%	20%	32%
Through friends and family in the destination country	19%	15%	21%

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1,403)

Planned booking channels for a trip to Britain by age

Travel comparison websites and official destinations' websites are again the most 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 confirmed to be a top choice among younger generations in LH markets.

SH markets

	18-34	35-54	55+
Direct with airline/train/ferry operator	45%	41%	50%
A travel comparison website	50%	45%	25%
Direct with accommodation provider	35%	37%	37%
Through a travel agent/tour operator online	30%	35%	34%
Direct from the official website of the destination	31%	30%	24%
Through a travel agent/tour operator at a storefront	22%	18%	19%
Through friends and family in the in the destination country	20%	13%	11%

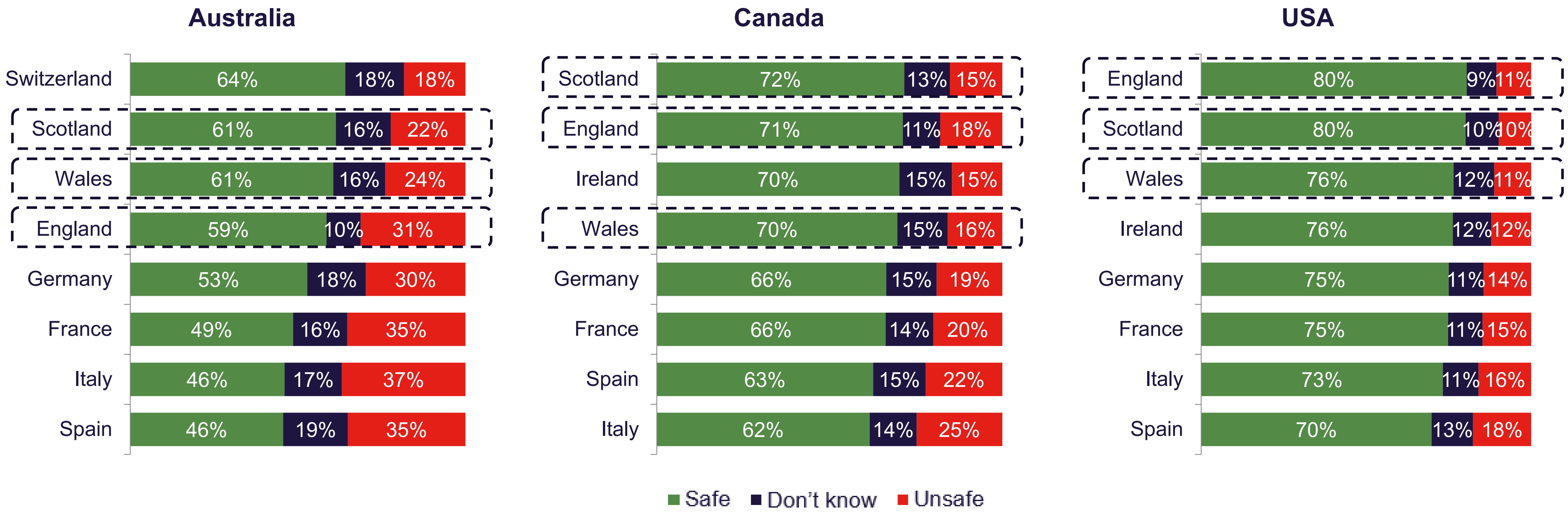
LH markets

	18-34	35-54	55+
Through a travel agent/tour operator online	53%	53%	35%
A travel comparison website	53%	52%	24%
Direct from the official website of the destination	50%	47%	25%
Direct with airline/train/ferry operator	37%	38%	33%
Through a travel agent/tour operator at a storefront	35%	35%	22%
Direct with accommodation provider	30%	29%	36%
Through friends and family in the in the destination country	24%	22%	12%

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1,403)

COVID-19 safety perception (1)

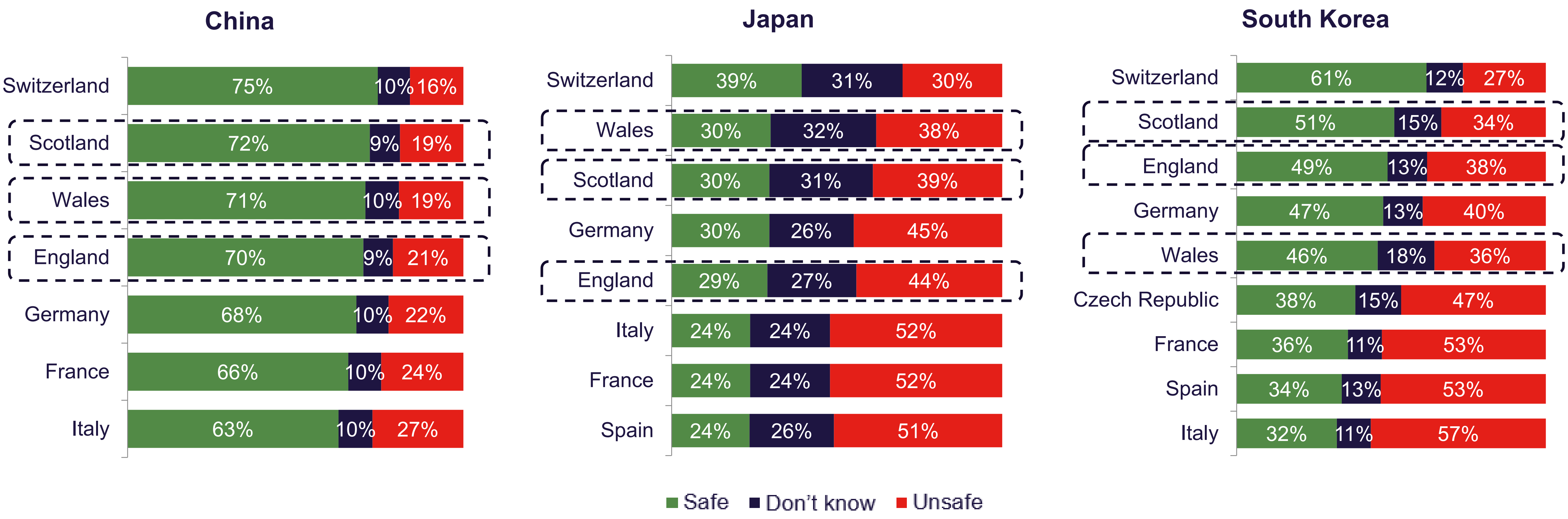
In North America and Australia, British destinations consolidate on a safer image compared to other large competitive destinations in Europe, such as France, Italy or Spain. England now matches the level of positivity of other British destinations in North America.



Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All respondents (n = 11,057)

COVID-19 safety perception (2)

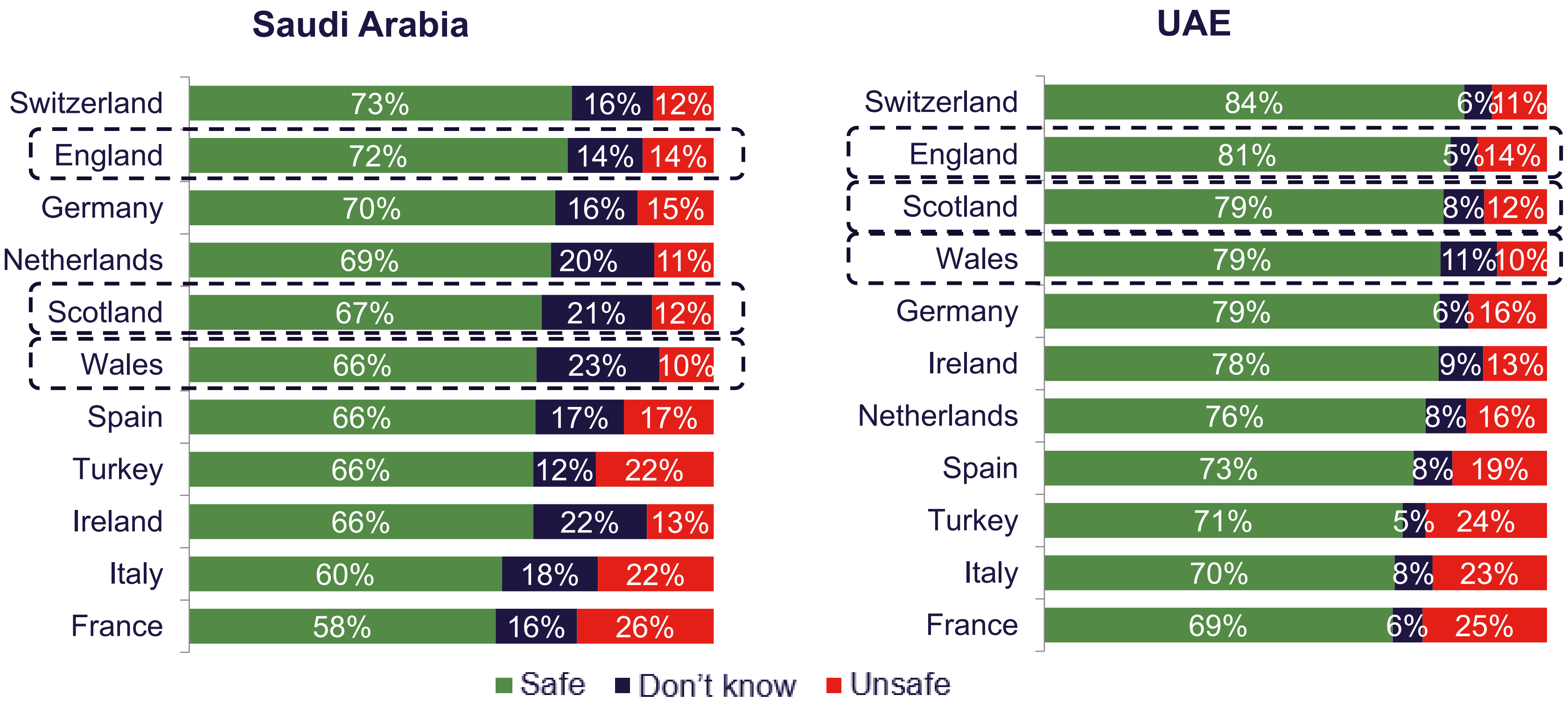
In Asian markets, the image of Britain with COVID-19 is consistent and competitive, only Switzerland and Germany tend to generate (slightly) better perceptions. In Japan, perceptions are still showing mixed feeling, however, the share of respondents rating Britain as unsafe in the context of the pandemic is not dominant anymore.



Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All respondents (n = 11,057)

COVID-19 safety perception (3)

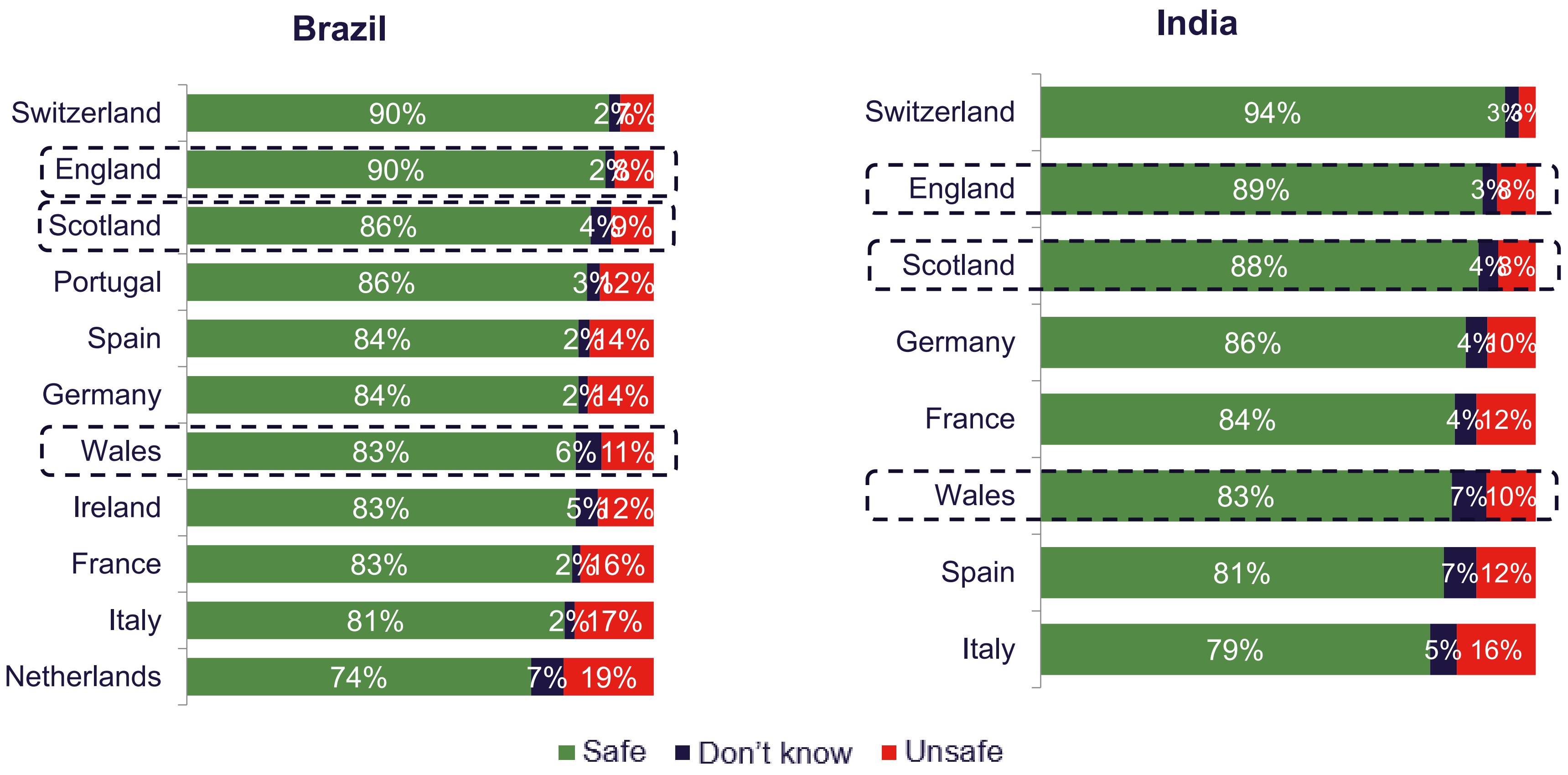
The COVID-19 safety image of Britain is positive in Saudi Arabia and the UAE. Switzerland benefits from the best image in this region of the world, however, British destinations are seen as safe in absolute value by the majority of respondents.



Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All respondents (n = 11,057)

COVID-19 safety perception (4)

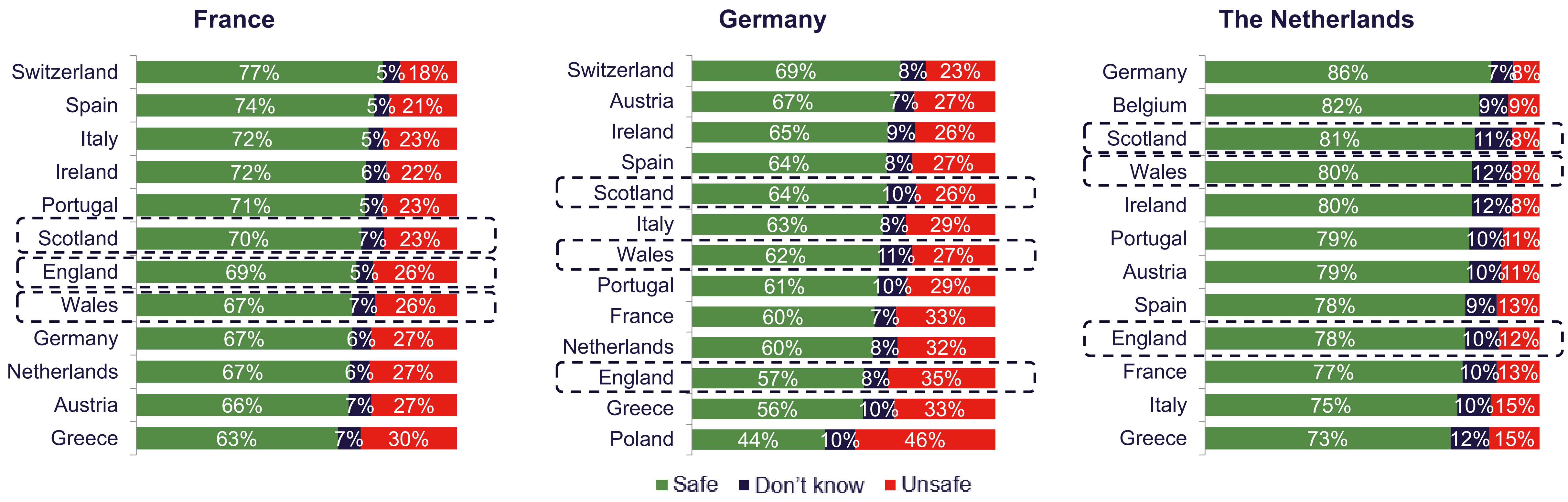
Britain's image in Brazil and India in relation to the COVID-19 safety is positive and competitive vs other large European destinations usually visited from those markets. Switzerland is again receiving the best rating in this aspect.



Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All respondents (n = 11,057)

COVID-19 safety perception (5)

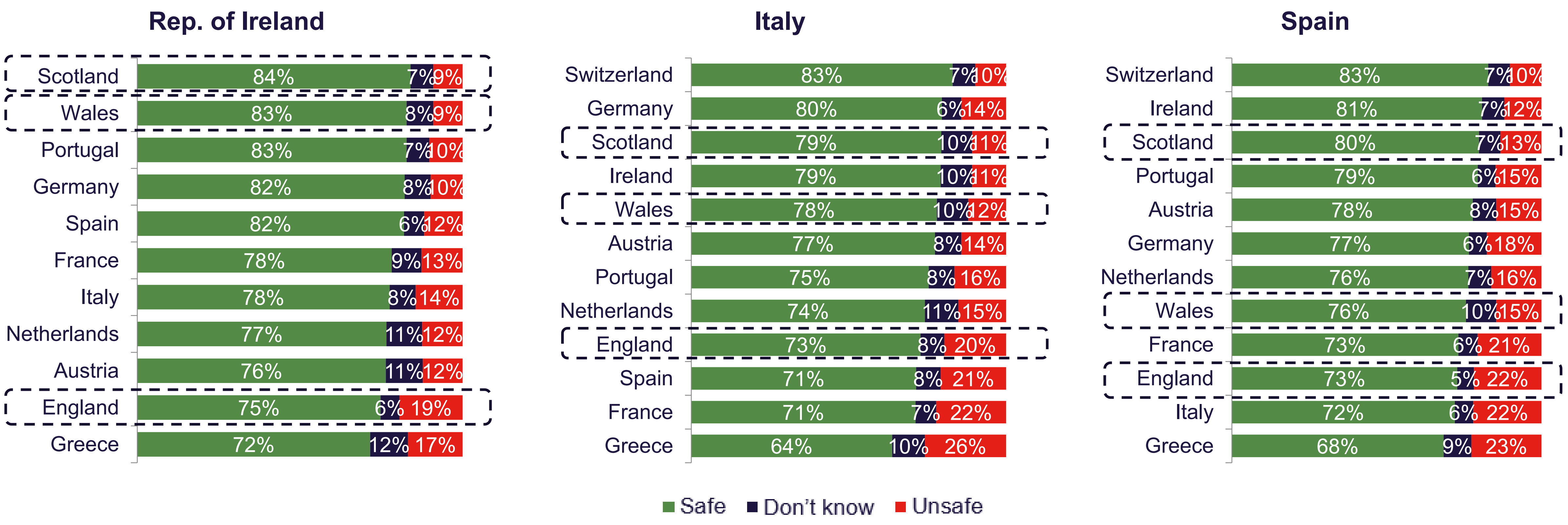
A perception gap between England and the other destinations in Britain still exists in Germany and the Netherlands. The image of British destinations has improved further in those markets and remains in a good average compared to the competition.



Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All respondents (n = 11,057)

COVID-19 safety perception (6)

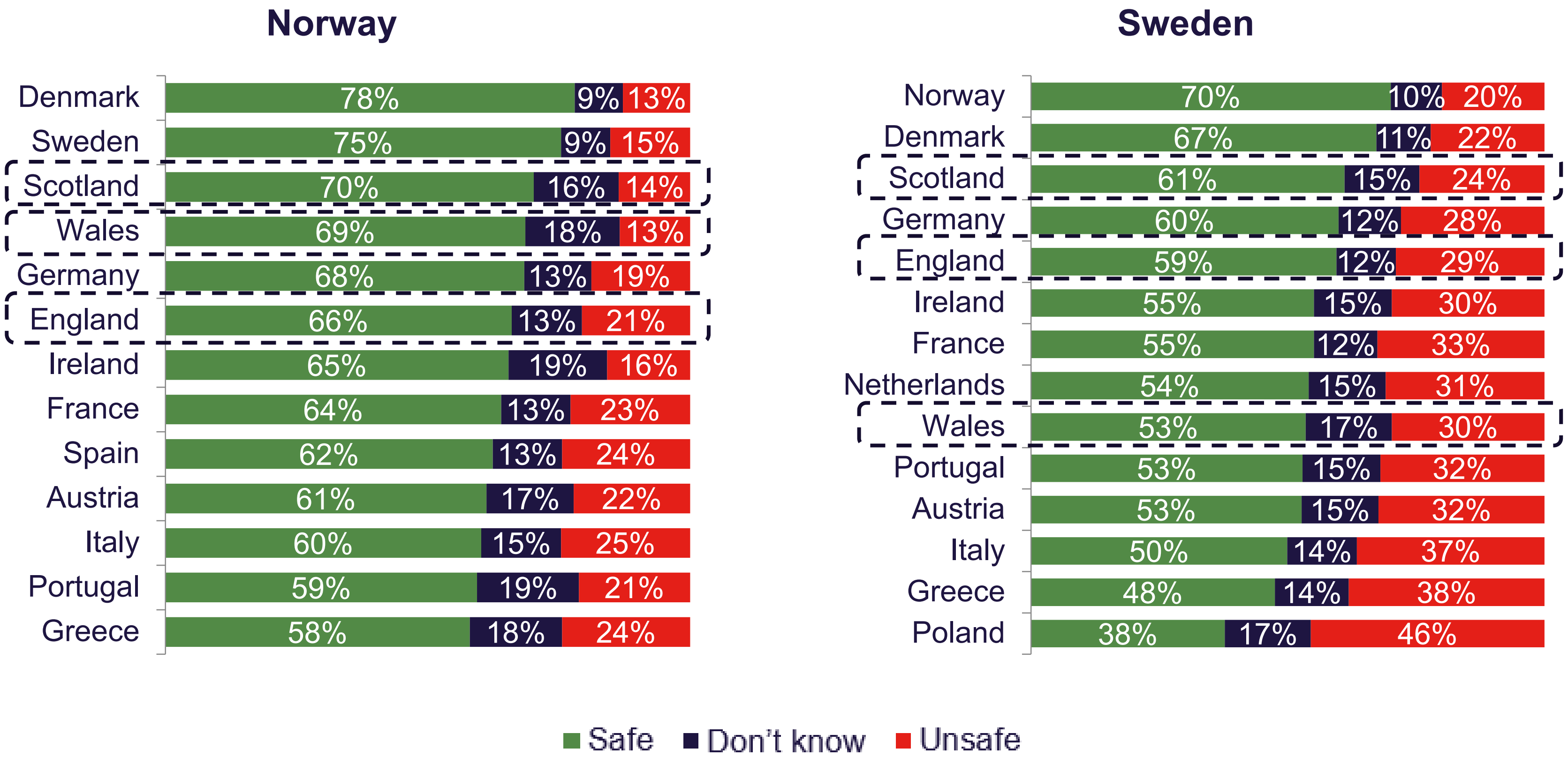
Perceptions in the Republic of Ireland, Italy and Spain are still positive but other destinations such as Switzerland, Austria, Germany and Ireland are also seen as safer than England today.



Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All respondents (n = 11,057)

COVID-19 safety perception (7)

The image of British destinations (notably England) has widely improved in Norway and Sweden, even if neighboring Nordic countries generate the best levels of trust today.

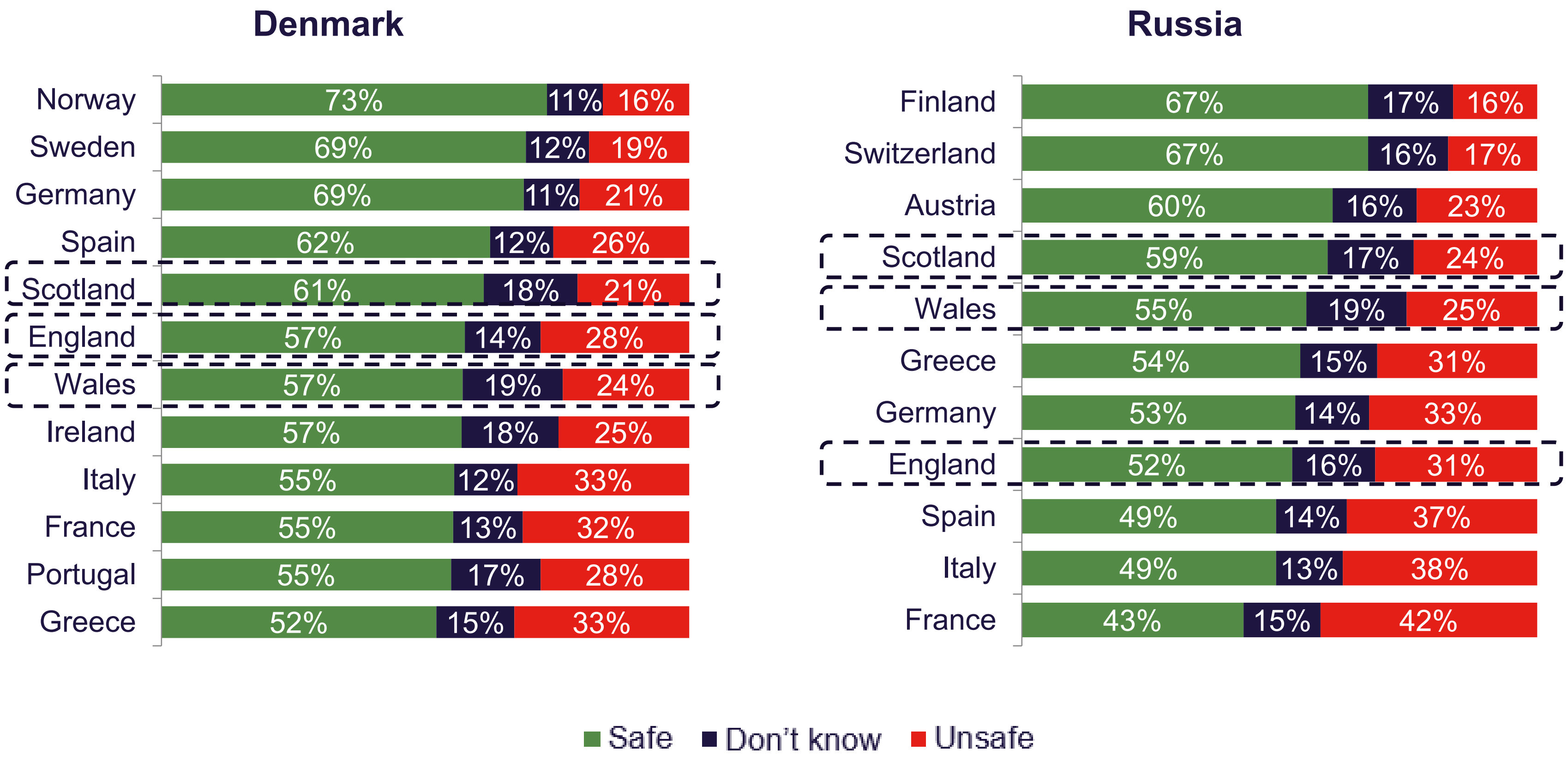


Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All respondents (n = 11,057)

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

COVID-19 safety perception (8)

In Russia, the gap between England and the other British destinations is more marked, while perceptions in Denmark match the Nordic trend.



Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All respondents (n = 11,057)


River Conwy: ©VisitBritain/ Bob Radlinski

Travel Preferences

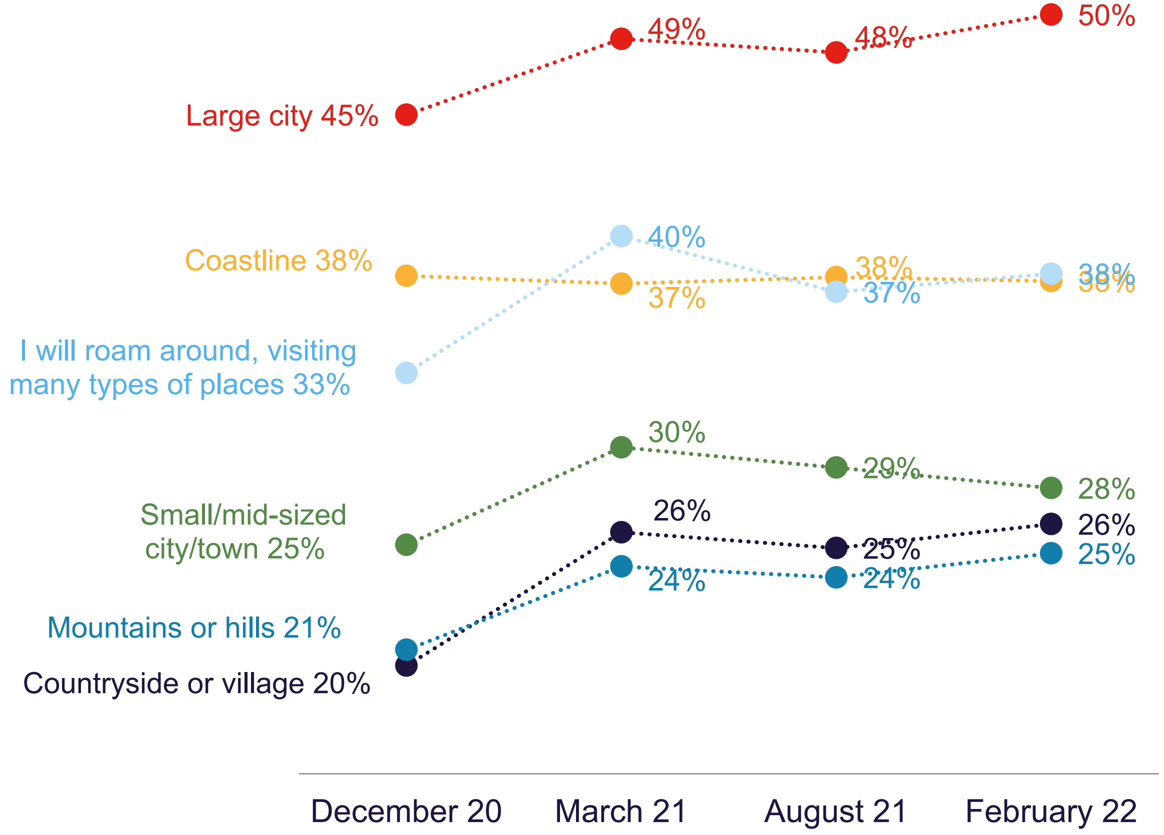
Travel preferences: summary

- The “return to normal” in destination experience is tangible though the increase of interest expressed for all types of activities, including events (cultural, sportive…) and visits to popular / iconic attractions in and outside large cities.
- Visiting large cities and coastal areas are still top of mind in SH markets, while roaming around is also very well considered. Given the strong position of Britain in the mind of LH markets looking for roaming around, opportunities of promoting multiple Britain destinations / tours are confirmed.
- The progressive return to many pre-pandemic behaviours now makes travellers envisage all types of activities including those considered at risk COVID-wise in a recent past (large shows, events, immersive socialising activities, highly frequented attractions, dining and nightlife…). Dining out has returned to being a dominant activity envisaged, growing strongly in interest.
- An even greater range of experiences is mentioned by most LH markets who still consider visiting iconic tourist attractions in priority.
- Potential visitors to Britain express higher interest than average in engaging in lively cultural and sportive events during their journey.
- While travel confidence grows, fewer travellers look for being hosted by friends and families and like the idea of connecting again to locals via Bed & Breakfast, while hotel chains remain a preferred choice overall.
- Britain intenders would look for a large variety of options including hotel chains and boutique properties, but also B&Bs, historic houses and private rentals. London intenders are again particularly drawn to (boutique) hotels. Potential visitors to Scotland and Wales confirm high levels of interest for lodging in historic houses/castles.
- Couples (with or without children) still dominate in travel cells envisaged, however solo and travel with friends generate further interest in many markets. Tour groups continue to be low in consideration across markets.

Data trends

The “return to normal” in destination experience is tangible though the increase in interest expressed for all types of activities, including events (cultural, sportive…) and visits to popular / iconic attractions in and outside large cities.

Main types of destinations envisaged



Interest level in activities (W4/W3 Evol. - gap of %)

Trend calculated at constant perimeter (13 markets consolidated)

Main destination types for an international leisure trip (SH)

Visiting large cities and coastal areas are still top of mind in SH markets, while roaming around is also popular, notably among Italians. Germans continue to express the highest interest in coastal experiences, Italians and Spaniards are massively considering city breaks.

	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
Large city	49%	46%	41%	43%	30%	47%	63%	38%	52%	35%	60%	49%
I will roam around, visiting many types of places	41%	34%	31%	36%	30%	24%	53%	36%	33%	52%	23%	24%
Coastline	37%	37%	34%	33%	52%	37%	32%	32%	43%	48%	22%	37%
Small/mid-sized city/town	29%	26%	22%	24%	23%	21%	32%	25%	27%	24%	33%	26%
Countryside or village	26%	20%	20%	20%	19%	23%	20%	25%	22%	12%	14%	20%
Mountains or hills	26%	20%	23%	14%	22%	18%	24%	31%	11%	24%	22%	13%
I'm not sure	6%	6%	8%	7%	6%	5%	3%	6%	7%	2%	5%	7%

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 = 10,954)

Main destination types for an international leisure trip (LH)

Beyond a large and growing demand for visiting large cities across LH markets (less obvious though for Saudi Arabia and Australians), a desire to roam around is steady, notably in Brazil, South Korea, Japan and Gulf markets. Given the strong position of Britain in mind of long-haul markets, opportunities of promoting multiple British destinations / tours is confirmed.

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Large city	49%	52%	41%	62%	46%	57%	60%	63%	39%	52%	47%	51%
I will roam around, visiting many types of places	41%	46%	43%	60%	42%	49%	45%	46%	43%	50%	47%	41%
Coastline	37%	37%	34%	24%	32%	48%	43%	32%	40%	35%	34%	34%
Small/mid-sized city/town	29%	32%	25%	40%	26%	38%	29%	45%	22%	29%	33%	27%
Countryside or village	26%	32%	33%	27%	27%	36%	40%	21%	37%	19%	41%	30%
Mountains or hills	26%	30%	27%	35%	20%	30%	55%	18%	33%	15%	44%	30%
I'm not sure	6%	5%	11%	2%	10%	6%	2%	7%	4%	2%	1%	7%

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 = 10,954)

Main destination types for a leisure trip in Britain

Britain intenders express further interest in visiting lively urban environment as well as roaming around for visiting many types of places (particularly among potential visitors to Wales and Scotland).

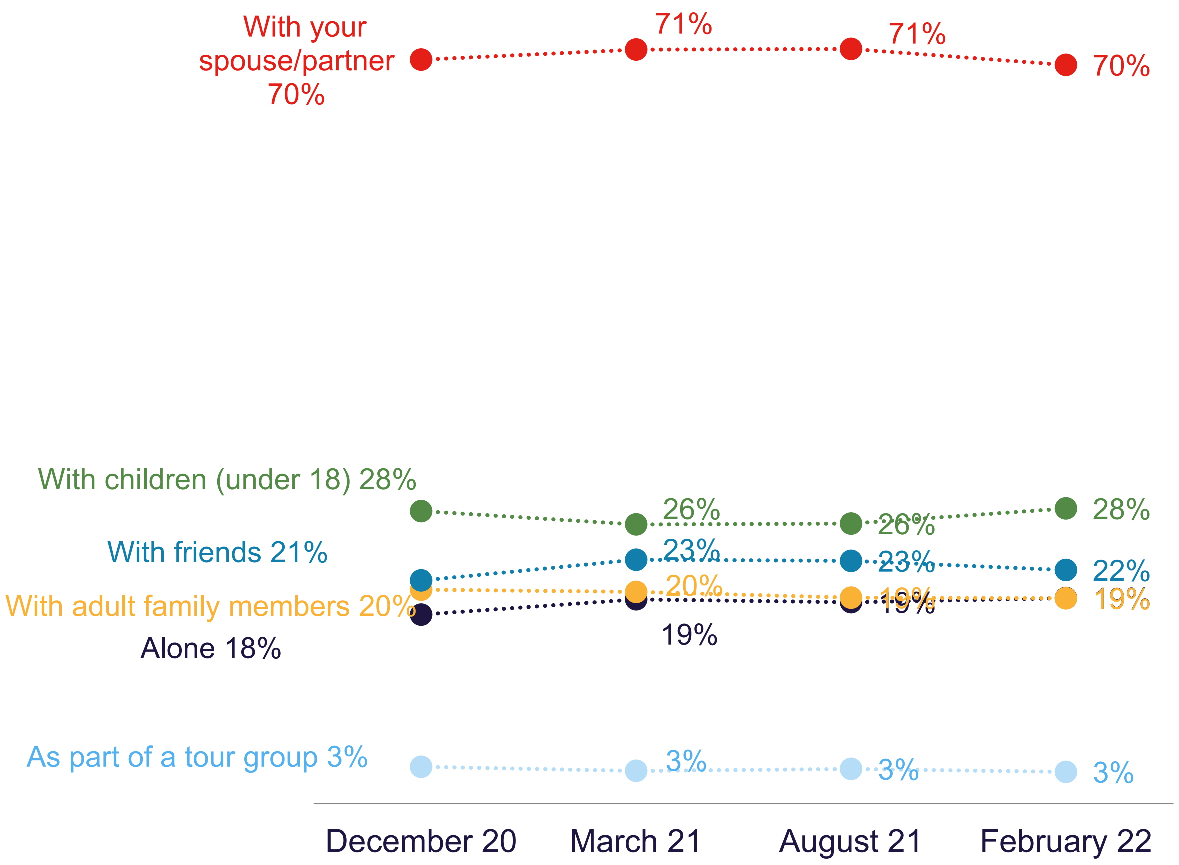
	Europe Intenders	Britain Intenders	England pot. visitors	Scotland pot. visitors	Wales pot. visitors	London pot. visitors
Large city	52%	68%	62%	52%	56%	71%
I will roam around, visiting many types of places	41%	50%	43%	50%	55%	44%
Coastline	38%	40%	36%	43%	49%	37%
Small/mid-sized city/town	31%	41%	32%	39%	44%	30%
Countryside or village	27%	37%	28%	37%	44%	25%
Mountains or hills	26%	32%	27%	37%	44%	25%
I'm not sure	4%	3%	3%	4%	4%	3%

Q15: Which of the following best describes the main types of destination where you are likely to stay during your next international leisure trip? (Multiple Answers)
Base: Europe Int. (n = 6,411) – Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588)

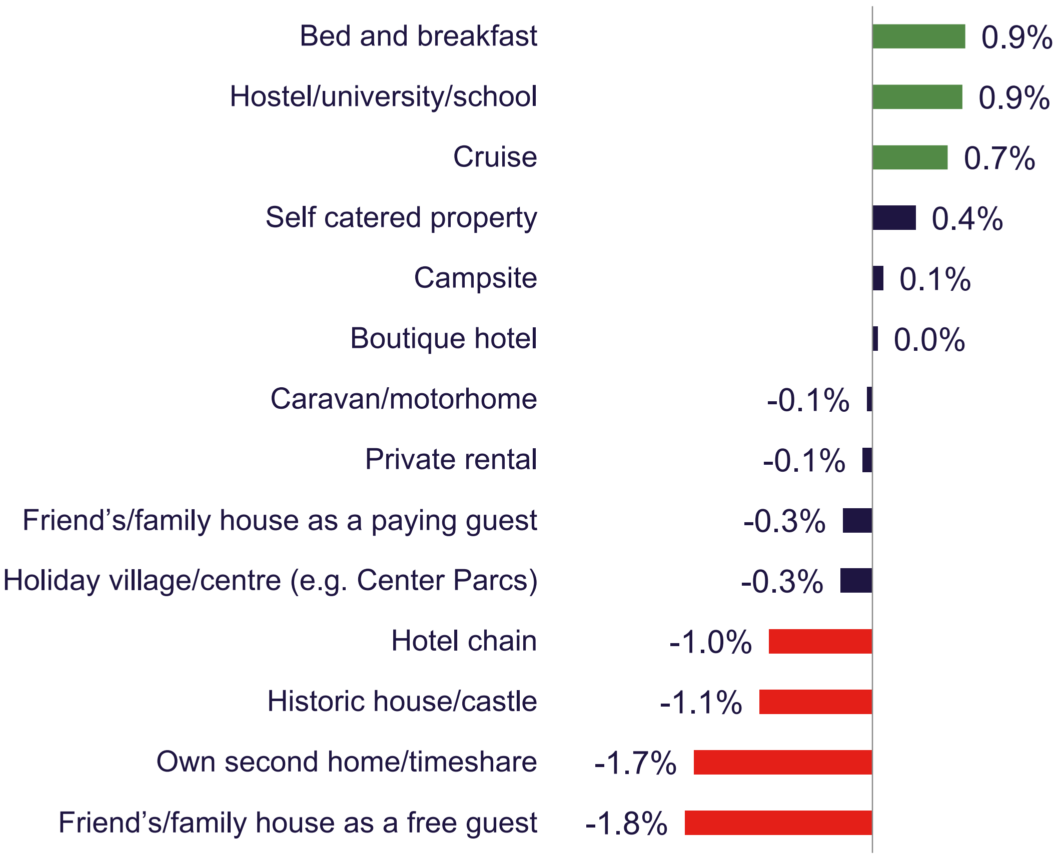
Data trends

While a back to pre-pandemic attitude is established, fewer travellers look for being hosted by friends and families and like the idea of connecting to locals again via Bed & Breakfast

Travel party



Accommodation (W4/W3 Evol. - gap of %)



Trend calculated at constant perimeter (13 markets consolidated)

Travel party for an international leisure trip (SH)

Couples (with or without children) still dominate while tour groups remain very low in consideration across markets. Travelling with friends or solo is more envisaged in Nordic markets. Sweden and Norway seem quite enthusiastic in planning several trips with diverse travel companions.

	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
With your spouse/partner	69%	69%	59%	72%	70%	67%	70%	67%	66%	68%	76%	70%
With children (under 18)	29%	26%	19%	31%	22%	31%	21%	29%	28%	23%	26%	30%
With friends	22%	26%	22%	16%	23%	17%	27%	24%	39%	23%	28%	37%
With adult family members	20%	21%	24%	18%	14%	16%	15%	21%	32%	17%	22%	33%
Alone	19%	20%	18%	11%	19%	21%	14%	27%	27%	13%	18%	30%
As part of a tour group	3%	4%	4%	1%	1%	1%	2%	4%	5%	8%	4%	7%

Q18: Would you envisage traveling… (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)

Travel party for an international leisure trip (LH)

Family trips are particularly considered in Gulf markets and Brazil while many trips with spouse/partners would be planned from the US. Travelling with other adult family members is popular in India and Brazil, while trips with friends are also high in the minds of Japanese and South Koreans. Tour groups continue to be low in consideration across markets. A higher proportion of solo travellers can be found in Japan, Canada and Brazil.

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
With your spouse/partner	69%	69%	66%	76%	65%	71%	68%	65%	68%	61%	68%	74%
With children (under 18)	29%	31%	24%	43%	18%	26%	38%	20%	37%	23%	44%	35%
With friends	22%	19%	15%	25%	17%	16%	25%	30%	15%	26%	19%	15%
With adult family members	20%	19%	15%	28%	15%	17%	29%	21%	20%	20%	19%	15%
Alone	19%	18%	16%	23%	23%	18%	18%	25%	17%	17%	15%	15%
As part of a tour group	3%	3%	2%	4%	2%	3%	4%	7%	2%	4%	2%	3%

Q18: Would you envisage traveling… (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)

Travel party for a leisure trip in Britain

All markets consolidated, those wishing to visit Britain consider a larger than average travel cell including children, friends and other adult travel companions. Again, Wales records a stronger interest amongst families, while potential visitors to London would also recruit among visitors travelling with friends.

	Europe Intenders	Britain Intenders	England pot. visitors	Scotland pot. visitors	Wales pot. visitors	London pot. visitors	City Intenders
With your spouse/partner	70%	68%	69%	73%	71%	68%	69%
With children (under 18)	29%	34%	32%	31%	36%	31%	32%
With friends	24%	25%	23%	23%	23%	27%	25%
With adult family members	20%	23%	20%	21%	22%	22%	22%
Alone	20%	25%	20%	19%	21%	22%	21%
As part of a tour group	4%	4%	3%	4%	4%	4%	3%

Q18: Would you envisage traveling… (Multiple Answers)
Base: Europe Int. (n = 6,411) – Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588) – Large City Int. (n = 5,398)

Accommodation types for an international leisure trip (SH)

Hotel chains remain a preferred choice, while self-catered accommodation is again a popular option along with Bed and Breakfast. The demand is structuring again around expectations for a large diversity of choices for accommodation where hotels of all sizes and categories, private rentals and specialty lodging all have a market to address, providing that they can offer the full and safe experience that is expected.

	Total	SH	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Hotel chain	62%	65%	71%	45%	65%	66%	64%	60%	74%	65%	62%	78%
Bed and breakfast	35%	41%	44%	31%	38%	43%	59%	42%	41%	47%	15%	46%
Boutique hotel	32%	28%	19%	34%	30%	43%	26%	23%	18%	13%	44%	24%
Self catered property (rented house, cottage, chalet, apartment)	31%	37%	36%	19%	49%	44%	36%	44%	37%	34%	27%	44%
Private rental such as Airbnb, Couchsurfing, FlipKey	26%	29%	21%	32%	30%	32%	37%	25%	25%	23%	37%	25%
Historic house/castle	25%	25%	31%	12%	24%	21%	23%	28%	30%	16%	27%	33%
Friend’s/family house as a free guest	25%	26%	23%	16%	28%	35%	23%	28%	24%	11%	32%	36%
Holiday village/centre (e.g. Center Parcs)	22%	22%	24%	16%	24%	25%	26%	33%	23%	19%	13%	20%
Cruise	19%	17%	16%	9%	19%	16%	17%	17%	31%	10%	14%	24%
Friend’s/family house as a paying guest	16%	17%	10%	11%	22%	21%	19%	22%	11%	7%	19%	25%
Hostel/university/school	14%	12%	13%	7%	7%	10%	11%	11%	7%	13%	19%	19%
Campsite	13%	14%	17%	12%	15%	13%	10%	23%	15%	11%	11%	14%
Own second home/timeshare	12%	12%	28%	3%	14%	10%	13%	13%	8%	7%	3%	25%
Caravan/motorhome	11%	13%	17%	6%	16%	11%	8%	19%	14%	5%	15%	15%

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 = 10,954)

Accommodation types for an international leisure trip (LH)

Long-haul markets confirm higher interest in boutique hotels even of hotel chains dominate in intentions. Brazil confirms its affinity with self catered properties and private rentals. Despite uncertainties for the sector, cruises remain widely envisaged in the US market. China and India show high interest in holiday villages and boutique hotels.

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Hotel chain	62%	59%	61%	77%	68%	40%	53%	86%	46%	67%	44%	62%
Bed and breakfast	35%	31%	47%	16%	39%	27%	33%	13%	19%	40%	31%	37%
Boutique hotel	32%	36%	44%	37%	37%	45%	32%	32%	23%	38%	26%	36%
Self catered property (rented house, cottage, chalet, apartment)	31%	26%	38%	43%	26%	30%	27%	16%	23%	18%	23%	22%
Private rental such as Airbnb, Couchsurfing, FlipKey	26%	25%	28%	47%	31%	19%	35%	10%	10%	17%	21%	29%
Historic house/castle	25%	25%	33%	30%	25%	33%	24%	19%	14%	15%	19%	29%
Friend's/family house as a free guest	25%	24%	31%	32%	28%	13%	38%	12%	19%	14%	30%	26%
Holiday village/centre (e.g. Center Parcs)	22%	22%	22%	19%	15%	41%	37%	6%	16%	11%	21%	16%
Cruise	19%	21%	23%	23%	20%	9%	29%	21%	27%	8%	22%	27%
Friend's/family house as a paying guest	16%	16%	20%	23%	13%	11%	30%	5%	15%	8%	24%	15%
Hostel/university/school	14%	15%	9%	18%	12%	17%	20%	7%	21%	12%	22%	12%
Campsite	13%	12%	13%	13%	9%	13%	15%	5%	14%	7%	18%	11%
Own second home/timeshare	12%	12%	11%	14%	9%	15%	15%	6%	9%	7%	14%	11%
Caravan/motorhome	11%	10%	14%	13%	7%	13%	16%	5%	9%	5%	13%	7%

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 = 10,954)

Accommodation types for a leisure trip in Britain

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

	Europe Intenders	Britain Intenders	England pot. visitors	Scotland pot. visitors	Wales pot. visitors	London pot. visitors	City Intenders
Hotel chain	64%	63%	63%	64%	61%	71%	68%
Bed & breakfast	38%	39%	37%	44%	44%	39%	37%
Self catered property (rented house, cottage, chalet, apartment)	35%	38%	31%	38%	38%	34%	31%
Boutique hotel	33%	45%	36%	40%	43%	40%	39%
Private rental such as Airbnb, Couchsurfing, FlipKey	29%	35%	30%	34%	35%	35%	30%
Historic house/castle	28%	35%	27%	36%	38%	29%	27%
Friend's/family house as a free guest	25%	29%	26%	26%	28%	27%	26%
Holiday village/centre (e.g. Center Parcs)	24%	31%	24%	29%	32%	25%	24%
Cruise	19%	22%	21%	23%	27%	20%	21%
Friend's/family house as a paying guest	17%	20%	18%	19%	22%	18%	18%
Campsite	14%	17%	13%	18%	20%	12%	12%
Hostel/university/school	14%	20%	16%	18%	22%	15%	16%
Own second home/timeshare	13%	15%	13%	16%	18%	13%	13%
Caravan/motorhome	13%	16%	12%	16%	18%	11%	11%

Q17: For your next international leisure trip, would you be comfortable staying in a … (Multiple Answers)
Base: Europe Int. (n = 6,411) – Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588) – Large City Int. (n = 5,398)

Level of interest in activities (SH)

The progressive return to many pre-pandemic behaviours now make travellers envisage all types of activities including those considered at risk COVID-wise in a recent past (large shows, events, immersive socialising activities, highly frequented attractions, dining and nightlife…). Outdoor activities remain popular for Germans, French, Italians and Dutch, while a strong appetite for culture is seen in France, Italy and Spain.

(% very interested)	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
Dining in restaurants/bars, cafes or pubs	52%	51%	50%	55%	50%	55%	52%	54%	55%	29%	49%	60%
Visiting famous/iconic tourist attractions	50%	44%	38%	52%	41%	48%	58%	43%	34%	49%	47%	31%
Exploring history and heritage	49%	44%	33%	53%	42%	42%	58%	44%	35%	42%	60%	34%
Outdoor nature activities	47%	42%	38%	57%	44%	47%	50%	45%	29%	40%	44%	30%
Visiting cultural attractions	46%	40%	34%	48%	34%	40%	57%	41%	30%	42%	47%	31%
Experiencing local lifestyle, socialising with locals	41%	38%	34%	49%	35%	36%	42%	42%	32%	37%	46%	31%
Shopping	39%	32%	29%	40%	31%	37%	35%	36%	30%	19%	29%	30%
Outdoor activ. (hiking, cycling..)	38%	35%	22%	43%	43%	34%	43%	51%	21%	32%	35%	21%
Guided tours/day-excursions	36%	33%	21%	41%	26%	28%	43%	43%	19%	44%	42%	20%
Self-driving tours	33%	31%	28%	55%	31%	26%	31%	48%	21%	22%	24%	29%
Attending cultural events	31%	25%	20%	26%	24%	32%	27%	23%	21%	24%	30%	19%
Culinary activities	31%	26%	21%	30%	29%	25%	29%	26%	24%	23%	29%	21%
Spa/wellness activities	29%	25%	17%	30%	28%	31%	29%	26%	17%	21%	30%	21%
Experiencing destination’s nightlife	28%	22%	15%	23%	22%	28%	32%	21%	18%	15%	27%	18%
Attending sport events	26%	20%	14%	24%	19%	27%	18%	21%	21%	15%	23%	15%
Learning new skills	25%	18%	10%	27%	18%	17%	28%	19%	11%	16%	28%	7%
Playing sports	22%	15%	11%	17%	17%	18%	15%	22%	18%	8%	16%	9%

Q16: Thinking about your level of confidence related to sanitary safety, how interested would you be in the following activities during your next international trip ?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)

Level of interest in activities (LH)

An even greater range of experiences are mentioned by most long-haul markets who still consider visiting iconic tourist attractions in priority. Shopping is still high on the bucket list in Brazil, India and Gulf markets. Gulf markets would envisage outdoor activities and Brazilians show affinities with nightlife. Asian markets will enjoy cultural, iconic attractions. Dining out has returned to being a dominant activity envisaged, growing strongly in interest.

(% very interested)	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Dining in restaurants/bars, cafes or pubs	52%	53%	39%	67%	50%	41%	62%	51%	61%	47%	61%	58%
Visiting famous/iconic tourist attractions	50%	55%	45%	69%	49%	47%	67%	44%	66%	50%	59%	56%
Exploring history and heritage	49%	53%	44%	66%	51%	49%	66%	48%	56%	42%	55%	55%
Outdoor nature activities	47%	51%	37%	62%	46%	47%	67%	33%	66%	42%	61%	51%
Visiting cultural attractions	46%	50%	35%	61%	43%	50%	60%	47%	54%	45%	54%	53%
Experiencing local lifestyle, socialising with locals	41%	43%	36%	49%	41%	44%	62%	22%	47%	32%	51%	46%
Shopping	39%	45%	27%	56%	30%	43%	65%	43%	57%	33%	54%	43%
Outdoor activ. (hiking, cycling..)	38%	40%	28%	46%	36%	41%	58%	20%	57%	23%	48%	42%
Guided tours/day-excursions	36%	39%	29%	48%	34%	35%	55%	28%	44%	23%	45%	44%
Self-driving tours	33%	34%	27%	45%	29%	39%	47%	9%	41%	21%	41%	32%
Attending cultural events	31%	37%	23%	40%	30%	41%	53%	25%	40%	30%	42%	39%
Culinary activities	31%	36%	23%	42%	24%	41%	50%	23%	32%	31%	42%	39%
Spa/wellness activities	29%	32%	21%	34%	19%	41%	47%	18%	37%	22%	38%	34%
Experiencing destination's nightlife	28%	34%	22%	53%	25%	40%	53%	15%	N/A	19%	N/A	35%
Attending sport events	26%	32%	21%	35%	19%	35%	46%	17%	41%	23%	42%	33%
Learning new skills	25%	31%	16%	39%	17%	36%	49%	13%	42%	16%	41%	31%
Playing sports	22%	29%	15%	24%	16%	36%	46%	17%	37%	19%	38%	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 = 10,954)

Level of interest in activities in Britain

Britain intenders confirm expectations around visiting iconic, cultural and natural attractions/activities during their next trip. They also express higher interest than average in engaging in lively cultural and sportive events during their journey.

	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	54%	57%	56%	54%	56%	58%	57%
Visiting famous/iconic tourist attractions	50%	58%	56%	55%	56%	59%	55%
Exploring history and heritage	50%	59%	53%	57%	59%	55%	54%
Visiting cultural attractions	47%	58%	52%	52%	54%	52%	52%
Outdoor nature activities	47%	51%	50%	53%	56%	48%	48%
Experiencing local lifestyle, socialising with locals	42%	49%	45%	46%	51%	44%	45%
Shopping	38%	46%	45%	39%	45%	44%	46%
Outdoor activ. (hiking, cycling..)	37%	41%	41%	43%	46%	38%	38%
Guided tours/day-excursions	36%	40%	41%	41%	44%	38%	40%
Self-driving tours	34%	38%	35%	38%	42%	32%	34%
Attending cultural events	32%	42%	37%	35%	41%	35%	37%
Culinary activities	31%	39%	36%	36%	41%	34%	35%
Spa/wellness activities	28%	34%	33%	31%	37%	31%	32%
Experiencing destination's nightlife	28%	36%	35%	31%	36%	33%	34%
Attending sport events	26%	36%	33%	28%	35%	28%	30%
Learning new skills	24%	31%	30%	28%	34%	26%	28%
Playing sports	22%	32%	28%	24%	32%	23%	26%

Q16: Thinking about your level of confidence related to sanitary safety, how interested would you be in the following activities during your next international trip ?
Base: Europe Int. (n = 6,411) – Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588) – Large City Int. (n = 5,398)

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

Saffron Walden: ©VisitBritain/ Herewegoagain.blog

Key Takeaways

What has changed since September 2021?

Key Takeaways – Overall travel sentiment

1. **Desire to travel internationally has increased further**, reaching the highest level recorded since 2020. **More than 5 in 10 respondents** certainly intend to travel internationally in the coming 12 months, while the vaccination and spending power continue to fuel confidence in travel.
2. If travel plans are getting more concrete, **destination choice remains still very open in consumers' minds**.
3. **The 2022 summer season** is the next not-to-be-missed window for an international trip for nearly 4 in 10 travellers.
4. The **vaccination** continues to be **a trigger for travel notably for LH markets** but the gap of intention between vaccinated and non-vaccinated consumers is lower while a **vaccine boost accelerates travel plans**.
5. **The younger generation** still shows the **highest propensity to travel internationally** across most markets.
6. **The *money-centric* factor** (money-back guarantee, deals..) equally matters vs health/COVID-19 factors in the decisions to take an international trip. This **"money factor"** is an **important trigger of travel intentions to Britain** as affordability is a common obstacle to visit.
7. Travellers' intentions show **established expectations for living the full destination experience**, including growing interest in **events and social activities.**
8. While attitudes towards a more **responsible and sustainable travel** remain, travel-related attitudes confirm the **shift to a careful back to pre-pandemic expectations** including high record level of trust in public transports and less last-minute booking dictated by the changing context.
9. While socialising is expected as an integral part of the experience at the next destination, **6 in 10 travellers express concerns about locals' attitudes towards international tourists**.
10. **Respect for COVID-19 rules by other people**, access to **healthcare**, risks of contracting COVID-19 and change in quarantine requirements are the **most frequent concerns among those wishing to go to Britain**.
11. **Consumers need reassurance** that the experiences are **available** and **not restricted.**

Key Takeaways – perceptions of destinations/Britain

1. **Europe** confirms and even reinforces its **status as the favourite region** in most markets.
2. **Britain has gained 1.5 points of intention in 6 months,** rivaling France and Spain in travel intentions.
3. The positive trend is notably fuelled by a **continuous improvement of its COVID-19 sanitary image.**
4. Providing pre-COVID-19 volumes of visits, intention levels and competitive positions and evolutions, the COVID-19 image, the competitive position of Britain is summarised as follows:
   - **4 markets in a highly favourable competitive position:** China, Australia, UAE and the Saudi Arabia
   - **6 markets in favourable competitive positions:** Italy, Spain, Norway, South Korea, Japan and the Republic of Ireland
   - **8 markets in average competitive positions:** France, the US, Canada, India, Germany, Brazil, Denmark and Sweden
   - **2 markets in a challenging competitive position:** the Netherlands, Russia
5. Among the 13 markets surveyed in August 2021:
   - **4 markets have improved their competitive positions:** the US, France, German and Spain
   - **6 markets have kept a favourable competitive position**: Italy, the Republic of Ireland, Norway, China, India and Australia
   - **1 market remain competitive** but has **lost its place in the ranking**: Sweden
   - **2 markets have become or remain challenged:** the Netherlands and Russia

Key Takeaways – Potential targets

Confirmed prioritised motivations and experiences to promote Britain

- "Under sanitary control" **festive, sportive and nightlife events**
- **Deals and promotions including / in partnership with transport companies** to alleviate the perception around "pricy 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…)
- **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** (Art in gardens, Suspended bridges, Big Wheels, panoramic views etc).
- **Affluent visitors** targeting the "lucky ones" whose spending power has risen through the crisis
- **Lovers of stays in historic houses** for long week-ends / mid-weeks
- **'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

Confirmed planning, booking and influencing channels

1. **Access to Travel Insurance deals** for protecting the trip in case of cancellation / last minute changes in COVID-related policies.
2. **Transport operators** are expected to offer the most flexible cancellation policies possible. This also applies to Travel Packages.
3. **OTAs/TOs** still well considered across all SH markets and among younger generations too.
4. **Intermediaries overall are seen as trusted channels** in times of uncertainty and should offer **flexible cancellation policies**.
5. **Official destination websites** as trusted sources on **where to live the "full experience".**
6. **Promoting best-rated performers in terms of value for money** (hotels, attractions).
7. Offering **guidance and info-mediation** in relation to **travel Insurance in COVID time**.
8. Providing **timely information** on when to visit attractions so as to **mitigate concerns on flow management/crowding issues**.
9. **"Experiential Packages"** including guided / self-guided excursions for roaming travellers in search of maximising the full experience.
10. **SoMe and digital marketing** can generate fast ROI as **Millennials plan to travel sooner than other generations**.
11. **Promotions on Travel comparison websites** which have a massive influence in short-haul markets.
12. **Promoting multi-modal transport flexibility** while travellers now have trust in flights, trains, ferries and public transport.
13. Providing clear **itineraries and road maps** (on destination apps) for **roaming travellers using their own/rented cars.**

Appendix

Giants Causeway: ©VisitBritain/Ben Selway

Market Summaries

Paddleboarding: ©VisitBritain/Matthew Williamson Ellis

Short-Haul Markets Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 2	Wave 4
72%	85%

Journey purpose

Holiday	81%
Visit friends or relatives	31%
Other leisure purposes	24%

Planning stage

	Wave 2	Wave 4
Trip booked	7%	15%
Destination chosen	34%	32%
Trip planned	32%	33%
Intend to travel	27%	21%

Among leisure trip intenders:

74% consider **Europe**

10% consider **Britain**

Among Britain intenders:

51% consider England
37% consider Scotland
24% consider London
13% consider Wales

Travel preferences

Top activities

Dining out	51%
History and heritage	44%
Iconic tourist attractions	44%
Outdoor nature activities	42%
Visiting cultural attractions	40%

Top Travel Companions

With your spouse/partner	69%
With children (under 18)	26%
With friends	26%
With adult family members	21%
Alone	20%
As part of a tour group	4%

Top Accommodation

Hotel chain	65%
Bed and breakfast	41%
Self catered property	37%
Private rental	29%
Boutique hotel	28%

Destination types

37% Coastline
46% Large city
26% Small/mid-sized city/town
34% Will roam around
20% Mountains or hills
20% Country/ village

Top modes of transport within Britain

Public transport - Train	49%
Public transport - Tube/subway	44%
Public transport - Bus	41%

Top modes of transport to Britain

Plane – via nonstop flight	92%
Plane – via connecting flight	75%
Own/rented vehicle – via Ferry	48%

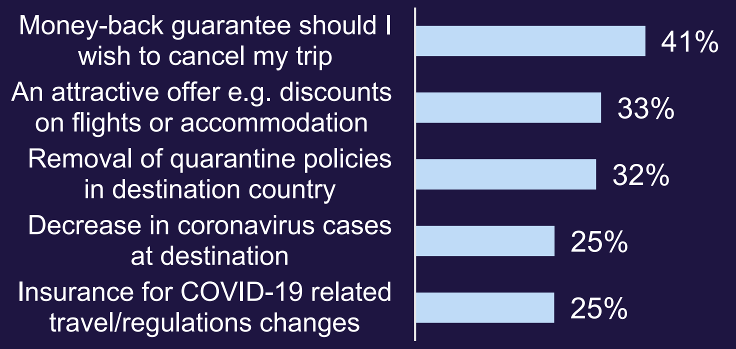
*(% definitely & probably) in the next 12 months

Short-Haul Markets Summary

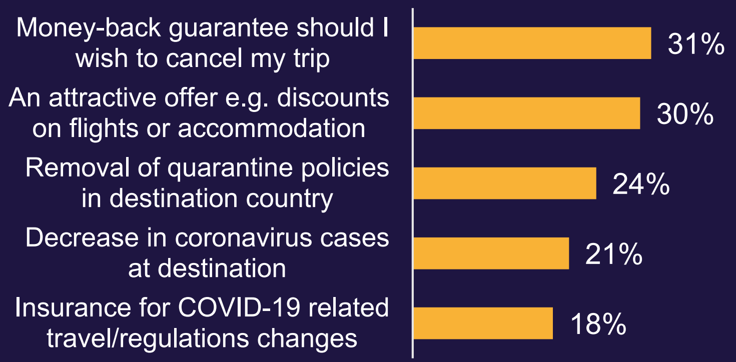
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

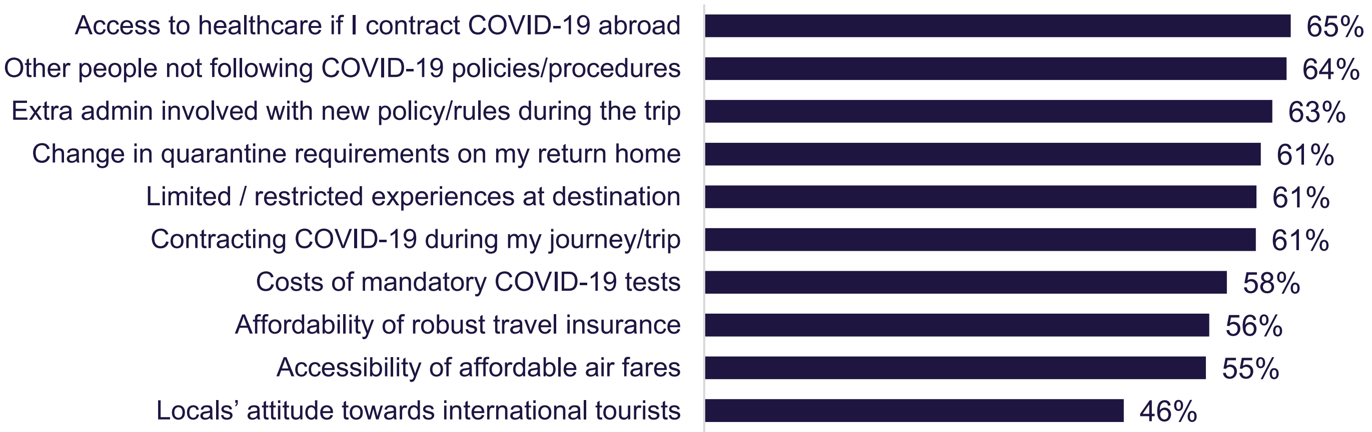
…for any international trip



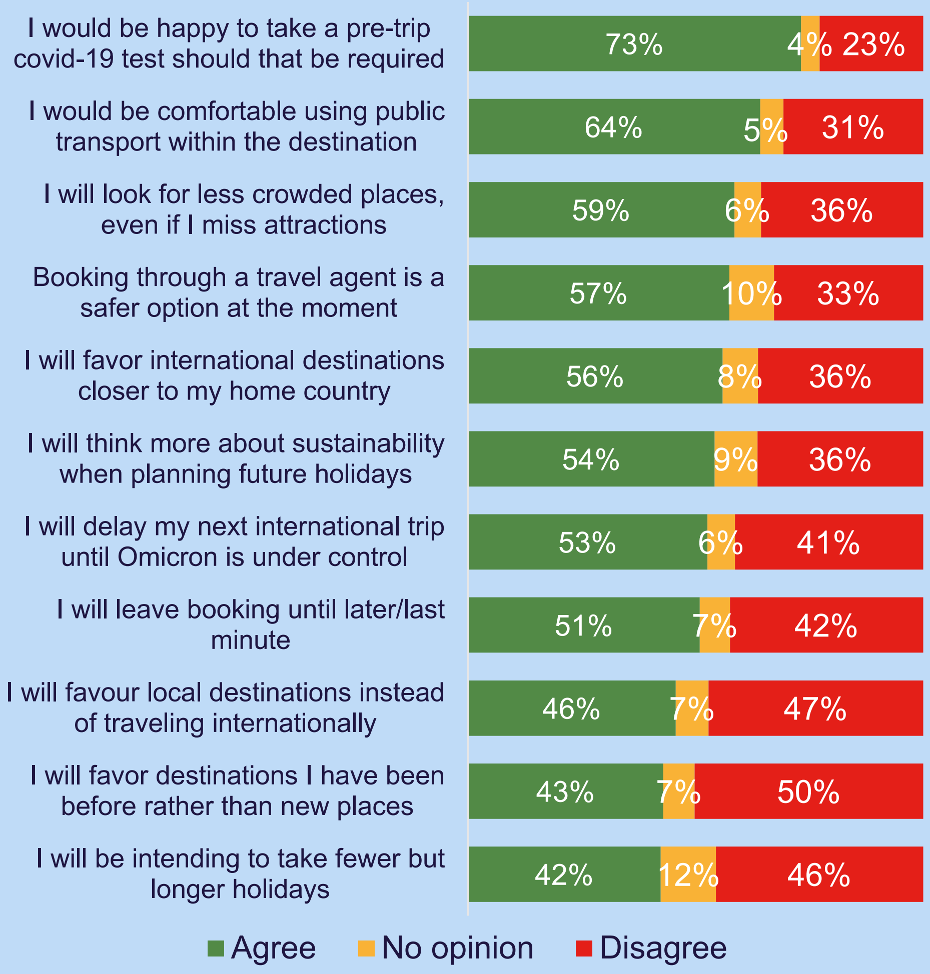
…for a trip to Britain



Travel Concerns – for travel to Britain*



Travel attitudes**



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

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

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Long-Haul Markets Summary

Travel intentions

Intending to travel abroad for leisure*

Wave 2	Wave 4
73%	76%

Journey purpose

Holiday	80%
Visit friends or relatives	35%
Other leisure purposes	33%

Planning stage

	Wave 2	Wave 4
Trip booked	7%	9%
Destination chosen	31%	32%
Trip planned	39%	35%
Intend to travel	24%	24%

Among leisure trip intenders:

45% consider **Europe**

15% consider **Britain**

Among Britain intenders:

62% consider England
36% consider Scotland
23% consider London
22% consider Wales

Travel preferences

Top activities

Iconic tourist attractions	55%
History and heritage	53%
Dining out	53%
Outdoor nature activities	51%
Visiting cultural attractions	50%

Top Travel Companions

With your spouse/partner	69%
With children (under 18)	31%
With friends	19%
With adult family members	19%
Alone	18%
As part of a tour group	3%

Top Accommodation

Hotel chain	59%
Boutique hotel	36%
Bed and breakfast	31%
Self catered property	26%
Historic house/castle	25%

Destination types

46% Will roam around
52% Large city
32% Country/ village
37% Coastline
30% Mountains or hills
32% Small/mid-sized city/town

Top modes of transport within Britain

Public transport - Train	44%
Public transport - Tube/subway	43%
Domestic flight	40%
Rented car/vehicle	38%
Public transport - Bus	34%
Taxi	31%
Uber/other sharing app	30%
Own car vehicle	26%
Private coach/minibus	24%

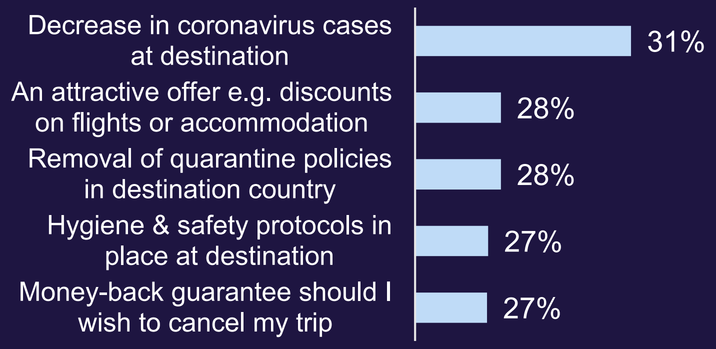
*(% definitely & probably) in the next 12 months

Long-Haul Markets Summary

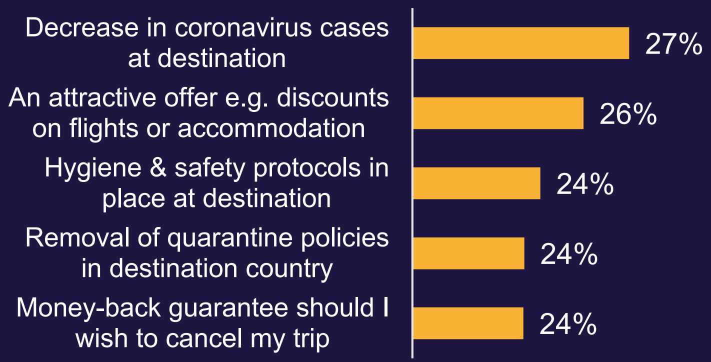
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

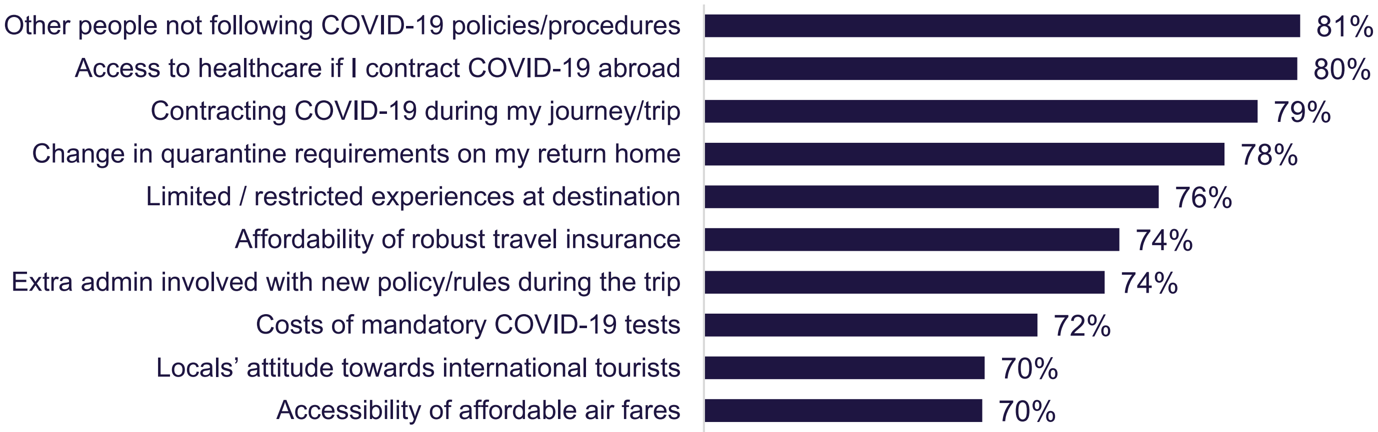
…for any international trip



…for a trip to Britain

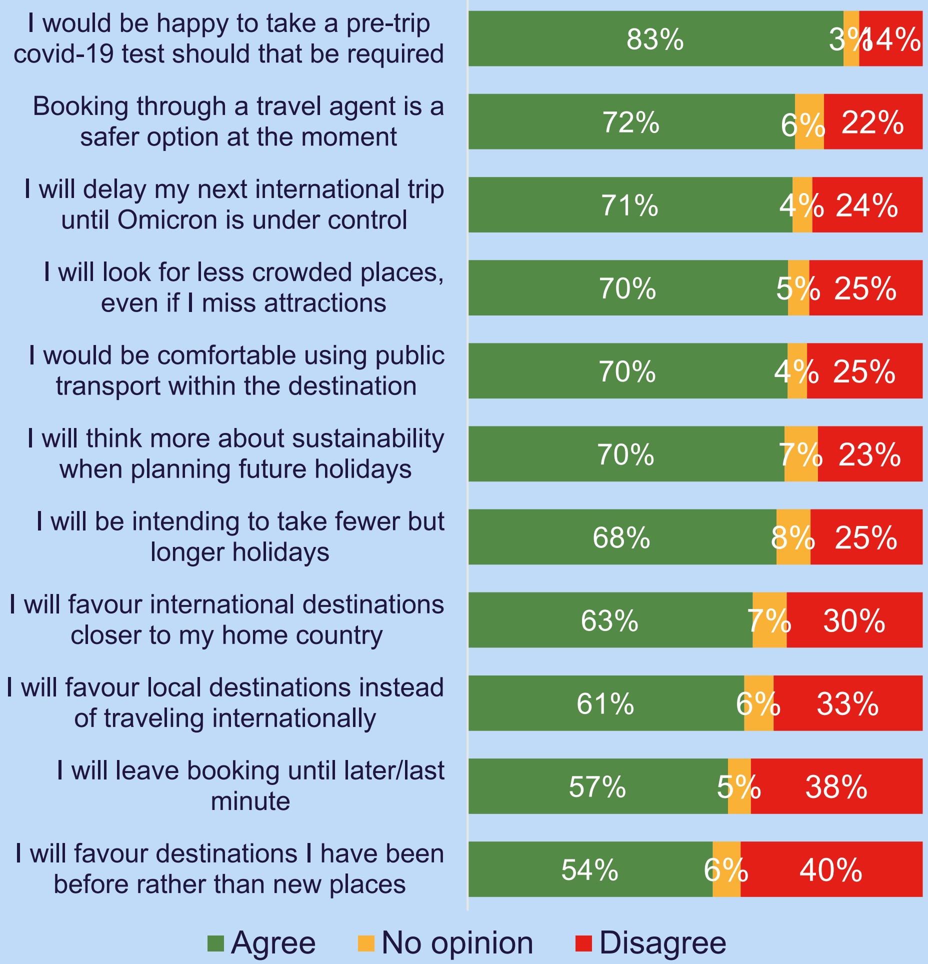


Travel Concerns – for travel to Britain*



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

Travel attitudes**



Australia Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3	Wave 4
62%	62%	63%	59%

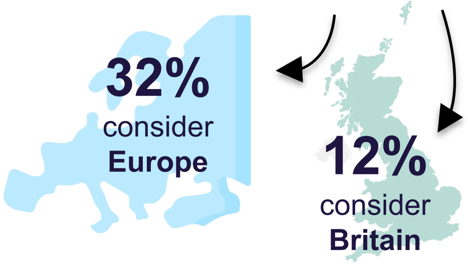
Journey purpose

Holiday	76%
Visit friends or relatives	43%
Other leisure purposes	18%

Planning stage

	Wave 1	Wave 2	Wave 3	Wave 4
Trip booked	7%	5%	6%	8%
Destination chosen	28%	32%	32%	29%
Trip planned	28%	31%	29%	28%
Intend to travel	36%	32%	34%	35%

Among leisure trip intenders:



Among Britain intenders:

59% consider England
33% consider Scotland
23% consider London
22% consider Wales

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

Travel preferences

Top activities

Iconic tourist attractions	45%
History and heritage	44%
Dining out	39%
Outdoor nature activities	37%
Experiencing local lifestyle	36%

Top Travel Companions

With your spouse/partner	66%
With children (under 18)	24%
Alone	16%
With friends	15%
With adult family members	15%
As part of a tour group	2%

Top Accommodation

Hotel chain	61%
Bed and breakfast	47%
Boutique hotel	44%
Self catered property	38%
Historic house/castle	33%

Destination types

43% Will roam around
41% Large city
34% Coastline
33% Country/ village
27% Mountains or hills
25% Small/mid-sized city/town

Top modes of transport within Britain

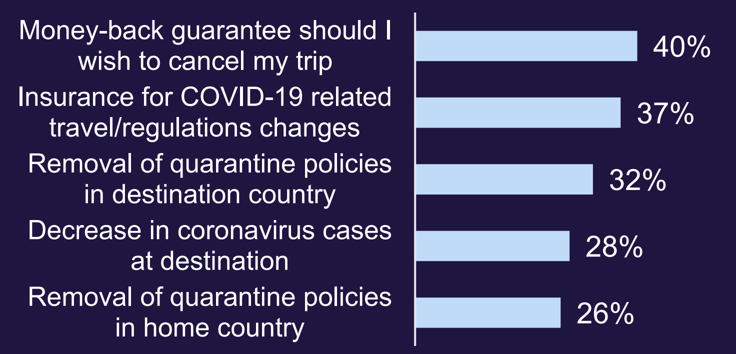
Rented car/vehicle	49%
Public transport - Train	48%
Domestic flight	48%
Public transport - Tube/subway	41%
Public transport - Bus	37%
Own car vehicle	35%
Taxi	32%
Private coach/minibus	28%
Uber/other sharing app	25%

Australia Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

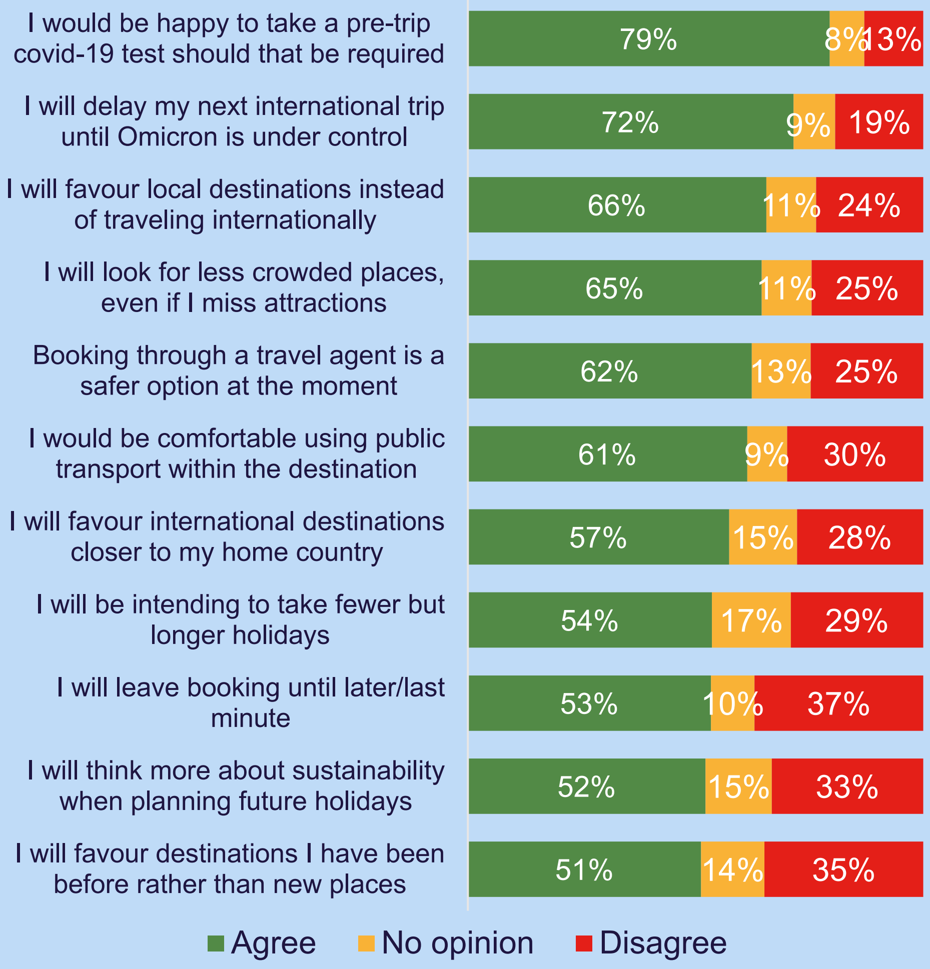
Top travel drivers

…for any international trip

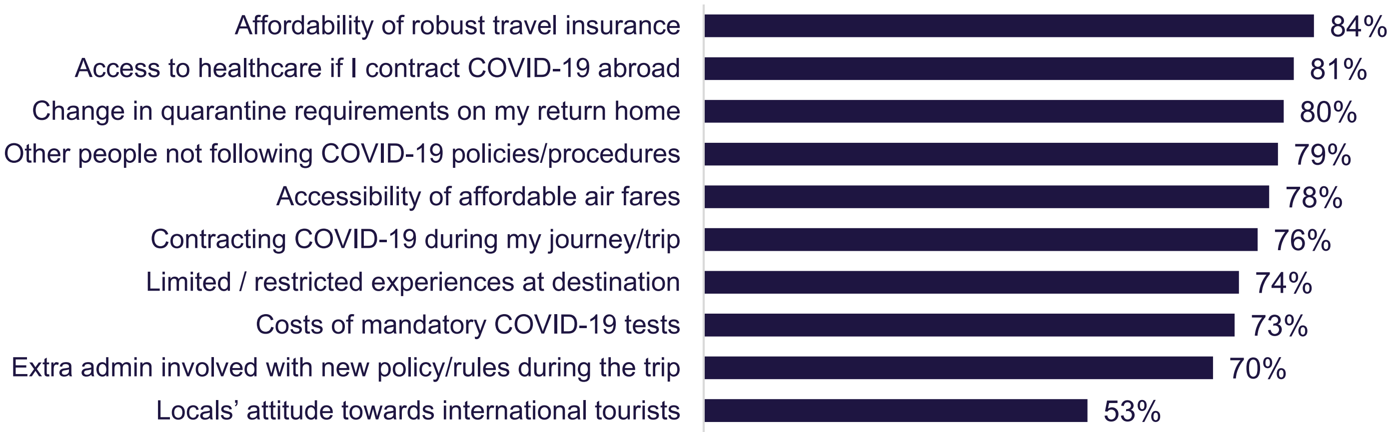


…for a trip to Britain

Travel attitudes**



Travel Concerns – for travel to Britain*



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

Brazil Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 2	Wave 4
82%	91%

Journey purpose

Holiday	85%
Other leisure purposes	38%
Visit friends or relatives	35%

Planning stage

	Wave 2	Wave 4
Trip booked	10%	14%
Destination chosen	47%	48%
Trip planned	31%	30%
Intend to travel	12%	7%

Among leisure trip intenders:

62% consider **Europe**

11% consider **Britain**

Among Britain intenders:

79% consider England
36% consider London
34% consider Scotland
18% consider Wales

Travel preferences

Top activities

Iconic tourist attractions	69%
Dining out	67%
History and heritage	66%
Outdoor nature activities	62%
Visiting cultural attractions	61%

Destination types

Will roam around	60%
Large city	62%
Coastline	24%
Country/village	27%
Mountains or hills	35%
Small/mid-sized city/town	40%

Top Travel Companions

With your spouse/partner	76%
With children (under 18)	43%
With adult family members	28%
With friends	25%
Alone	23%
As part of a tour group	4%

Top Accommodation

Hotel chain	77%
Private rental	47%
Self catered property	43%
Boutique hotel	37%
Friend's/family house…	32%

Top modes of transport within Britain

Rented car/vehicle	56%
Uber/other sharing app	52%
Public transport - Tube/subway	51%
Domestic flight	50%
Public transport - Train	50%
Taxi	37%
Public transport - Bus	35%
Own car vehicle	26%
Private coach/minibus	20%

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

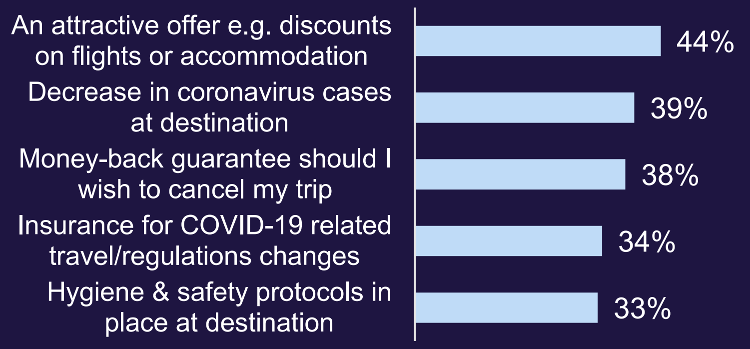
TCI Research Travel Competitive Intelligence | LONDON & PARTNERS | Llywodraeth Cymru Welsh Government | Visit Scotland Alba | VisitBritain

Brazil Market Summary

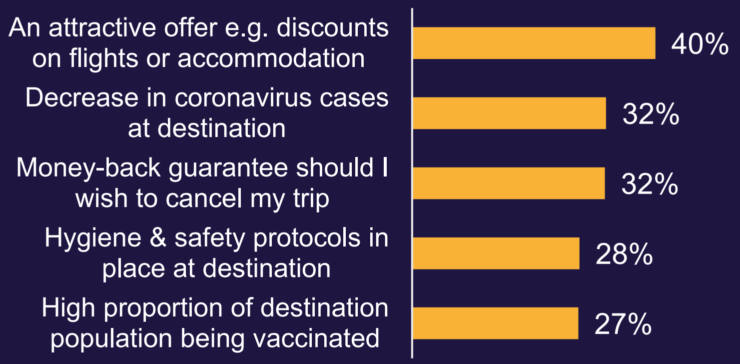
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

…for any international trip



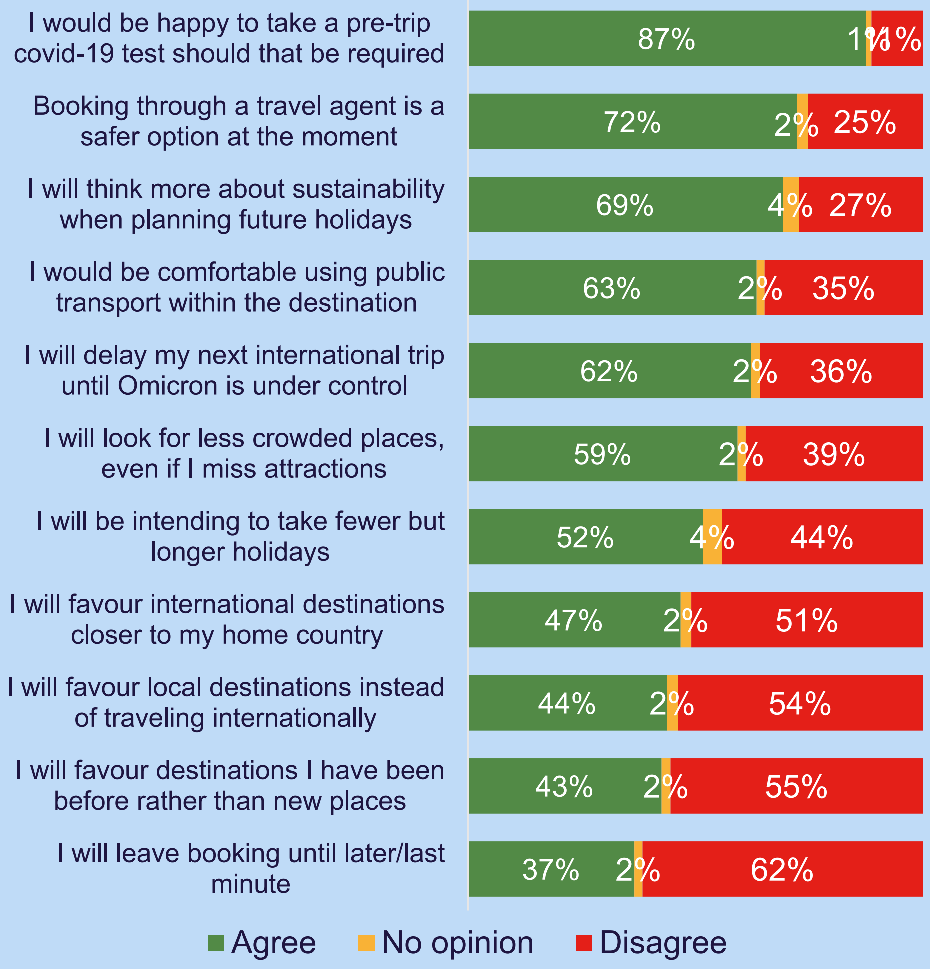
…for a trip to Britain



Travel Concerns – for travel to Britain*

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

Travel attitudes**



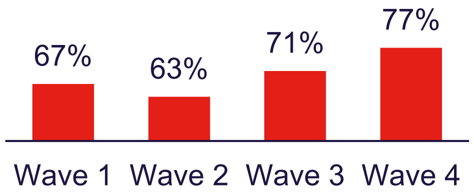
TCI Research Travel Competitive Intelligence
LONDON & PARTNERS
Llywodraeth Cymru Welsh Government
VisitScotland | Alba
VisitBritain

Canada Market Summary

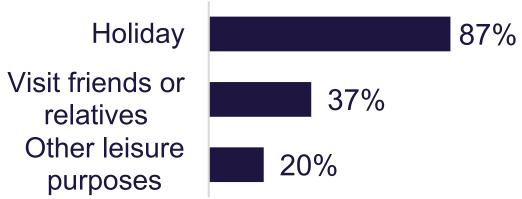
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

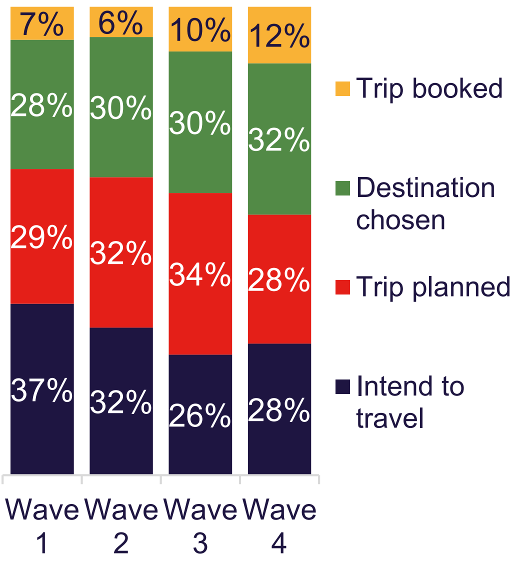
Intending to travel abroad for leisure*



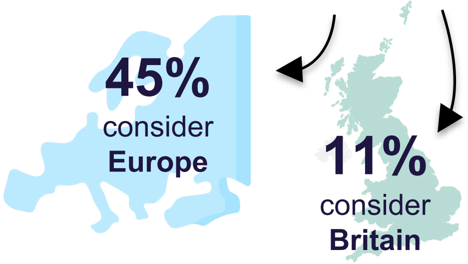
Journey purpose



Planning stage



Among leisure trip intenders:



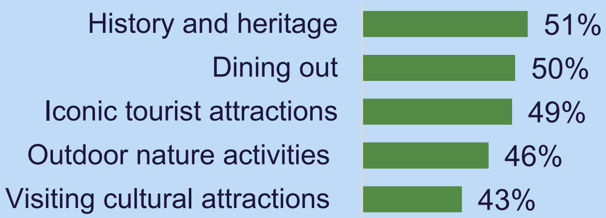
Among Britain intenders:

57% consider England
36% consider Scotland
27% consider London
16% consider Wales

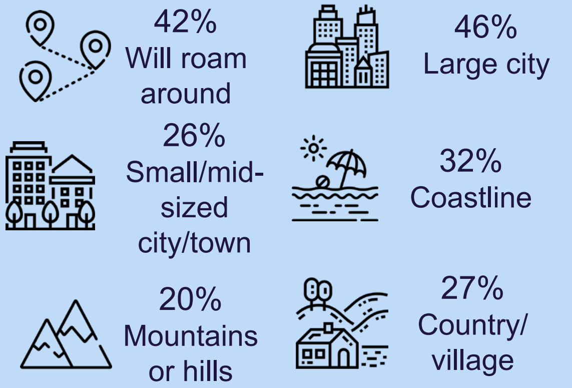
*(% definitely & probably) in the next 12 months

Travel preferences

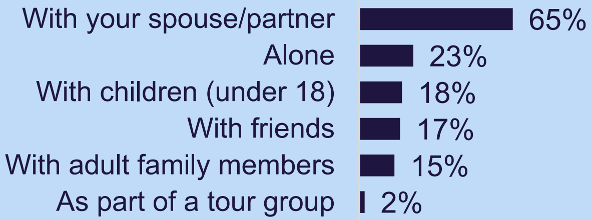
Top activities



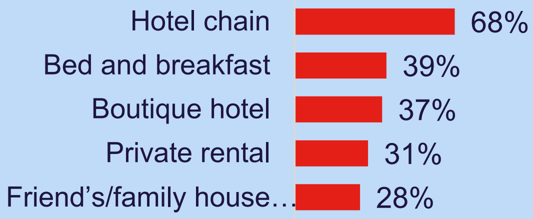
Destination types



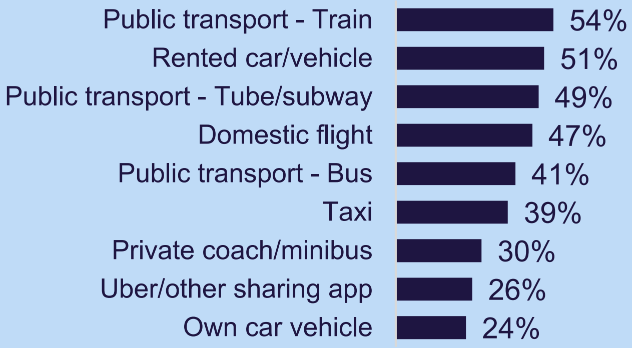
Top Travel Companions



Top Accommodation



Top modes of transport within Britain



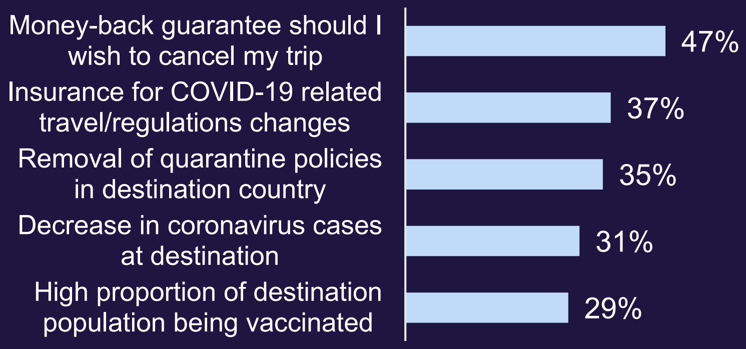
TCI Research Travel Competitive Intelligence
LONDON & PARTNERS
Llywodraeth Cymru Welsh Government
Visit Scotland | Alba
VisitBritain

Canada Market Summary

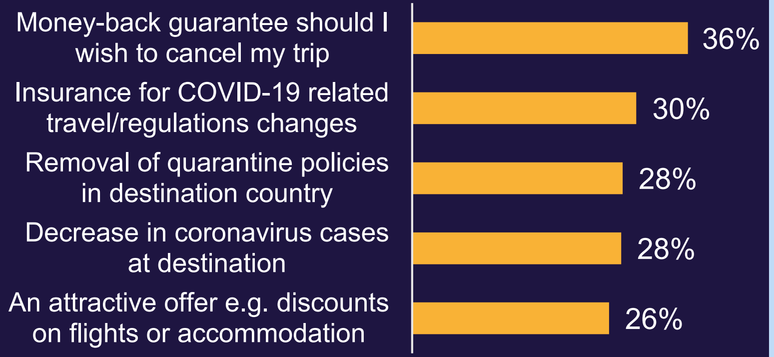
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

…for any international trip

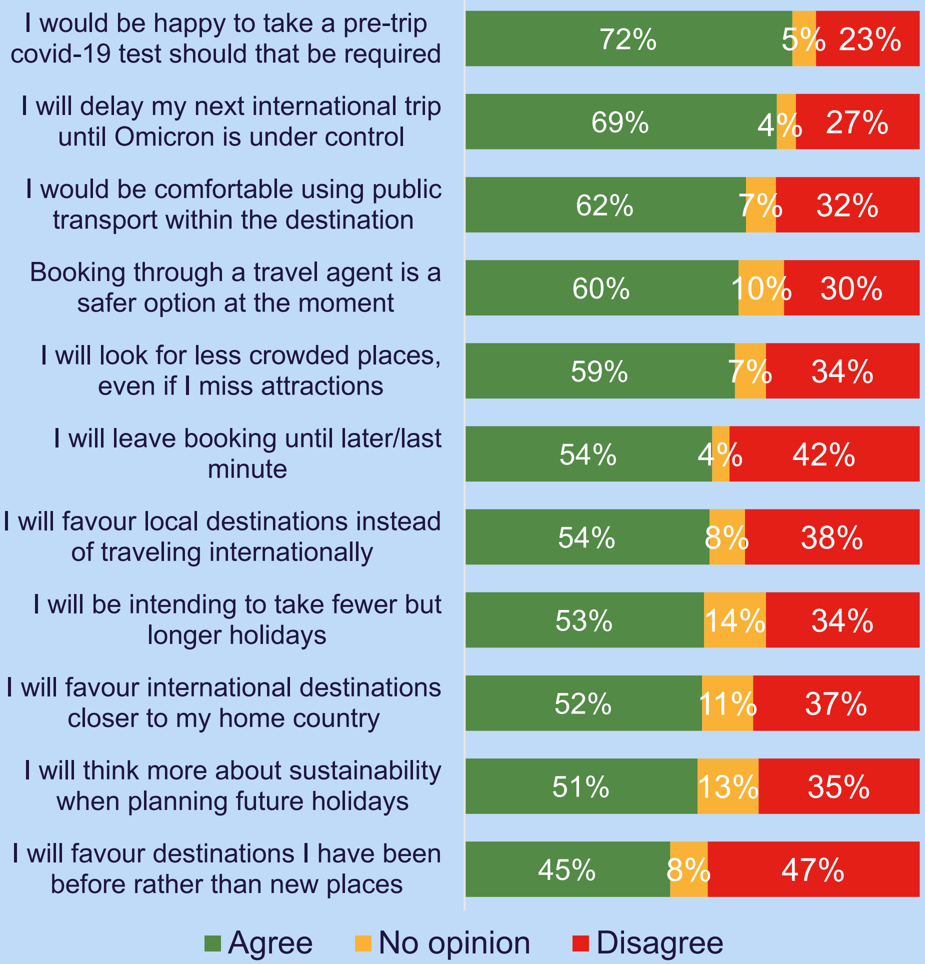


…for a trip to Britain



*Travel Concerns – for travel to Britain**

*Travel attitudes***



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

China Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3	Wave 4
69%	82%	84%	85%

Journey purpose

Holiday	88%
Other leisure purposes	31%
Visit friends or relatives	21%

Planning stage

	Wave 1	Wave 2	Wave 3	Wave 4
Trip booked	3%	4%	5%	7%
Destination chosen	35%	18%	22%	29%
Trip planned	29%	55%	46%	38%
Intend to travel	33%	23%	27%	26%

Among leisure trip intenders:

58% consider Europe

35% consider Britain

Among Britain intenders:

64% consider England
47% consider Scotland
33% consider Wales
27% consider London

Travel preferences

Top activities

Visiting cultural attractions	50%
History and heritage	49%
Iconic tourist attractions	47%
Outdoor nature activities	47%
Experiencing local lifestyle	44%

Destination types

Coastline	48%
Large city	57%
Small/mid-sized city/town	38%
Will roam around	49%
Mountains or hills	30%
Country/ village	36%

Top Travel Companions

With your spouse/partner	71%
With children (under 18)	26%
Alone	18%
With adult family members	17%
With friends	16%
As part of a tour group	3%

Top Accommodation

Boutique hotel	45%
Holiday village/centre	41%
Hotel chain	40%
Historic house/castle	33%
Self catered property	30%

Top modes of transport within Britain

Own car vehicle	38%
Public transport - Tube/subway	38%
Domestic flight	36%
Public transport - Train	31%
Public transport - Bus	29%
Rented car/vehicle	29%
Taxi	28%
Uber/other sharing app	26%
Private coach/minibus	22%

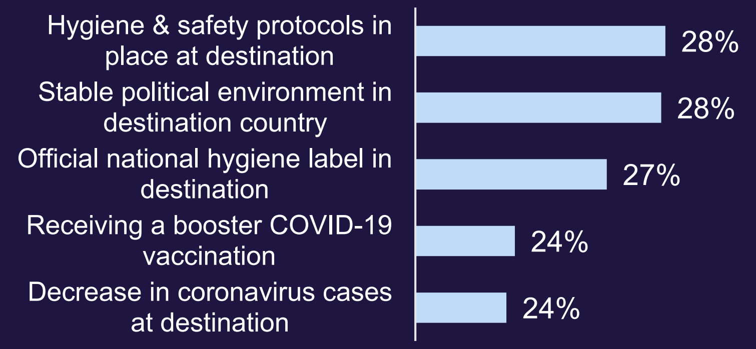
*(% definitely & probably) in the next 12 months

China Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

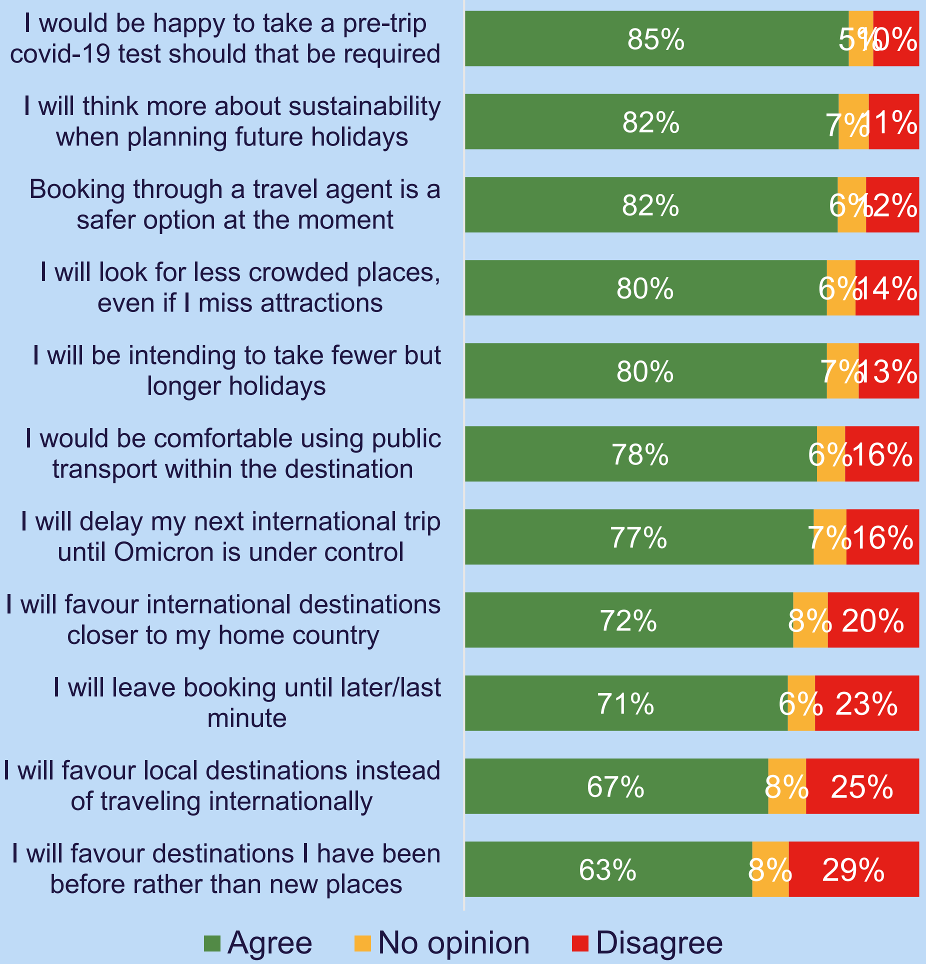
…for any international trip



…for a trip to Britain

Travel Concerns – for travel to Britain*

Travel attitudes**



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

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

Denmark Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 2	Wave 4
72%	79%

Journey purpose

Holiday	84%
Visit friends or relatives	24%
Other leisure purposes	14%

Planning stage

	Wave 2	Wave 4
Trip booked	12%	18%
Destination chosen	37%	27%
Trip planned	25%	30%
Intend to travel	25%	25%

Among leisure trip intenders:

82% consider **Europe**

8% consider **Britain**

Among Britain intenders:

46% consider England
28% consider Scotland
21% consider London
7% consider Wales

Travel preferences

Top activities

Dining out	50%
Iconic tourist attractions	38%
Outdoor nature activities	38%
Visiting cultural attractions	34%
Experiencing local lifestyle	34%

Top Travel Companions

With your spouse/partner	59%
With adult family members	24%
With friends	22%
With children (under 18)	19%
Alone	18%
As part of a tour group	4%

Top Accommodation

Hotel chain	71%
Bed and breakfast	44%
Self catered property	36%
Historic house/castle	31%
Own second…	28%

Destination types

34% Coastline
41% Large city
22% Small/mid-sized city/town
31% Will roam around
23% Mountains or hills
20% Country/ village

Top modes of transport within Britain

Public transport - Train	52%
Public transport - Bus	42%
Public transport - Tube/subway	41%

Top modes of transport to Britain

Plane – via nonstop flight	91%
Plane – via connecting flight	68%
Own/rented vehicle – via Channel Tunnel	40%

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

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

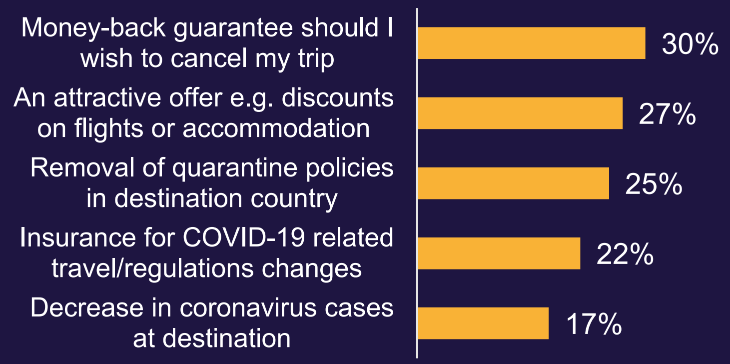
Denmark Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

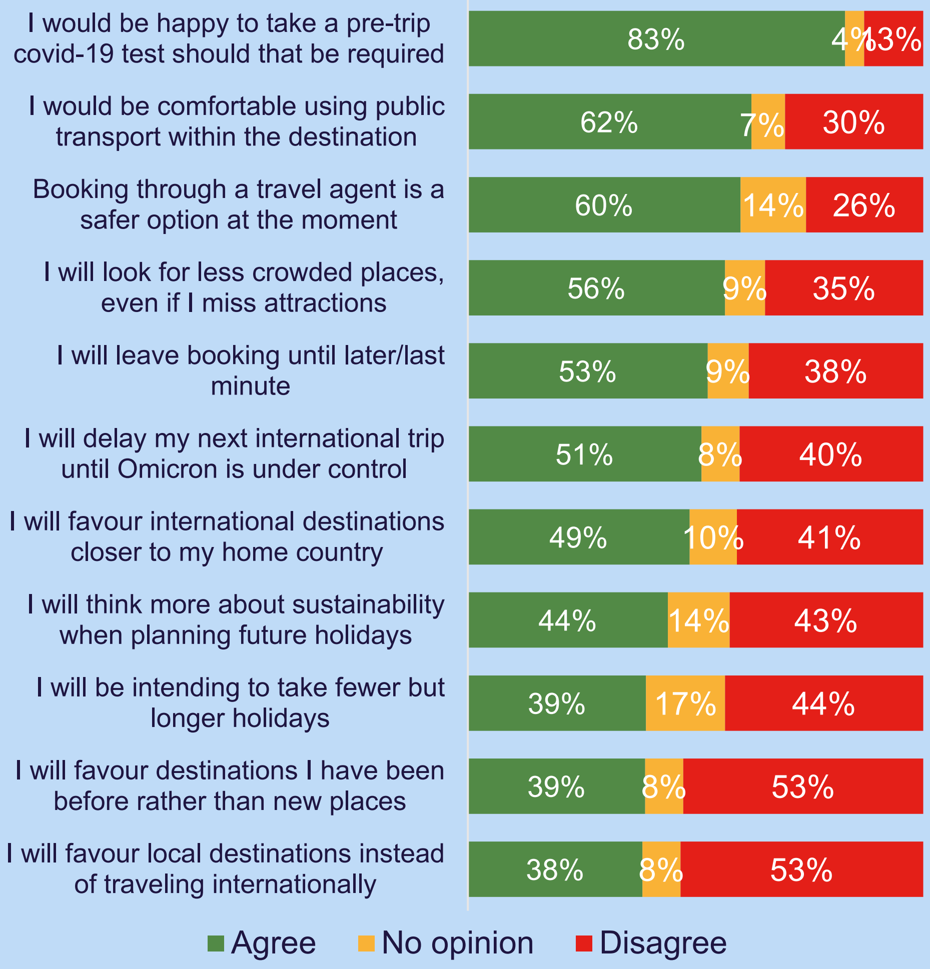
Top travel drivers

…for any international trip

…for a trip to Britain



*Travel attitudes***



*Travel Concerns – for travel to Britain**

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

France Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3	Wave 4
79%	80%	87%	90%

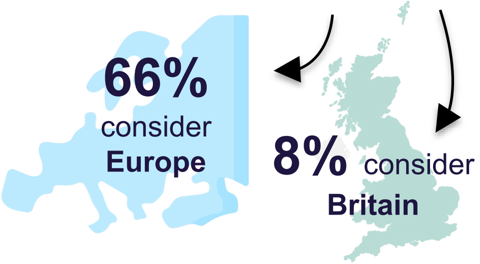
Journey purpose

Holiday	90%
Visit friends or relatives	30%
Other leisure purposes	20%

Planning stage

	Wave 1	Wave 2	Wave 3	Wave 4
Trip booked	7%	9%	12%	16%
Destination chosen	28%	26%	30%	28%
Trip planned	28%	30%	29%	31%
Intend to travel	36%	36%	28%	26%

Among leisure trip intenders:



Among Britain intenders:

49% consider England
44% consider Scotland
23% consider London
14% consider Wales

Travel preferences

Top activities

Outdoor nature activities	57%
Dining out	55%
Self-driving tours	55%
History and heritage	53%
Iconic tourist attractions	52%

Top Travel Companions

With your spouse/partner	72%
With children (under 18)	31%
With adult family members	18%
With friends	16%
Alone	11%
As part of a tour group	1%

Top Accommodation

Hotel chain	45%
Boutique hotel	34%
Private rental	32%
Bed and breakfast	31%
Self catered property	19%

Destination types

- 33% Coastline
- 43% Large city
- 24% Small/mid-sized city/town
- 36% Will roam around
- 14% Mountains or hills
- 20% Country/ village

Top modes of transport within Britain

Public transport - Train	51%
Public transport - Tube/subway	49%
Public transport - Bus	46%

Top modes of transport to Britain

Plane – via nonstop flight	91%
Plane – via connecting flight	75%
On foot – via Eurostar/Train	62%

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

France Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

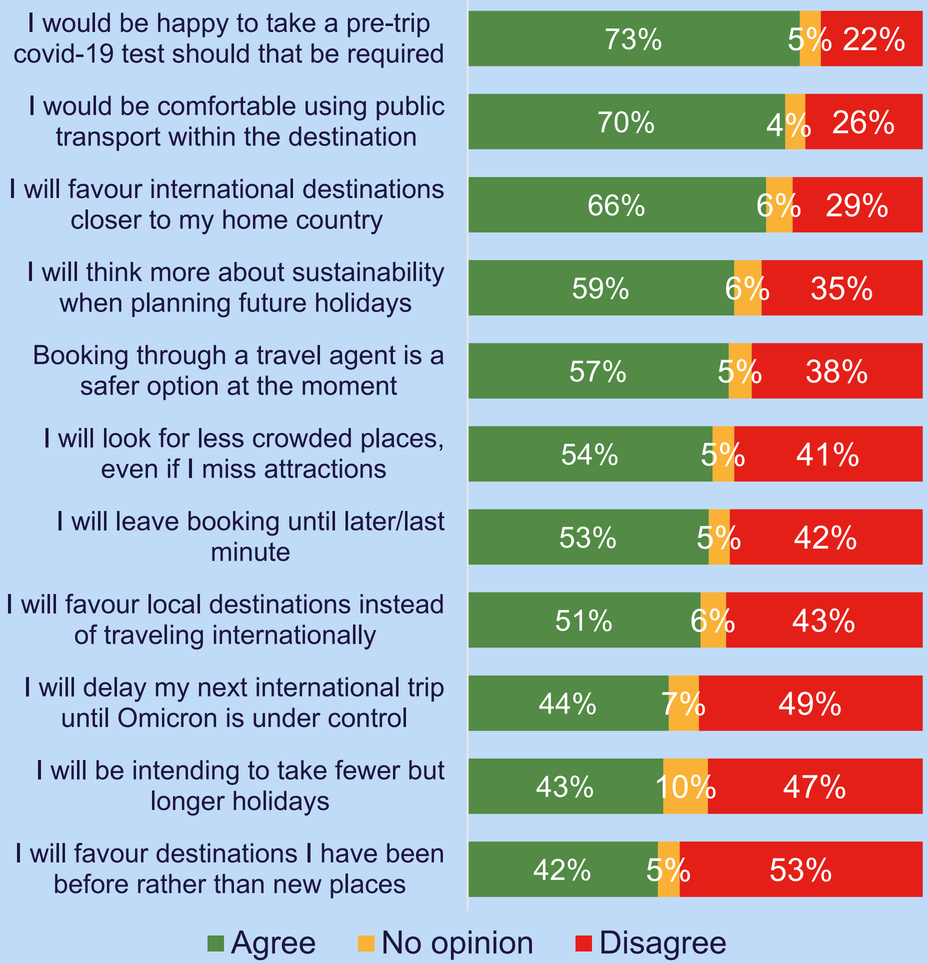
Top travel drivers

…for any international trip

…for a trip to Britain

Travel Concerns – for travel to Britain*

Travel attitudes**



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

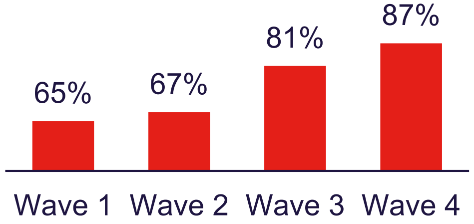
TCI Research Travel Competitive Intelligence | LONDON & PARTNERS | Llywodraeth Cymru Welsh Government | VisitScotland Alba | VisitBritain

Germany Market Summary

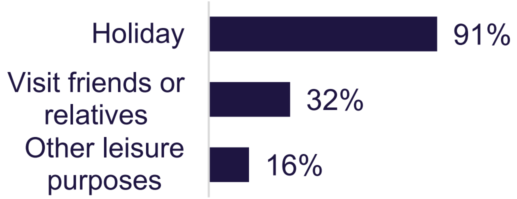
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

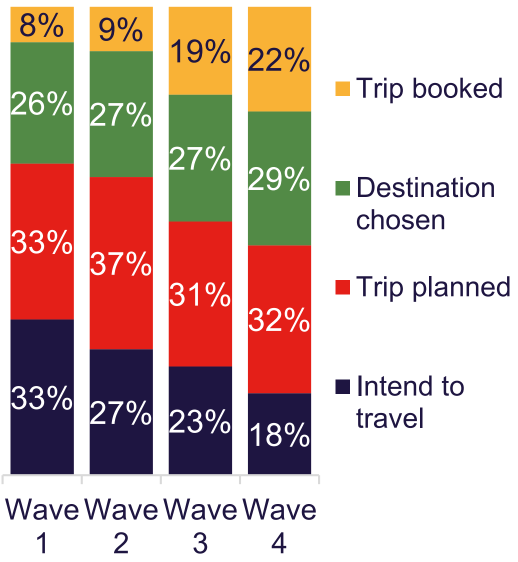
Intending to travel abroad for leisure*



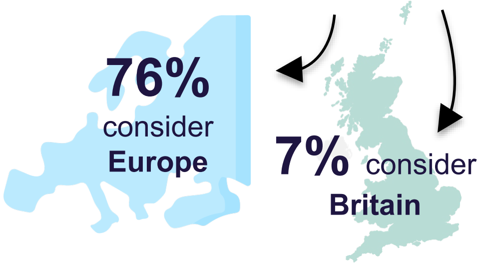
Journey purpose



Planning stage



Among leisure trip intenders:



Among Britain intenders:

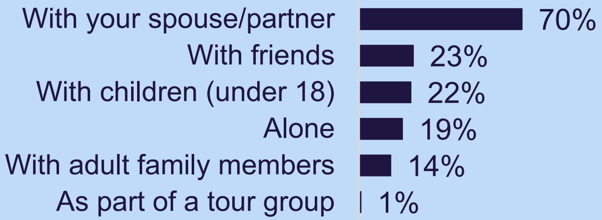
45% consider Scotland
40% consider England
26% consider London
14% consider Wales

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

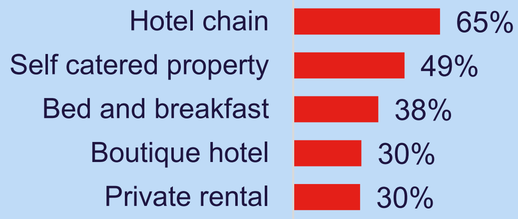
Travel preferences

Top activities

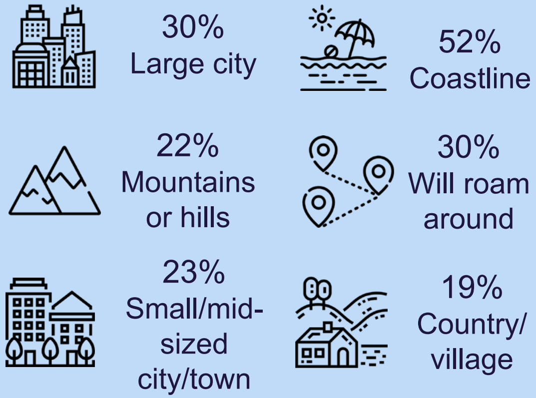
Top Travel Companions



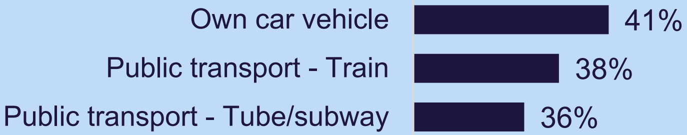
Top Accommodation



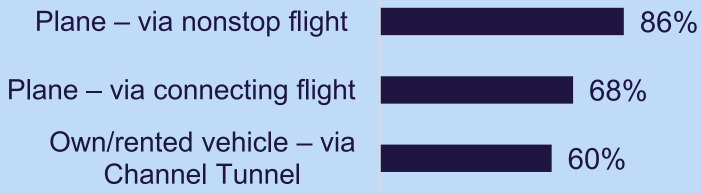
Destination types



Top modes of transport within Britain



Top modes of transport to Britain



Germany Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

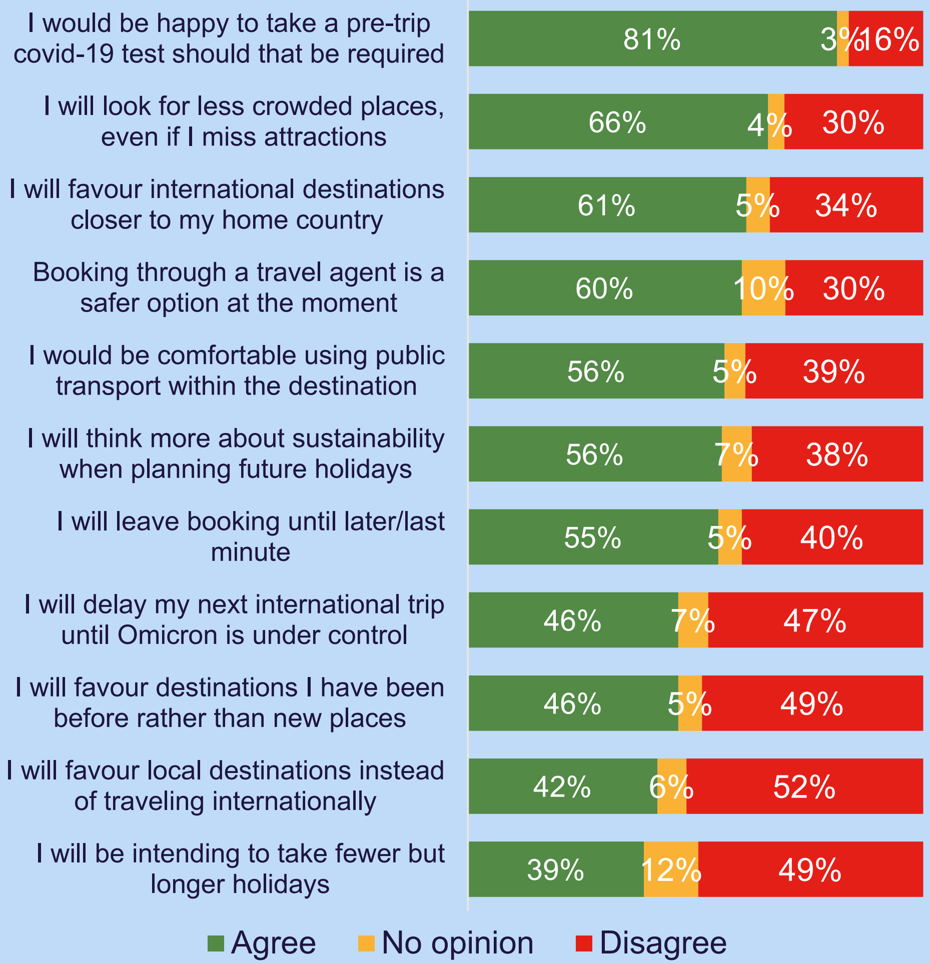
Top travel drivers

…for any international trip

…for a trip to Britain

Travel Concerns – for travel to Britain*

Travel attitudes**



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

India Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3	Wave 4
92%	90%	94%	91%

Journey purpose

Holiday	77%
Visit friends or relatives	48%
Other leisure purposes	48%

Planning stage

	Wave 1	Wave 2	Wave 3	Wave 4
Trip booked	17%	11%	15%	6%
Destination chosen	36%	38%	37%	36%
Trip planned	33%	37%	31%	40%
Intend to travel	14%	14%	18%	17%

Among leisure trip intenders:

40% consider **Europe**

13% consider **Britain**

Among Britain intenders:

74% consider England
44% consider Scotland
25% consider Wales
23% consider London

Travel preferences

Top activities

Iconic tourist attractions	67%
Outdoor nature activities	67%
History and heritage	66%
Shopping	65%
Experiencing local lifestyle	62%

Destination types

Large city	60%
Mountains or hills	55%
Coastline	43%
Will roam around	45%
Small/mid-sized city/town	29%
Country/ village	40%

Top Travel Companions

With your spouse/partner	68%
With children (under 18)	38%
With adult family members	29%
With friends	25%
Alone	18%
As part of a tour group	4%

Top modes of transport within Britain

Domestic flight	51%
Public transport - Train	45%
Rented car/vehicle	42%
Public transport - Tube/subway	41%
Uber/other sharing app	39%
Public transport - Bus	36%
Taxi	33%
Private coach/minibus	30%
Own car vehicle	24%

Top Accommodation

Hotel chain	53%
Friend's/family house (free guest)	38%
Holiday village/centre	37%
Private rental	35%
Bed and breakfast	33%

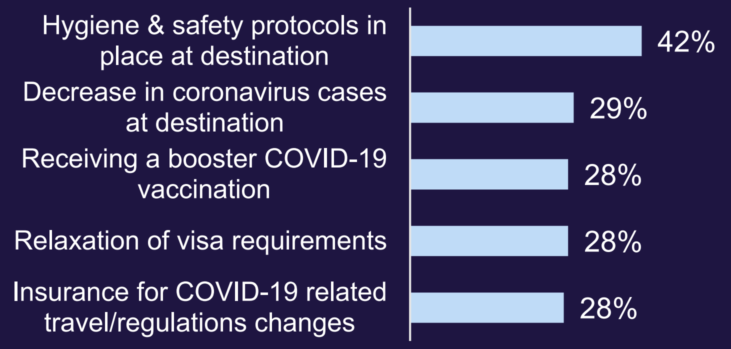
*(% definitely & probably) in the next 12 months

India Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

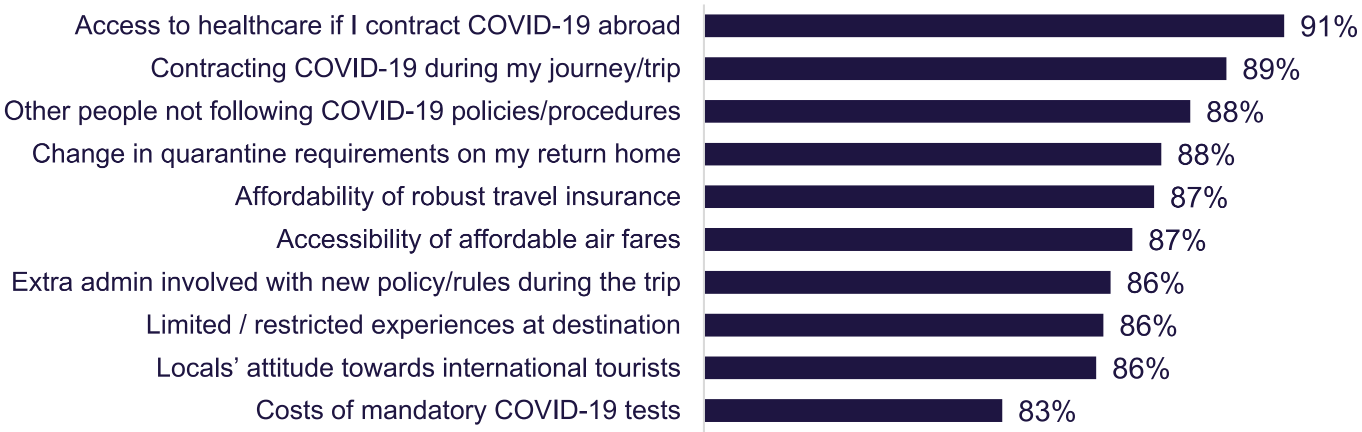
Top travel drivers

…for any international trip

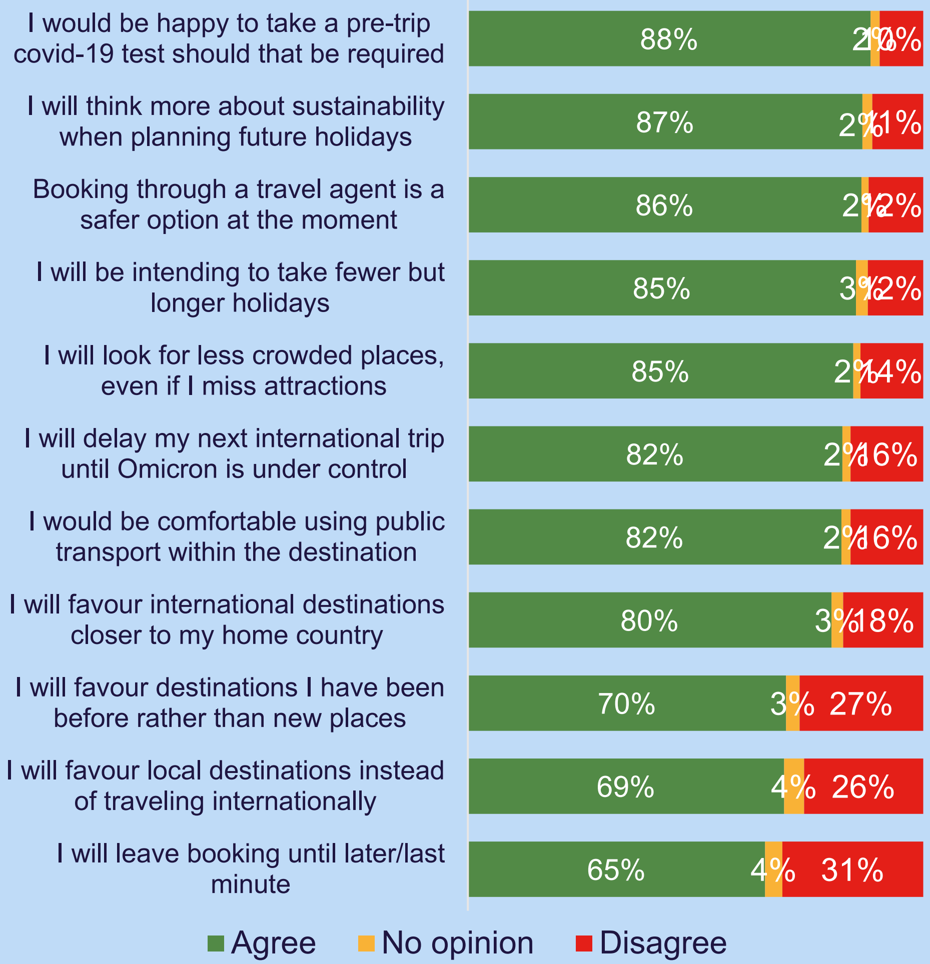


…for a trip to Britain

Travel Concerns – for travel to Britain*



Travel attitudes**



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

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

Irish Republic Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3	Wave 4
71%	68%	82%	87%

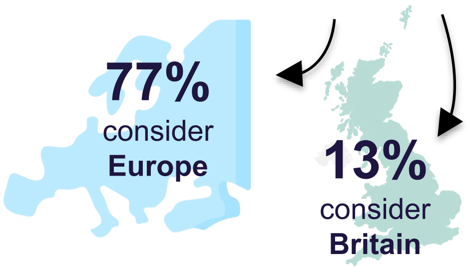
Journey purpose

Holiday	84%
Visit friends or relatives	41%
Other leisure purposes	18%

Planning stage

	Wave 1	Wave 2	Wave 3	Wave 4
Trip booked	9%	6%	18%	23%
Destination chosen	30%	32%	32%	26%
Trip planned	32%	29%	29%	30%
Intend to travel	30%	32%	20%	21%

Among leisure trip intenders:



Among Britain intenders:

57% consider England
31% consider Scotland
22% consider London
12% consider Wales

Travel preferences

Top activities

Dining out	55%
Iconic tourist attractions	48%
Outdoor nature activities	47%
History and heritage	42%
Visiting cultural attractions	40%

Top Travel Companions

With your spouse/partner	67%
With children (under 18)	31%
Alone	21%
With friends	17%
With adult family members	16%
As part of a tour group	1%

Top Accommodation

Hotel chain	66%
Self catered property	44%
Boutique hotel	43%
Bed and breakfast	43%
Friend's/family house (free guest)	35%

Destination types

Coastline	37%
Large city	47%
Will roam around	24%
Small/mid-sized city/town	21%
Mountains or hills	18%
Country/village	23%

Top modes of transport within Britain

Public transport - Train	51%
Own car vehicle	49%
Domestic flight	46%

Top modes of transport to Britain

Plane – via nonstop flight	94%
Plane – via connecting flight	76%
Own/rented vehicle – via Ferry	66%

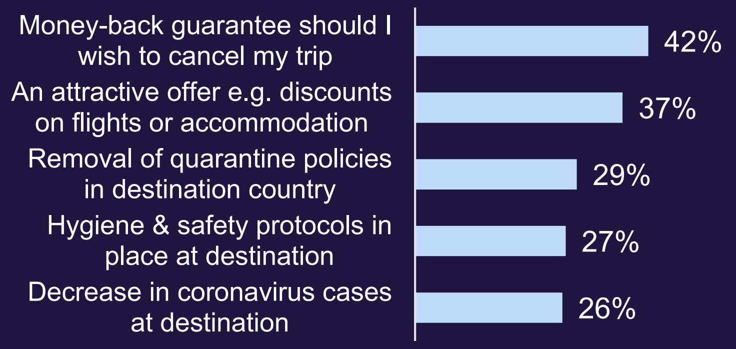
*(% definitely & probably) in the next 12 months

Irish Republic Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

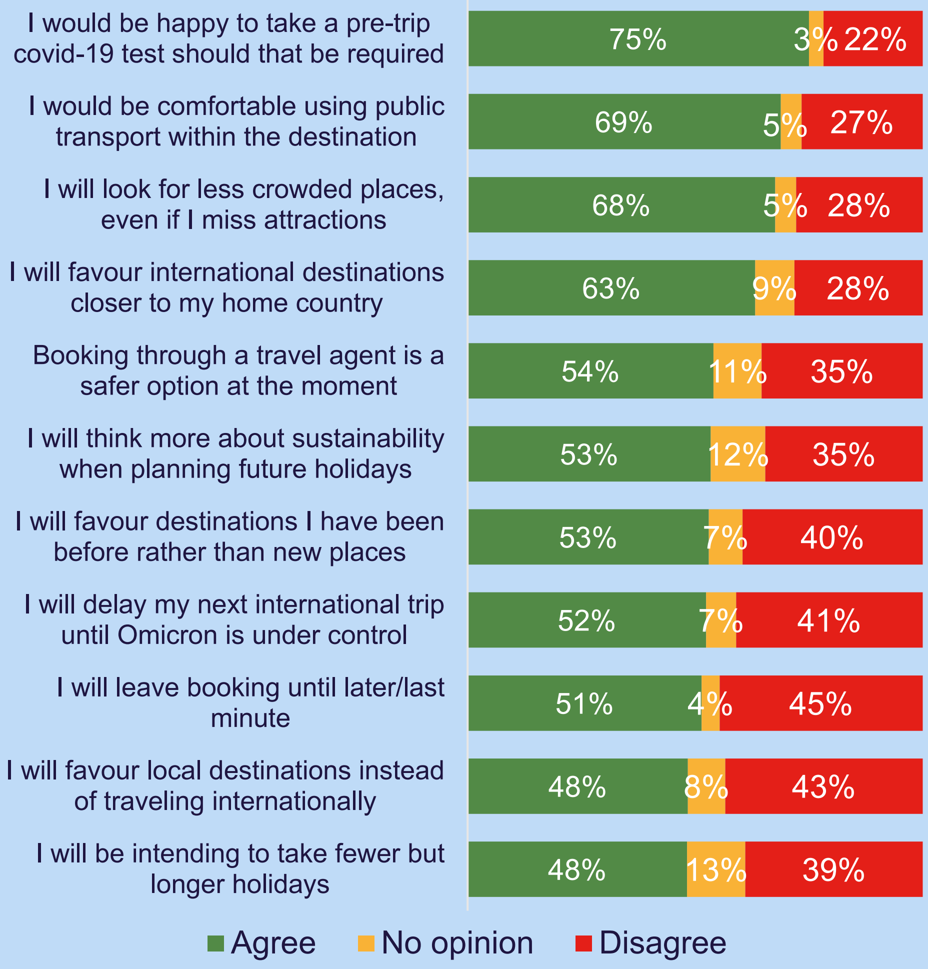
…for any international trip



…for a trip to Britain

*Travel Concerns – for travel to Britain**

*Travel attitudes***



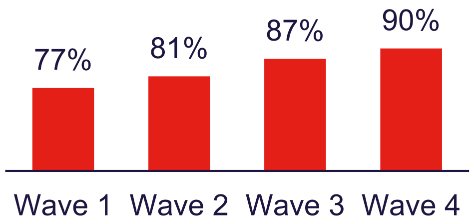
*% very & somewhat concerned
**% completely & somewhat agree

Italy Market Summary

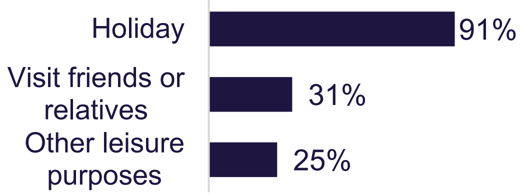
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

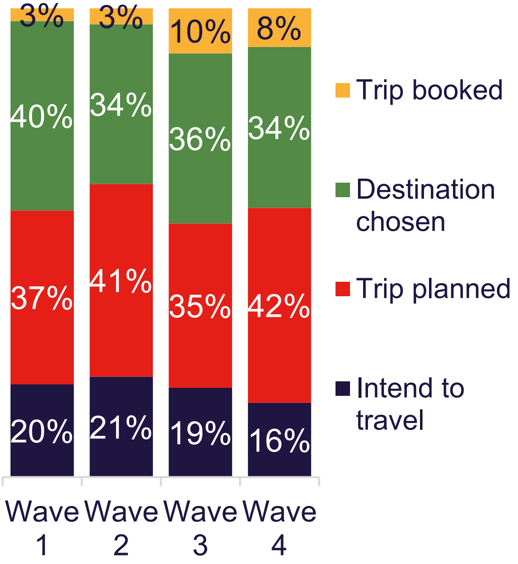
Intending to travel abroad for leisure*



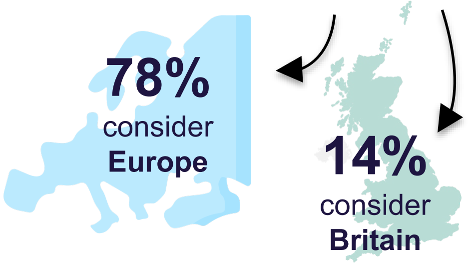
Journey purpose



Planning stage



Among leisure trip intenders:



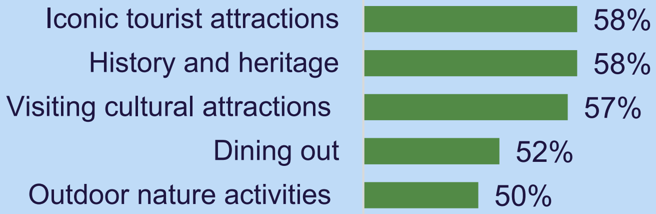
Among Britain intenders:

60% consider England
53% consider Scotland
32% consider London
20% consider Wales

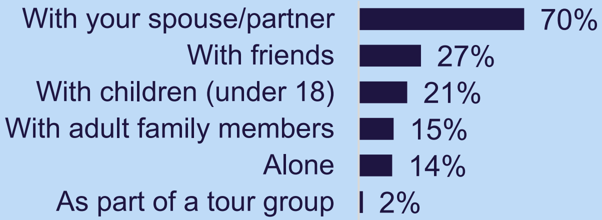
*(% definitely & probably) in the next 12 months

Travel preferences

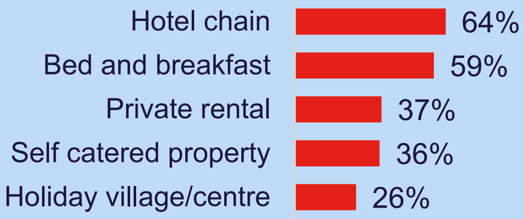
Top activities



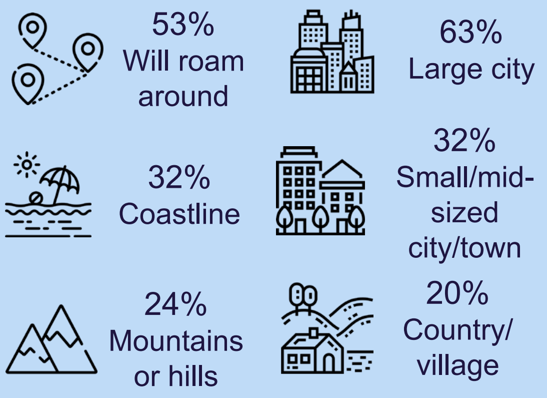
Top Travel Companions



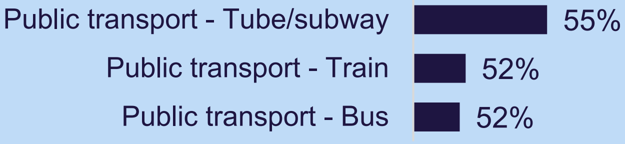
Top Accommodation



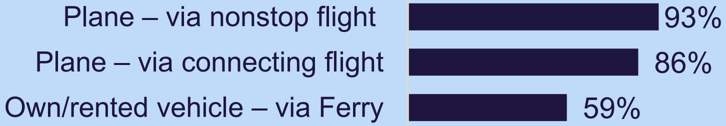
Destination types



Top modes of transport within Britain



Top modes of transport to Britain



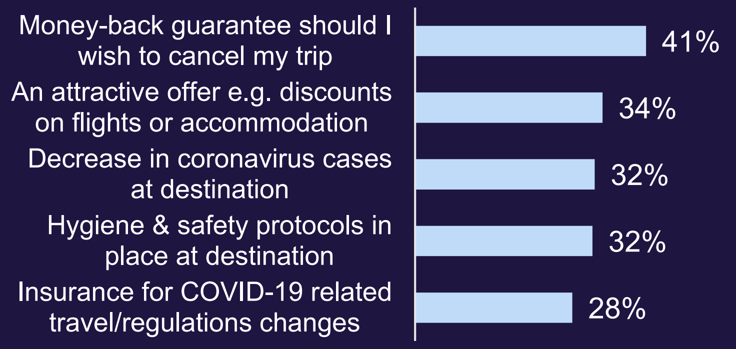
TCI Research Travel Competitive Intelligence
LONDON & PARTNERS
Llywodraeth Cymru Welsh Government
Visit Scotland | Alba
VisitBritain

Italy Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

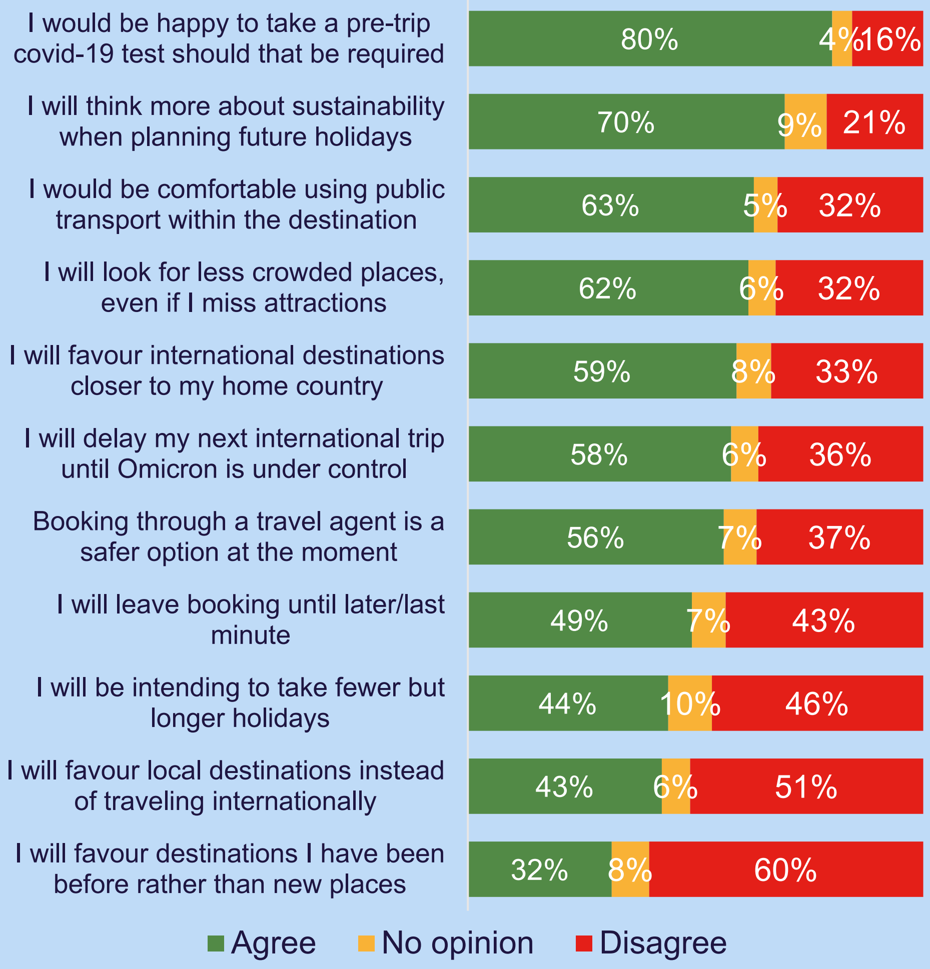
Top travel drivers

…for any international trip

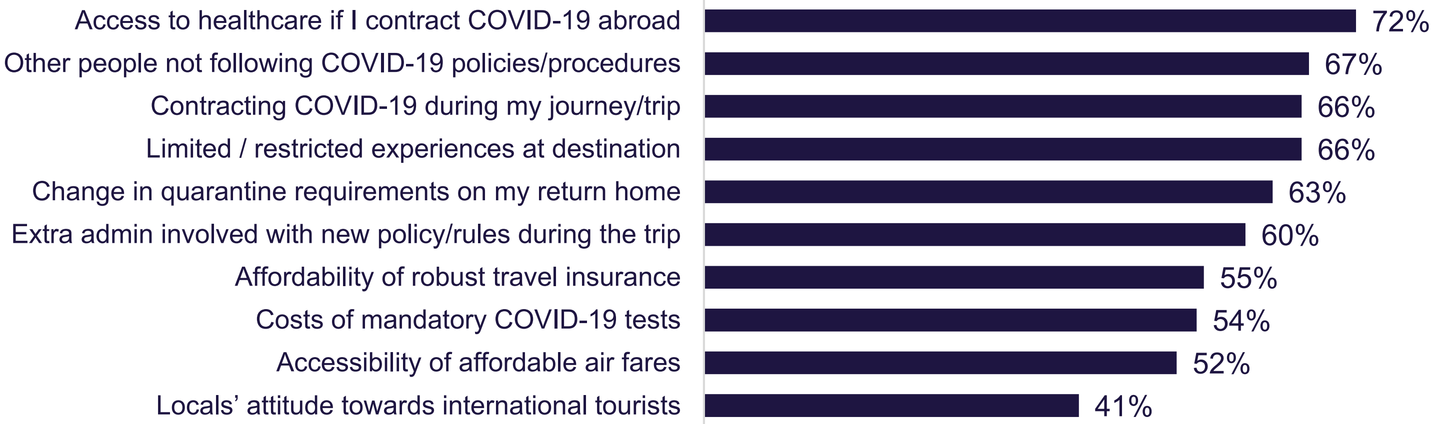


…for a trip to Britain

Travel attitudes**



Travel Concerns – for travel to Britain*



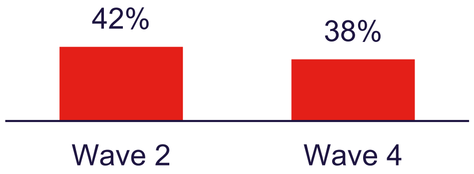
*% very & somewhat concerned
**% completely & somewhat agree

Japan Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

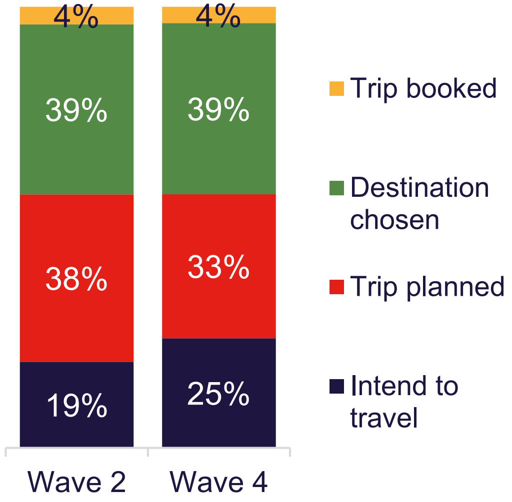
Travel intentions

Intending to travel abroad for leisure*

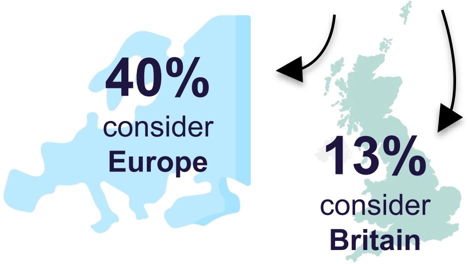


Journey purpose

Planning stage



Among leisure trip intenders:



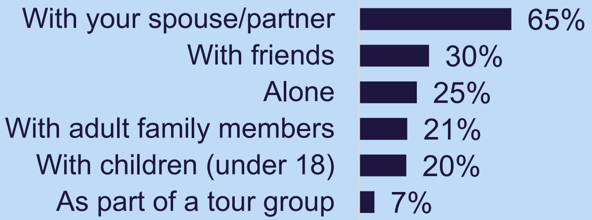
Among Britain intenders:

53% consider England
37% consider Scotland
23% consider London
20% consider Wales

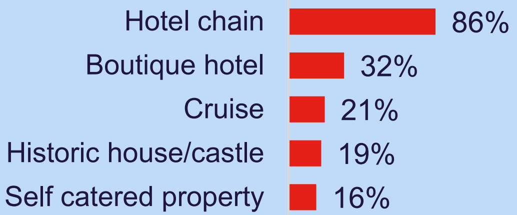
Travel preferences

Top activities

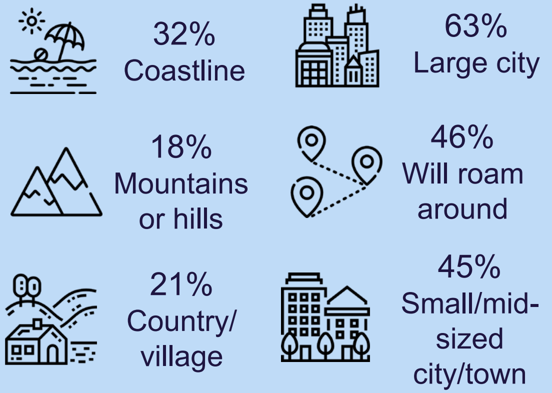
Top Travel Companions



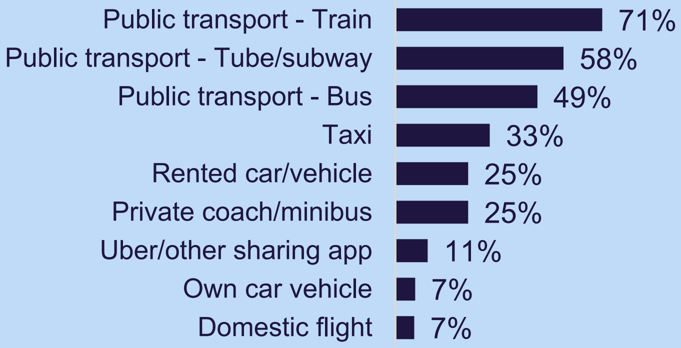
Top Accommodation



Destination types



Top modes of transport within Britain



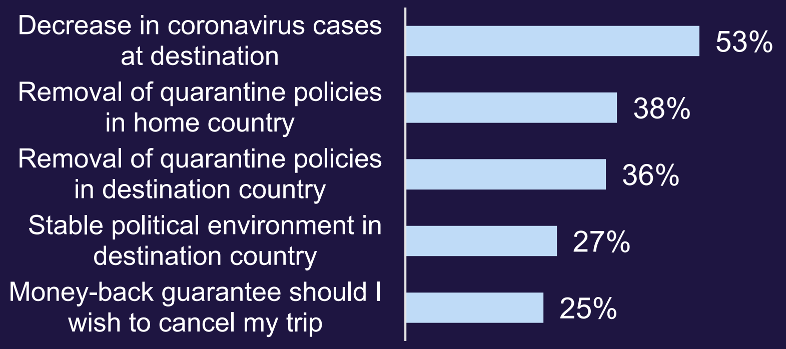
*(% definitely & probably) in the next 12 months

Japan Market Summary

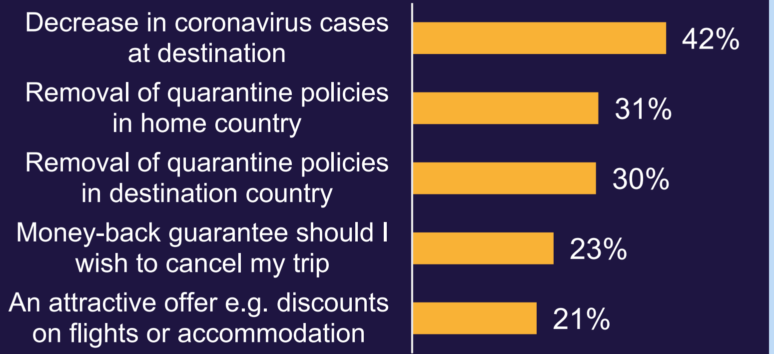
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

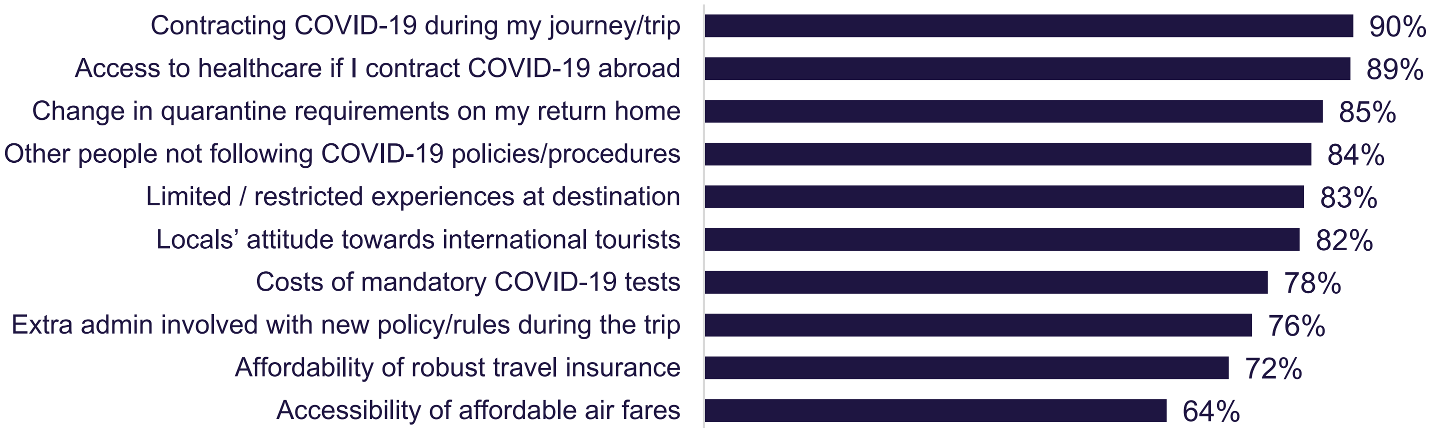
…for any international trip



…for a trip to Britain

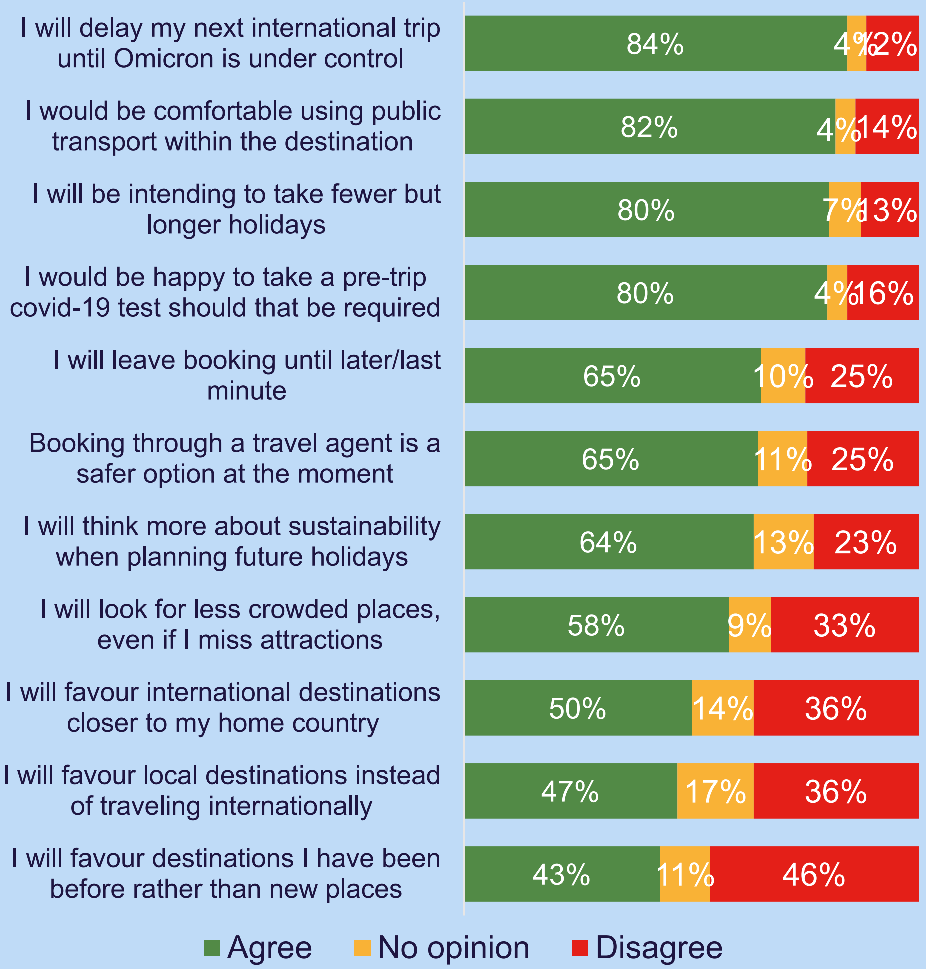


*Travel Concerns – for travel to Britain**



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

*Travel attitudes***

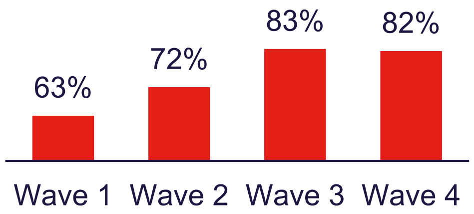


Netherlands Market Summary

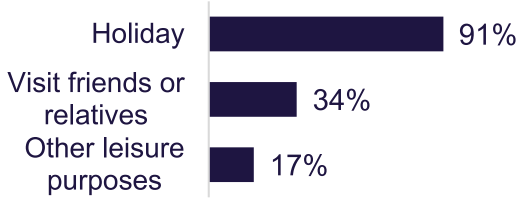
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

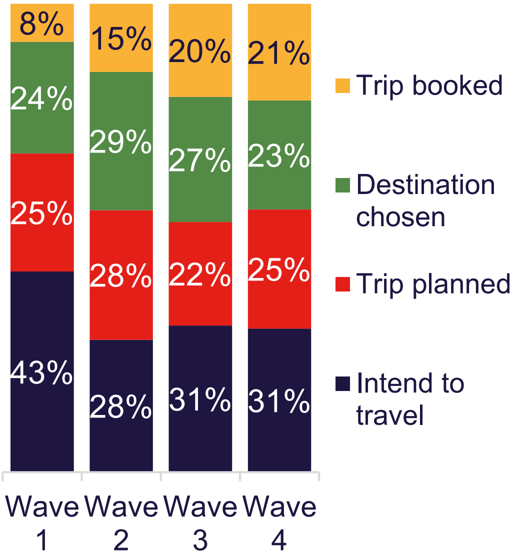
Intending to travel abroad for leisure*



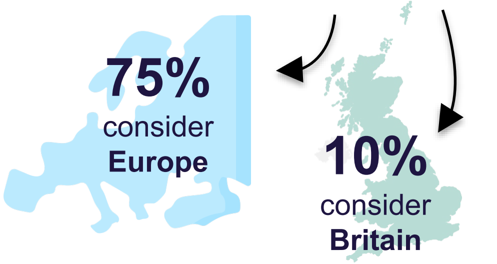
Journey purpose



Planning stage



Among leisure trip intenders:



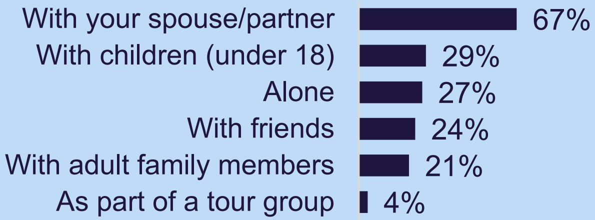
Among Britain intenders:

48% consider England
38% consider Scotland
18% consider London
14% consider Wales

Travel preferences

Top activities

Top Travel Companions

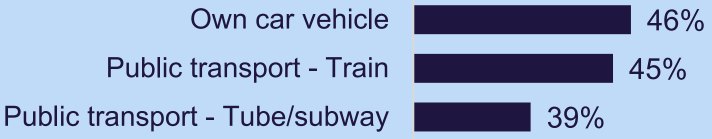


Top Accommodation

Destination types

32% Coastline
38% Large city
31% Mountains or hills
36% Will roam around
25% Country/ village
25% Small/mid-sized city/town

Top modes of transport within Britain



Top modes of transport to Britain

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

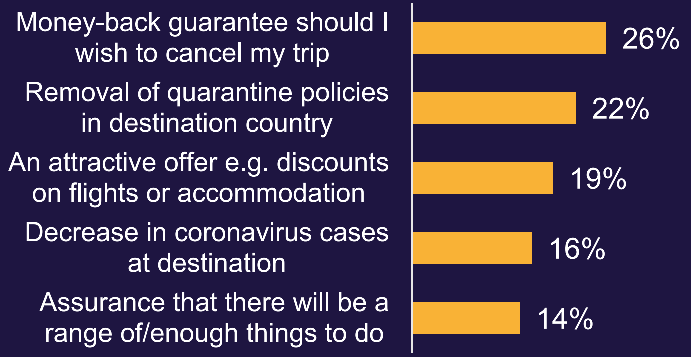
Netherlands Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

…for any international trip

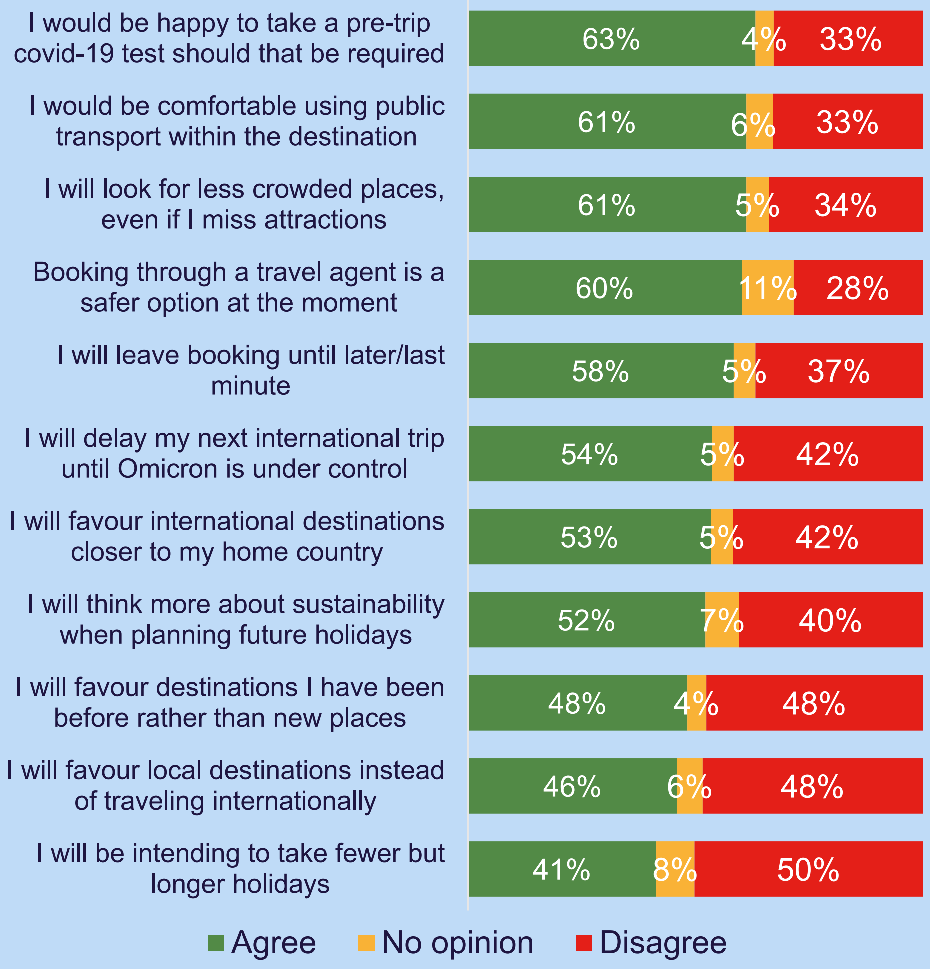
…for a trip to Britain



Travel Concerns – for travel to Britain*

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

Travel attitudes**

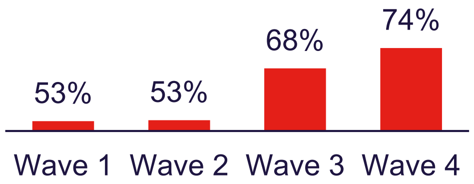


Norway Market Summary

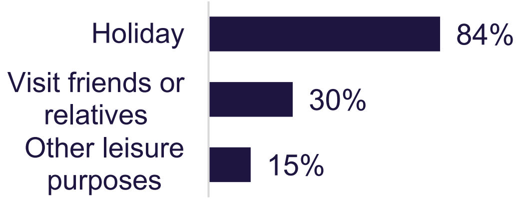
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

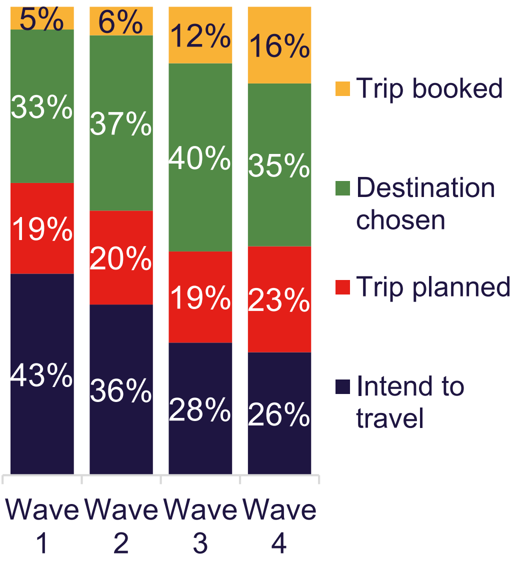
Intending to travel abroad for leisure*



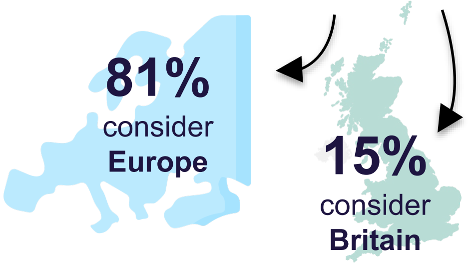
Journey purpose



Planning stage



Among leisure trip intenders:



Among Britain intenders:

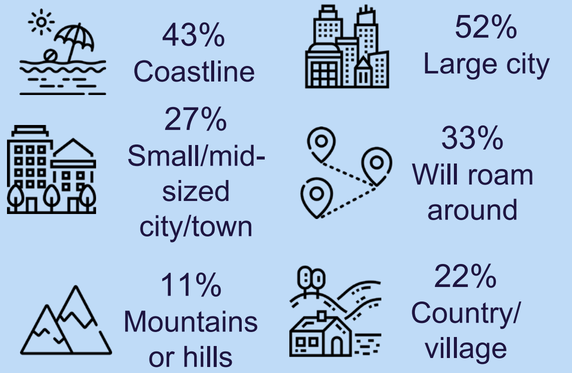
57% consider England
32% consider Scotland
27% consider London
10% consider Wales

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

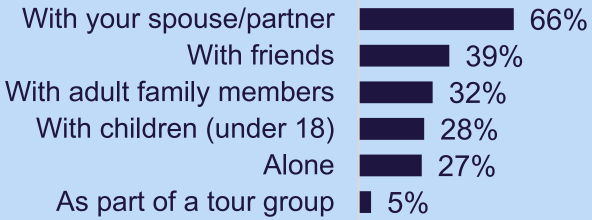
Travel preferences

Top activities

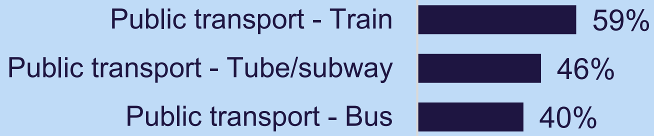
Destination types



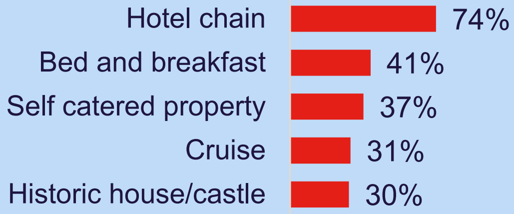
Top Travel Companions



Top modes of transport within Britain



Top Accommodation



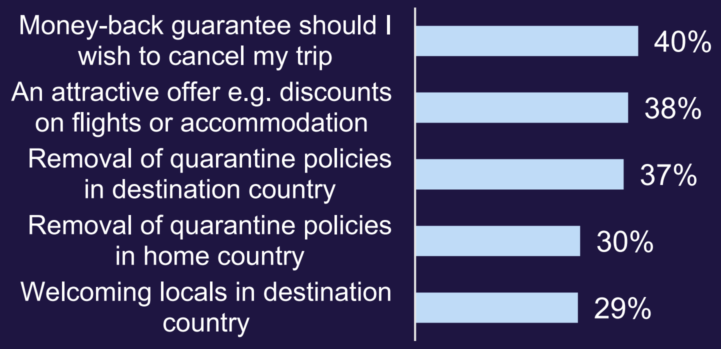
Top modes of transport to Britain

Norway Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

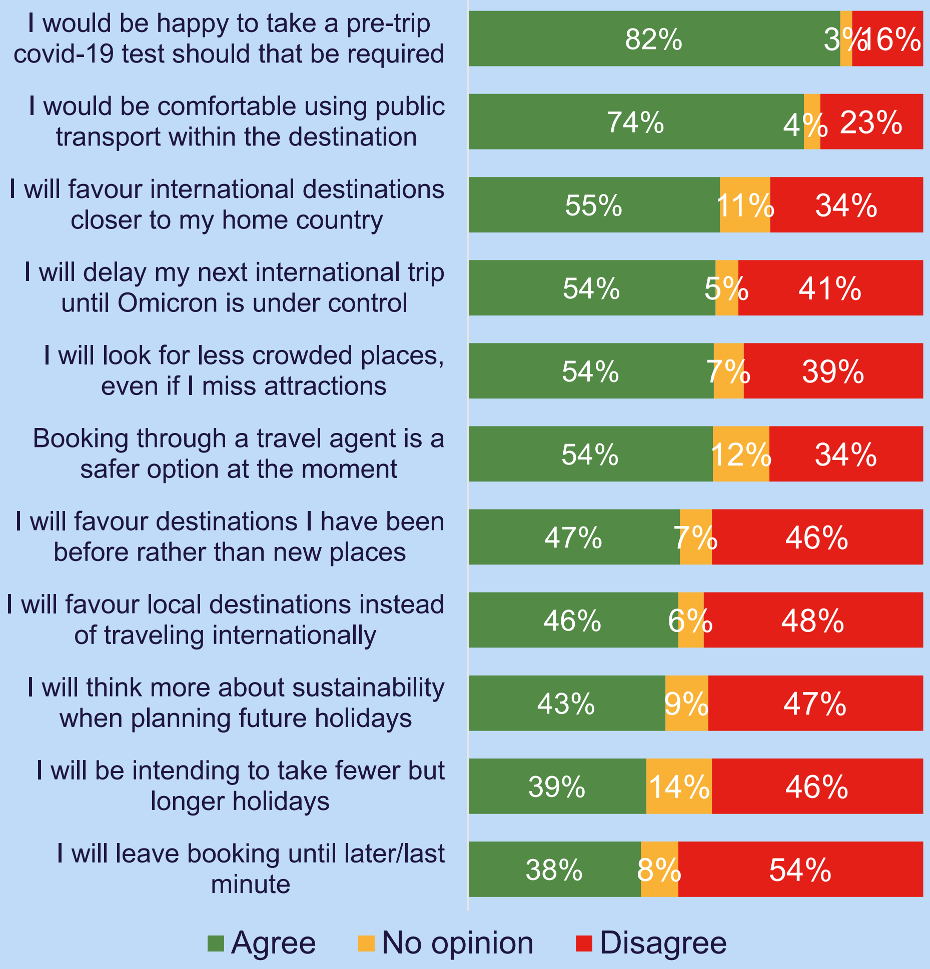
…for any international trip



…for a trip to Britain

*Travel Concerns – for travel to Britain**

*Travel attitudes***



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

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

Russia Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

Intending to travel abroad for leisure*

	Wave 2	Wave 4
Intending to travel abroad for leisure*	83%	83%

Journey purpose

Other leisure purposes	68%
Holiday	28%
Visit friends or relatives	22%

Planning stage

	Wave 2	Wave 4
Trip booked	3%	1%
Destination chosen	40%	40%
Trip planned	46%	46%
Intend to travel	11%	13%

Among leisure trip intenders:

56% consider **Europe**

1% consider **Britain**

Among Britain intenders:

45% consider England
34% consider Scotland
24% consider London
14% consider Wales

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

Travel preferences

Top activities

Iconic tourist attractions	49%
Guided tours/day-excursions	44%
History and heritage	42%
Visiting cultural attractions	42%
Outdoor nature activities	40%

Top Travel Companions

With your spouse/partner	68%
With friends	23%
With children (under 18)	23%
With adult family members	17%
Alone	13%
As part of a tour group	8%

Top Accommodation

Hotel chain	65%
Bed and breakfast	47%
Self catered property	34%
Private rental	23%
Holiday village/centre	19%

Destination types

Small/mid-sized city/town	24%
Large city	35%
Will roam around	52%
Coastline	48%
Country/village	12%
Mountains or hills	24%

Top modes of transport within Britain

Public transport - Bus	48%
Public transport - Train	45%
Public transport - Tube/subway	41%

Top modes of transport to Britain

Mode	%
Plane – via nonstop flight	99%
Plane – via connecting flight	69%
Coach – via Channel Tunnel	33%

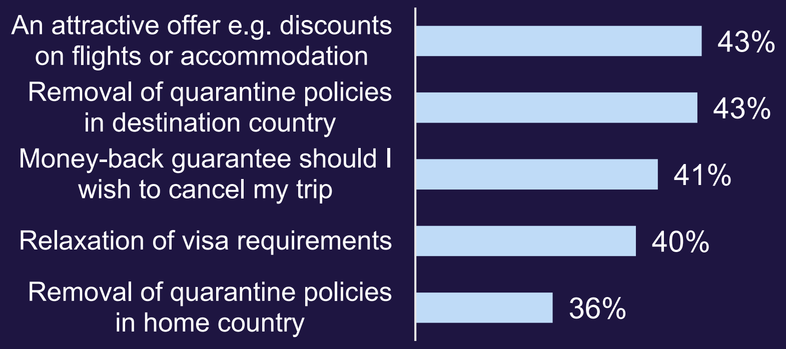
TCI Research Travel Competitive Intelligence | London & Partners | Llywodraeth Cymru Welsh Government | Visit Scotland Alba | VisitBritain

Russia Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

…for any international trip

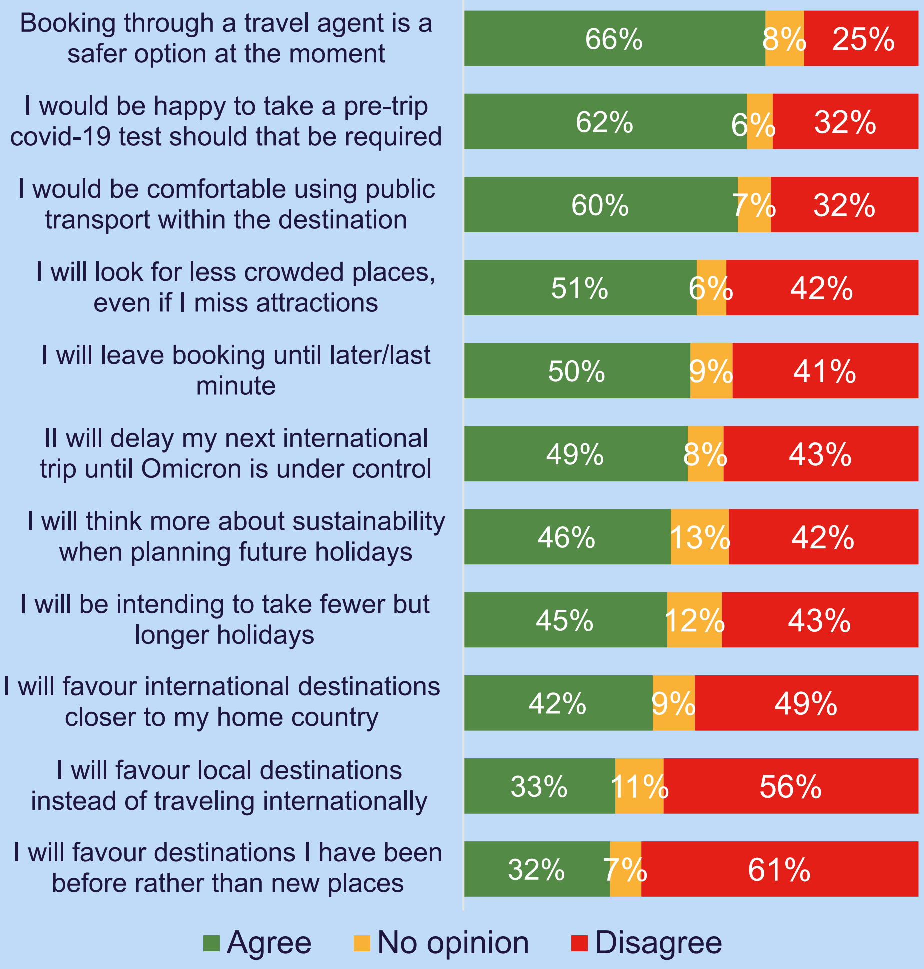


…for a trip to Britain

Travel Concerns – for travel to Britain*

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

Travel attitudes**



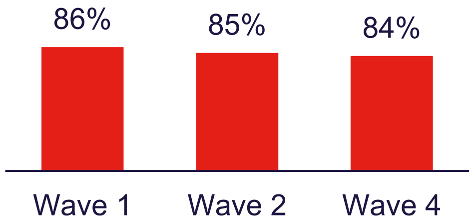
TCI Research Travel Competitive Intelligence | LONDON & PARTNERS | Llywodraeth Cymru Welsh Government | Visit Scotland | Alba | VisitBritain

Saudi Arabia Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

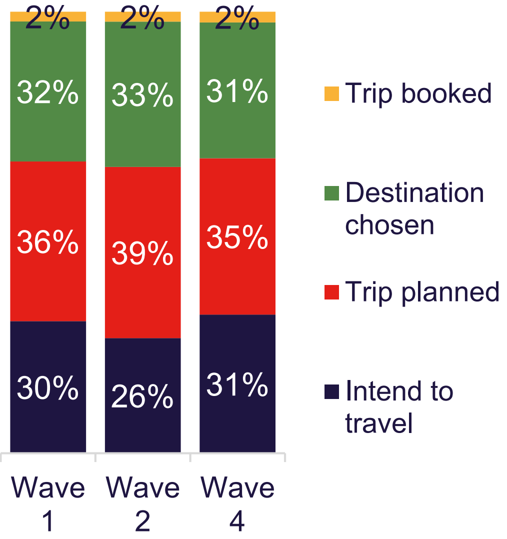
Travel intentions

Intending to travel abroad for leisure*

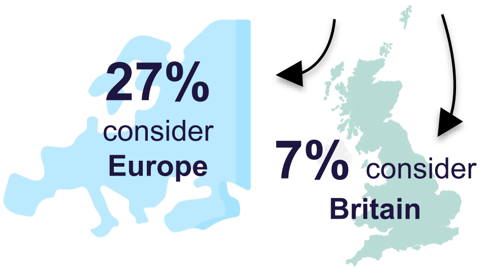


Journey purpose

Planning stage



Among leisure trip intenders:



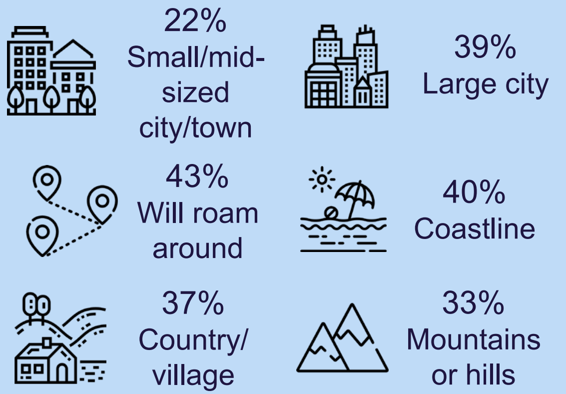
Among Britain intenders:

52% consider England
16% consider Scotland
16% consider Wales
13% consider London

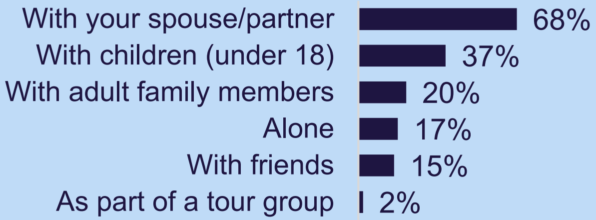
Travel preferences

Top activities

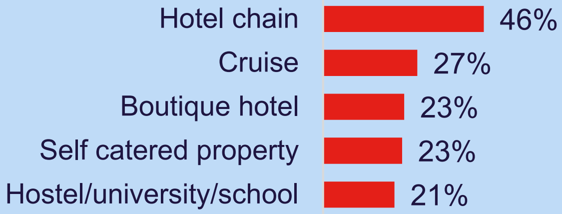
Destination types



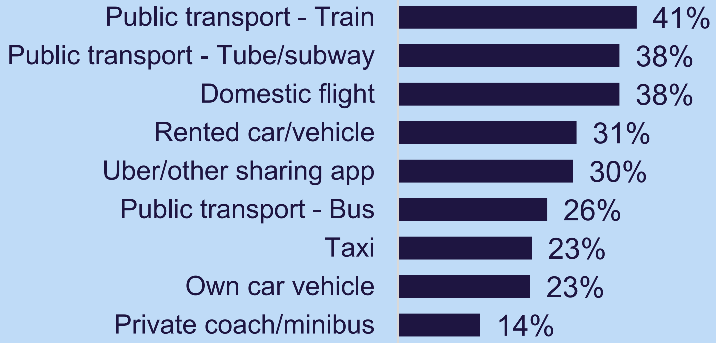
Top Travel Companions



Top Accommodation



Top modes of transport within Britain



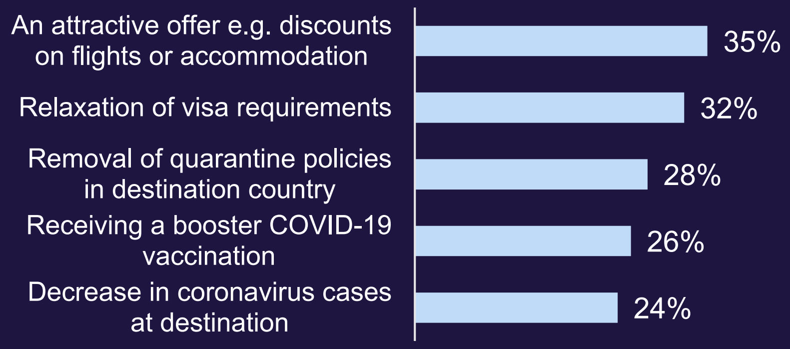
*(% definitely & probably) in the next 12 months

Saudi Arabia Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

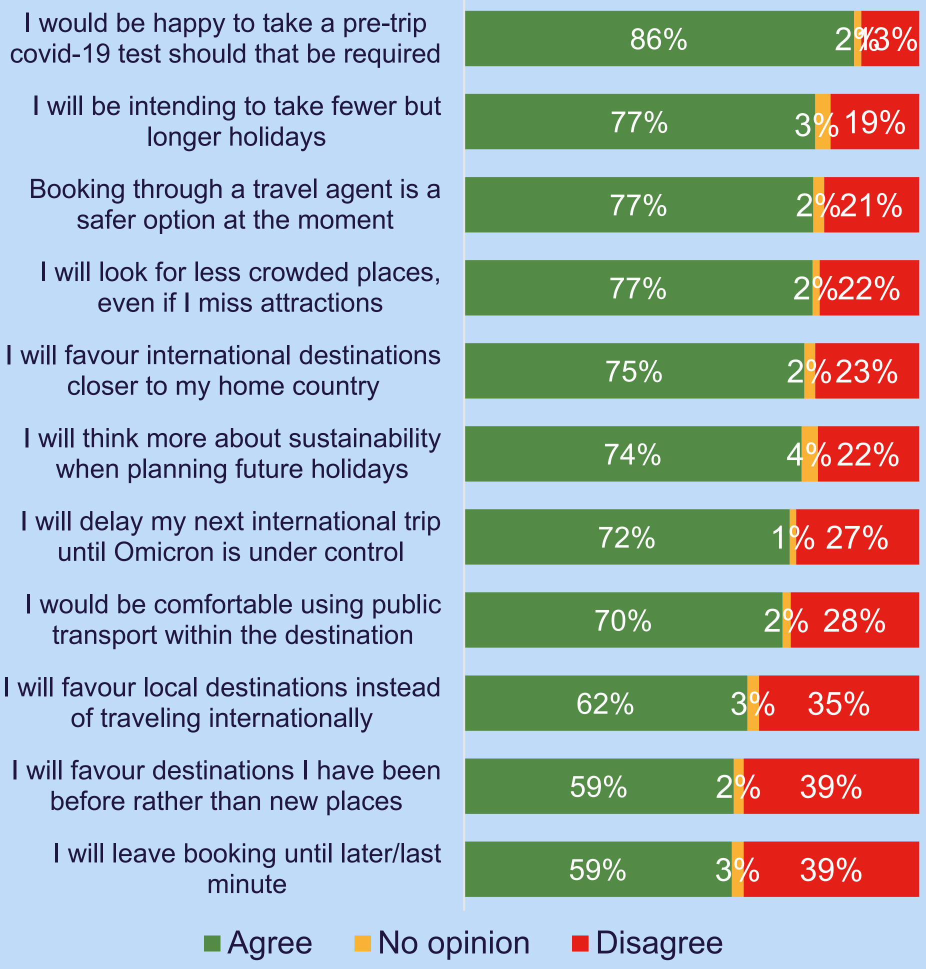
Top travel drivers

…for any international trip



…for a trip to Britain

Travel attitudes**



Travel Concerns – for travel to Britain*

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

South Korea Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 2	Wave 4
56%	60%

Journey purpose

- Holiday 93%
- Other leisure purposes 17%
- Visit friends or relatives 14%

Planning stage

	Wave 2	Wave 4
Trip booked	1%	2%
Destination chosen	28%	32%
Trip planned	45%	43%
Intend to travel	26%	23%

Among leisure trip intenders:

36% consider **Europe**

11% consider **Britain**

Among Britain intenders:

57% consider England
34% consider Scotland
18% consider London
13% consider Wales

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

Travel preferences

Top activities

- Iconic tourist attractions 50%
- Dining out 47%
- Visiting cultural attractions 45%
- Outdoor nature activities 42%
- History and heritage 42%

Top Travel Companions

- With your spouse/partner 61%
- With friends 26%
- With children (under 18) 23%
- With adult family members 20%
- Alone 17%
- As part of a tour group 4%

Top Accommodation

- Hotel chain 67%
- Bed and breakfast 40%
- Boutique hotel 38%
- Self catered property 18%
- Private rental 17%

Destination types

- 29% Small/mid-sized city/town
- 52% Large city
- 50% Will roam around
- 35% Coastline
- 19% Country/ village
- 15% Mountains or hills

Top modes of transport within Britain

- Public transport - Tube/subway 46%
- Public transport - Train 36%
- Rented car/vehicle 36%
- Public transport - Bus 31%
- Taxi 23%
- Domestic flight 22%
- Uber/other sharing app 22%
- Private coach/minibus 16%
- Own car vehicle 13%

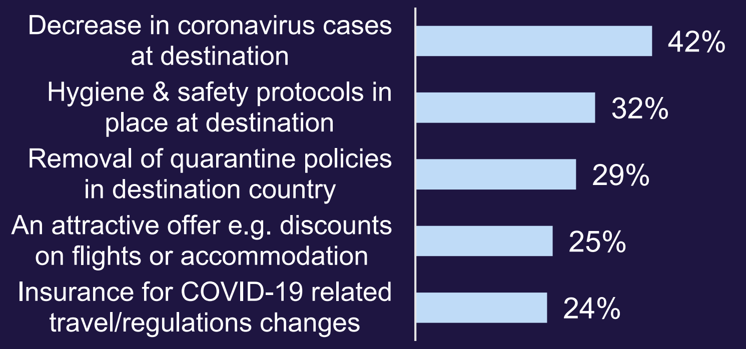
TCI Research Travel Competitive Intelligence
LONDON & PARTNERS
Llywodraeth Cymru Welsh Government
VisitScotland | Alba
VisitBritain

South Korea Market Summary

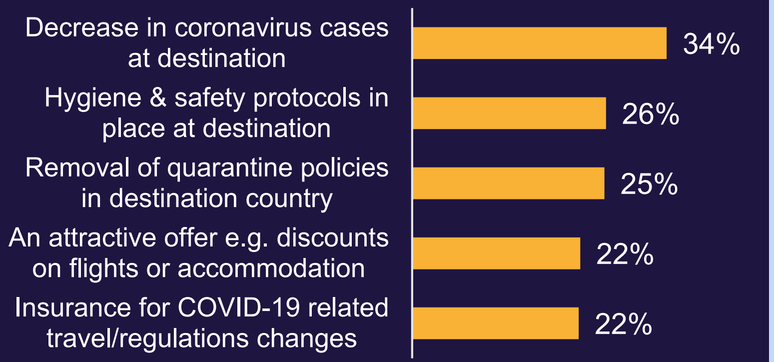
Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

…for any international trip

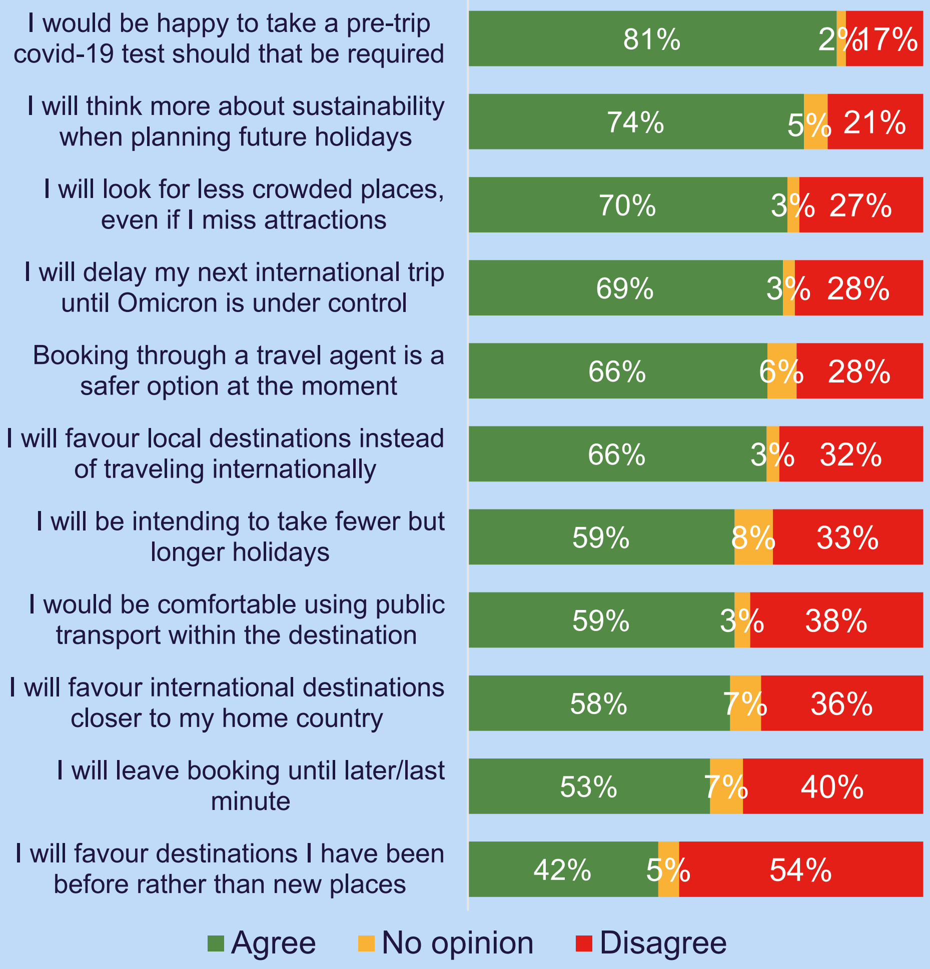


…for a trip to Britain



Travel Concerns – for travel to Britain*

Travel attitudes**



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

Spain Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3	Wave 4
72%	77%	81%	91%

Journey purpose

Holiday	88%
Visit friends or relatives	35%
Other leisure purposes	23%

Planning stage

	Wave 1	Wave 2	Wave 3	Wave 4
Trip booked	3%	4%	9%	8%
Destination chosen	38%	36%	37%	40%
Trip planned	32%	35%	30%	33%
Intend to travel	27%	24%	24%	19%

Among leisure trip intenders:

73% consider **Europe**

15% consider **Britain**

Among Britain intenders:

52% consider England
43% consider Scotland
24% consider London
13% consider Wales

Travel preferences

Top activities

History and heritage	60%
Dining out	49%
Iconic tourist attractions	47%
Visiting cultural attractions	47%
Experiencing local lifestyle	46%

Top Travel Companions

With your spouse/partner	76%
With friends	28%
With children (under 18)	26%
With adult family members	22%
Alone	18%
As part of a tour group	4%

Top Accommodation

Hotel chain	62%
Boutique hotel	44%
Private rental	37%
Friend's/family house (free guest)	32%
Historic house/castle	27%

Destination types

33% Small/mid-sized city/town
60% Large city
23% Will roam around
22% Coastline
14% Country/ village
22% Mountains or hills

Top modes of transport within Britain

Domestic flight	40%
Public transport - Train	37%
Public transport - Tube/subway	36%

Top modes of transport to Britain

Plane – via nonstop flight	96%
Plane – via connecting flight	81%
On foot – via Eurostar/Train	53%

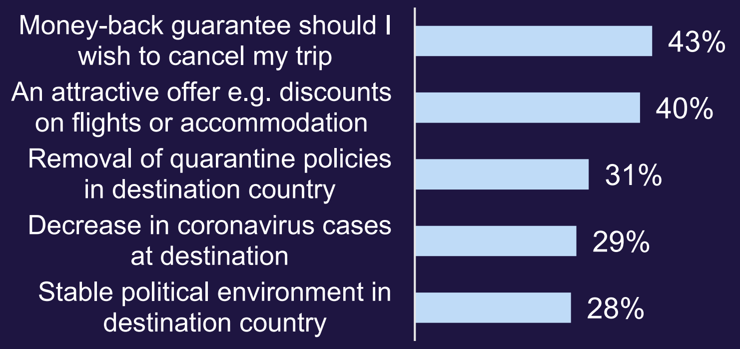
*(% definitely & probably) in the next 12 months

Spain Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

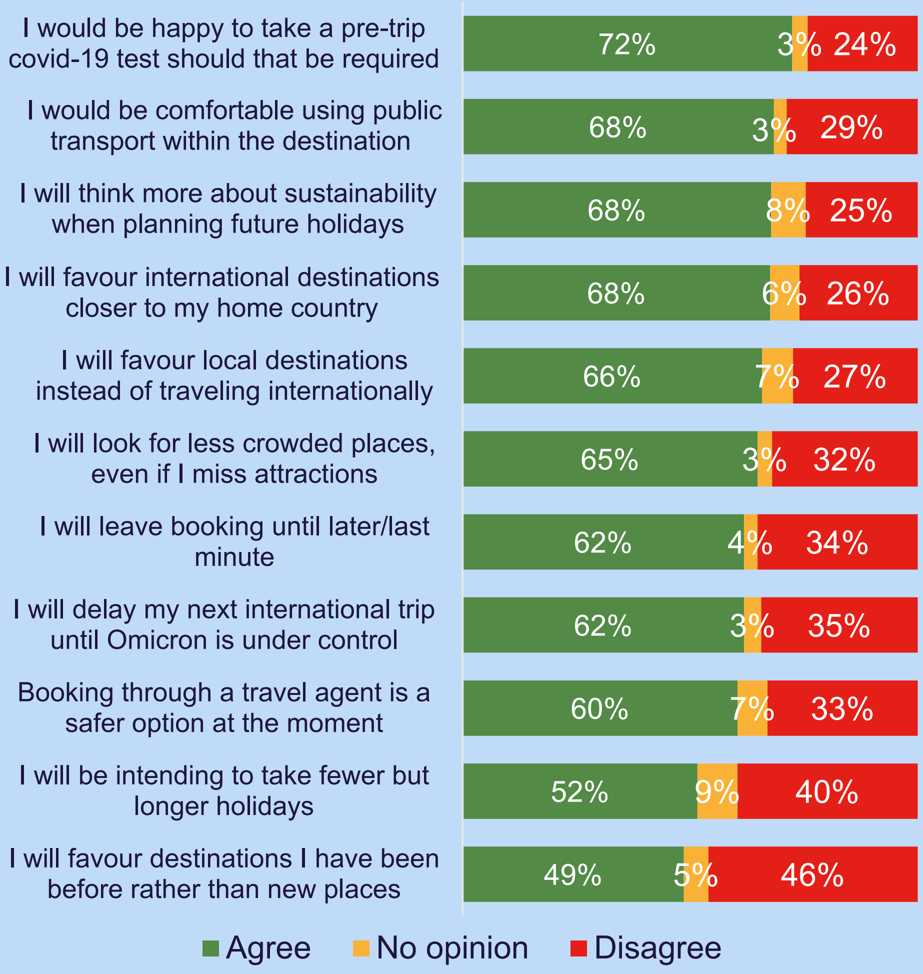
Top travel drivers

…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

Sweden Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3	Wave 4
55%	67%	75%	82%

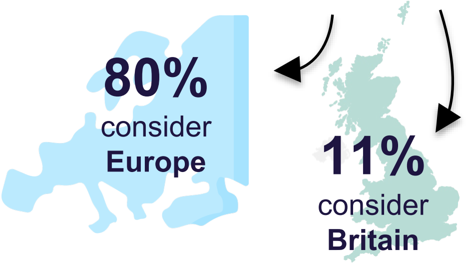
Journey purpose

Holiday	85%
Visit friends or relatives	28%
Other leisure purposes	19%

Planning stage

	Wave 1	Wave 2	Wave 3	Wave 4
Trip booked	5%	7%	15%	14%
Destination chosen	32%	35%	32%	36%
Trip planned	32%	34%	34%	33%
Intend to travel	31%	24%	19%	17%

Among leisure trip intenders:



80% consider **Europe**

11% consider **Britain**

Among Britain intenders:

46% consider England
27% consider Scotland
24% consider London
8% consider Wales

Travel preferences

Top activities

Dining out	60%
History and heritage	34%
Iconic tourist attractions	31%
Experiencing local lifestyle	31%
Visiting cultural attractions	31%

Top Travel Companions

With your spouse/partner	70%
With friends	37%
With adult family members	33%
Alone	30%
With children (under 18)	30%
As part of a tour group	7%

Top Accommodation

Hotel chain	78%
Bed and breakfast	46%
Self catered property	44%
Friend's/family house (free guest)	36%
Historic house/castle	33%

Destination types

Coastline	37%
Large city	49%
Will roam around	24%
Small/mid-sized city/town	26%
Mountains or hills	13%
Country/ village	20%

Top modes of transport within Britain

Public transport - Train	61%
Public transport - Tube/subway	56%
Public transport - Bus	52%

Top modes of transport to Britain

Plane – via nonstop flight	92%
Plane – via connecting flight	78%
Own/rented vehicle – via Channel Tunnel	39%

*(% 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
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

…for any international trip

Money-back guarantee should I wish to cancel my trip	48%
Insurance for COVID-19 related travel/regulations changes	35%
An attractive offer e.g. discounts on flights or accommodation	34%
Removal of quarantine policies in destination country	32%
Decrease in coronavirus cases at destination	29%

…for a trip to Britain

Money-back guarantee should I wish to cancel my trip	33%
An attractive offer e.g. discounts on flights or accommodation	29%
Removal of quarantine policies in destination country	23%
Insurance for COVID-19 related travel/regulations changes	23%
Decrease in coronavirus cases at destination	19%

Travel Concerns – for travel to Britain*

Other people not following COVID-19 policies/procedures	62%
Extra admin involved with new policy/rules during the trip	58%
Access to healthcare if I contract COVID-19 abroad	52%
Change in quarantine requirements on my return home	51%
Contracting COVID-19 during my journey/trip	50%
Limited / restricted experiences at destination	45%
Affordability of robust travel insurance	44%
Costs of mandatory COVID-19 tests	44%
Accessibility of affordable air fares	38%
Locals' attitude towards international tourists	32%

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

Travel attitudes**

	Agree	No opinion	Disagree
I would be happy to take a pre-trip covid-19 test should that be required	60%	6%	34%
I would be comfortable using public transport within the destination	58%	6%	36%
I will delay my next international trip until Omicron is under control	55%	6%	39%
I will think more about sustainability when planning future holidays	52%	10%	39%
I will look for less crowded places, even if I miss attractions	49%	9%	42%
Booking through a travel agent is a safer option at the moment	46%	13%	42%
I will favour international destinations closer to my home country	44%	9%	47%
I will favour local destinations instead of traveling internationally	43%	8%	48%
I will favour destinations I have been before rather than new places	42%	12%	46%
I will leave booking until later/last minute	40%	10%	50%
I will be intending to take fewer but longer holidays	34%	16%	50%

Agree No opinion Disagree

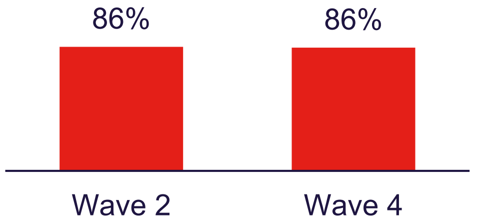
TCI Research Travel Competitive Intelligence
LONDON & PARTNERS
Llywodraeth Cymru Welsh Government
Visit Scotland | Alba
VisitBritain

UAE Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

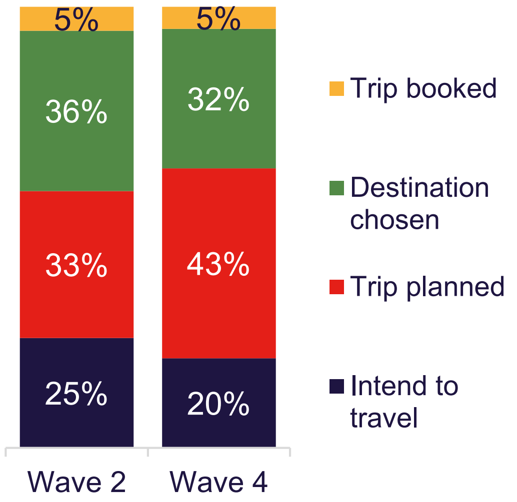
Travel intentions

Intending to travel abroad for leisure*

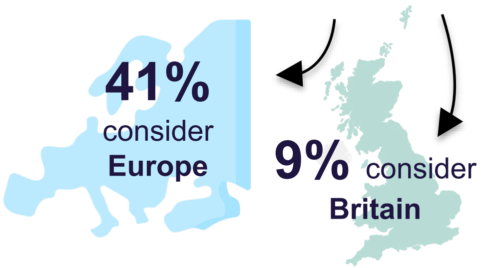


Journey purpose

Planning stage



Among leisure trip intenders:



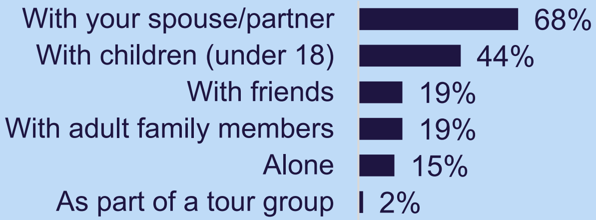
Among Britain intenders:

59% consider England
30% consider Scotland
21% consider Wales
20% consider London

Travel preferences

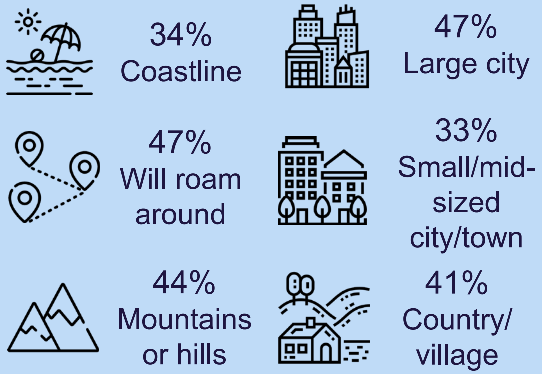
Top activities

Top Travel Companions

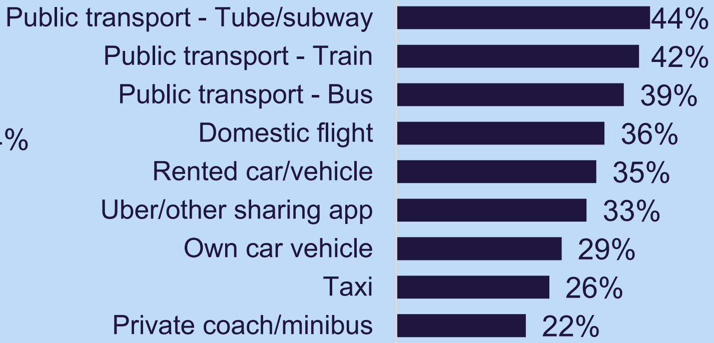


Top Accommodation

Destination types



Top modes of transport within Britain



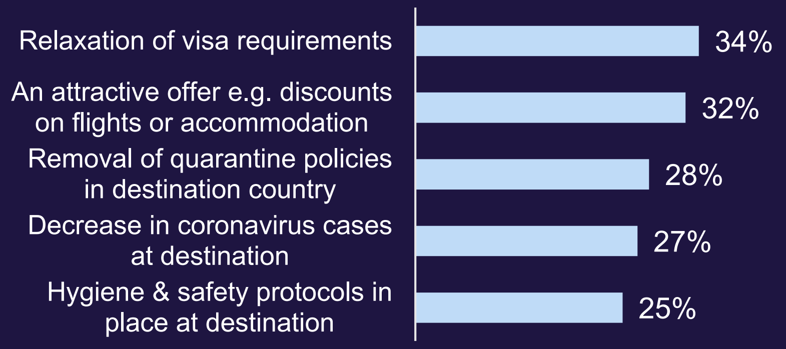
*(% definitely & probably) in the next 12 months

UAE Market Summary

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

…for any international trip

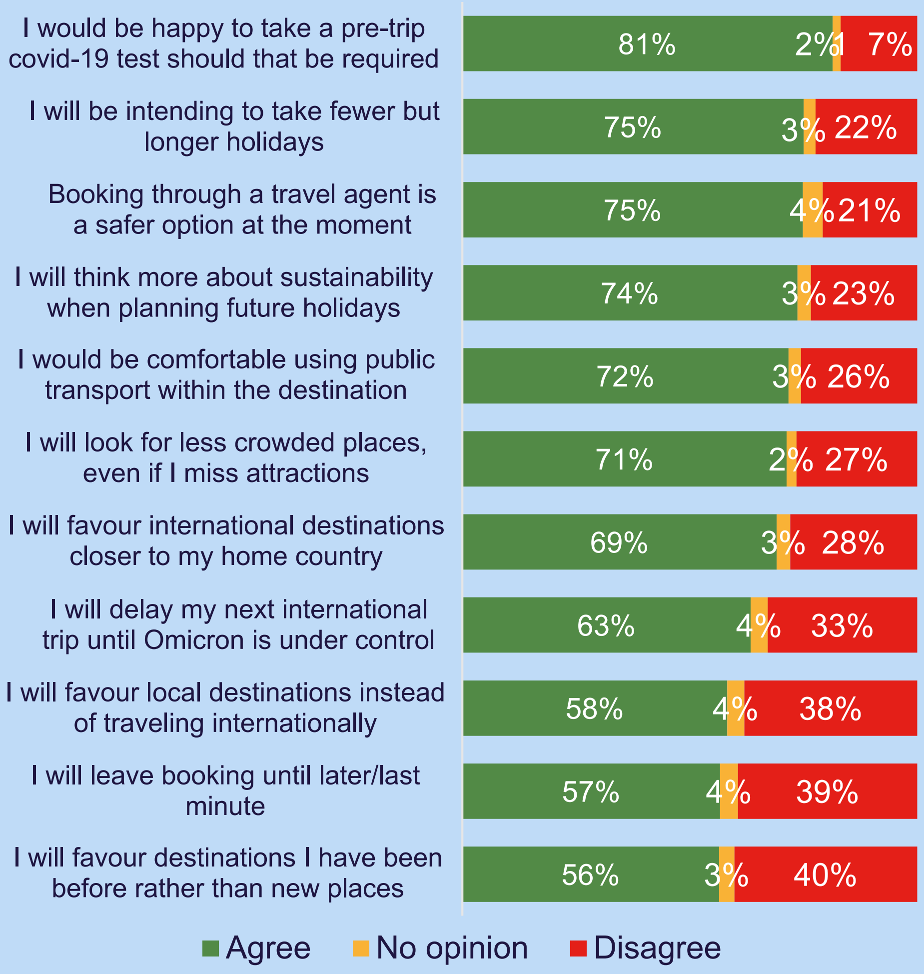


…for a trip to Britain

*Travel Concerns – for travel to Britain**

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

*Travel attitudes***



Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

USA Market Summary

Travel intentions

Intending to travel abroad for leisure*

Wave 1	Wave 2	Wave 3	Wave 4
69%	73%	80%	80%

Journey purpose

Holiday	85%
Visit friends or relatives	37%
Other leisure purposes	28%

Planning stage

	Wave 1	Wave 2	Wave 3	Wave 4
Trip booked	14%	16%	21%	17%
Destination chosen	24%	25%	23%	24%
Trip planned	28%	34%	32%	34%
Intend to travel	33%	26%	23%	25%

Among leisure trip intenders:

53% consider **Europe**

11% consider **Britain**

Among Britain intenders:

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

Travel preferences

Top activities

Dining out	58%
Iconic tourist attractions	56%
History and heritage	55%
Visiting cultural attractions	53%
Outdoor nature activities	51%

Top Travel Companions

With your spouse/partner	74%
With children (under 18)	35%
Alone	15%
With friends	15%
With adult family members	15%
As part of a tour group	3%

Top Accommodation

Hotel chain	62%
Bed and breakfast	37%
Boutique hotel	36%
Historic house/castle	29%
Private rental	29%

Destination types

41% Will roam around
51% Large city
30% Country/ village
34% Coastline
27% Small/mid-sized city/town
30% Mountains or hills

Top modes of transport within Britain

Domestic flight	48%
Public transport - Train	41%
Public transport - Tube/subway	39%
Rented car/vehicle	36%
Taxi	32%
Public transport - Bus	29%
Uber/other sharing app	29%
Private coach/minibus	29%
Own car vehicle	27%

*(% 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
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

Top travel drivers

…for any international trip

Money-back guarantee should I wish to cancel my trip	32%
Decrease in coronavirus cases at destination	28%
An attractive offer e.g. discounts on flights or accommodation	28%
Removal of quarantine policies in destination country	27%
Hygiene & safety protocols in place at destination	27%

…for a trip to Britain

An attractive offer e.g. discounts on flights or accommodation	27%
Decrease in coronavirus cases at destination	26%
Money-back guarantee should I wish to cancel my trip	25%
High proportion of destination population being vaccinated	23%
Removal of quarantine policies in destination country	23%

Travel Concerns – for travel to Britain*

Other people not following COVID-19 policies/procedures	75%
Limited / restricted experiences at destination	73%
Access to healthcare if I contract COVID-19 abroad	73%
Change in quarantine requirements on my return home	72%
Contracting COVID-19 during my journey/trip	71%
Extra admin involved with new policy/rules during the trip	67%
Accessibility of affordable air fares	67%
Affordability of robust travel insurance	64%
Locals' attitude towards international tourists	63%
Costs of mandatory COVID-19 tests	62%

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

Travel attitudes**

	Agree	No opinion	Disagree
I would be happy to take a pre-trip covid-19 test should that be required	83%	2%	14%
I will look for less crowded places, even if I miss attractions	71%	3%	26%
I would be comfortable using public transport within the destination	69%	4%	27%
Booking through a travel agent is a safer option at the moment	68%	7%	25%
I will delay my next international trip until Omicron is under control	65%	4%	30%
I will favour local destinations instead of traveling internationally	65%	5%	30%
I will think more about sustainability when planning future holidays	63%	8%	29%
I will be intending to take fewer but longer holidays	61%	9%	31%
I will favour international destinations closer to my home country	60%	9%	32%
I will favour destinations I have been before rather than new places	55%	5%	40%
I will leave booking until later/last minute	51%	3%	46%

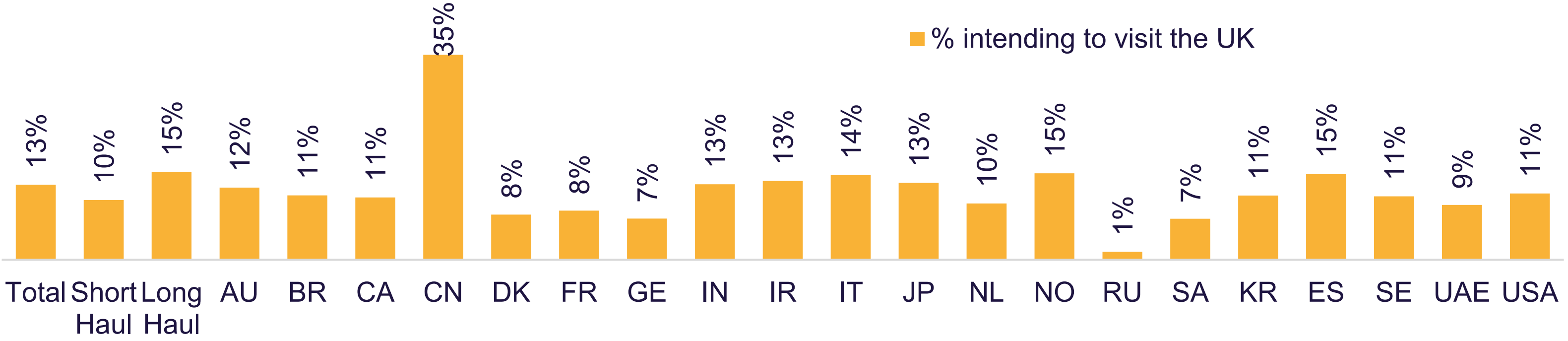
TCI Research Travel Competitive Intelligence
LONDON & PARTNERS
Llywodraeth Cymru Welsh Government
VisitScotland | Alba
VisitBritain

Loch Ness: ©VisitBritain/Andrew Pickett

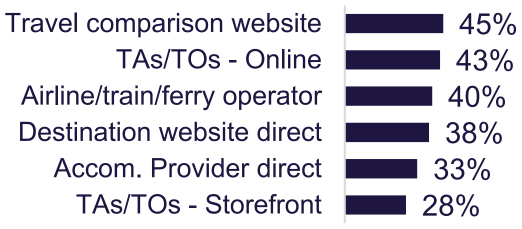
Destination Summaries

Britain – Intenders Profile

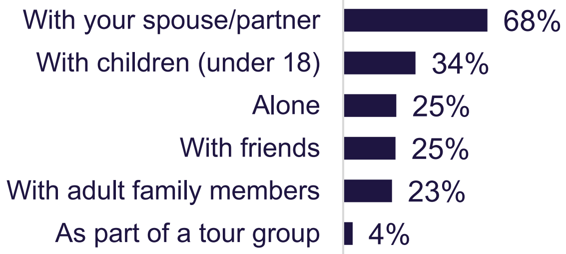
Travel intentions & Profile



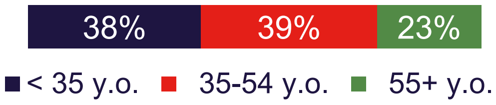
Channel booking



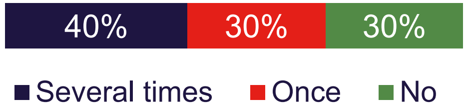
Travel Party



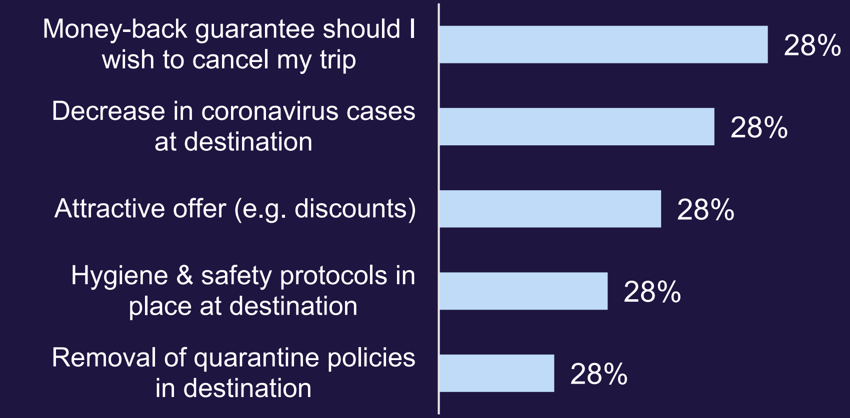
Age



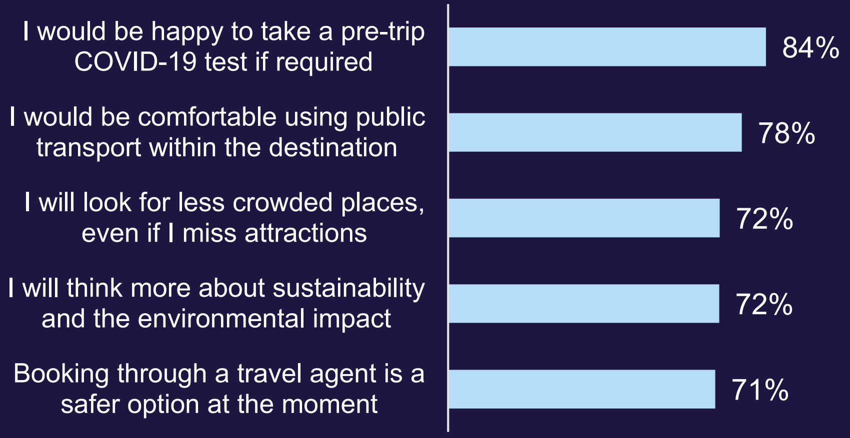
Ever visited Britain



Britain travel drivers

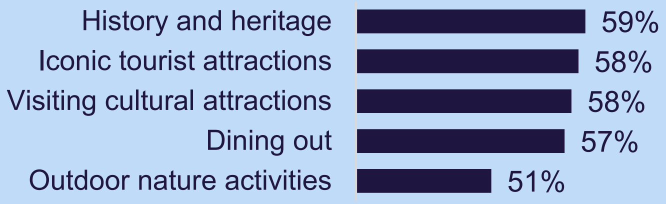


Travel attitudes *(% completely & somewhat agree)*

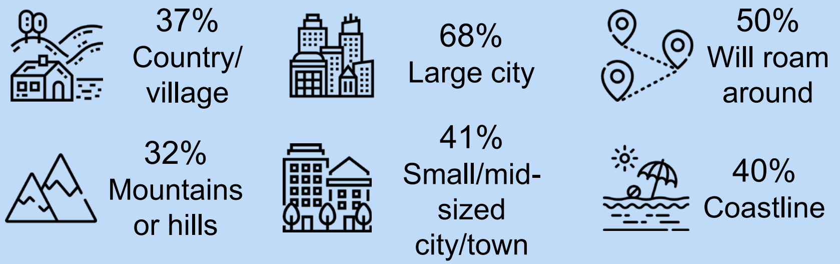


Travel preferences

Top activities



Destination types

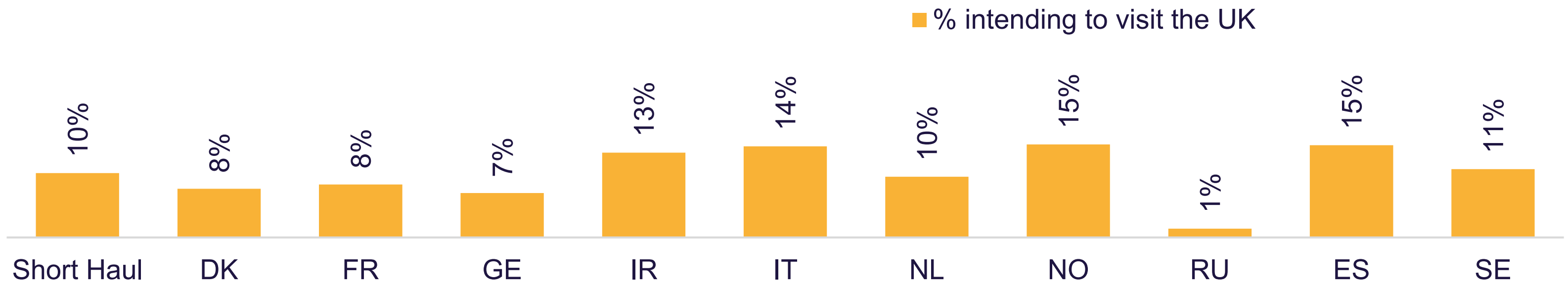


Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK on your next international leisure trip (n = 1403)

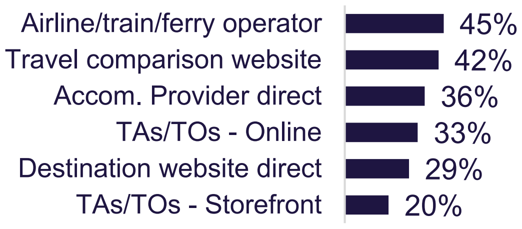
TCI Research Travel Competitive Intelligence · LONDON & PARTNERS · Llywodraeth Cymru Welsh Government · Visit Scotland | Alba · VisitBritain

Britain – Intenders Profile (SH)

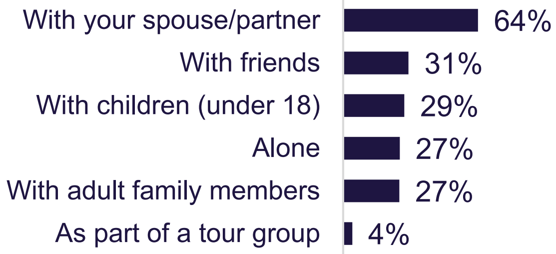
Travel intentions & Profile



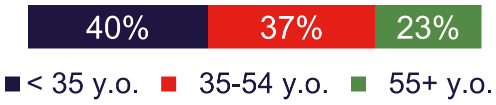
Channel booking



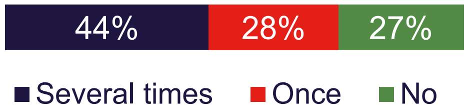
Travel Party



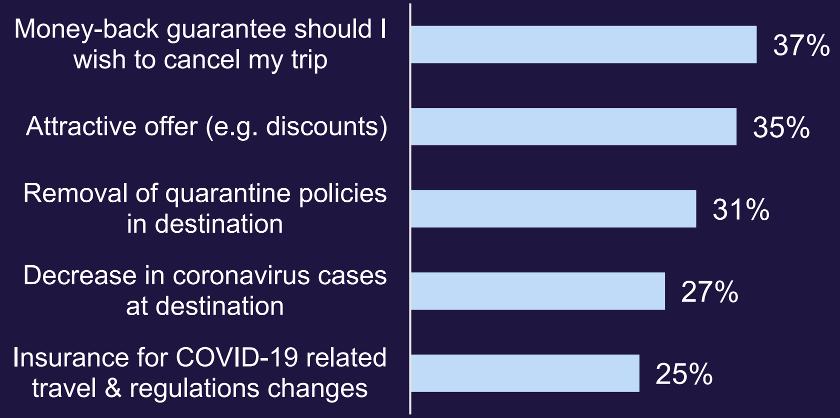
Age



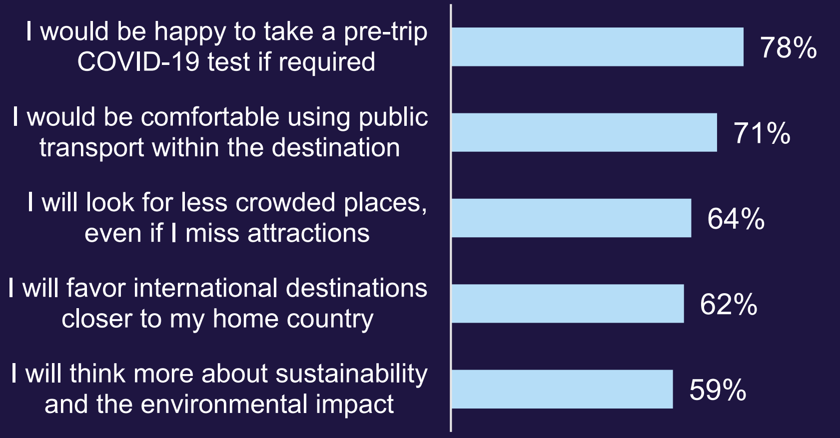
Ever visited Britain



Britain travel drivers



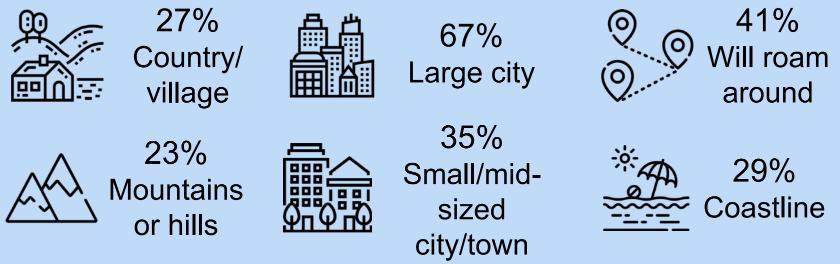
Travel attitudes *(% completely & somewhat agree)*



Travel preferences

Top activities

Destination types



Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK on your next international leisure trip (n = 509)

Britain – Intenders Profile (LH)

Travel intentions & Profile

% intending to visit the UK

Long Haul	AU	BR	CA	CN	IN	JP	SA	KR	UAE	USA
15%	12%	11%	11%	35%	13%	13%	7%	11%	9%	11%

Channel booking

TAs/TOs - Online	49%
Travel comparison website	46%
Destination website direct	43%
Airline/train/ferry operator	37%
TAs/TOs - Storefront	32%
Accom. Provider direct	31%

Travel Party

With your spouse/partner	71%
With children (under 18)	37%
Alone	24%
With friends	21%
With adult family members	21%
As part of a tour group	5%

Age

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

Ever visited Britain

Several times	Once	No
37%	31%	32%

Britain travel drivers

Hygiene & safety protocols in place at destination	31%
Decrease in coronavirus cases at destination	29%
Removal of quarantine policies in destination	27%
Official national hygiene label	26%
Welcoming locals in destination country	25%

Travel attitudes (% completely & somewhat agree)

I would be happy to take a pre-trip COVID-19 test if required	88%
I would be comfortable using public transport within the destination	82%
Booking through a travel agent is a safer option at the moment	79%
I will think more about sustainability and the environmental impact	79%
I will delay my next international trip until Omicron is under control	79%

Travel preferences

Top activities

History and heritage	61%
Iconic tourist attractions	61%
Visiting cultural attractions	59%
Dining out	56%
Outdoor nature activities	53%

Destination types

42% Country/ village

68% Large city

56% Will roam around

37% Mountains or hills

44% Small/mid-sized city/town

46% Coastline

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK on your next international leisure trip (n = 894)

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	10%	8%
Long Haul	15%	13%
AU	12%	11%
BR	11%	10%
CA	11%	9%
CN	35%	30%
DK	8%	6%
FR	8%	7%
GE	7%	5%
IN	13%	12%
IR	13%	11%
IT	14%	11%
JP	13%	11%
NL	10%	8%
NO	15%	12%
RU	1%	1%
SA	7%	6%
KR	11%	9%
ES	15%	11%
SE	11%	8%
UAE	9%	8%
USA	11%	10%

Channel booking

Travel comparison website	45%
TAs/TOs - Online	44%
Airline/train/ferry operator	40%
Destination website direct	39%
Accom. Provider direct	35%
TAs/TOs - Storefront	29%

Travel Party

With your spouse/partner	68%
With children (under 18)	37%
Alone	26%
With adult family members	24%
With friends	23%
As part of a tour group	5%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
38%	39%	23%

Ever visited Britain

Several times	Once	No
42%	29%	29%

Britain travel drivers

Money-back guarantee should I wish to cancel my trip	29%
Decrease in coronavirus cases at destination	29%
Hygiene & safety protocols in place at destination	29%
Attractive offer (e.g. discounts)	28%
Removal of quarantine policies in destination	27%

Travel attitudes (% completely & somewhat agree)

I would be happy to take a pre-trip COVID-19 test if required	85%
I would be comfortable using public transport within the destination	79%
I will think more about sustainability and the environmental impact	73%
I will look for less crowded places, even if I miss attractions	73%
Booking through a travel agent is a safer option at the moment	72%

Travel preferences

Top activities

History and heritage	59%
Iconic tourist attractions	59%
Visiting cultural attractions	58%
Dining out	57%
Outdoor nature activities	51%

Destination types

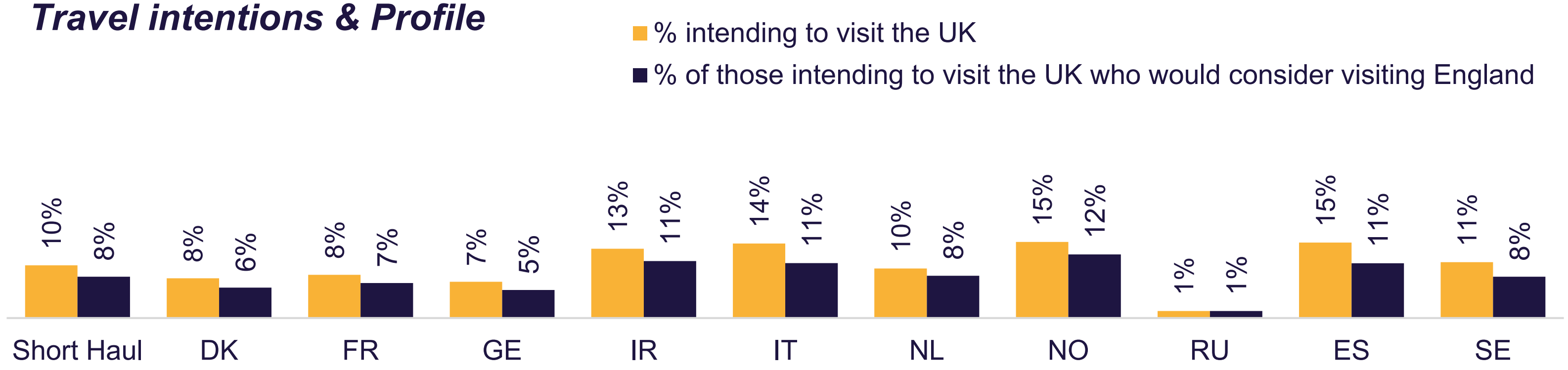
Country/ village	37%
Large city	72%
Will roam around	49%
Mountains or hills	32%
Small/mid-sized city/town	42%
Coastline	40%

Note: TA/TO = Travel Agencies/Tour Operators

Base: Respondents intending to visit the UK who would consider visiting England in the next 12 months (n = 1,188)

England – Potential Visitors Profile (SH)

Travel intentions & Profile



Channel booking

Airline/train/ferry operator	46%
Travel comparison website	42%
Accom. Provider direct	38%
TAs/TOs - Online	33%
Destination website direct	30%
TAs/TOs - Storefront	20%

Travel Party

With your spouse/partner	63%
With children (under 18)	33%
Alone	28%
With adult family members	28%
With friends	27%
As part of a tour group	4%

Age

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

Ever visited Britain

Several times	Once	No
49%	27%	25%

Britain travel drivers

Money-back guarantee should I wish to cancel my trip	37%
Attractive offer (e.g. discounts)	33%
Removal of quarantine policies in destination	31%
Decrease in coronavirus cases at destination	27%
Hygiene & safety protocols in place at destination	24%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	78%
I would be comfortable using public transport within the destination	73%
I will look for less crowded places, even if I miss attractions	64%
I will favor international destinations closer to my home country	61%
I will think more about sustainability and the environmental impact	60%

Travel preferences

Top activities

Dining out	60%
History and heritage	56%
Iconic tourist attractions	56%
Visiting cultural attractions	56%
Experiencing local lifestyle	49%

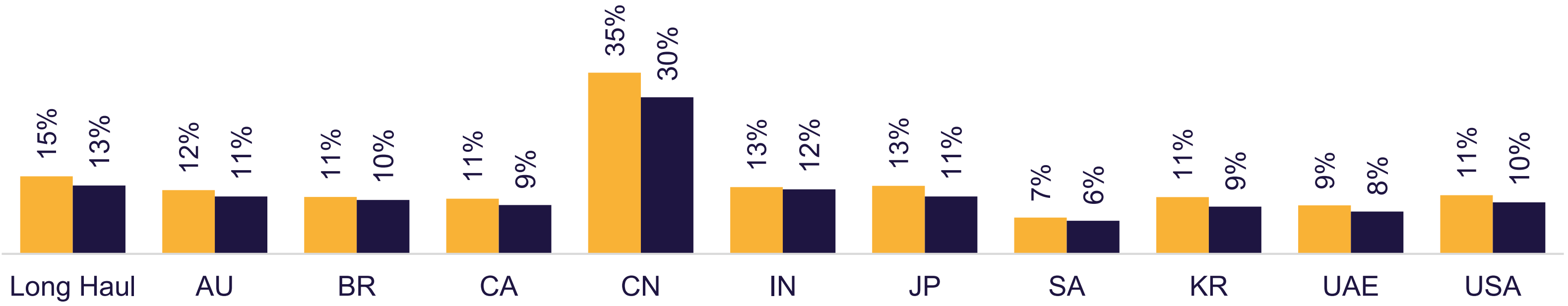
Destination types

- 27% Country/ village
- 73% Large city
- 36% Will roam around
- 22% Mountains or hills
- 36% 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 = 400)

England – Potential Visitors Profile (LH)

Travel intentions & Profile



Channel booking

TAs/TOs - Online	50%
Travel comparison website	46%
Destination website direct	43%
Airline/train/ferry operator	38%
Accom. Provider direct	33%
TAs/TOs - Storefront	33%

Travel Party

With your spouse/partner	70%
With children (under 18)	39%
Alone	25%
With adult family members	22%
With friends	21%
As part of a tour group	5%

Age

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

Ever visited Britain

Several times	Once	No
39%	30%	31%

Britain travel drivers

Hygiene & safety protocols in place at destination	32%
Decrease in coronavirus cases at destination	30%
Official national hygiene label	27%
Removal of quarantine policies in destination	26%
Money-back guarantee should I wish to cancel my trip	25%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	89%
I would be comfortable using public transport within the destination	83%
I will think more about sustainability and the environmental impact	81%
Booking through a travel agent is a safer option at the moment	80%
I will be intending to take fewer but longer holidays	79%

Travel preferences

Top activities

History and heritage	61%
Iconic tourist attractions	60%
Visiting cultural attractions	59%
Dining out	56%
Outdoor nature activities	53%

Destination types

- 42% Country/ village
- 72% Large city
- 55% Will roam around
- 37% Mountains or hills
- 45% Small/mid-sized city/town
- 46% 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 = 788)

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

Scotland – Potential Visitors Profile

Travel intentions & Profile

	Total	Short Haul	Long Haul	AU	BR	CA	CN	DK	FR	GE	IN	IR	IT	JP	NL	NO	RU	SA	KR	ES	SE	UAE	USA
% intending to visit the UK	13%	10%	15%	12%	11%	11%	35%	8%	8%	7%	13%	13%	14%	13%	10%	15%	1%	7%	11%	15%	11%	9%	11%
% of those intending to visit the UK who would consider visiting Scotland	6%	5%	8%	6%	6%	5%	19%	2%	5%	3%	7%	5%	8%	9%	6%	6%	1%	2%	5%	6%	3%	4%	6%

Channel booking

Travel comparison website	50%
TAs/TOs - Online	49%
Destination website direct	47%
Airline/train/ferry operator	43%
Accom. Provider direct	37%
TAs/TOs - Storefront	35%

Travel Party

With your spouse/partner	76%
With children (under 18)	40%
With friends	25%
With adult family members	24%
Alone	23%
As part of a tour group	6%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
41%	42%	17%

Ever visited Britain

Several times	Once	No
43%	31%	26%

Britain travel drivers

Hygiene & safety protocols in place at destination	30%
Attractive offer (e.g. discounts)	30%
Money-back guarantee should I wish to cancel my trip	29%
Decrease in coronavirus cases at destination	28%
Removal of quarantine policies in destination	25%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	87%
I would be comfortable using public transport within the destination	80%
I will think more about sustainability and the environmental impact	75%
Booking through a travel agent is a safer option at the moment	75%
I will look for less crowded places, even if I miss attractions	73%

Travel preferences

Top activities

History and heritage	63%
Iconic tourist attractions	61%
Visiting cultural attractions	60%
Dining out	57%
Outdoor nature activities	55%

Destination types

Country/ village	47%
Large city	66%
Will roam around	62%
Mountains or hills	44%
Small/mid-sized city/town	52%
Coastline	49%

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 = 696)

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	10%	5%
DK	8%	2%
FR	8%	5%
GE	7%	3%
IR	13%	5%
IT	14%	8%
NL	10%	6%
NO	15%	6%
RU	1%	1%
ES	15%	6%
SE	11%	3%

Channel booking

Travel comparison website	48%
Airline/train/ferry operator	48%
Accom. Provider direct	42%
Destination website direct	37%
TAs/TOs - Online	35%
TAs/TOs - Storefront	28%

Travel Party

With your spouse/partner	71%
With children (under 18)	33%
With friends	29%
Alone	27%
With adult family members	24%
As part of a tour group	5%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
43%	38%	19%

Ever visited Britain

Several times	Once	No
46%	31%	23%

Britain travel drivers

Attractive offer (e.g. discounts)	37%
Money-back guarantee should I wish to cancel my trip	33%
Insurance for COVID-19 related travel and regulation changes	28%
Removal of quarantine policies in destination	27%
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	82%
I would be comfortable using public transport within the destination	71%
I will look for less crowded places, even if I miss attractions	69%
I will favor international destinations closer to my home country	66%
I will think more about sustainability and the environmental impact	65%

Travel preferences

Top activities

History and heritage	62%
Iconic tourist attractions	61%
Dining out	61%
Visiting cultural attractions	60%
Outdoor nature activities	56%

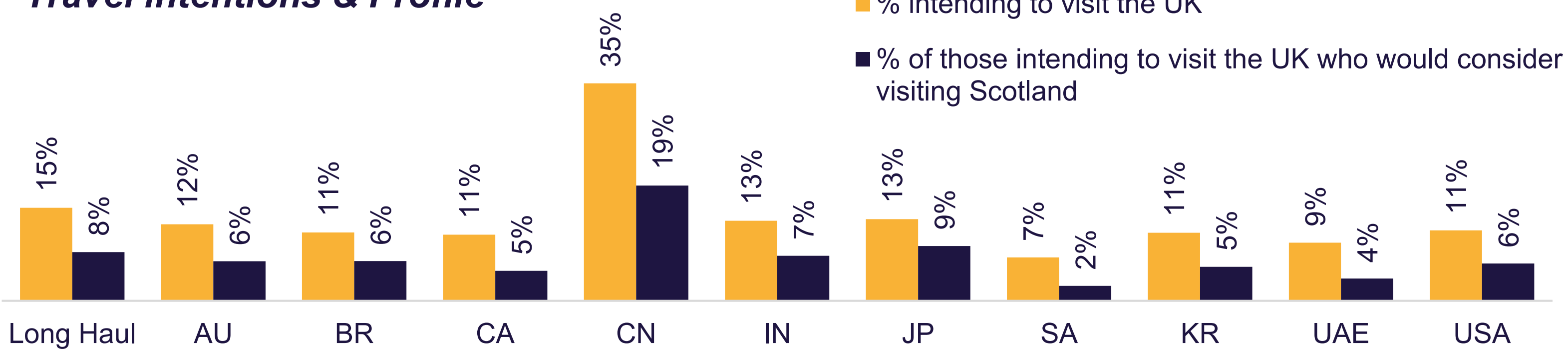
Destination types

Country/village	38%
Large city	61%
Will roam around	58%
Mountains or hills	36%
Small/mid-sized city/town	46%
Coastline	39%

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 = 228)

Scotland – Potential Visitors Profile (LH)

Travel intentions & Profile



Channel booking

TAs/TOs - Online	56%
Destination website direct	51%
Travel comparison website	51%
Airline/train/ferry operator	41%
TAs/TOs - Storefront	39%
Accom. Provider direct	35%

Travel Party

With your spouse/partner	78%
With children (under 18)	43%
With adult family members	23%
With friends	23%
Alone	21%
As part of a tour group	6%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
40%	44%	16%

Ever visited Britain

Several times	Once	No
41%	31%	27%

Britain travel drivers

Hygiene & safety protocols in place at destination	31%
Decrease in coronavirus cases at destination	30%
Money-back guarantee should I wish to cancel my trip	27%
Attractive offer (e.g. discounts)	26%
Welcoming locals in destination country	26%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	89%
I would be comfortable using public transport within the destination	84%
Booking through a travel agent is a safer option at the moment	81%
I will think more about sustainability and the environmental impact	80%
I will be intending to take fewer but longer holidays	79%

Travel preferences

Top activities

History and heritage	63%
Visiting cultural attractions	61%
Iconic tourist attractions	60%
Dining out	55%
Outdoor nature activities	55%

Destination types

- 52% Country/ village
- 69% Large city
- 63% Will roam around
- 48% Mountains or hills
- 55% Small/mid-sized city/town
- 54% Coastline

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Scotland in the next 12 months (n = 468)

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	10%	2%
Long Haul	15%	6%
AU	12%	3%
BR	11%	4%
CA	11%	2%
CN	35%	14%
DK	8%	0%
FR	8%	2%
GE	7%	2%
IN	13%	6%
IR	13%	2%
IT	14%	4%
JP	13%	7%
NL	10%	3%
NO	15%	2%
RU	1%	1%
SA	7%	1%
KR	11%	4%
ES	15%	2%
SE	11%	1%
UAE	9%	3%
USA	11%	4%

Channel booking

TAs/TOs - Online	55%
Travel comparison website	53%
Destination website direct	53%
Airline/train/ferry operator	47%
TAs/TOs - Storefront	44%
Accom. Provider direct	39%

Travel Party

With your spouse/partner	79%
With children (under 18)	47%
With friends	25%
Alone	24%
With adult family members	24%
As part of a tour group	7%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
41%	47%	12%

Ever visited Britain

Several times	Once	No
49%	28%	24%

Britain travel drivers

Hygiene & safety protocols in place at destination	32%
Attractive offer (e.g. discounts)	29%
Welcoming locals in destination country	28%
Decrease in coronavirus cases at destination	27%
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	86%
I would be comfortable using public transport within the destination	83%
I will think more about sustainability and the environmental impact	79%
Booking through a travel agent is a safer option at the moment	79%
I will delay my next international trip until Omicron is under control	76%

Travel preferences

Top activities

History and heritage	64%
Visiting cultural attractions	61%
Dining out	59%
Iconic tourist attractions	59%
Outdoor nature activities	55%

Destination types

Country/ village	56%
Large city	72%
Will roam around	66%
Mountains or hills	52%
Small/mid-sized city/town	62%
Coastline	57%

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 = 429)

Wales – Potential Visitors Profile (SH)

Travel intentions & Profile

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

	Short Haul	DK	FR	GE	IR	IT	NL	NO	RU	ES	SE
% intending to visit the UK	10%	8%	8%	7%	13%	14%	10%	15%	1%	15%	11%
% of those intending to visit the UK who would consider visiting Wales	2%	0%	2%	2%	2%	4%	3%	2%	1%	2%	1%

Channel booking

Travel comparison website	58%
Airline/train/ferry operator	57%
Accom. Provider direct	47%
Destination website direct	42%
TAs/TOs - Online	36%
TAs/TOs - Storefront	35%

Travel Party

With your spouse/partner	77%
With children (under 18)	49%
Alone	27%
With friends	21%
With adult family members	20%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
46%	46%	7%

Ever visited Britain

Several times	Once	No
54%	27%	19%

Britain travel drivers

Attractive offer (e.g. discounts)	35%
Hygiene & safety protocols in place at destination	31%
Insurance for COVID-19 related travel and regulation changes	31%
Welcoming locals in destination country	27%
Money-back guarantee should I wish to cancel my trip	27%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	81%
I would be comfortable using public transport within the destination	77%
I will think more about sustainability and the environmental impact	72%
I will look for less crowded places, even if I miss attractions	72%
I will favor international destinations closer to my home country	71%

Travel preferences

Top activities

History and heritage	66%
Iconic tourist attractions	66%
Dining out	62%
Visiting cultural attractions	59%
Outdoor nature activities	59%

Destination types

Country/ village	47%
Large city	67%
Will roam around	57%
Mountains or hills	42%
Small/mid-sized city/town	63%
Coastline	45%

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 = 99)

Wales – Potential Visitors Profile (LH)

Travel intentions & Profile

	Long Haul	AU	BR	CA	CN	IN	JP	SA	KR	UAE	USA
% intending to visit the UK	15%	12%	11%	11%	35%	13%	13%	7%	11%	9%	11%
% of those intending to visit the UK who would consider visiting Wales	6%	3%	4%	2%	14%	6%	7%	1%	4%	3%	4%

Channel booking

TAs/TOs - Online	61%
Destination website direct	56%
Travel comparison website	52%
TAs/TOs - Storefront	47%
Airline/train/ferry operator	44%
Accom. Provider direct	37%

Travel Party

With your spouse/partner	79%
With children (under 18)	46%
With friends	26%
With adult family members	26%
Alone	23%
As part of a tour group	7%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
39%	47%	14%

Ever visited Britain

Several times	Once	No
47%	28%	25%

Travel preferences

Top activities

History and heritage	63%
Visiting cultural attractions	61%
Dining out	59%
Iconic tourist attractions	57%
Outdoor nature activities	55%

Destination types

Country/village	58%
Large city	74%
Will roam around	69%
Mountains or hills	55%
Small/mid-sized city/town	62%
Coastline	60%

Britain travel drivers

Hygiene & safety protocols in place at destination	32%
Decrease in coronavirus cases at destination	29%
Attractive offer (e.g. discounts)	28%
Welcoming locals in destination country	28%
Official national hygiene label	28%

Travel attitudes (% completely & somewhat agree)

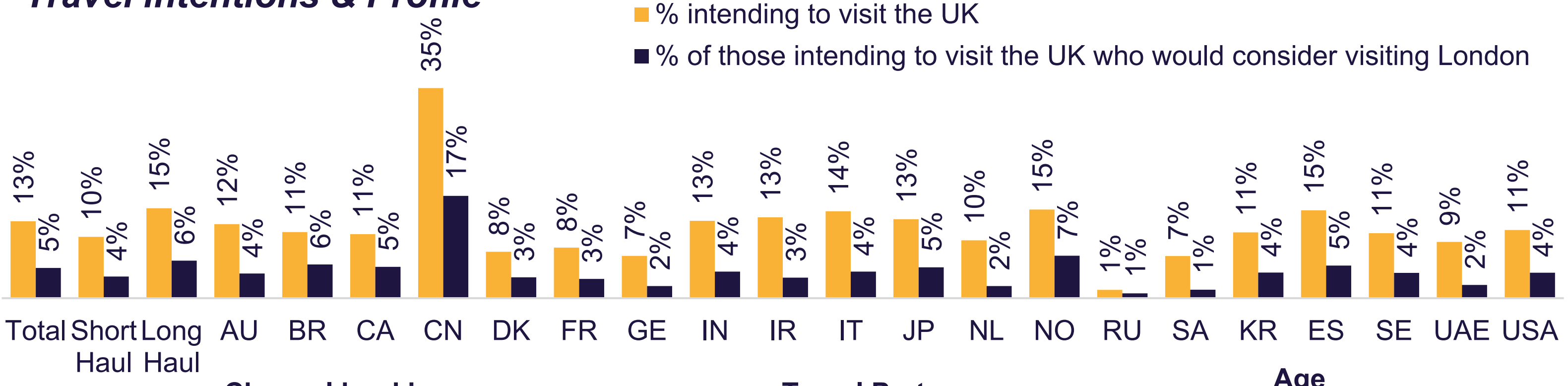
I would be happy to take a pre-trip COVID-19 test if required	88%
I would be comfortable using public transport within the destination	85%
Booking through a travel agent is a safer option at the moment	83%
I will be intending to take fewer but longer holidays	82%
I will think more about sustainability and the environmental impact	81%

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 = 330)

London – Potential Visitors Profile

Travel intentions & Profile



	% intending to visit the UK	% of those intending to visit the UK who would consider visiting London
Total	13%	5%
Short Haul	10%	4%
Long Haul	15%	6%
AU	12%	4%
BR	11%	6%
CA	11%	5%
CN	35%	17%
DK	8%	3%
FR	8%	3%
GE	7%	2%
IN	13%	4%
IR	13%	3%
IT	14%	4%
JP	13%	5%
NL	10%	2%
NO	15%	7%
RU	1%	1%
SA	7%	1%
KR	11%	4%
ES	15%	5%
SE	11%	4%
UAE	9%	2%
USA	11%	4%

Channel booking

Travel comparison website	50%
TAs/TOs - Online	43%
Airline/train/ferry operator	42%
Destination website direct	41%
Accom. Provider direct	37%
TAs/TOs - Storefront	25%

Travel Party

With your spouse/partner	63%
With children (under 18)	36%
Alone	31%
With adult family members	26%
With friends	25%
As part of a tour group	5%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
40%	36%	24%

Ever visited Britain

Several times	Once	No
40%	26%	34%

Britain travel drivers

Money-back guarantee should I wish to cancel my trip	33%
Hygiene & safety protocols in place at destination	31%
Attractive offer (e.g. discounts)	31%
Removal of quarantine policies in destination	31%
Decrease in coronavirus cases at destination	29%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	87%
I would be comfortable using public transport within the destination	80%
I will think more about sustainability and the environmental impact	74%
Booking through a travel agent is a safer option at the moment	70%
I will delay my next international trip until Omicron is under control	69%

Travel preferences

Top activities

Iconic tourist attractions	65%
History and heritage	63%
Visiting cultural attractions	59%
Dining out	57%
Outdoor nature activities	49%

Accommodation

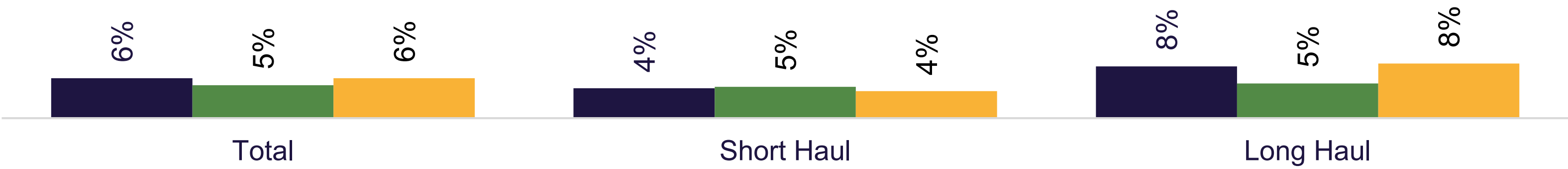
Hotel chain	66%
Boutique hotel	55%
Bed & breakfast	40%
Self catered property	38%
Historic house/castle	38%

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 = 551)

London – Potential Visitors Profile

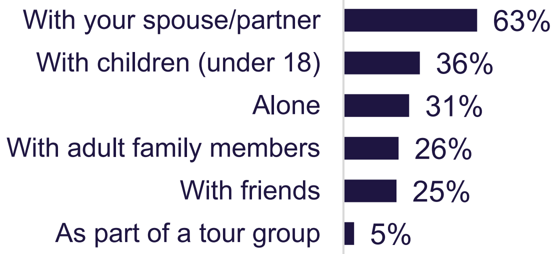
Travel intentions & Profile

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

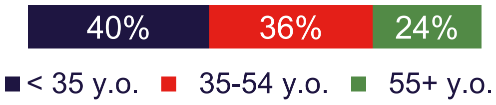


Channel booking

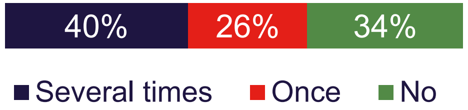
Travel Party



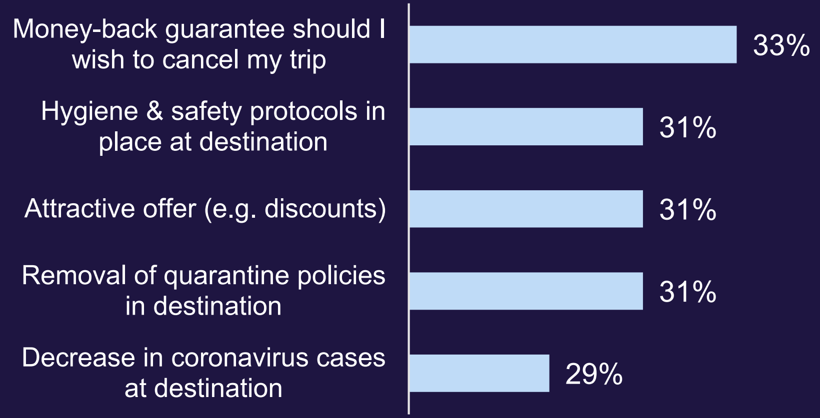
Age



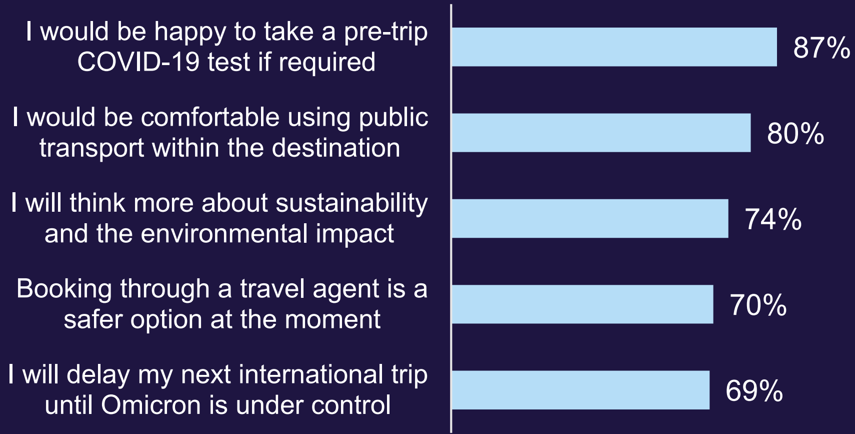
Ever visited Britain



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 = 551)

London – Potential Visitors Profile (SH)

Travel intentions & Profile

	% intending to visit the UK	% of those intending to visit the UK who would consider visiting London
Short Haul	10%	4%
DK	8%	3%
FR	8%	3%
GE	7%	2%
IR	13%	3%
IT	14%	4%
NL	10%	2%
NO	15%	7%
RU	1%	1%
ES	15%	5%
SE	11%	4%

Channel booking

Airline/train/ferry operator	53%
Travel comparison website	49%
Accom. Provider direct	39%
Destination website direct	32%
TAs/TOs - Online	31%
TAs/TOs - Storefront	20%

Travel Party

With your spouse/partner	60%
With adult family members	35%
With friends	34%
With children (under 18)	33%
Alone	26%
As part of a tour group	4%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
45%	36%	20%

Ever visited Britain

Several times	Once	No
46%	26%	28%

Britain travel drivers

Money-back guarantee should I wish to cancel my trip	42%
Attractive offer (e.g. discounts)	39%
Removal of quarantine policies in destination	35%
Decrease in coronavirus cases at destination	28%
Insurance for COVID-19 related travel and regulation changes	28%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	81%
I would be comfortable using public transport within the destination	75%
I will think more about sustainability and the environmental impact	58%
I will look for less crowded places, even if I miss attractions	58%
I will favor international destinations closer to my home country	58%

Travel preferences

Top activities

Iconic tourist attractions	66%
Dining out	64%
History and heritage	62%
Visiting cultural attractions	56%
Outdoor nature activities	46%

Accommodation

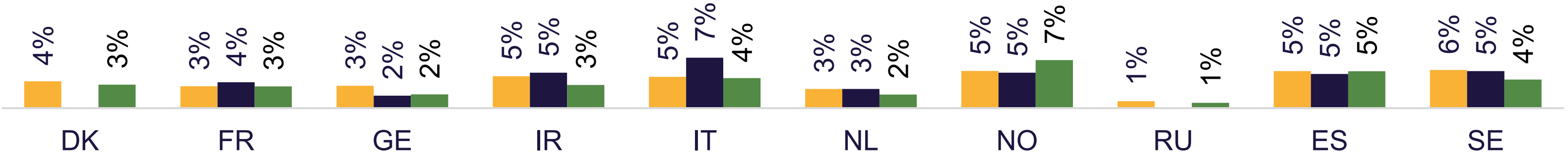
Hotel chain	79%
Bed & breakfast	47%
Boutique hotel	42%
Self catered property	41%
Private rental	39%

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 = 179)

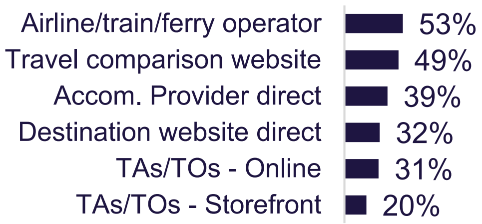
London – Potential Visitors Profile (SH)

Travel intentions & Profile

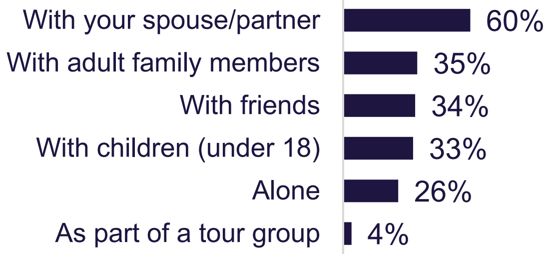
% of those intending to visit the UK who would consider visiting London



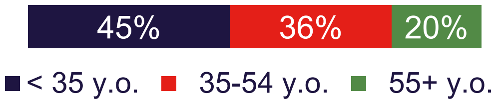
Channel booking



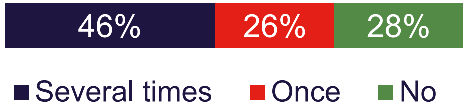
Travel Party



Age



Ever visited Britain

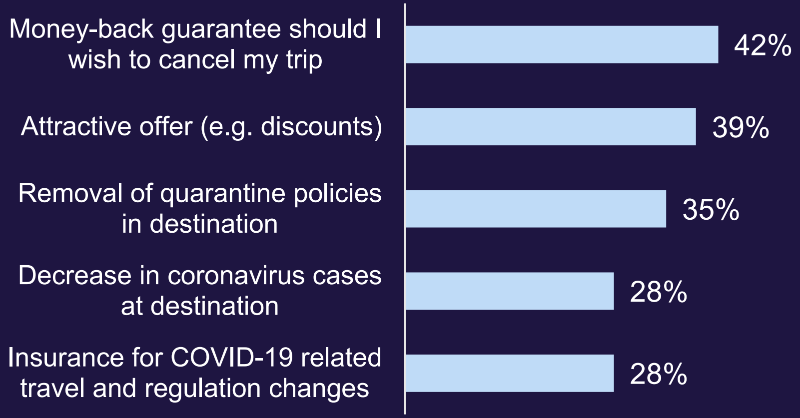


Travel preferences

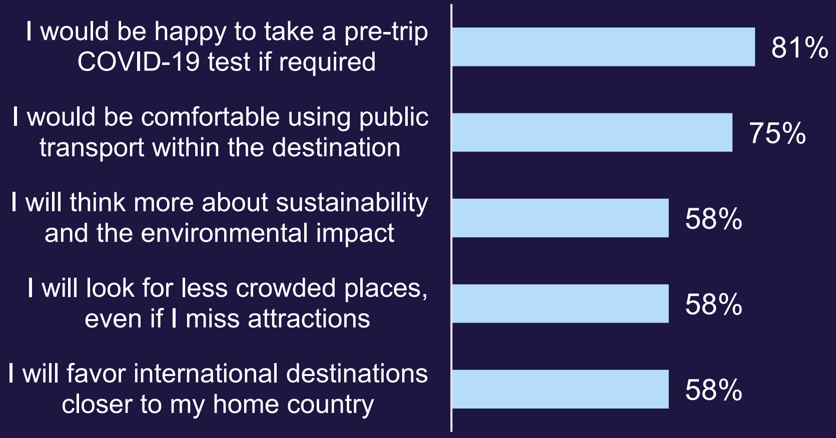
Top activities

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 = 179)

London – Potential Visitors Profile (LH)

Travel intentions & Profile

	Long Haul	AU	BR	CA	CN	IN	JP	SA	KR	UAE	USA
% intending to visit the UK	15%	12%	11%	11%	35%	13%	13%	7%	11%	9%	11%
% of those intending to visit the UK who would consider visiting London	6%	4%	6%	5%	17%	4%	5%	1%	4%	2%	4%

Channel booking

Travel comparison website	50%
TAs/TOs - Online	49%
Destination website direct	45%
Airline/train/ferry operator	36%
Accom. Provider direct	35%
TAs/TOs - Storefront	28%

Travel Party

With your spouse/partner	65%
With children (under 18)	38%
Alone	33%
With adult family members	22%
With friends	22%
As part of a tour group	5%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
37%	37%	26%

Ever visited Britain

Several times	Once	No
38%	26%	36%

Britain travel drivers

Hygiene & safety protocols in place at destination	34%
Removal of quarantine policies in destination	30%
Official national hygiene label	30%
Money-back guarantee should I wish to cancel my trip	29%
Decrease in coronavirus cases at destination	29%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	90%
I would be comfortable using public transport within the destination	83%
I will think more about sustainability and the environmental impact	81%
Booking through a travel agent is a safer option at the moment	80%
I will be intending to take fewer but longer holidays	78%

Travel preferences

Top activities

Iconic tourist attractions	64%
History and heritage	63%
Visiting cultural attractions	61%
Dining out	53%
Outdoor nature activities	51%

Accommodation

Boutique hotel	61%
Hotel chain	60%
Historic house/castle	41%
Holiday village/centre	36%
Private rental	36%

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 372)

London – Potential Visitors Profile (LH)

Travel intentions & Profile

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

	W2	W3	W4
AU	4%	6%	4%
BR	5%		6%
CA	3%	2%	5%
CN	14%	7%	17%
IN	6%	7%	4%
JP	4%		5%
SA	2%		1%
KR	4%		4%
UAE	2%		2%
USA	6%	3%	4%

Channel booking

Travel comparison website	50%
TAs/TOs - Online	49%
Destination website direct	45%
Airline/train/ferry operator	36%
Accom. Provider direct	35%
TAs/TOs - Storefront	28%

Travel Party

With your spouse/partner	65%
With children (under 18)	38%
Alone	33%
With adult family members	22%
With friends	22%
As part of a tour group	5%

Age

< 35 y.o.	35-54 y.o.	55+ y.o.
37%	37%	26%

Ever visited Britain

Several times	Once	No
38%	26%	36%

Britain travel drivers

Hygiene & safety protocols in place at destination	34%
Removal of quarantine policies in destination	30%
Official national hygiene label	30%
Money-back guarantee should I wish to cancel my trip	29%
Decrease in coronavirus cases at destination	29%

Travel attitudes *(% completely & somewhat agree)*

I would be happy to take a pre-trip COVID-19 test if required	90%
I would be comfortable using public transport within the destination	83%
I will think more about sustainability and the environmental impact	81%
Booking through a travel agent is a safer option at the moment	80%
I will be intending to take fewer but longer holidays	78%

Travel preferences

Top activities

Iconic tourist attractions	64%
History and heritage	63%
Visiting cultural attractions	61%
Dining out	53%
Outdoor nature activities	51%

Accommodation

Boutique hotel	61%
Hotel chain	60%
Historic house/castle	41%
Holiday village/centre	36%
Private rental	36%

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 372)

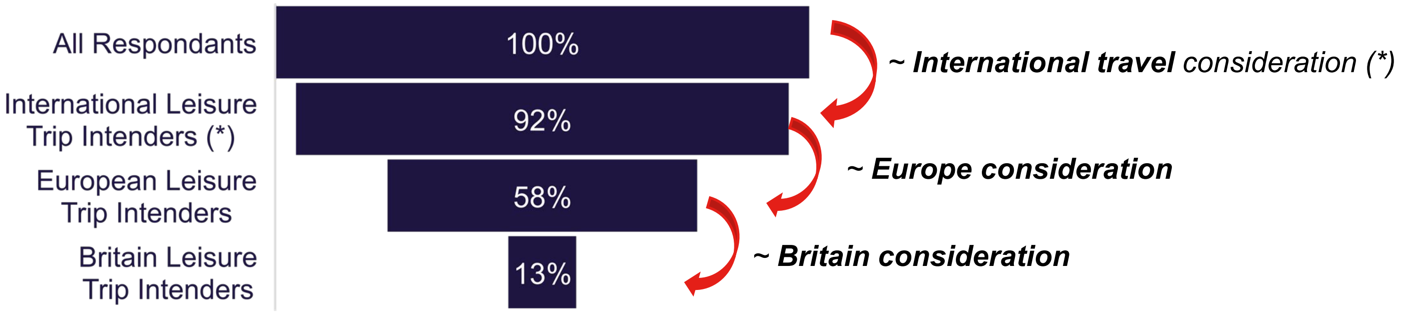
Glyder Fach: ©VisitBritain/Kris Williams

Funnels
Travel Horizons
Sample profile

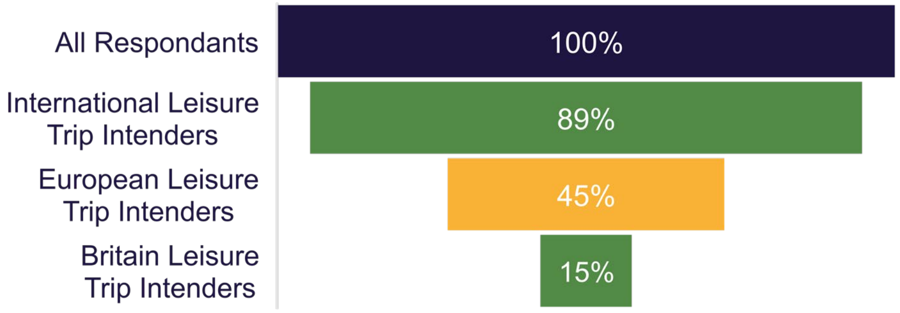
Trends: August 2021 vs February 2022

Market: All

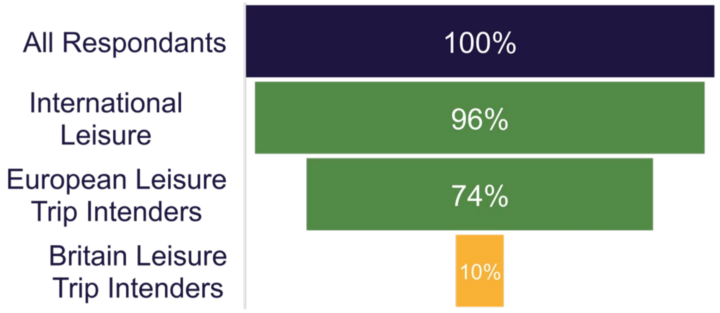
What conversion funnels measure



Market: long-haul



Market: short-haul



High conversion rate

Medium conversion rate

Low conversion rate

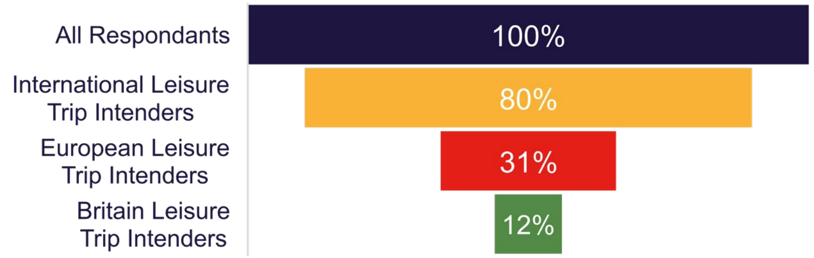
(*) Would definitely, probably or maybe consider an international leisure trip for more than one night in the next 12 months
Base: : All respondents (n = 11,000)

Conversion Funnel summary

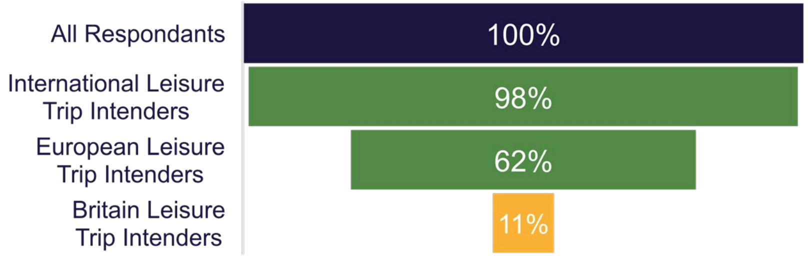
- High conversion rate
- Medium conversion rate
- Low conversion rate

Long-haul markets

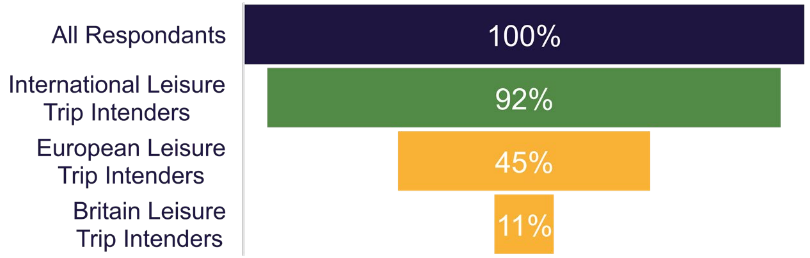
Market: Australia



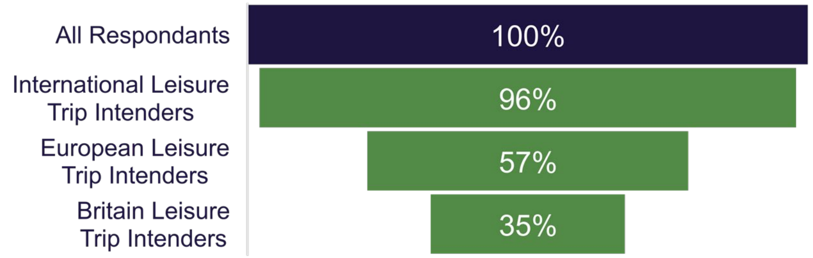
Market: Brazil



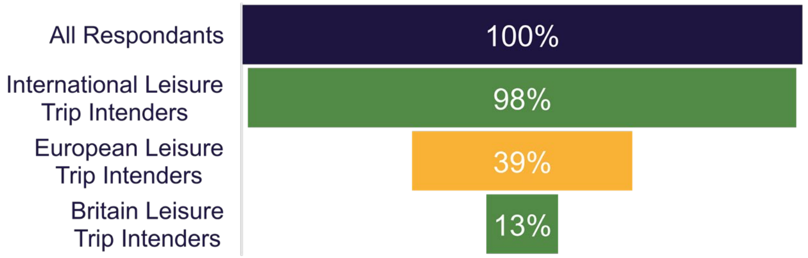
Market: Canada



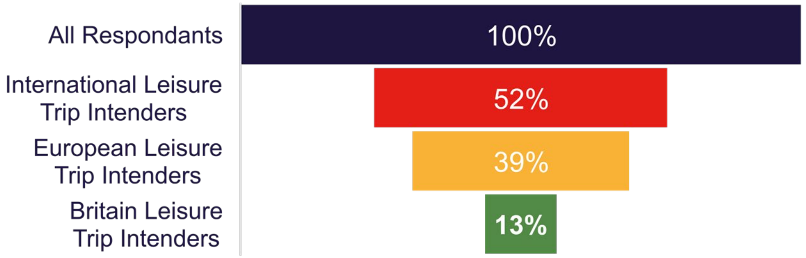
Market: China



Market: India



Market: Japan



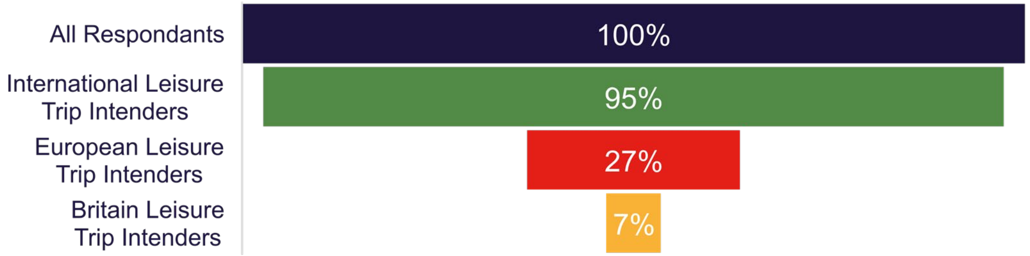
Q: /
Base: : All respondents (n = 11,057)

Conversion Funnel summary

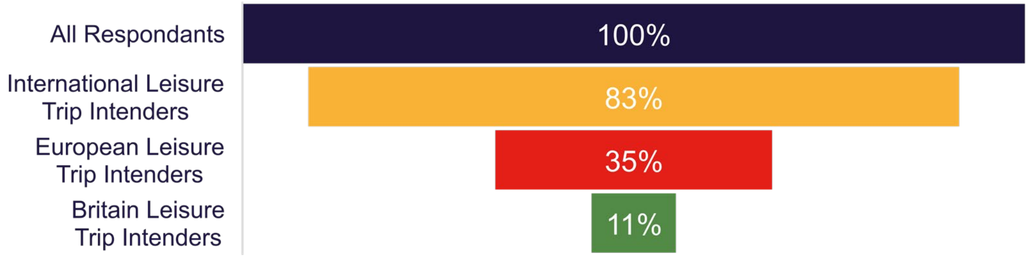
High conversion rate
Medium conversion rate
Low conversion rate

Long-haul markets

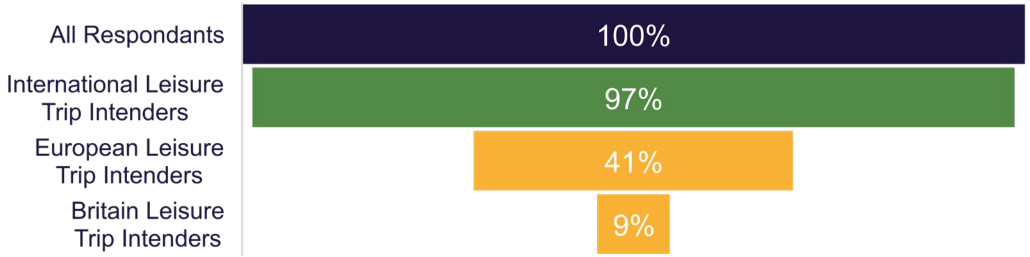
Market: Saudi Arabia



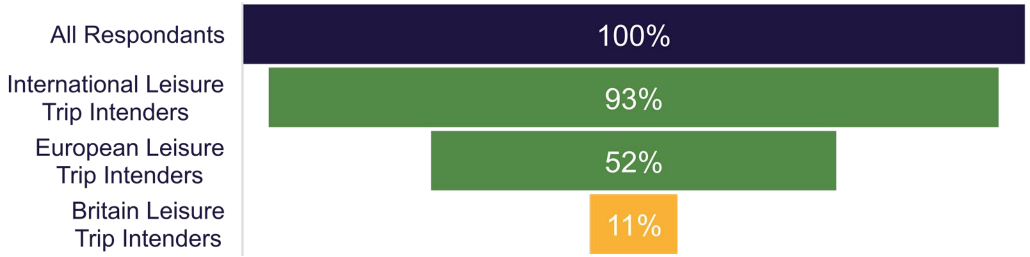
Market: South Korea



Market: UAE



Market: USA



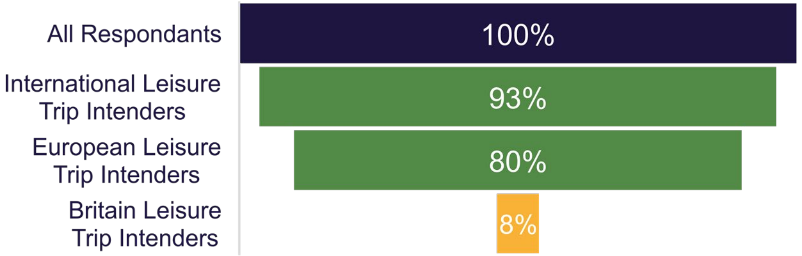
Q: /
Base: : All respondents (n = 11,057)

Conversion Funnel summary

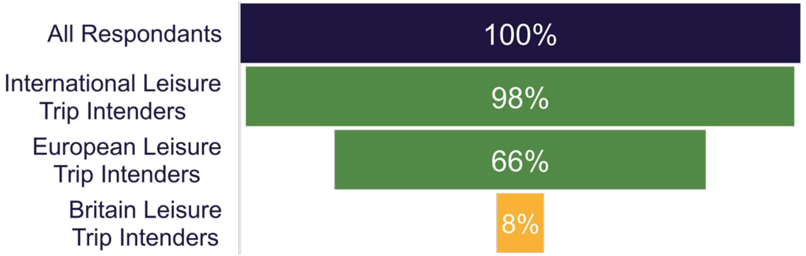
High conversion rate
Medium conversion rate
Low conversion rate

Short-haul markets

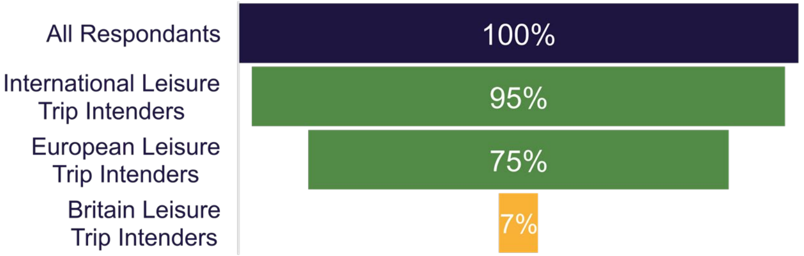
Market: Denmark



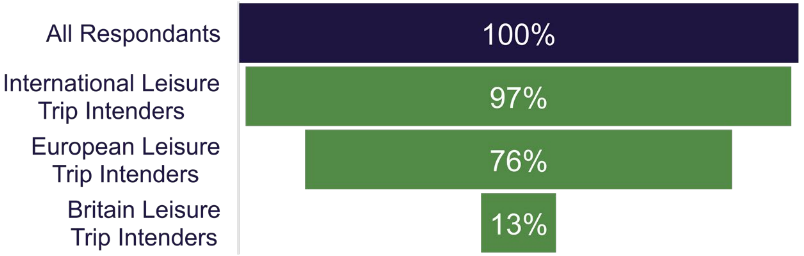
Market: France



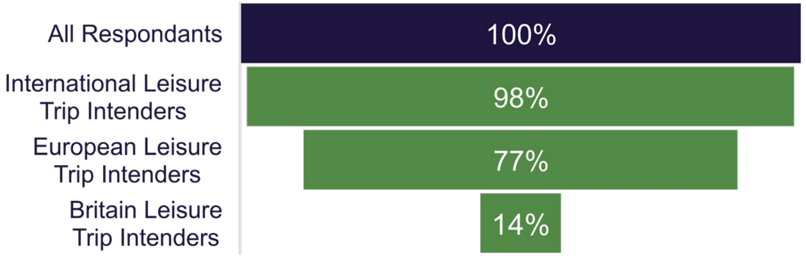
Market: Germany



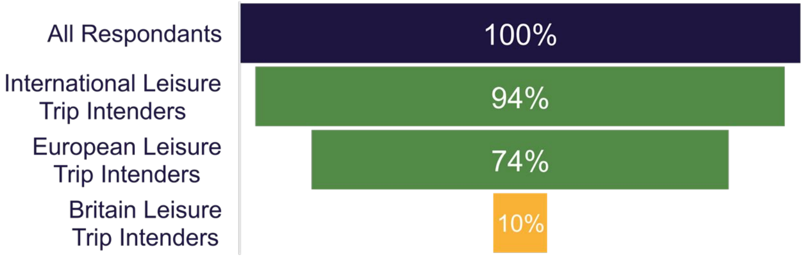
Market: Irish Republic



Market: Italy



Market: Netherlands



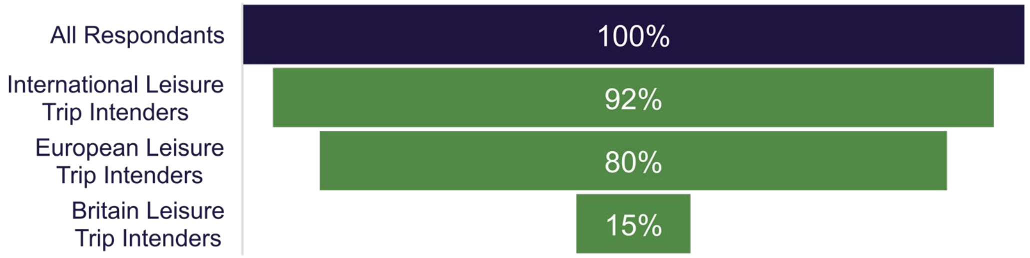
Q: /
Base: : All respondents (n = 11,057)

Conversion Funnel summary

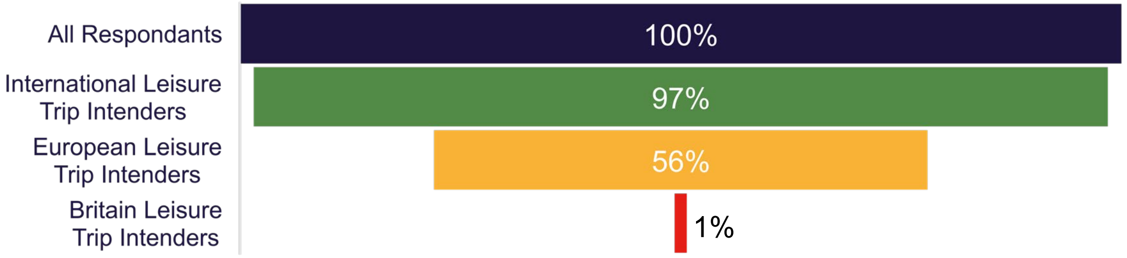
High conversion rate
Medium conversion rate
Low conversion rate

Short-haul markets

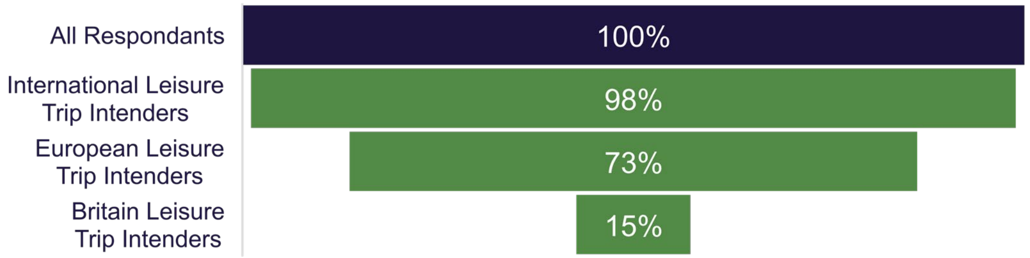
Market: Norway



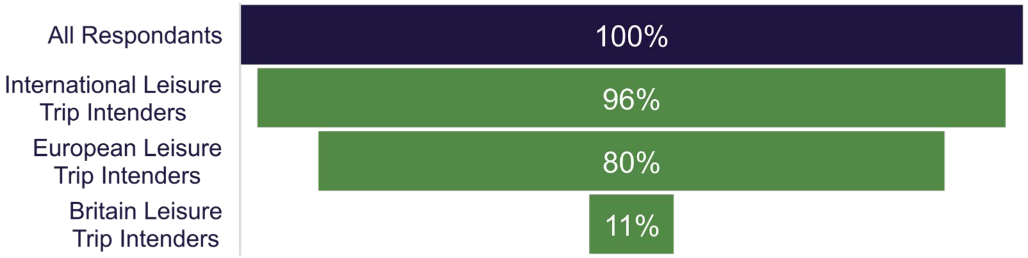
Market: Russia



Market: Spain



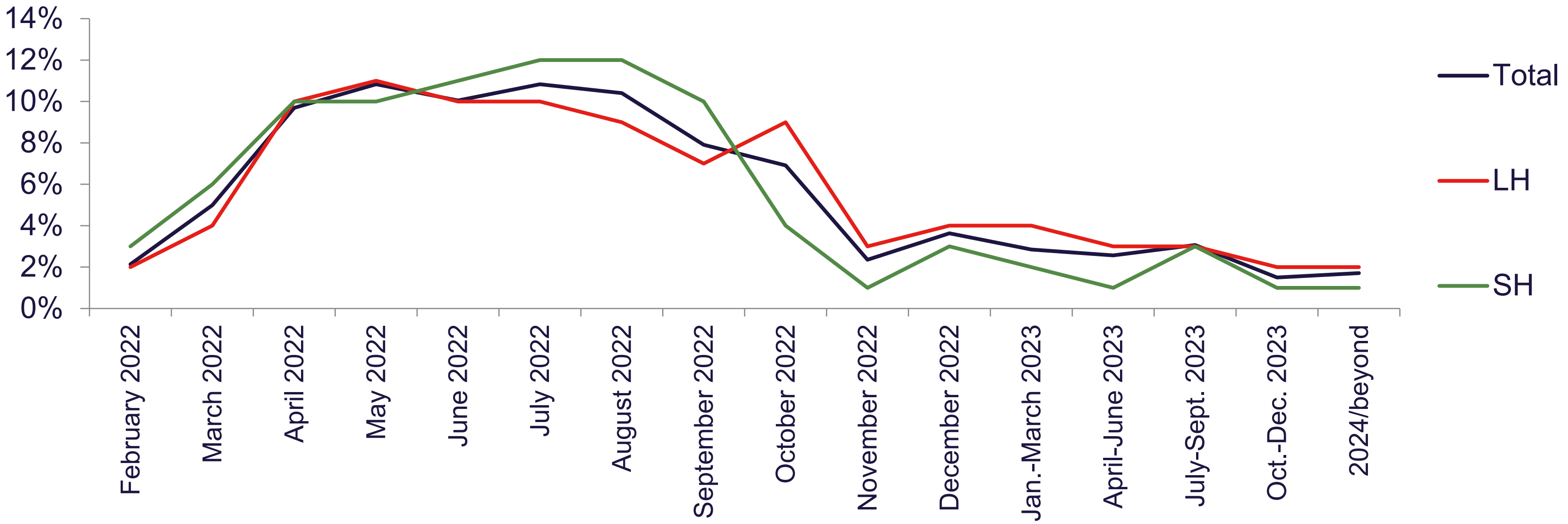
Market: Sweden



Q: /
Base: : All respondents (n = 11,057)

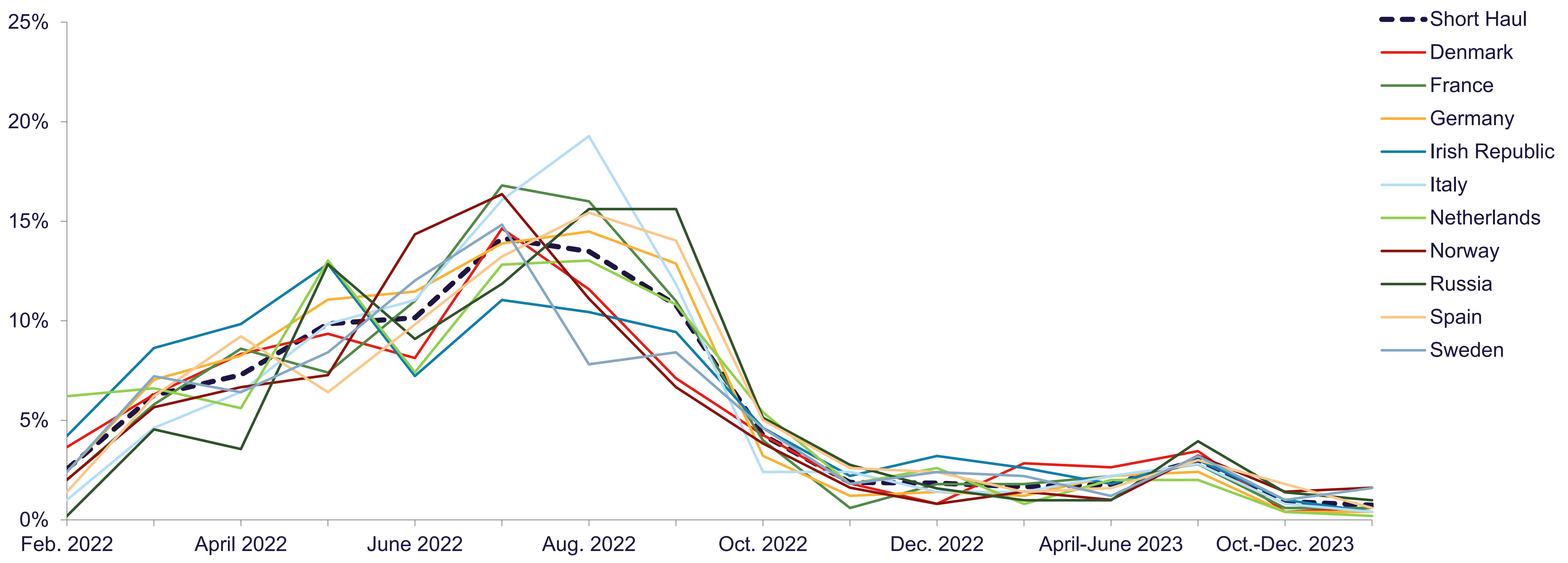
Britain Intenders – Travel Horizons

Britain Intenders	Short-haul (n = 509)	Long-haul (n = 894)	Total (n = 1403)
Apr. 22 - June 22	31%	31%	31%
July 22 - Aug. 22	24%	20%	21%
Sept. 22 - Dec. 22	18%	22%	21%
January-March 2023	2%	4%	3%
April-June 2023	1%	3%	3%
July-September 2023	3%	3%	3%
October-December 2023	1%	2%	1%
2024/beyond	1%	2%	2%



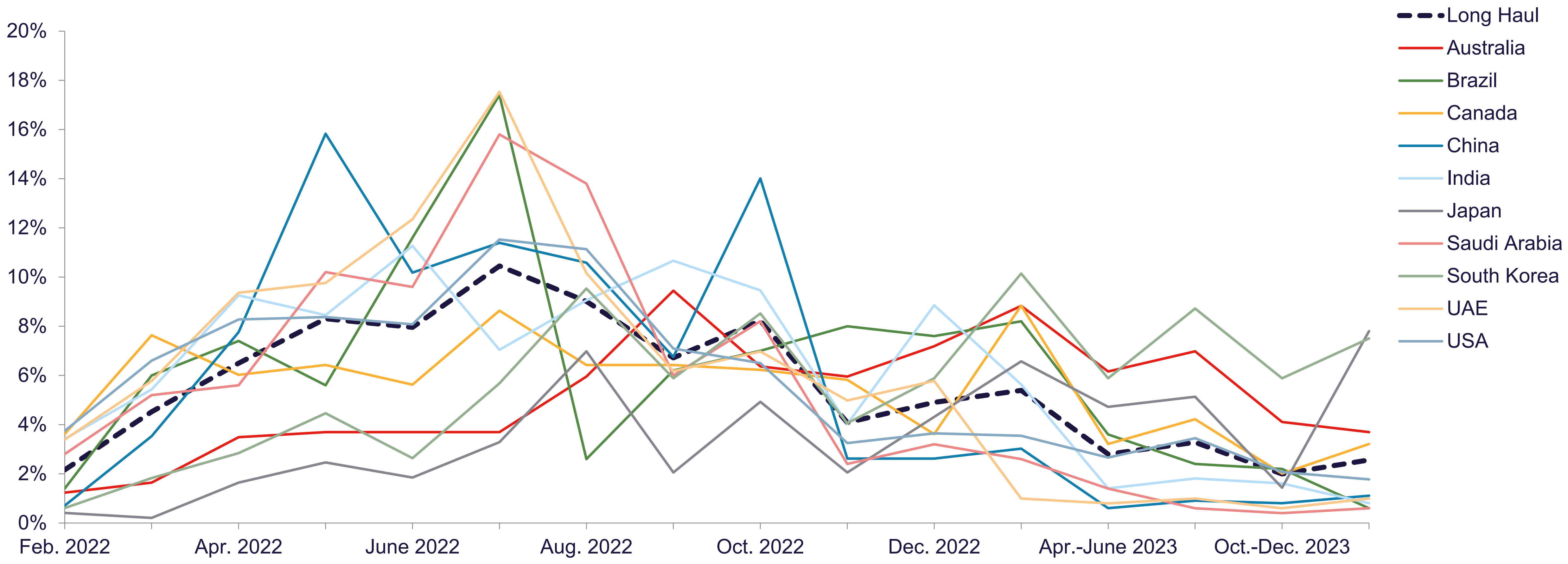
Base: Respondents who plan on taking a leisure trip in Britain (n = 991)

Travel horizon for next international leisure trip (SH)



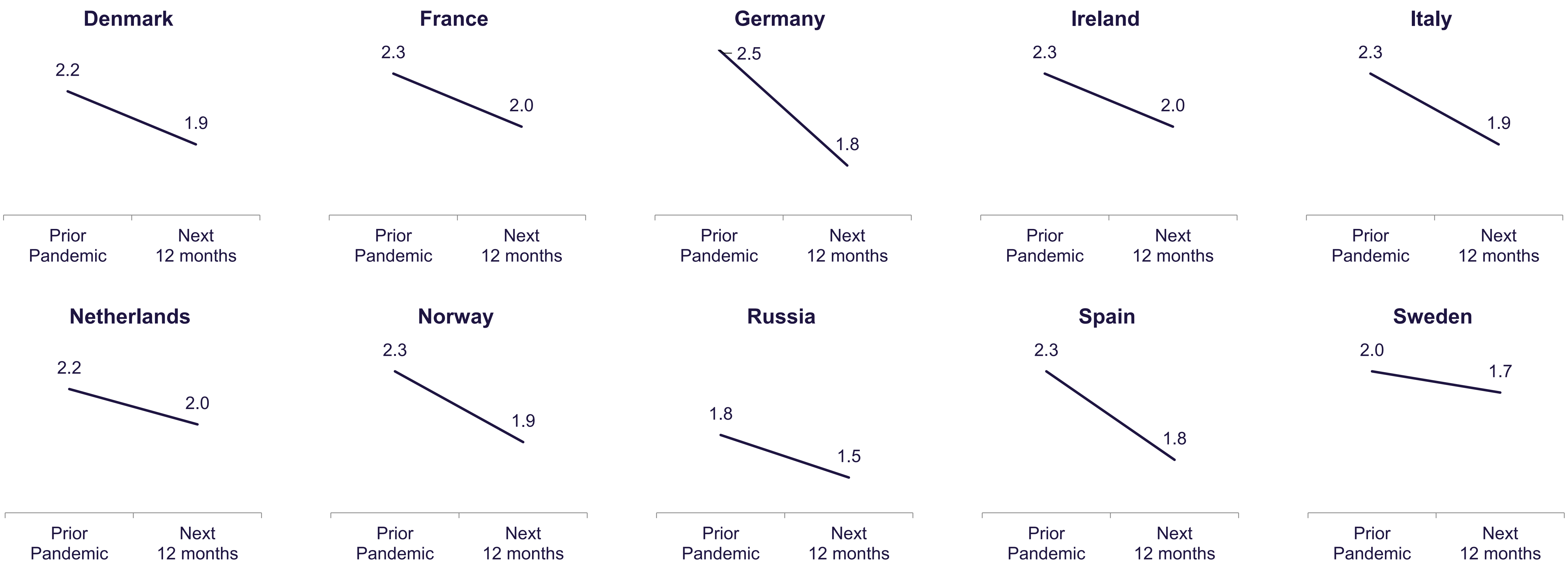
Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)

Travel horizon for next international leisure trip (LH)



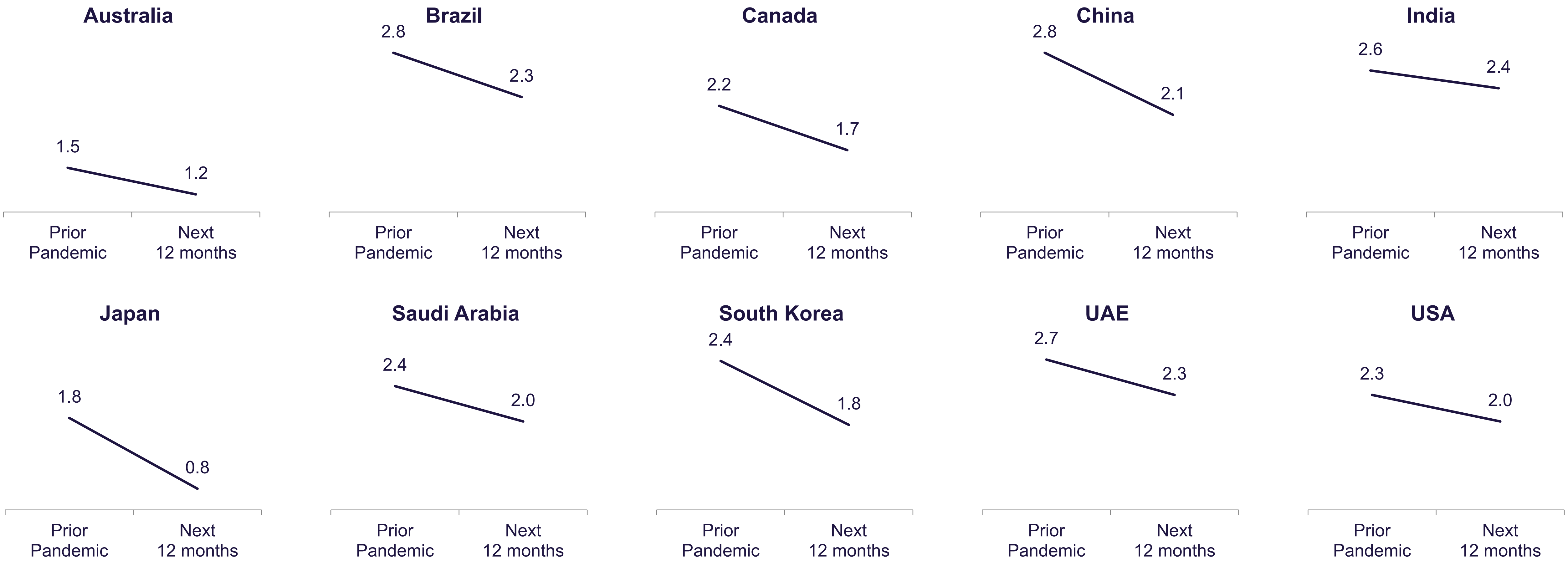
Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)

Number of international leisure trips planned in SH markets



Q26b: How many international leisure trips do you plan on taking in the next 12 months?
Q26c: How many international leisure trips do you usually take per year (prior to the pandemic)?
Base: All respondents (n = 11,057)

Number of international leisure trips planned in LH markets



Q26b: How many international leisure trips do you plan on taking in the next 12 months?
Q26c: How many international leisure trips do you usually take per year (prior to the pandemic)?
Base: All respondents (n = 11,057)

Sample description (SH)

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Male	51%	50%	49%	50%	50%	50%	50%	50%	50%	49%	50%	50%
Female	49%	50%	51%	50%	50%	50%	50%	50%	50%	51%	50%	50%

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Less than 35	35%	33%	26%	35%	35%	37%	35%	35%	29%	31%	35%	28%
From 35 to 54	38%	38%	34%	39%	37%	38%	43%	36%	37%	41%	41%	32%
55 and over	26%	30%	40%	26%	28%	25%	22%	29%	34%	28%	24%	41%

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Working full-time	66%	60%	47%	65%	62%	65%	61%	55%	52%	78%	66%	51%
Working part-time	11%	11%	10%	6%	11%	13%	9%	19%	13%	8%	10%	13%
Retired	13%	16%	27%	17%	17%	11%	9%	13%	23%	10%	9%	23%
Homemaker	4%	3%	3%	3%	3%	5%	4%	5%	4%	2%	2%	2%
Unemployed	3%	4%	5%	4%	2%	4%	5%	5%	3%	1%	6%	4%
Student	3%	5%	8%	5%	6%	2%	11%	3%	5%	0%	7%	5%

	Total	Short-haul	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Not impacted	57%	55%	68%	54%	60%	51%	36%	70%	64%	34%	47%	69%
Uncertain	35%	36%	25%	37%	34%	38%	52%	25%	27%	57%	41%	25%
Impacted negatively	8%	9%	7%	9%	6%	11%	12%	5%	8%	10%	12%	7%

Base: : All respondents (n = 11,057)

Sample description (LH)

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Male	51%	52%	47%	47%	50%	49%	52%	48%	61%	49%	71%	51%
Female	49%	48%	53%	53%	50%	50%	47%	52%	39%	51%	29%	49%

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Less than 35	35%	37%	27%	43%	29%	40%	44%	27%	39%	35%	56%	34%
From 35 to 54	38%	39%	34%	38%	36%	41%	40%	33%	52%	48%	42%	32%
55 and over	26%	24%	40%	19%	35%	19%	16%	40%	9%	17%	2%	34%

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Working full-time	66%	70%	47%	78%	58%	88%	80%	66%	71%	79%	77%	58%
Working part-time	11%	10%	20%	10%	11%	2%	10%	12%	14%	5%	8%	12%
Retired	13%	11%	22%	9%	24%	8%	2%	7%	4%	2%	1%	23%
Homemaker	4%	4%	5%	1%	2%	0%	3%	11%	6%	5%	7%	4%
Unemployed	3%	2%	5%	1%	2%	0%	0%	2%	2%	3%	5%	2%
Student	3%	2%	1%	1%	3%	1%	4%	2%	3%	4%	1%	1%

	Total	Long-haul	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Not impacted	57%	58%	52%	44%	64%	72%	68%	28%	57%	42%	60%	70%
Uncertain	35%	35%	37%	51%	29%	25%	27%	62%	33%	47%	31%	26%
Impacted negatively	8%	7%	10%	5%	7%	2%	4%	10%	10%	11%	10%	4%

Base: : All respondents (n = 11,057)

Segmentation (SH)

Among international trip Intenders

	Total	SH	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Buzzseekers	31%	22%	15%	28%	19%	21%	29%	20%	15%	26%	26%	18%
Culture Buffs	20%	18%	19%	17%	18%	17%	16%	17%	23%	17%	19%	20%
Adventurers	18%	20%	25%	27%	17%	20%	25%	24%	16%	14%	16%	17%
Explorers	18%	25%	25%	16%	35%	30%	18%	27%	28%	23%	20%	30%
Sightseers	13%	15%	17%	12%	11%	12%	11%	13%	18%	19%	20%	15%

Base: Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10954)

Among Europe Intenders

	Total	SH	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Buzzseekers	29%	21%	13%	27%	19%	21%	28%	20%	14%	27%	26%	17%
Explorers	20%	26%	26%	15%	34%	31%	20%	27%	30%	20%	20%	32%
Culture Buffs	20%	19%	19%	19%	18%	17%	16%	17%	22%	16%	19%	22%
Adventurers	19%	20%	25%	27%	18%	19%	24%	23%	15%	13%	16%	15%
Sightseers	13%	15%	18%	11%	11%	13%	12%	13%	19%	24%	18%	14%

Base: Respondents who plan on taking a leisure trip in Europe (n = 6411)

Among Britain Intenders

	Total	SH	Denmark	France	Germany	Irish Republic	Italy	Neths.	Norway	Russia	Spain	Sweden
Buzzseekers	34%	23%	13%	26%	23%	22%	31%	27%	18%	43%	23%	17%
Culture Buffs	25%	22%	26%	21%	29%	13%	13%	33%	16%	29%	23%	33%
Adventurers	16%	18%	18%	29%	14%	15%	22%	19%	19%	29%	15%	11%
Explorers	14%	22%	13%	10%	26%	34%	24%	13%	27%	0%	18%	26%
Sightseers	11%	15%	29%	14%	9%	15%	11%	8%	19%	0%	21%	13%

Base: Respondents who plan on taking a leisure trip in Britain (n = 1403)

Segmentation (LH)

Among international trip Intenders

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Buzzseekers	31%	38%	24%	35%	25%	43%	52%	25%	59%	26%	53%	39%
Culture Buffs	20%	21%	12%	17%	15%	38%	15%	30%	10%	33%	14%	15%
Adventurers	18%	16%	23%	21%	21%	6%	22%	10%	14%	13%	16%	22%
Explorers	18%	13%	23%	9%	23%	8%	7%	14%	12%	11%	11%	14%
Sightseers	13%	11%	18%	18%	16%	4%	4%	22%	5%	17%	7%	11%

Base: Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10954)

Among Europe Intenders

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Buzzseekers	29%	39%	28%	35%	26%	44%	54%	25%	58%	32%	54%	38%
Explorers	20%	11%	17%	7%	19%	8%	8%	14%	12%	11%	9%	13%
Culture Buffs	20%	22%	13%	15%	16%	39%	11%	30%	9%	32%	15%	16%
Adventurers	19%	17%	24%	25%	21%	6%	23%	14%	15%	13%	17%	22%
Sightseers	13%	10%	18%	17%	18%	3%	3%	16%	5%	13%	5%	11%

Base: Respondents who plan on taking a leisure trip in Europe (n = 6411)

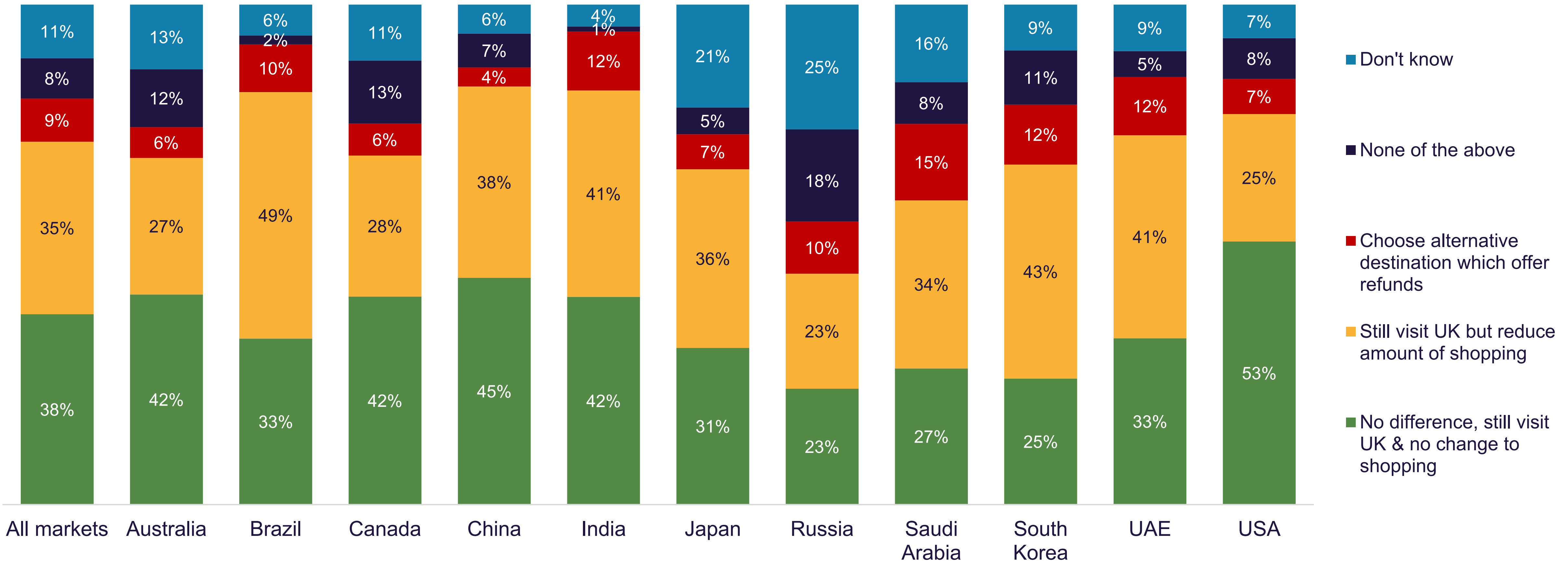
Among Britain Intenders

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Buzzseekers	34%	41%	28%	40%	23%	45%	58%	31%	60%	35%	53%	33%
Culture Buffs	25%	26%	8%	15%	13%	41%	8%	31%	11%	37%	11%	13%
Adventurers	16%	15%	32%	22%	19%	5%	20%	19%	14%	7%	21%	27%
Explorers	14%	9%	8%	7%	28%	6%	11%	5%	3%	9%	11%	12%
Sightseers	11%	9%	23%	16%	17%	2%	3%	14%	11%	11%	4%	15%

Base: Respondents who plan on taking a leisure trip in Britain (n = 1403)

Mixed reactions to the end of VAT-returns on tax-free shopping in the UK

While 38% of international travellers say that the policy change has no effect on their consideration for the UK and their shopping in the destination, more than a third (35%) state that they would reduce the amount of their tax-free shopping following the end of VAT refunds. 9% would choose a different destination which still offers these refunds over the UK. The picture varies strongly by market.



Q32: Finally, which of the following best describes your reaction to the fact that you can no longer claim value-added tax refunds on goods purchased in tax-free shopping in the UK?
Base: All respondents concerned (n = 6,553)

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

in conjunction with

International Recovery Research

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

Destination Bristol ©Gary Newman