European post EU-exit research

VisitBritain

Research conducted by ICM Unlimited February 2022 – April 2022

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Halesworth, Suffolk, Photo by Niklas Weiss on Unsplash

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Low lighthouse, Harwich, Essex, Photo by Benjamin Thomas on Pixabay

European post EU-exit research – questions to answer

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3. **Perceptions of Britain**
4. **Causes for concern and barriers to travelling to Britain post EU-exit**

Research details:

- Focus on levels of passport and national identity card (ID card) ownership.
- Nationally representative sample of 500 per market – Germany, France, Spain, Italy, Poland, Belgium, The Netherlands, Sweden, Switzerland and Norway (total sample: 5,000).
- Data has been weighted to be representative of the population of each individual market by gender, age and region. The proportion of each market is equal across all markets.
- Data in the report is either shown by total sample or amongst international travellers. By international travellers we mean those who have taken a holiday abroad in the last five years and/or plan to take a holiday in the next two years.
- Online fieldwork conducted by ICM Unlimited.
- Online fieldwork took place 14th-24th March.

Executive summary – document ownership & understanding of rules required to travel

1. **Passport and ID card ownership.** Almost two in three (63%) Europeans own a passport and nearly three quarters (72%) have an ID card. Passport ownership is particularly high in Norway, Spain and Switzerland, but is lower in Italy, France and Poland. At the same time, almost three in ten people in these three countries, and almost a quarter overall, intend to get a passport to enter Britain. A significant minority of about one in ten in Belgium, France and Italy state that they will stop travelling to Britain as a result of the change in entry document requirements.

2. **Understanding of the documents required.** Over a third (36%) of all Europeans still think a national ID card can be used to enter Britain, with this proportion rising to around half in Belgium (44%), France (45%) and Switzerland (50%). One in ten people (10%) – and 17% in Germany - say they do not know what documents are required. When assessing knowledge of travel rules, a quarter of international travellers say they are not confident that they know the conditions for travel to enter Britain. This provides an opportunity to hone communications to make it clearer what documents are needed to enter the UK, increasing the knowledge and confidence of European travellers.

3. **Knowledge and understanding of rules changed post EU-exit.** Many misconceptions exist with regards to visa requirements to the UK following post EU-exit rule changes. Only three in ten (28%) international travellers correctly state that visa requirements depend on a number of factors such as the length of stay. In other findings, 15% think they now always need a visa to come to Britain, 41% believe they never need a visa, and 15% do not know, highlighting this as another area to help potential travellers improve their knowledge and facilitate visitation. Passenger rights and driving in the UK are the topic areas that travellers are most knowledgeable about (with 48% and 44% selecting the correct answer).

Executive summary – likelihood to visit Britain and overall perceptions

4. **Interest in visiting Britain:** Promisingly for Britain, interest in visiting Britain is high despite COVID-19 and Britain's exit from the EU, with those in Poland, Italy, Spain and Sweden most interested in coming to the UK. International travellers who have previously visited and those who either have a passport or expect to have a passport in the next 2 years are also significantly more likely to be interested in visiting Britain. London is the area that most European travellers interested in visiting state as a likely destination, particularly for those from Norway, Poland and Sweden.

5. **Perceptions of Britain**: Most Europeans have a positive view of Britain, with at least around seven in ten international travellers believing the country is open minded and tolerant, is safe and secure, and is welcoming to visitors. However, fewer than half (45%) think that Britain represents good value for money, indicating that this is an area where perceptions of Britain could be improved, particularly in the Italian market. Poland is the country that consistently outperforms other European countries in terms of positive perceptions of Britain, having statistically significant differences with other markets on all statements.

Executive summary – barriers to travel

6. **Concerns for travellers to the UK**: More than two years after the UK's exit from the EU and more than one year after the end of the transition period, almost half of European consumers are concerned about a series of potential changes impacting their visit: The areas that cause the most concern amongst international travellers following the UK's exit from the EU are the potentially increasing costs of accessing mobile data (47%), increased costs of travel insurance (45%), changes to the customs process (45%) and the extra admin (45%). Poland, Italy and Belgium are the countries that are most concerned with these potential changes, with Poland displaying the highest levels compared to the European average. There is an opportunity here to address these concerns of potential travellers and minimise the barriers travellers feel they face when coming to Britain.

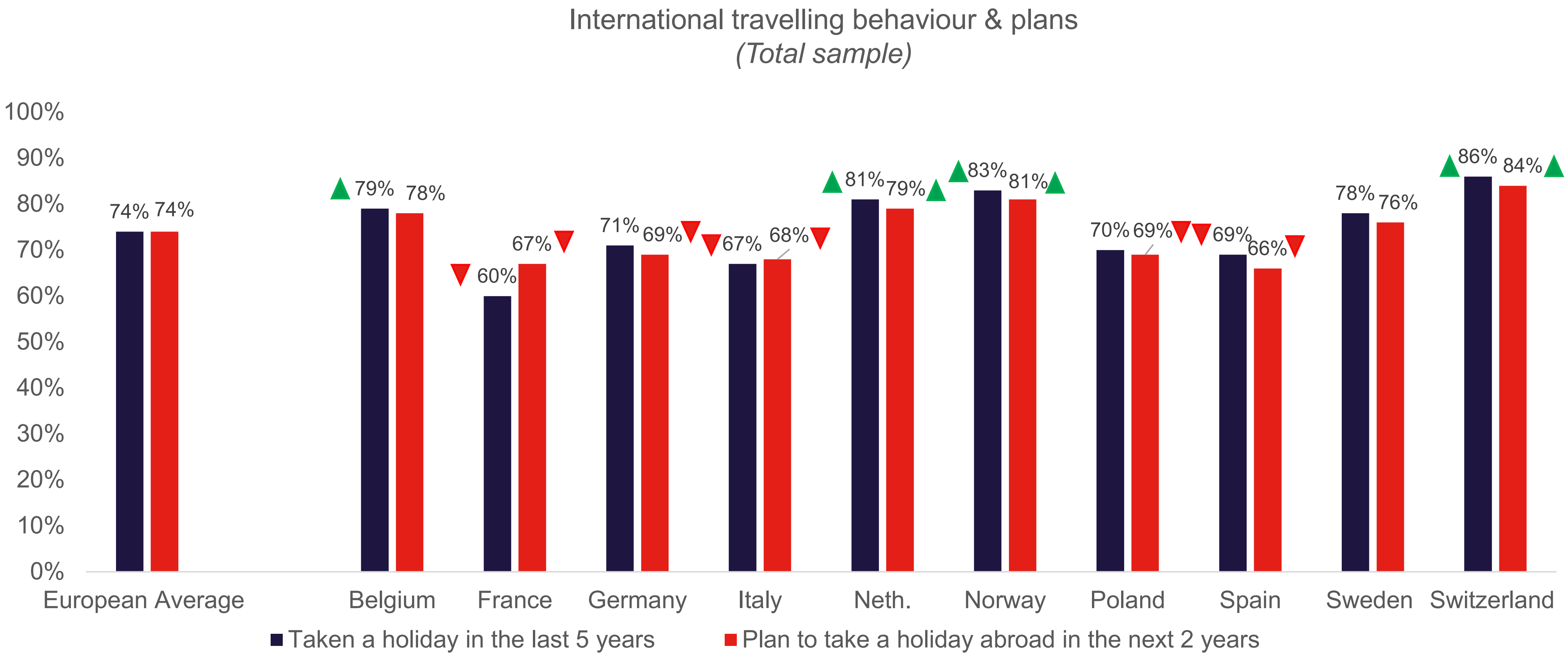
7. **Effect of the war in Ukraine**: There is a real split amongst international travellers with regards the impact of the war in Ukraine on their travel plans, with almost half (51%) stating it does affect their willingness to travel. Although a high percentage, most people say they keep their plans under review rather than cancel or postpone their current plans (just 3% will cancel). Those from Spain, Italy, Poland and Sweden are most likely to say the war has affected their willingness to travel.

Great Mis Tor, Dartmoor, Devon, Photo by Gidon Reid on Pixabay

2. Perceptions of Britain and appetite for travel

Likelihood to take a holiday abroad in next 2 years

Despite the ongoing uncertainty of Covid-19, abound three quarters of Europeans are hoping to travel abroad in the next two years. Citizens in Belgium, the Netherlands, Norway and Switzerland are most likely to get away in the next 2 years.



Q1a. Have you taken a holiday abroad in the last five years?
Q1b. And do you plan to take a holiday abroad in the next two years?
Base size: All respondents: All markets (5014), Germany (504), France (501), Spain (506), Italy (500), Poland (500), Belgium (500), The Netherlands (501), Sweden (500), Switzerland (501), Norway (501)

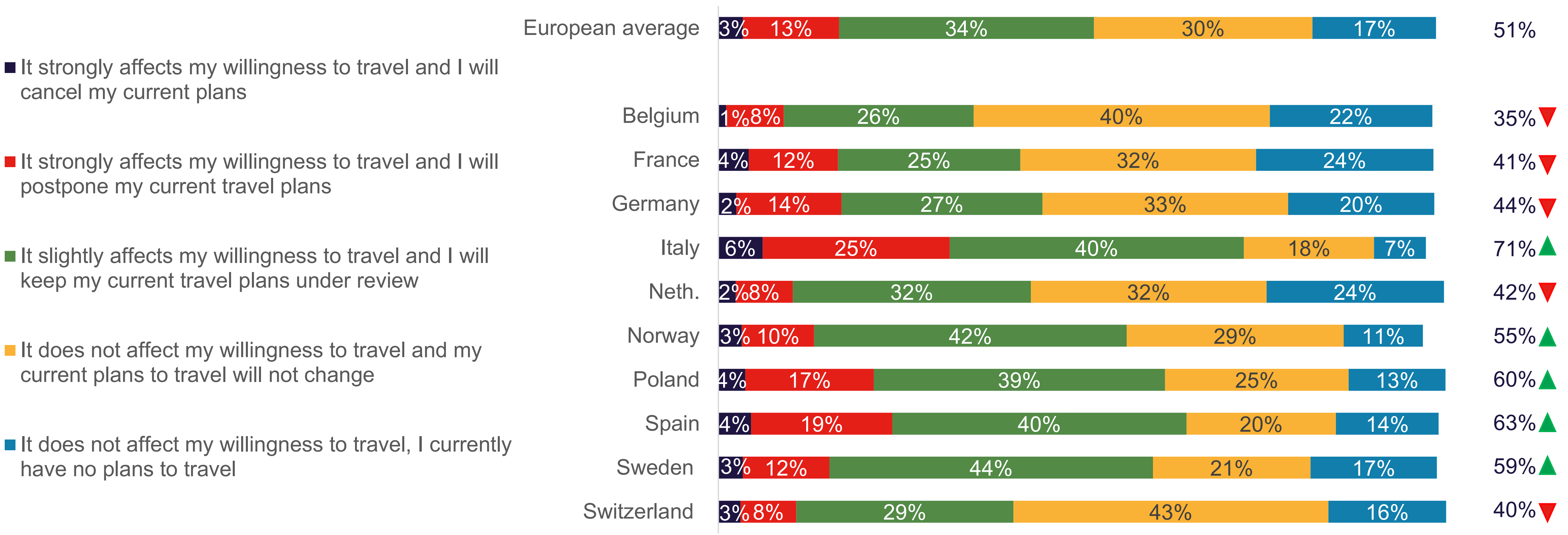
▲ / ▼ Indicates significantly higher / lower than European average

The effect of the war in Ukraine on travel plans

About half (51%) say that the war in Ukraine does affect their willingness to travel; however, only a small proportion are cancelling their travel plans (3%) or postponing them (13%), compared to 34% who say they will keep them under review. A higher proportion of those from Spain, Italy and Poland say that the war will affect their travel plans.

How much, if at all, does the war between Ukraine and Russia affect your willingness to travel abroad in the next 6 months?
(International Travellers)

Net: Does affect willingness to travel



Q1c. How much, if at all, does the war between Ukraine and Russia affect your willingness to travel abroad in the next 6 months?
Base size: All international travellers: All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

▲ / ▼ Indicates significantly higher / lower than European average

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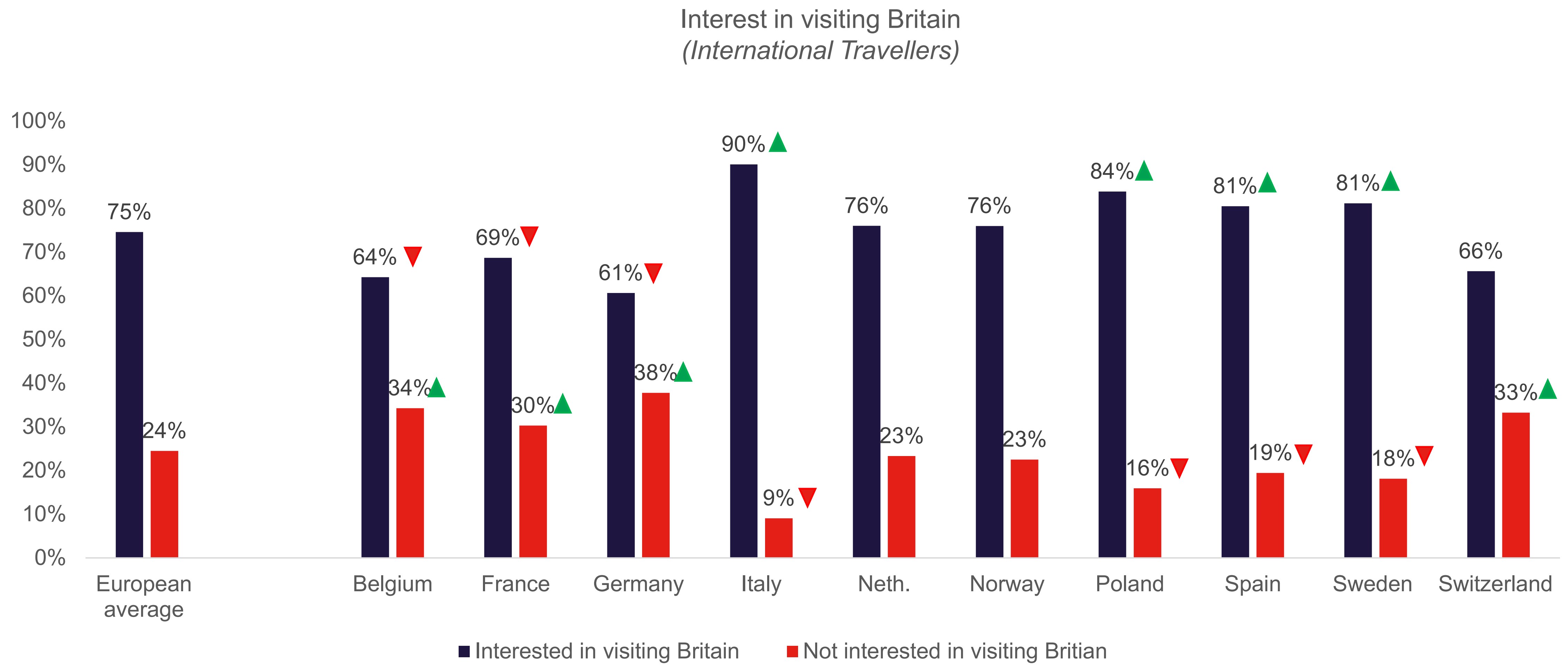
Interest in visiting Britain 1/2

Promisingly, interest in visiting Britain is high, especially in Italy, Poland, Spain and Sweden. Germany, Belgium, Switzerland and France are the countries where interest is the lowest; however, in these countries more than 3 in 5 still express an interest in visiting Britain.

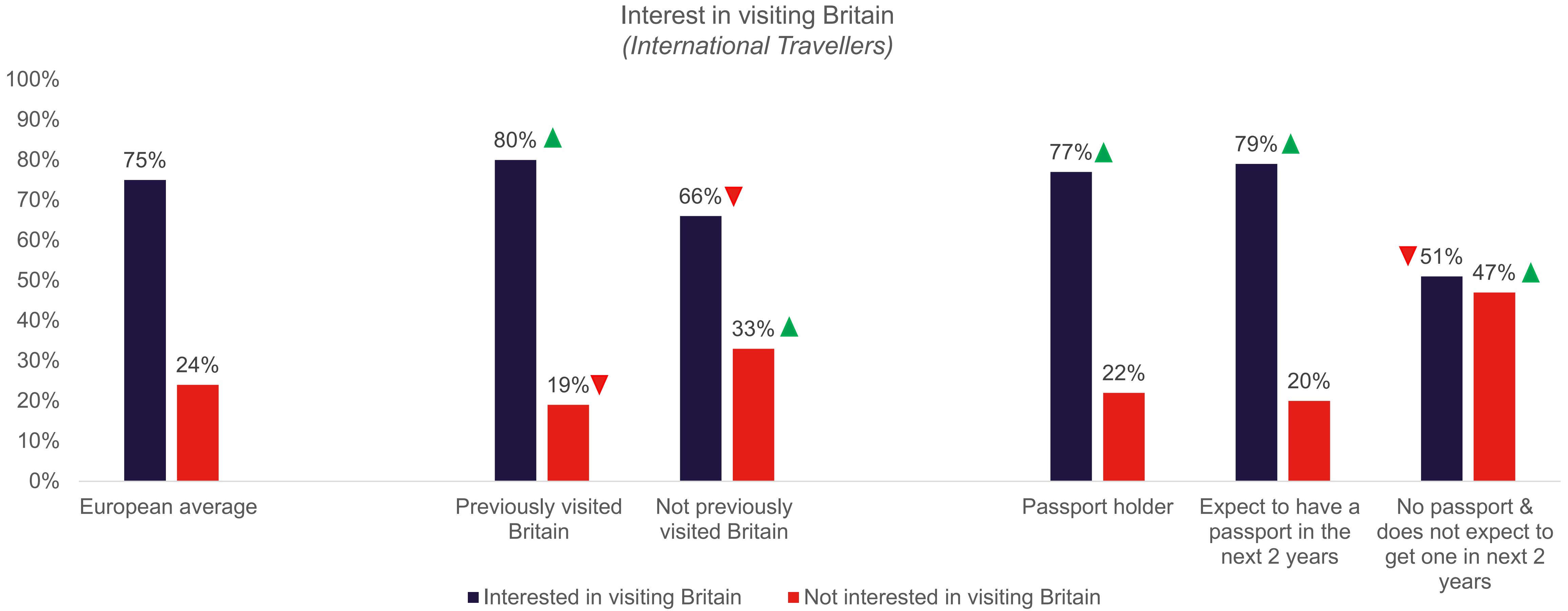


Q2a. On a scale of 1 to 10, where 1 is not at all interested and 10 is very interested, how interested would you be in visiting Britain in the future? By Britain, we mean England, Wales and Scotland. (NET interested codes 6-10)
Base size: All international travellers: All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

▲ / ▼ Indicates significantly higher / lower than European average

Interest in visiting Britain 2/2

Those who have previously visited Britain have a higher interest in visiting again compared to those who haven't visited before. Those who have a passport or are expecting to have a passport in the next 2 years are also more interested in visiting the UK than those who do not have a passport and do not expect to have one in the next 2 years.



Q2a. On a scale of 1 to 10, where 1 is not at all interested and 10 is very interested, how interested would you be in visiting Britain in the future? By Britain, we mean England, Wales and Scotland. (NET interested codes 6-10)
Base size: All international travellers: All markets (4177), Previously visited Britain (2639), Not previously visited Britain (1523), Passport holder (2884), Expect to have a passport in the next 2 years (866), Has not got a passport and does not expect to have one I the next 2 years (427).

▲ / ▼ Indicates significantly higher / lower than average subgroup

Areas in Britain of interest

Norway, Poland and Sweden are the markets most interested in visiting London and England as a whole, while Germany, Italy, and Spain are more interested in visiting Wales and Scotland than the European average.

Where in Britain would you be interested in visiting?
(International Travellers interested in visiting Britain)

%-share stating interest	European average	Belgium	France	Germany	Italy	Nether-lands	Norway	Poland	Spain	Sweden	Switzer-land
London	70%	67%	62%	71%	68%	66%	75%	76%	69%	73%	67%
Elsewhere in England	24%	24%	18%	20%	28%	20%	35%	24%	17%	23%	24%
NET: England	76%	74%	68%	75%	73%	73%	85%	79%	72%	80%	75%
Scotland	55%	52%	56%	63%	66%	45%	41%	57%	63%	54%	55%
Wales	29%	26%	24%	31%	36%	23%	25%	34%	37%	23%	26%

Q2b. And where in Britain would you be interested in visiting?
Base size: All international travellers interested in visiting Britain: All markets (3139), Germany (243), France (259), Spain (328), Italy (358), Poland (339), Belgium (275), The Netherlands (335), Sweden (346), Switzerland (307), Norway (349)

Indicates significantly higher / lower than European average

Timing of travel plans to Britain

International travellers in Sweden are more likely than average to visit Britain in the first half of this year. However, they are also much less likely to visit in the second half of the year, meaning that overall, they are less likely to visit in 2022 compared to the European average. Poland and Spain are more likely to visit in the second half of 2022 and those in France and Italy are more likely to visit next year.

When would you be interested in visiting Britain?
(International Travellers interested in visiting Britain)

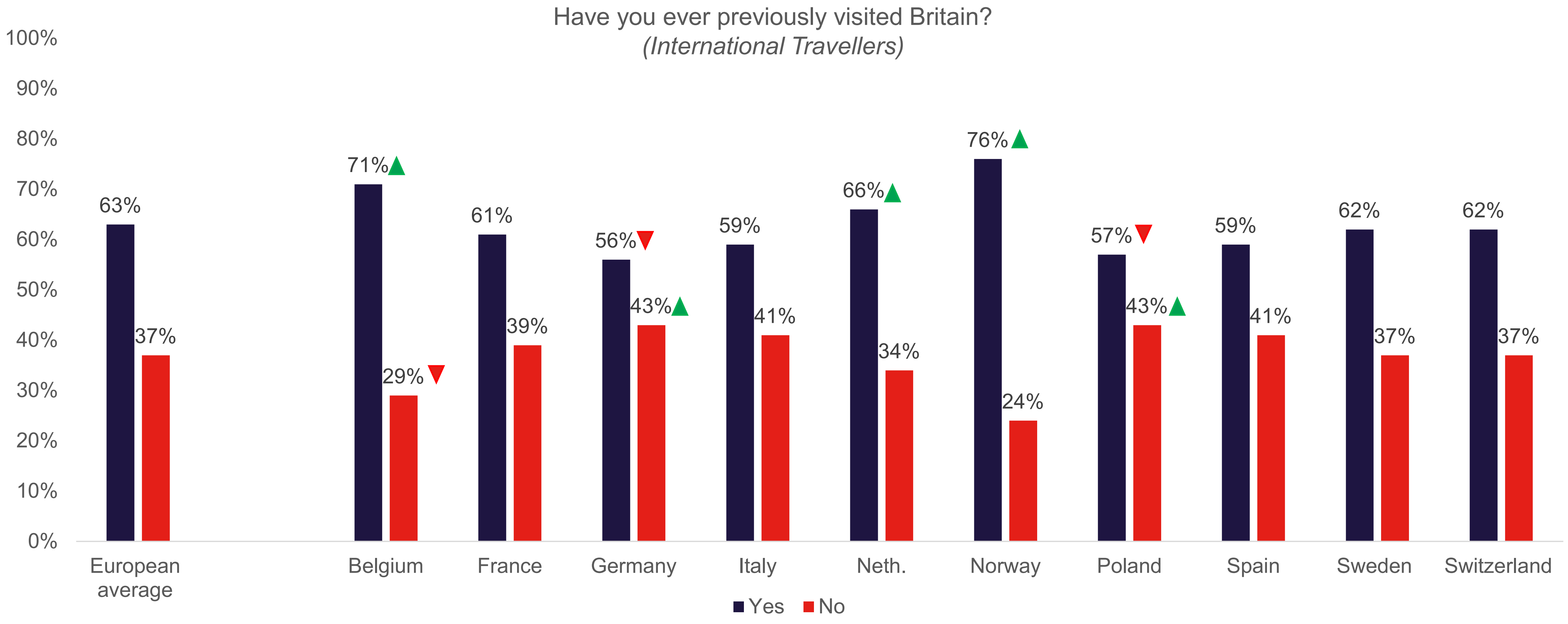
%-share stating interest	European average	Belgium	France	Germany	Italy	Nether-lands	Norway	Poland	Spain	Sweden	Switzerland
First half of 2022	10%	11%	9%	9%	9%	7%	11%	12%	8%	15%	10%
Second half of 2022	30%	28%	26%	31%	28%	34%	28%	35%	40%	22%	30%
NET: 2022	41%	39%	36%	40%	36%	41%	39%	47%	48%	37%	40%
Next year	33%	32%	39%	37%	40%	31%	31%	33%	33%	35%	29%
Later in the future	17%	17%	14%	15%	14%	16%	19%	11%	9%	16%	21%
Not sure	14%	12%	10%	8%	10%	12%	11%	9%	10%	13%	11%

Q2c. And when would you be interested in visiting Britain?
Base size: All international travellers interested in visiting Britain: All markets (3139), Germany (243), France (259), Spain (328), Italy (358), Poland (339), Belgium (275), The Netherlands (335), Sweden (346), Switzerland (307), Norway (349)

Indicates significantly higher / lower than European average

Previous visits to Britain

Travellers from Norway, The Netherlands and Belgium are all significantly more likely than the European average to have previously visited Britain. Conversely, those in Germany, Italy, Poland and Spain are significantly more likely than the European average not to have been to Britain before.



Q3. Have you ever previously visited Britain?
Base size: All international travellers: All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

▲ / ▼ Indicates significantly higher / lower than European average

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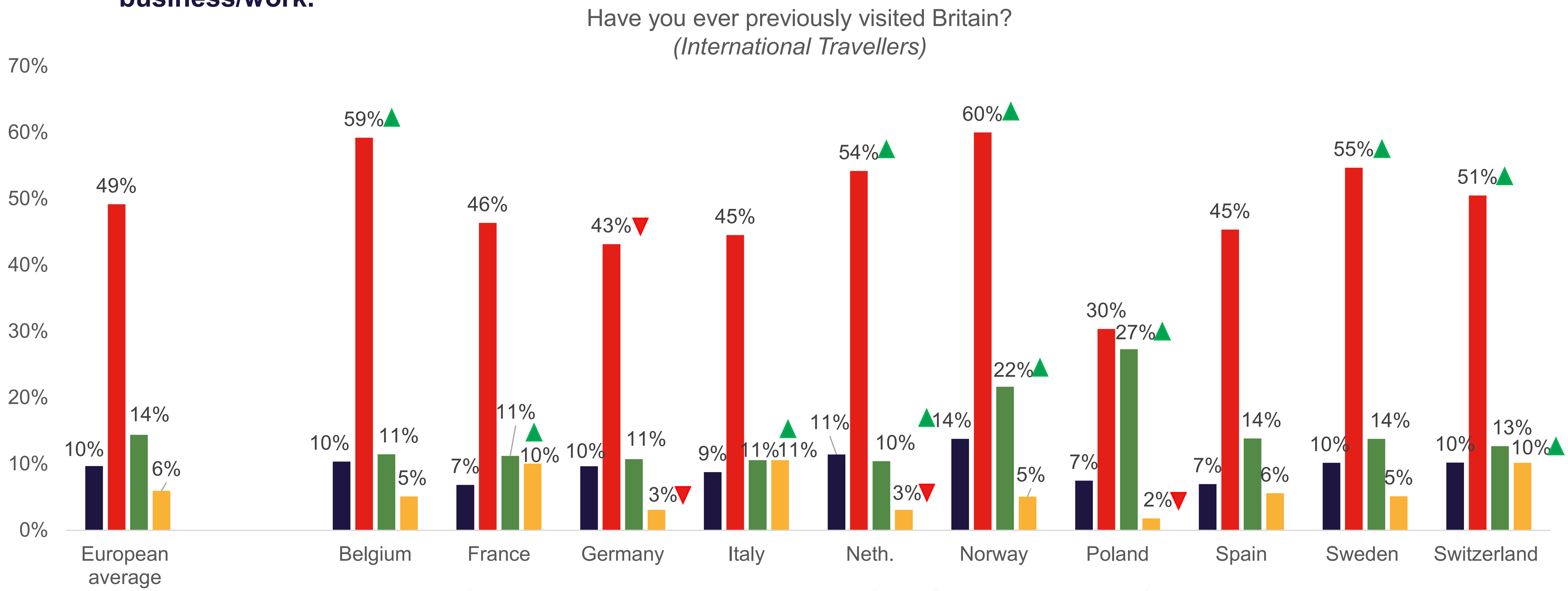
Reasons for previous visits to Britain

Holidaying is the main reason for previously visiting Britain across all European markets. Travellers from Poland and Norway are significantly more likely than the European average to have travelled to visit friends and family, while those from Norway and The Netherlands are significantly more likely to visit Britain for business/work.



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Q3. Have you ever previously visited Britain?
Base size: All international travellers: All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

Timing of previous visit to Britain

The majority of previous visits to Britain were in 2018 or before; just one in six have visited since the outbreak of coronavirus in 2020. Travellers from Belgium and France are more likely than the European average to have visited more than 3 years ago, while travellers from the Netherlands and Poland are significantly more likely than the European average to have visited since 2020.

When was your most recent visit to Britain?
(International Travellers who have visited Britain)

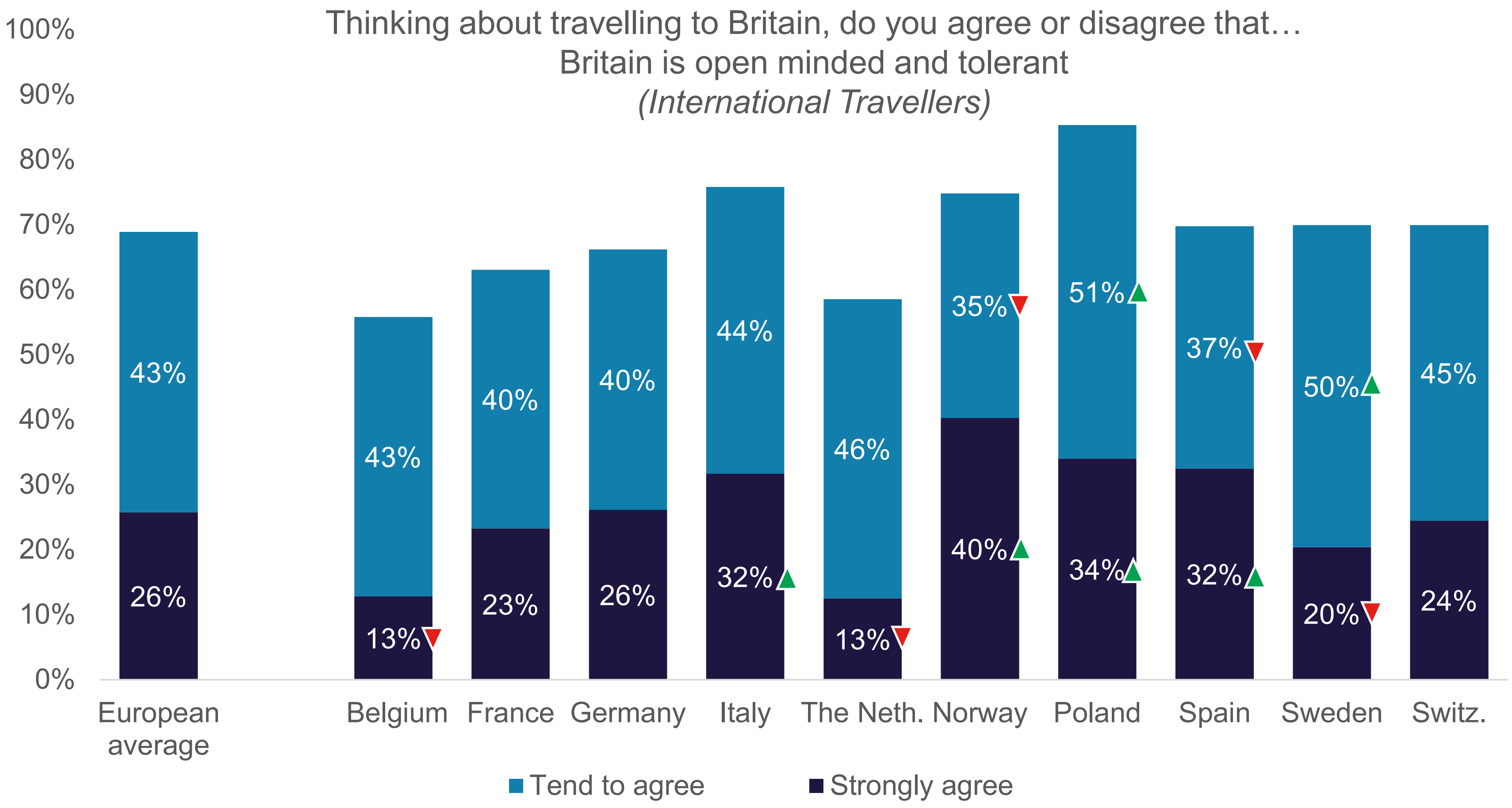
% who have visited	European average	Belgium	France	Germany	Italy	The Neth.	Norway	Poland	Spain	Sweden	Switzerland
2022	3%	2%	3%	1%	3%	3%	4%	2%	2%	3%	2%
2021	5%	5%	4%	4%	5%	5%	5%	8%	7%	5%	4%
2020	9%	8%	7%	9%	7%	13%	7%	19%	8%	8%	7%
2019	19%	14%	18%	18%	20%	18%	20%	24%	25%	21%	18%
2018 or before	62%	70%	67%	67%	63%	60%	64%	41%	59%	63%	68%

Q4. When was your most recent visit to Britain?
Base size: All international travellers who have visited Britain before: All markets (2639), Germany (222), France (228), Spain (239), Italy (233), Poland (230), Belgium (307), The Netherlands (285), Sweden (265), Switzerland (289), Norway (341)

/ Indicates significantly higher / lower than European average

Britain is perceived as open minded and tolerant

Overall, seven in ten (69%) European travellers think that Britain is open minded and tolerant. This belief is strongest in Poland and lowest in the Netherlands and Belgium. Furthermore, agreement is higher among those who have previously visited or are interested in visiting Britain.



European average	Strongly Agree	Tend to agree
Previously visited Britain	31% ●	45% ●
Not previously visited Britain	9%	37%
Interested in visiting Britain	30% ●	45% ●
Not interested in visiting Britain	8%	35%
Has a passport	29% ●	43%
Expect to have in the next 2 years	20% ●	46% ●
Doesn't have or expect to have in the next 2 years	14%	40%

Q5_1. Thinking about travelling to Britain, to what extent do you agree or disagree with the following statements? Britain is open minded and tolerant
Base size: All international travellers: All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

● / ● Indicates significantly higher / lower than average subgroup
▲ / ▼ Indicates significantly higher / lower than European average

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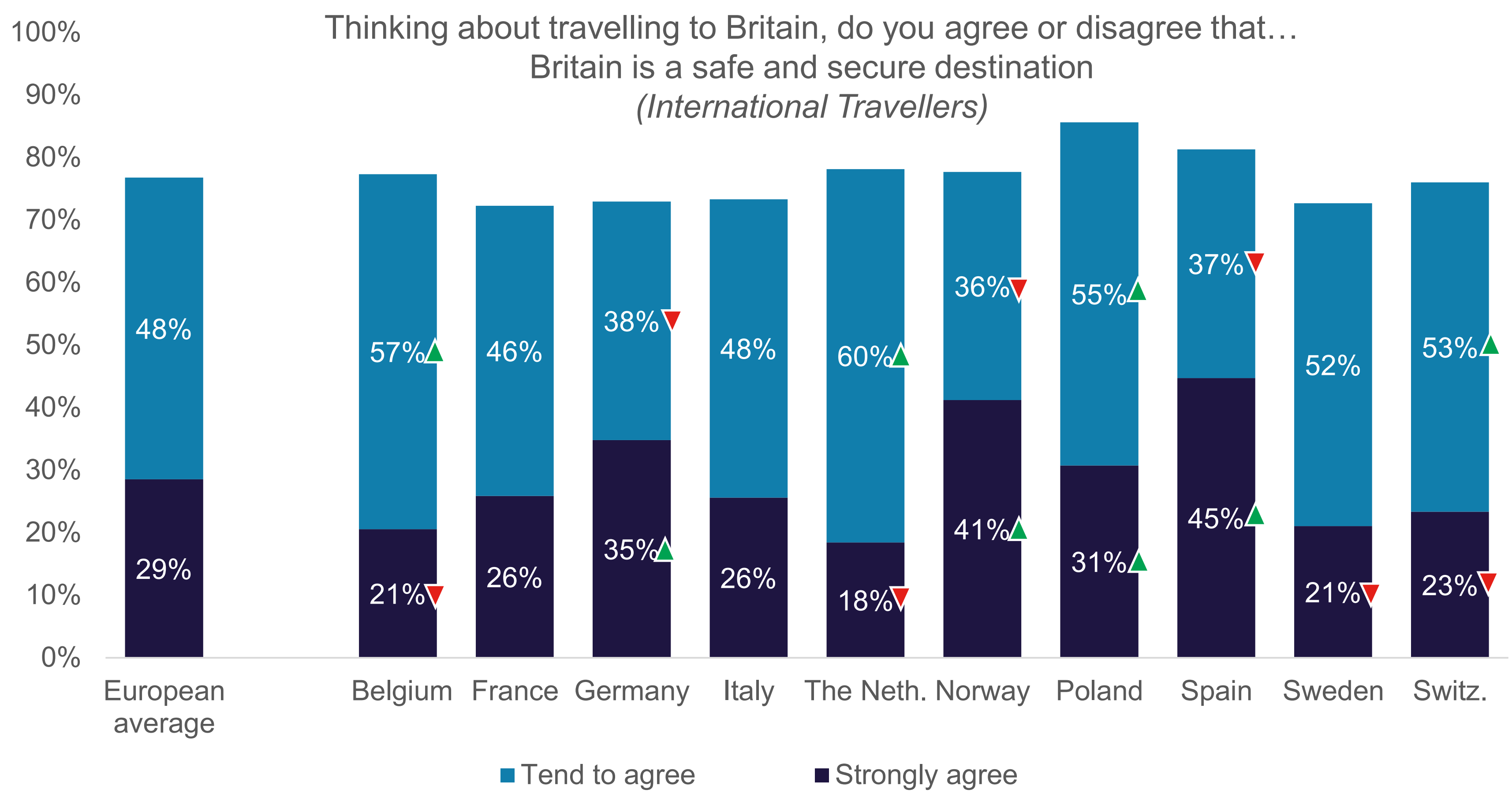
Britain is perceived as a safe and secure destination by most European travellers

More three quarters (77%) of European international travellers perceive Britain as a safe and secure destination, with Poland and Spain most likely to agree.



European average	Strongly Agree		Tend to agree
Previously visited Britain	32%		49%
Not previously visited Britain	23%		47%
Business/work	34%	●	47%
Holiday	32%	●	50%
Visit friends and family	36%	●	46%
Study	26%		52%
Has a passport	32%	●	47%
Expect to have in the next 2 years	23%		51%
Doesn't have or expect to have in the next 2 years	17%		50%

Q5_2. Thinking about travelling to Britain, to what extent do you agree or disagree with the following statements? Britain is a safe and secure destination
Base size: All international travellers: All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

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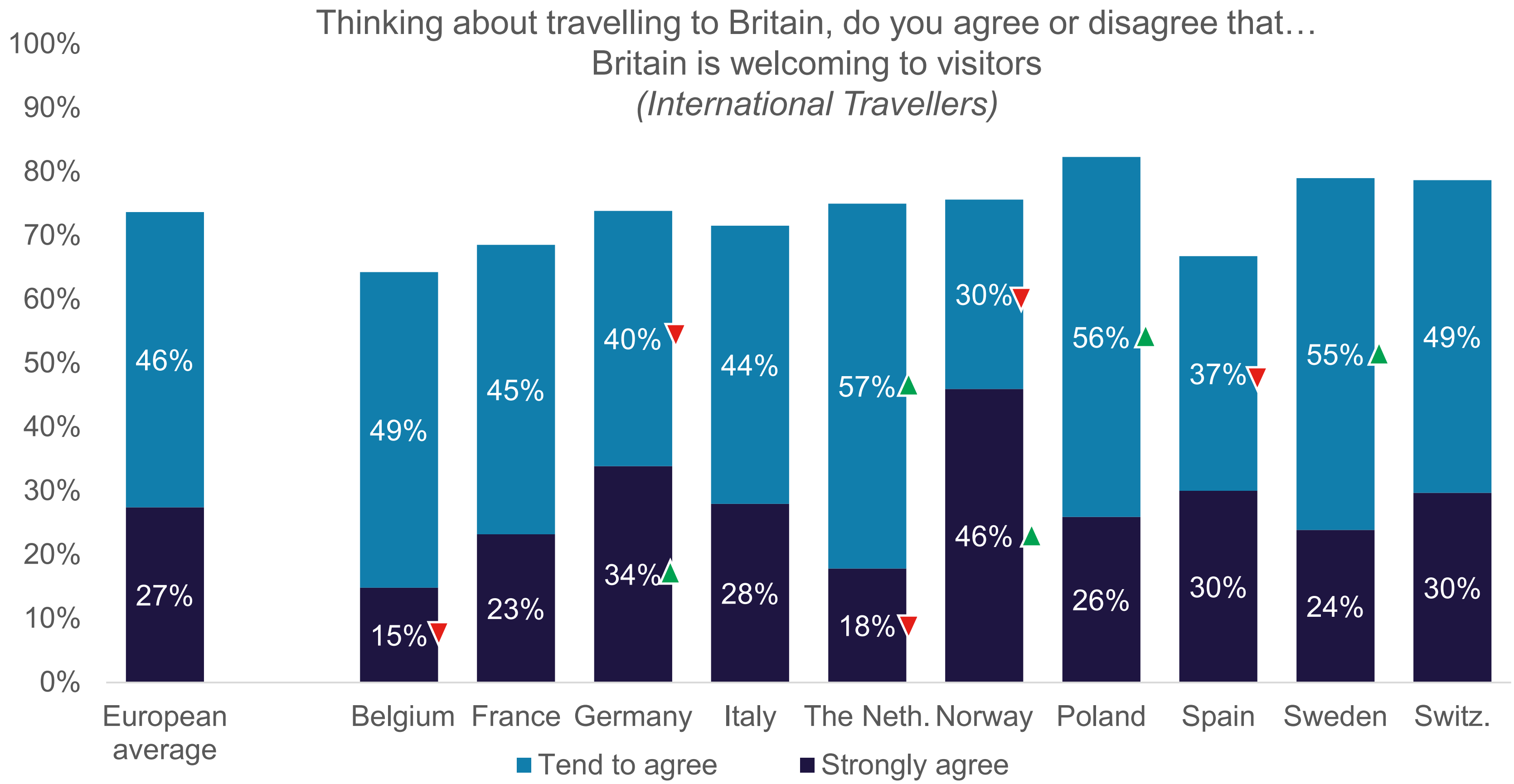
Britain is welcoming to visitors

Britain is perceived as welcoming to visitors by three-quarters (74%) of travellers in Europe, with this sentiment highest in Poland, Switzerland and Sweden. Those who have previously visited Britain or who are interested in visiting are also significantly more likely to think Britain is welcoming to visitors.



European average	Strongly Agree	Tend to agree
Previously visited Britain	31% ●	48% ●
Not previously visited Britain	21%	44%
Interested in visiting Britain	33% ●	48% ●
Not interested in visiting Britain	10%	42%
Has a passport	31% ●	45%
Expect to have in the next 2 years	21% ●	50% ●
Doesn't have or expect to have in the next 2 years	16%	48%

Q5_3. Thinking about travelling to Britain, to what extent do you agree or disagree with the following statements? Britain is welcoming to visitors
Base size: All international travellers: All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

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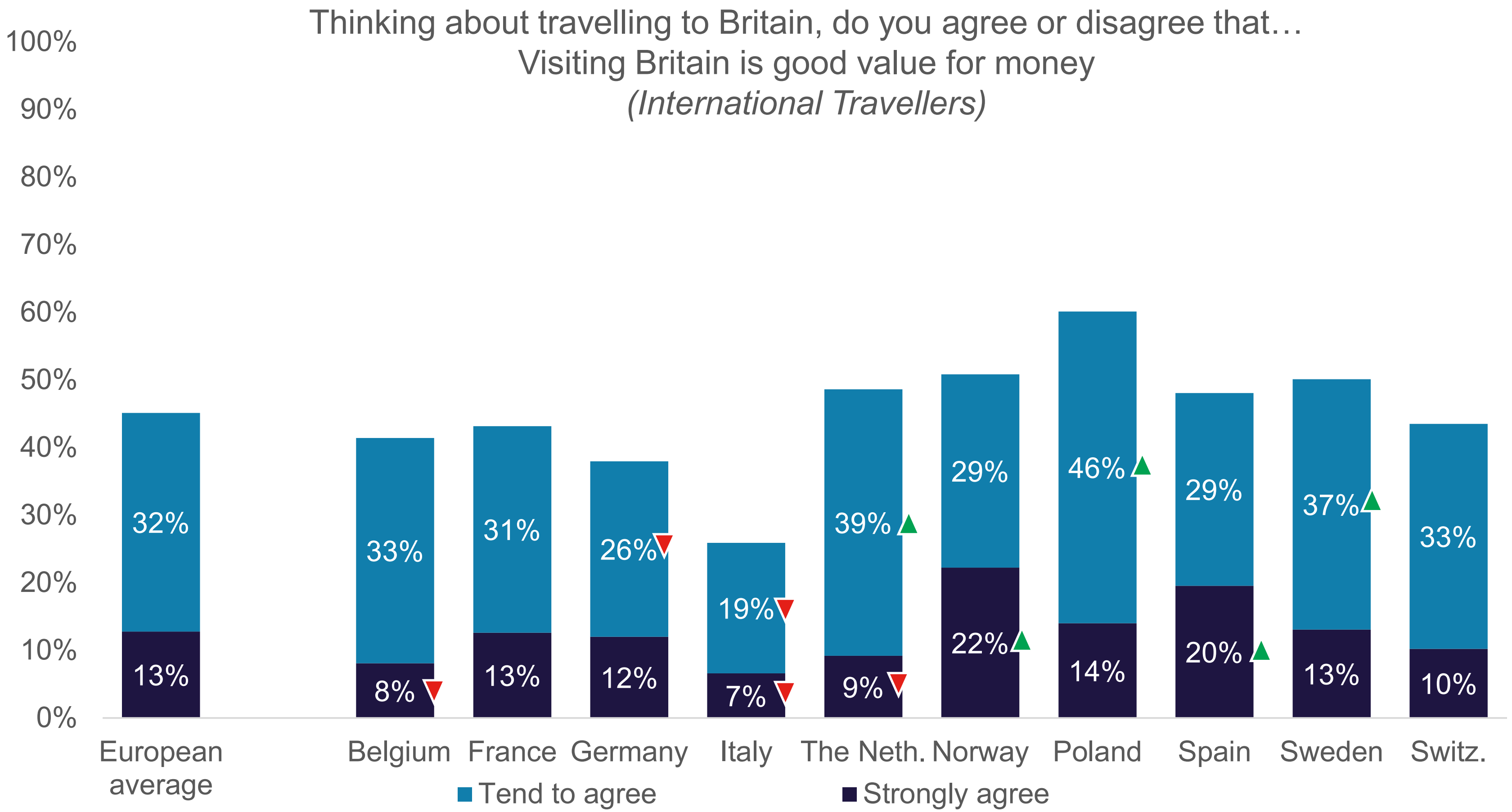
Britain's value for money

Fewer than half (45%) of international travellers in Europe perceive Britain as good value for money. Poland scores highest on this measure whereas Italy scores the lowest.



European average	Strongly Agree	Tend to agree
Previously visited Britain	15% ●	36% ●
Not previously visited Britain	10%	27%
Interested in visiting Britain	16% ●	38% ●
Not interested in visiting Britain	3%	17%
Has a passport	15% ●	33% ●
Expect to have in the next 2 years	10% ●	35% ●
Doesn't have or expect to have in the next 2 years	4%	26%

Q5_4. Thinking about travelling to Britain, to what extent do you agree or disagree with the following statements? Visiting Britain is good value for money
Base size: All international travellers: All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

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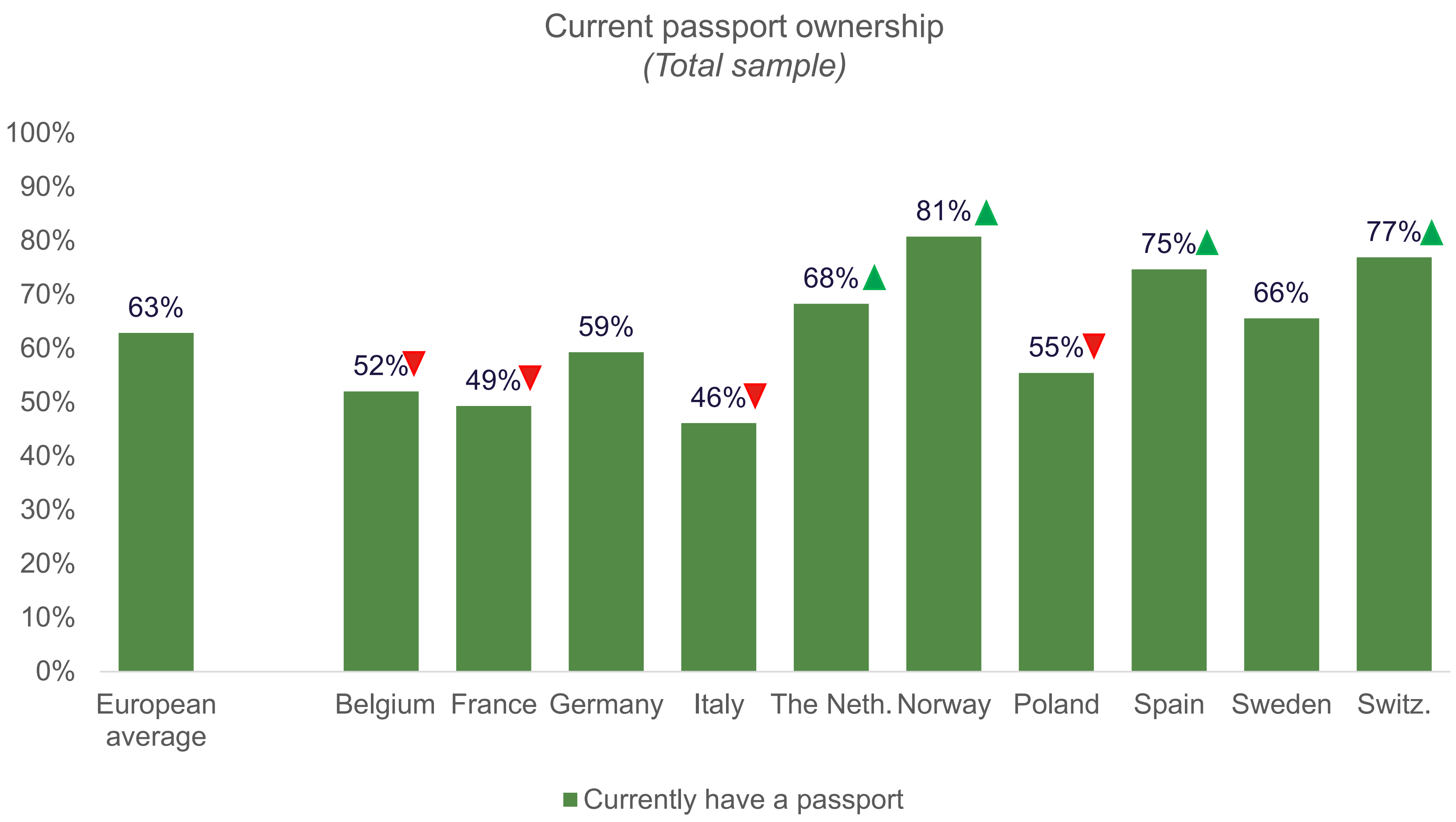
Slater Bridge, Lake District, Cumbria, Photo by Paul Edney on Pixabay

3. Passport and ID card ownership

Passport ownership 1/2

Almost 2 in 3 (63%) Europeans own a passport. However, this varies strongly from around half in Italy, France and Belgium to at least three quarters in Spain, Switzerland and Norway. Passport ownership is marginally higher than average among 35-54 year olds than older or younger people.



European average	Passport holder	Doesn't have or expect to have
Male	67% ●	14%
Female	59%	18% ●
16-24	67%	9%
25-34	68%	6%
35-44	72%	8%
45-54	70%	12% ●
55-64	67%	13% ●
65+	69%	14% ●

Q5a_1. A passport (Please select from the list below which of the following you currently have or expect to have within the next 2 years.)
Base size: All respondents: All markets (5014), Germany (504), France (501), Spain (506), Italy (500), Poland (500), Belgium (500), The Netherlands (501), Sweden (500), Switzerland (501), Norway (501)

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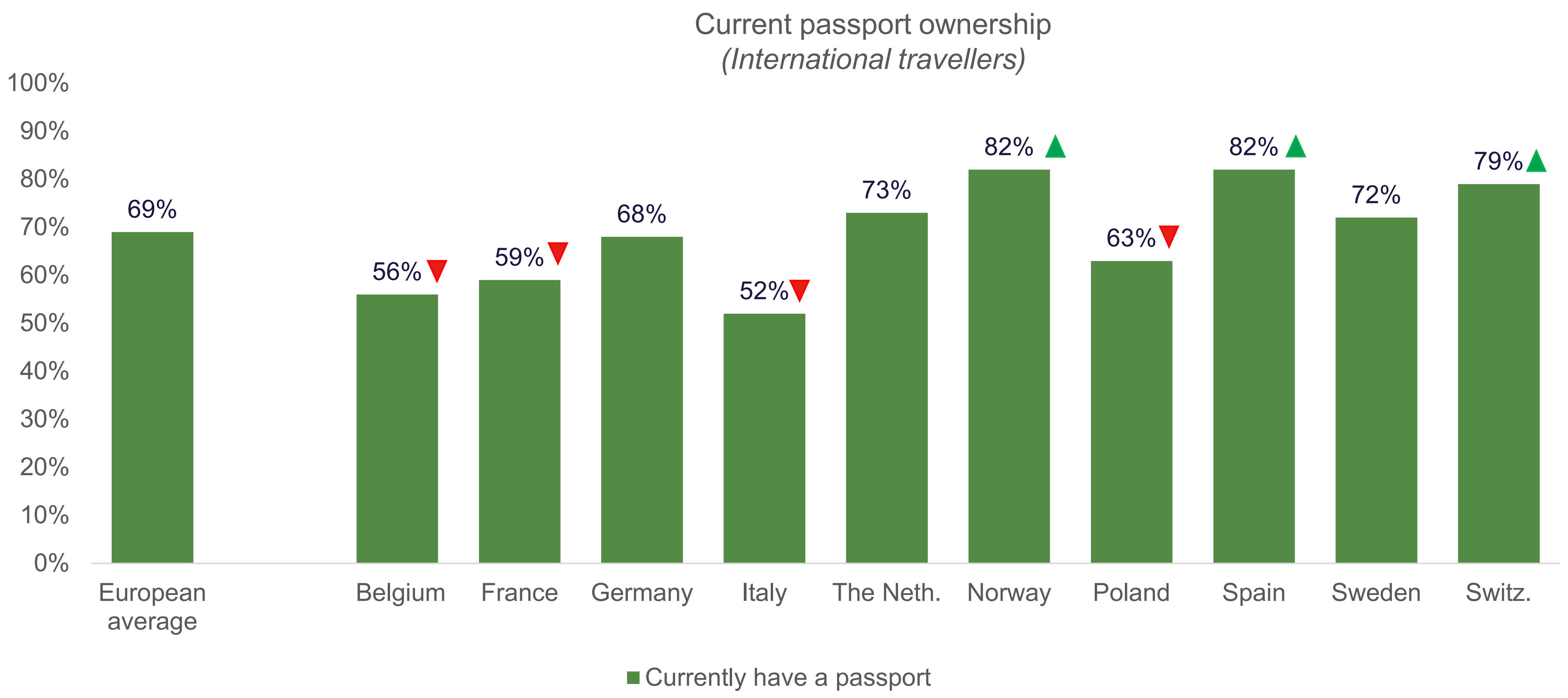
Passport ownership 2/2

Almost 7 in 10 (69%) of European international travelers own a passport. However, this varies strongly with Belgium and Italy having significantly lower levels of ownership and Norway, Spain, and Switzerland having significantly higher levels of ownership.



Q5a_1. A passport (Please select from the list below which of the following you currently have or expect to have within the next 2 years.)
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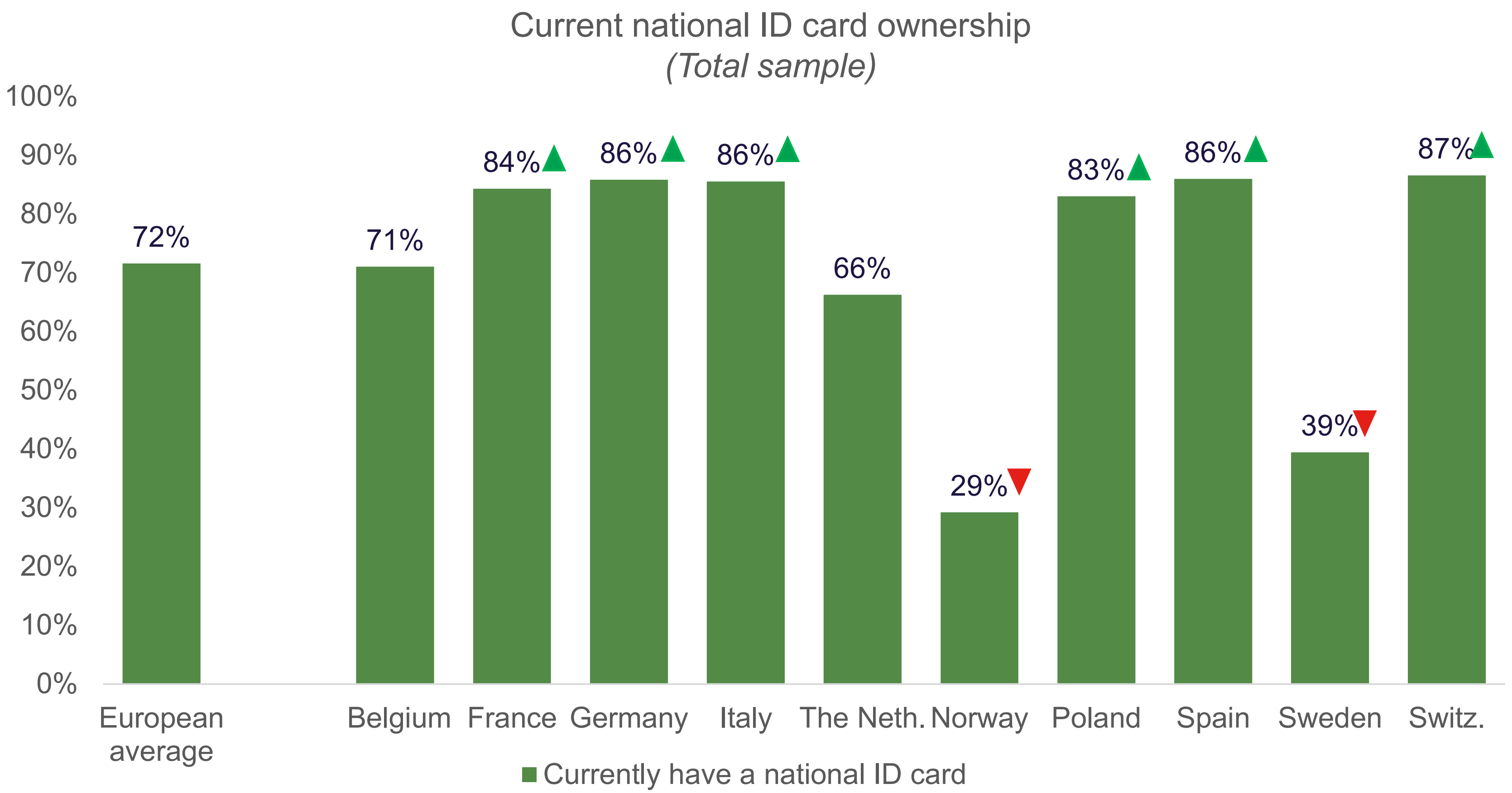
National ID card ownership

More than 7 in 10 (72%) Europeans currently hold an ID card. In Norway and Sweden, where passport ownership levels are high, ID cards are owned by less that 40% of people. In the Netherlands there are almost equal levels of ID card and passport ownership.



European average	ID card holder	Doesn't have or expect to have
Male	71%	15%
Female	73%	13%
16-24	76% ●	9%
25-34	72%	11%
35-44	72%	12%
45-54	77% ●	11%
55-64	69%	16% ●
65+	73%	17% ●

Q5a_1. A national identity card which can be used for travelling abroad(Please select from the list below which of the following you currently have or expect to have within the next 2 years.)
Base size: All respondents: All markets (5014), Germany (504), France (501), Spain (506), Italy (500), Poland (500), Belgium (500), The Netherlands (501), Sweden (500), Switzerland (501), Norway (501)

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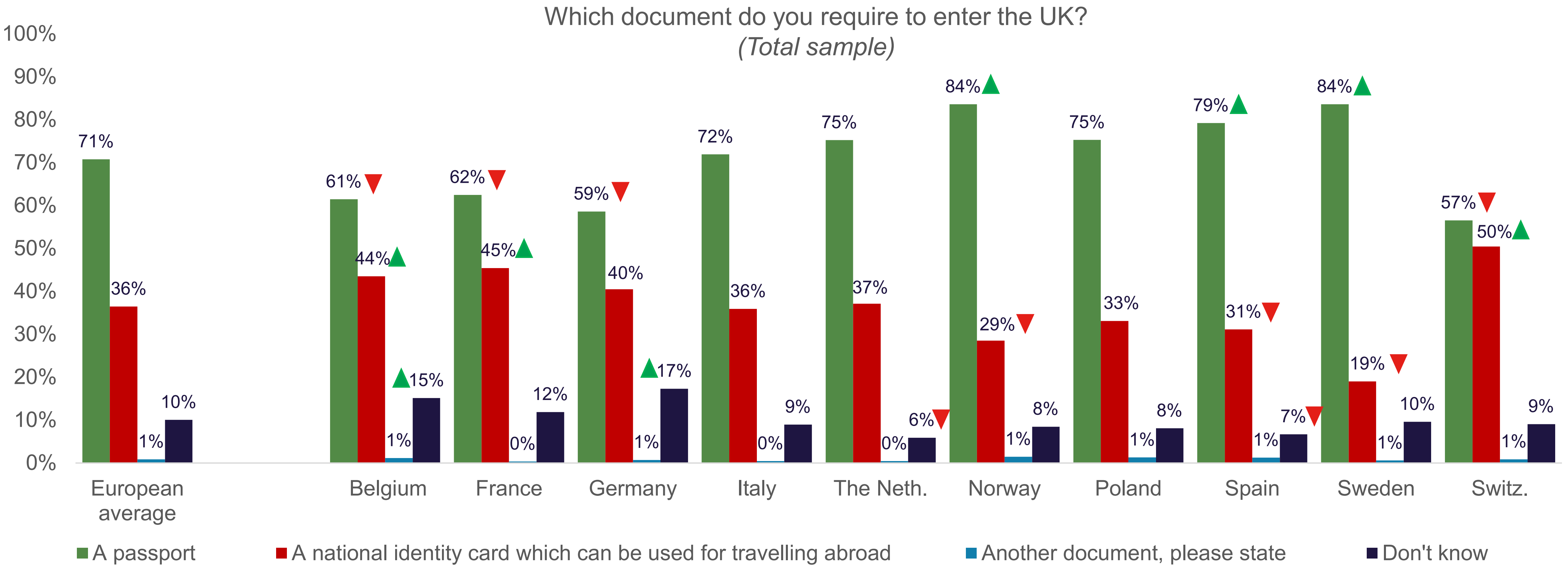
Understanding of documentation requirements

While about 7 in 10 Europeans correctly understand that they need a passport to travel to the UK, more than a third (36%) still believe that a national ID card is valid for entry, which is no longer the case. This number rises to half when looking at those from Switzerland, 45% in France and 44% in Belgium. One in ten of the Europeans surveyed were unsure which document they require, which highlights the need for more information for international travellers.



Q5b. Which document do you require to enter the UK?
Base size: All respondents: All markets (5014), Germany (504), France (501), Spain (506), Italy (500), Poland (500), Belgium (500), The Netherlands (501), Sweden (500), Switzerland (501), Norway (501)

▲ / ▼ Indicates significantly higher / lower than European average

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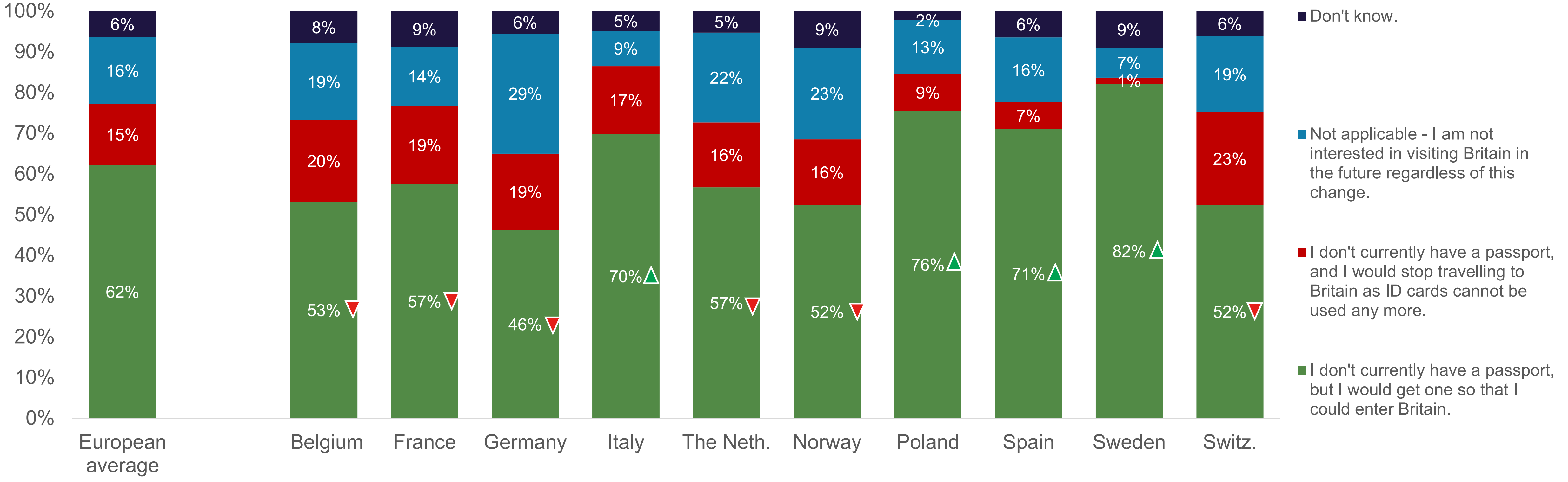
Reaction to passport requirement to enter Britain 1/2

The majority of Europeans surveyed who do not currently hold a passport state they would get one to enter Britain. However, 15% said that they would stop travelling to Britain as ID cards are longer accepted. Their share rises to as many as round about one in five in Belgium, France, and Germany respectively and more than one in five (23%) in Switzerland.

Reaction to passport requirement to enter Britain
(Total sample without a passport)

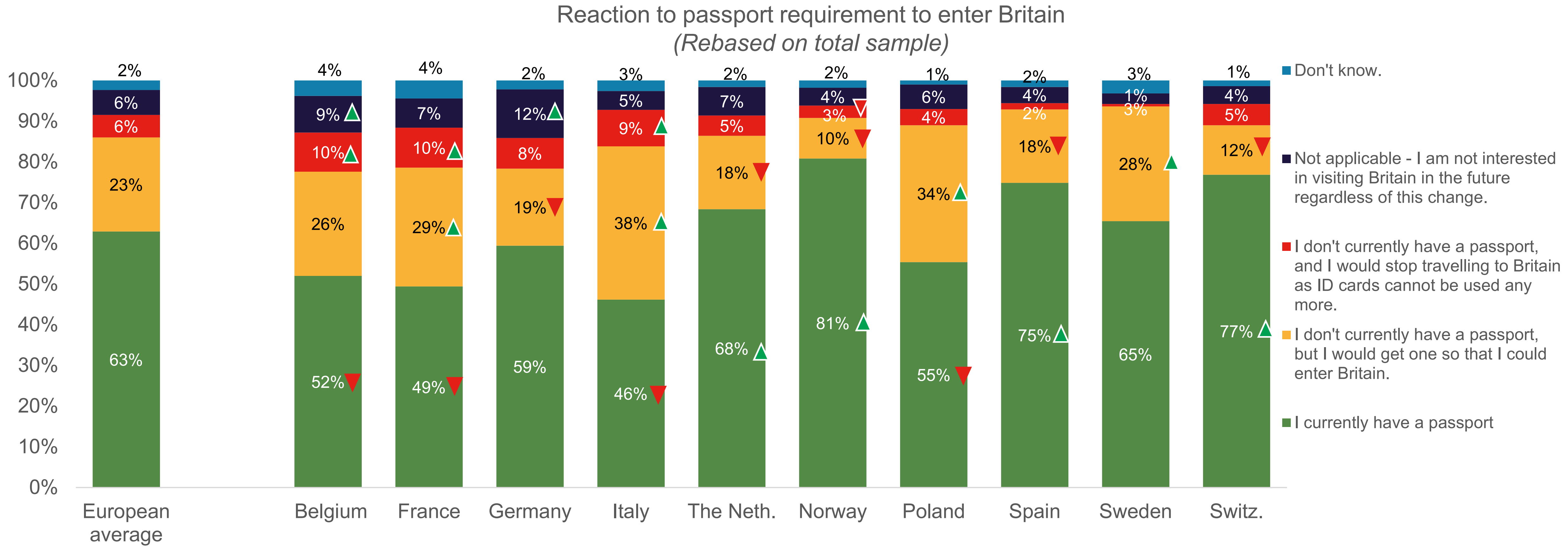


Q6a. From October 2021, the UK no longer accepts national identity (ID) cards for entry to the UK for citizens from (description) (with a few exceptions) and they now require a passport. Thinking about your response to this change, which of the following most closely applies to you?
Base size: All respondents without a passport: All markets (1861), Germany (210), France (258), Spain (130), Italy (269), Poland (217), Belgium (230), The Netherlands (165), Sweden (169), Switzerland (116), Norway (97)

▲ / ▼ Indicates significantly higher / lower than European average

Reaction to passport requirement to enter Britain 2/2

Although passport ownership is lower in France, Italy and Poland compared to other European markets, positively, a significant minority of those who do *not* hold a passport in these countries state that they would get one (29%, 38%, 34% respectively). However, about one in ten in France, Belgium and Italy say that they would not get a passport and stop travelling to Britain.



Q6a. From October 2021, the UK no longer accepts national identity (ID) cards for entry to the UK for citizens from (description) (with a few exceptions) and they now require a passport. Thinking about your response to this change, which of the following most closely applies to you? Q5a_1. A passport (Please select from the list below which of the following you currently have or expect to have within the next 2 years.)
Base size: All respondents without a passport: All markets (5014), Germany (504), France (501), Spain (506), Italy (500), Poland (500), Belgium (500), The Netherlands (501), Sweden (500), Switzerland (501), Norway (501)

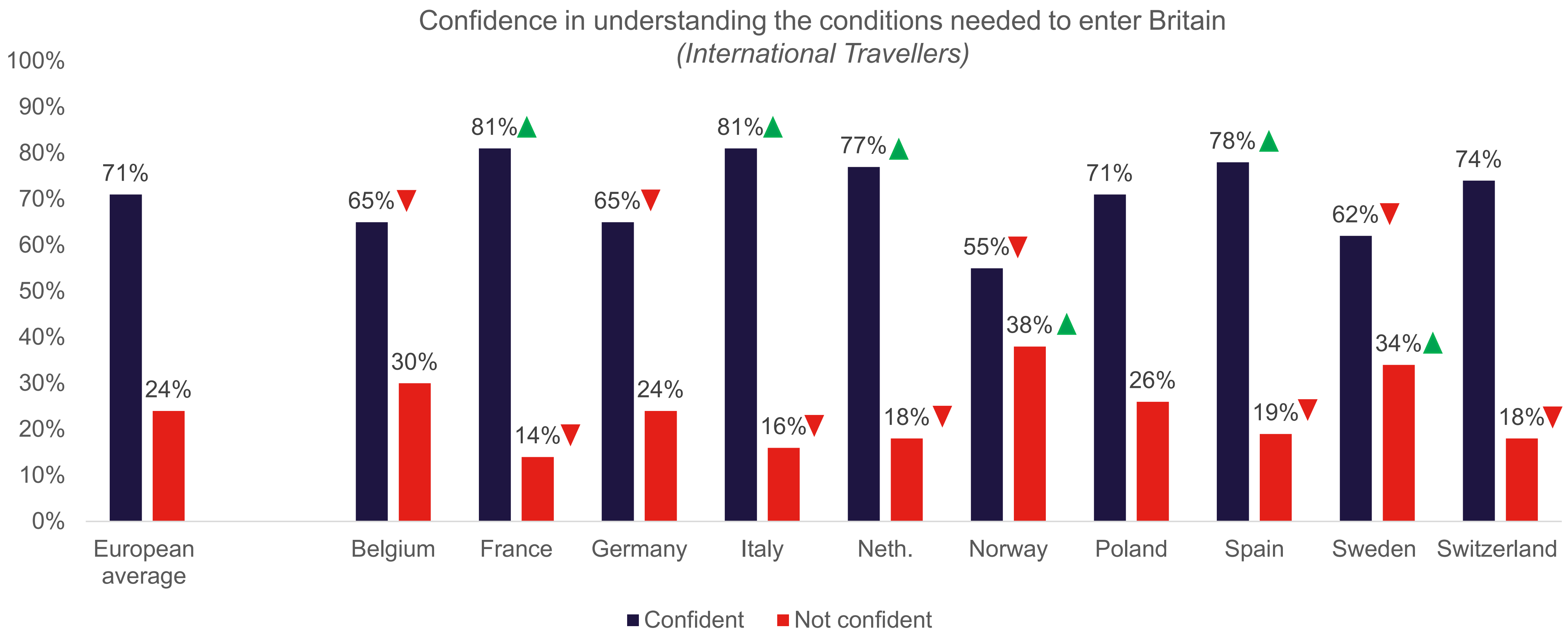
▲ / ▼ Indicates significantly higher / lower than European average

Loch Morlich, Cairngorms, Scotland, Photo by Georgia de Lotz on Unsplash

4. Understanding of the new rules and perceived barriers

Confidence in understanding the conditions to enter Britain

Around 7 in 10 (71%) say that they are confident they understand the conditions for travel to enter Britain. A quarter (24%) are not confident, which rises to 34% for Sweden and 38% for Norway. This demonstrates the need for clarification on what is required to travel to Britain under the new rules in some markets.



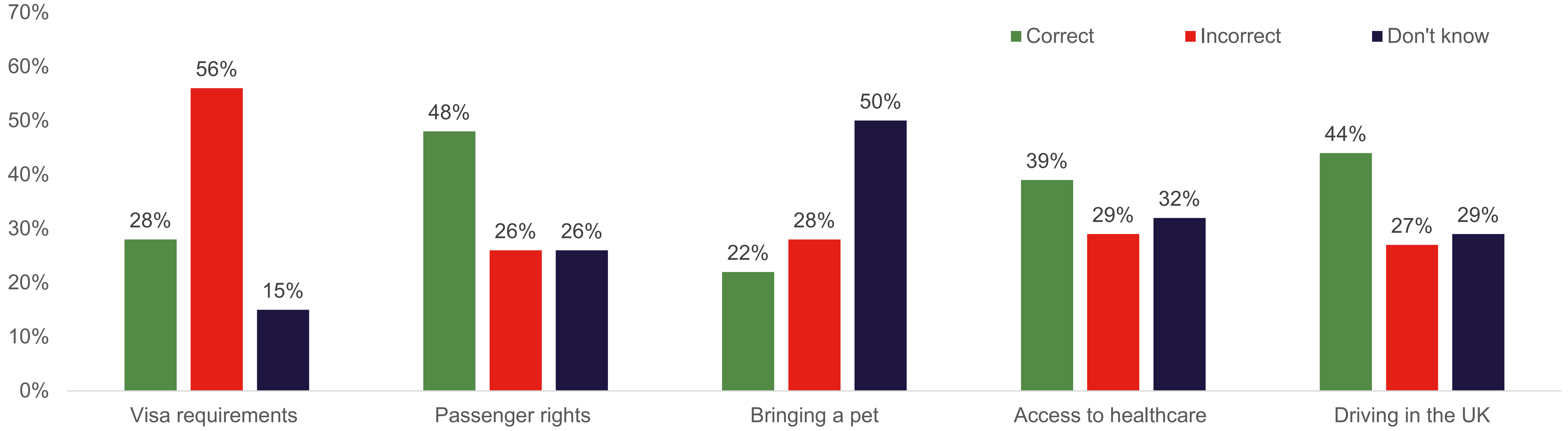
Q7a. How confident, if at all, are you that you understand the conditions for travel to enter Britain?
Base size: All International travellers: All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

▲ / ▼ Indicates significantly higher / lower than European average

Knowledge and understanding

European travellers hold misconceptions about visa requirements for entry to Britain and it is therefore an area where communications could be targeted to increase the knowledge and understanding of travellers coming to the UK. Passenger rights and driving in the UK are the topics where knowledge is the best although there is still room for improvement.

Base: All international travellers



The visa requirement depends on the length of stay, journey purpose and activities carried out in the UK.

Passenger rights remain the same.

There has been no change to the health preparations for pets entering Great Britain from 1 January 2021

I can continue to use my European health insurance card to access emergency healthcare in the UK during my stay.

I can continue to use my non-UK licence to drive in the UK during my stay and do not require an International Driving Licence.

Q8a. What is your understanding of each of the below? For each topic please select the statement which you believe is true.
Base size: All international travellers: All markets (4177)

The correct statement for each area

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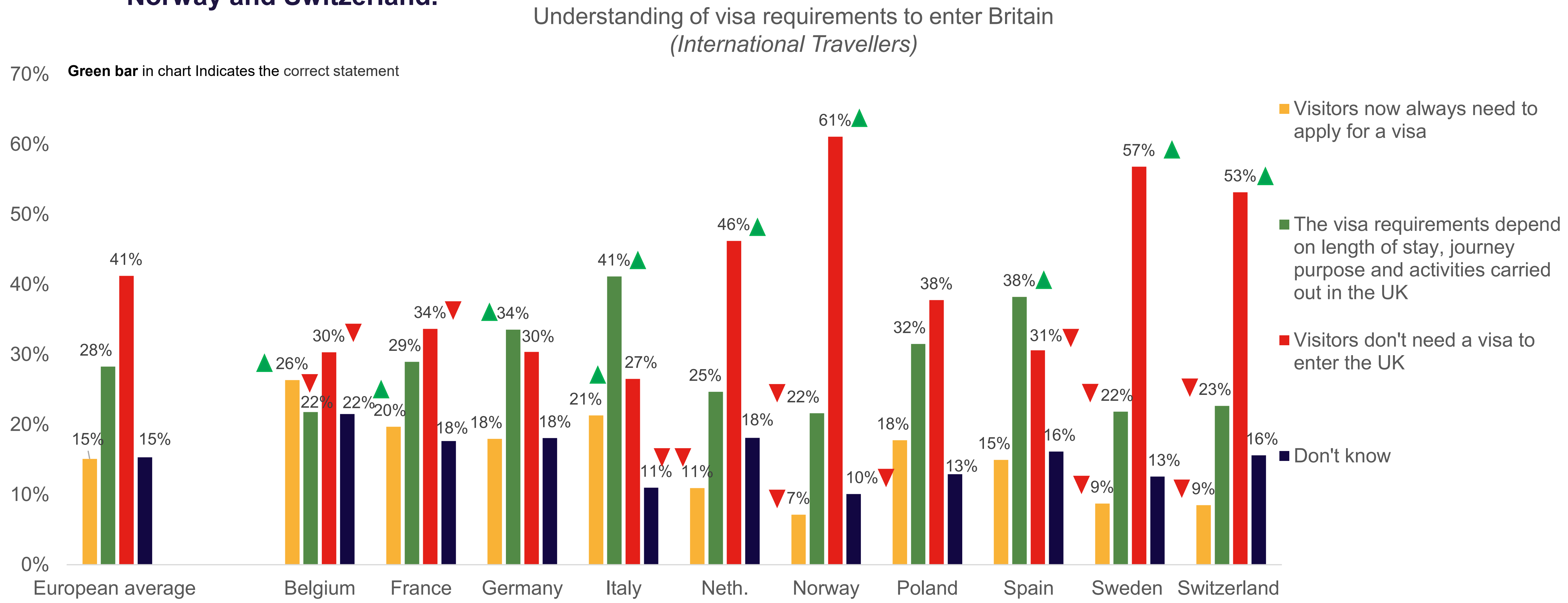
Visa requirements

There is still significant misunderstanding surrounding the visa requirements for entering Britain, with over half selecting an incorrect answer and 15% saying they do not know. Misunderstanding is highest in Sweden, Norway and Switzerland.



Q8a. What is your understanding of each of the below? For each topic please select the statement which you believe is true. Visa requirements
Base size: All international travellers: All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

▲ / ▼ Indicates significantly higher / lower than European average

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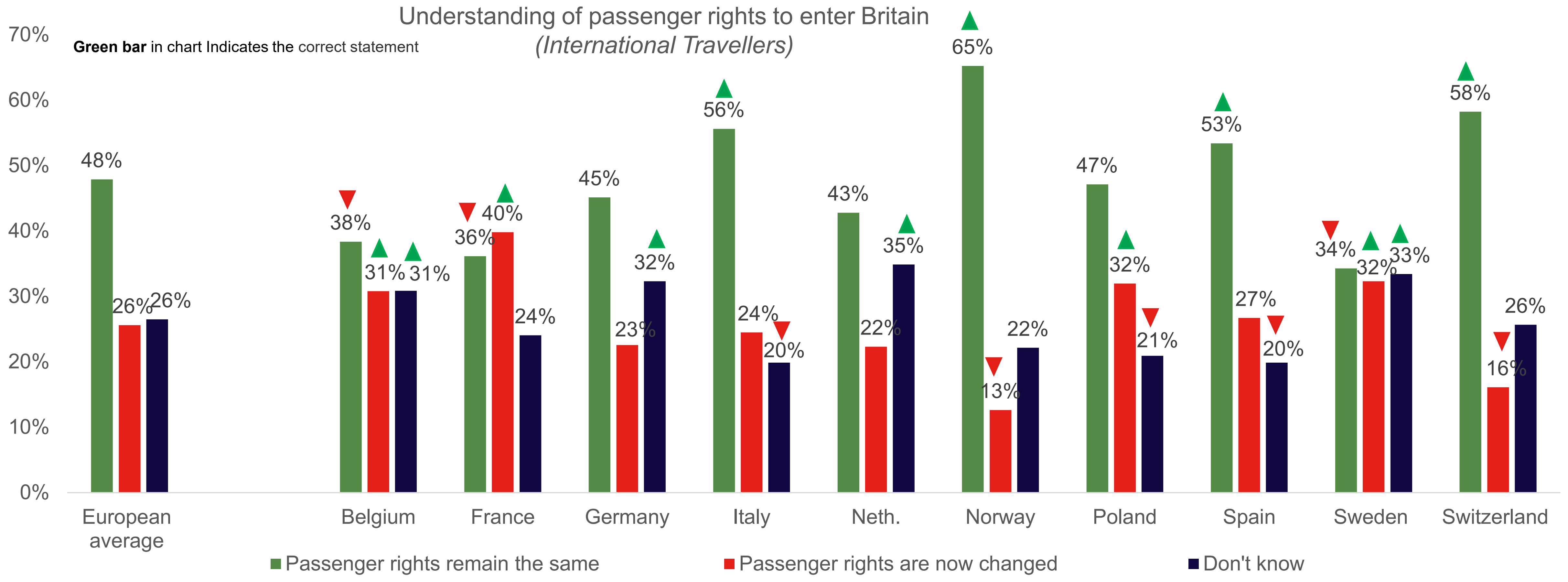
Passenger rights

Half (48%) of international travellers correctly identify passenger rights as remaining unchanged when travelling to Britain. Yet just over a quarter do not know, demonstrating scope to increase understanding of passenger rights amongst European travellers. Incorrect answers were more common amongst those in France.



Q8a. What is your understanding of each of the below? For each topic please select the statement which you believe is true. Passenger rights when travelling to the UK by air, train, bus/coach, Eurotunnel shuttle or ferry (e.g. in case of a delay or cancellation.
Base size: All international travellers : All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

▲ / ▼ Indicates significantly higher / lower than European average

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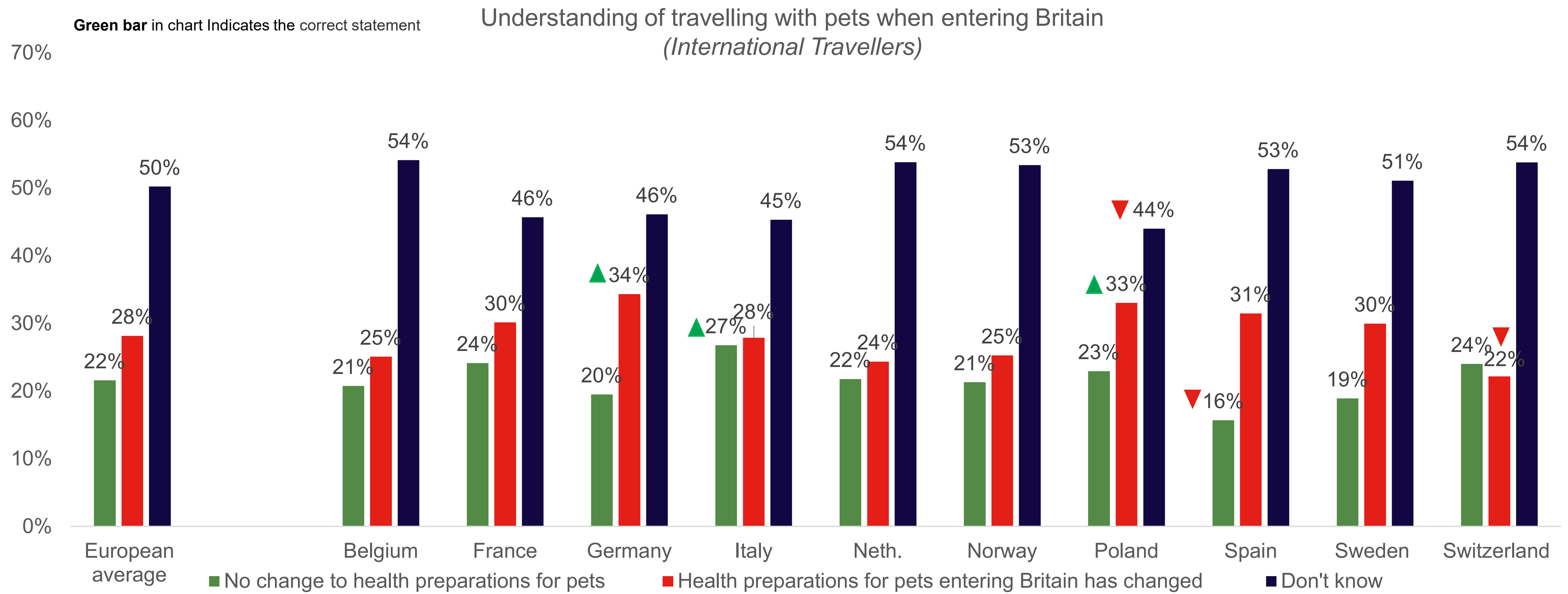
Bringing pets

Half of European travellers selected ‘don’t know’, showing there is a big gap in the knowledge of international travellers surrounding the health preparations for bringing pets to the Britain. However, this is likely due to not everyone travelling with pets and this information not being relevant to them. Knowledge is higher than average in Italy, with more than a quarter selecting the correct answer.

Green bar in chart Indicates the correct statement

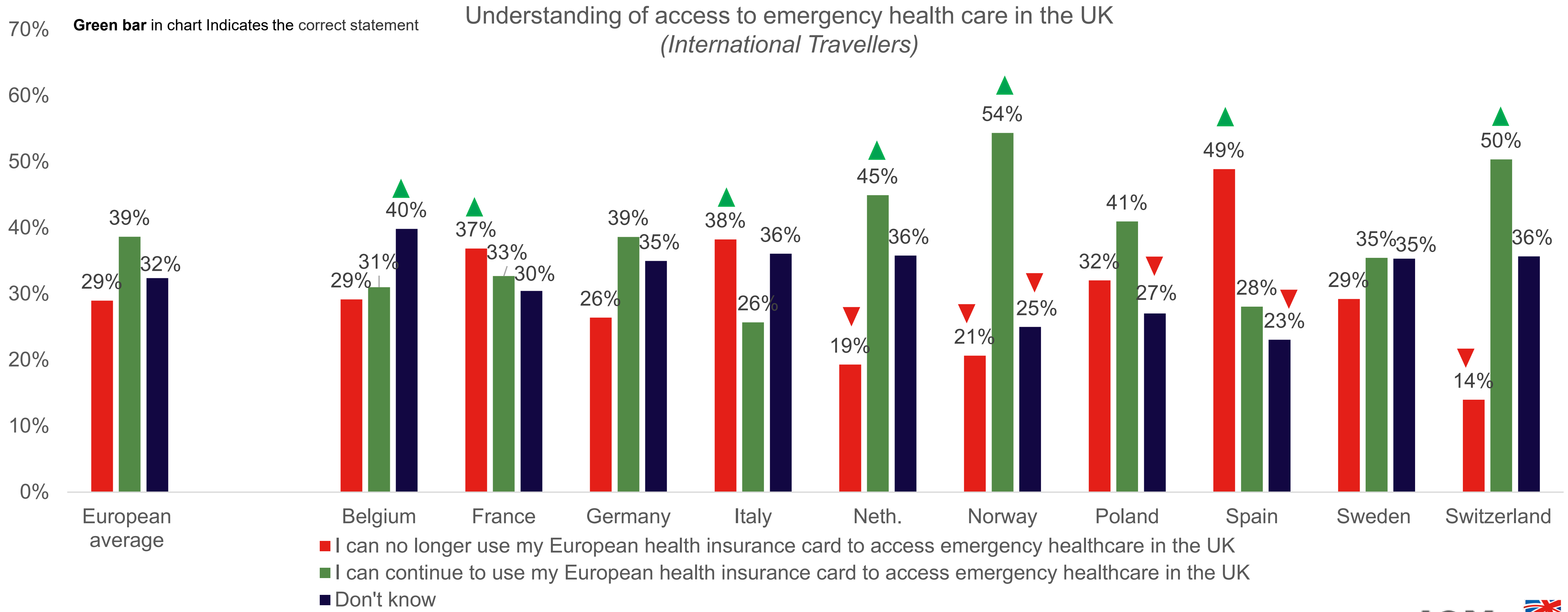


Q8a. What is your understanding of each of the below? For each topic please select the statement which you believe is true. Bringing a pet.
Base size: All international travellers : All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

▲ / ▼ Indicates significantly higher / lower than European average

Access to emergency healthcare

Access to emergency healthcare in the UK is another area where knowledge could be improved. Just under 2 in 5 international travellers correctly state that they can continue to use their European health insurance card to access emergency healthcare. While knowledge is higher in Norway, The Netherlands and Switzerland, it is much lower than average in Spain and Italy.



Q8a. What is your understanding of each of the below? For each topic please select the statement which you believe is true. Access to healthcare. Base size: All international travellers : All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

▲ / ▼ Indicates significantly higher / lower than European average

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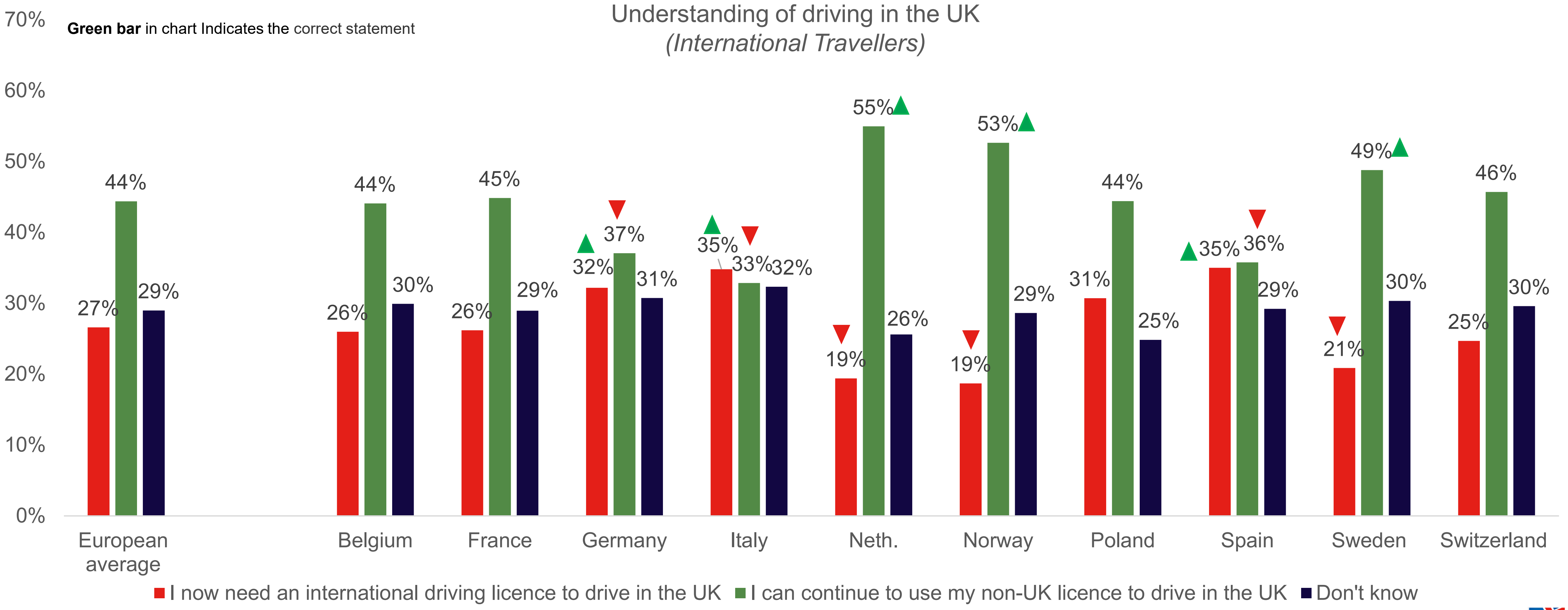
Driving in the UK

Just over four in ten (44%) international drivers correctly state that they can continue to use their non-UK licence to drive in Britain. However, there is still a large proportion who select the incorrect answer (27%) or don't know (29%). Knowledge is significantly higher in the Netherlands and Norway compared to above average gaps in understanding in Spain, Germany and Italy.



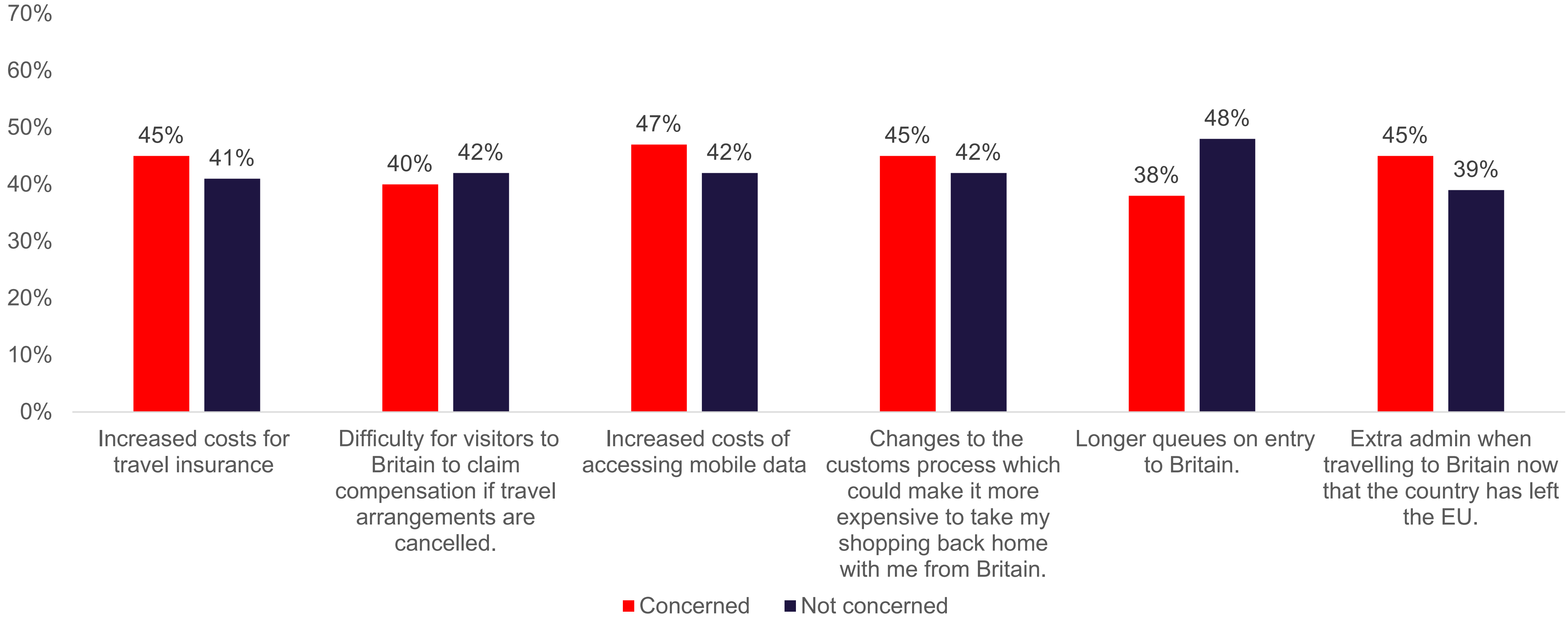
Q8a. What is your understanding of each of the below? For each topic please select the statement which you believe is true. Driving in the UK.
Base size: All international travellers : All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

▲ / ▼ Indicates significantly higher / lower than European average

Concerns for travellers

More than two years after the UK's exit from the EU and more than one year after the end of the transition period, almost half of European consumers are concerned about a series of potential changes impacting their visit: The increasing costs of mobile data is the biggest concern; the potential for longer queues on entry to Britain the lowest (relative) concern.

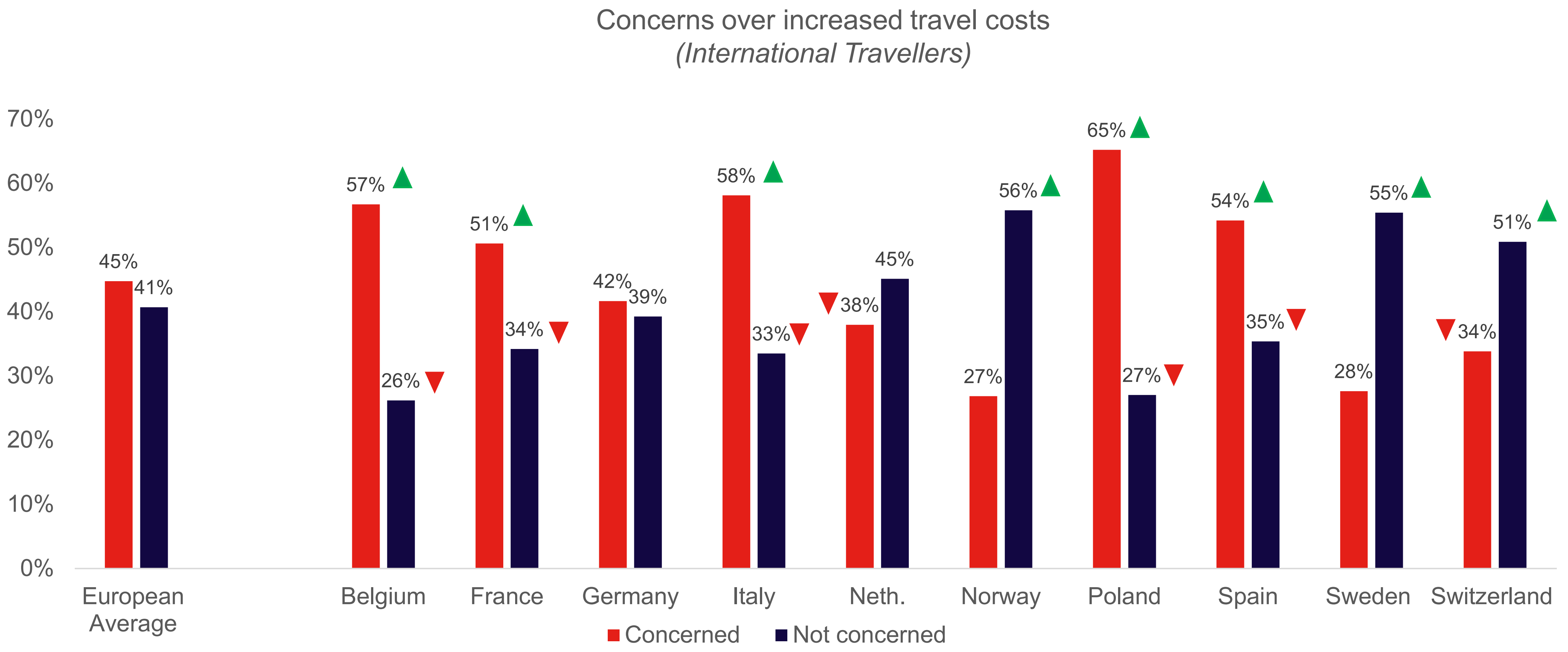
Base: All international travellers



Q9. Thinking about the possibility of visiting Britain in future, to what extent, if at all, are you personally concerned you could encounter any of the following? When considering your level of concern, please think about it in the context of the UK's exit from the EU, not as a result of the COVID-19 pandemic. Base size: All respondents: All international travellers(4177),

Increased costs for travel insurance

Increased costs for travel insurance is a cause of concern for 45% of international travellers, with those from Poland, Italy, Spain and Belgium particularly concerned.

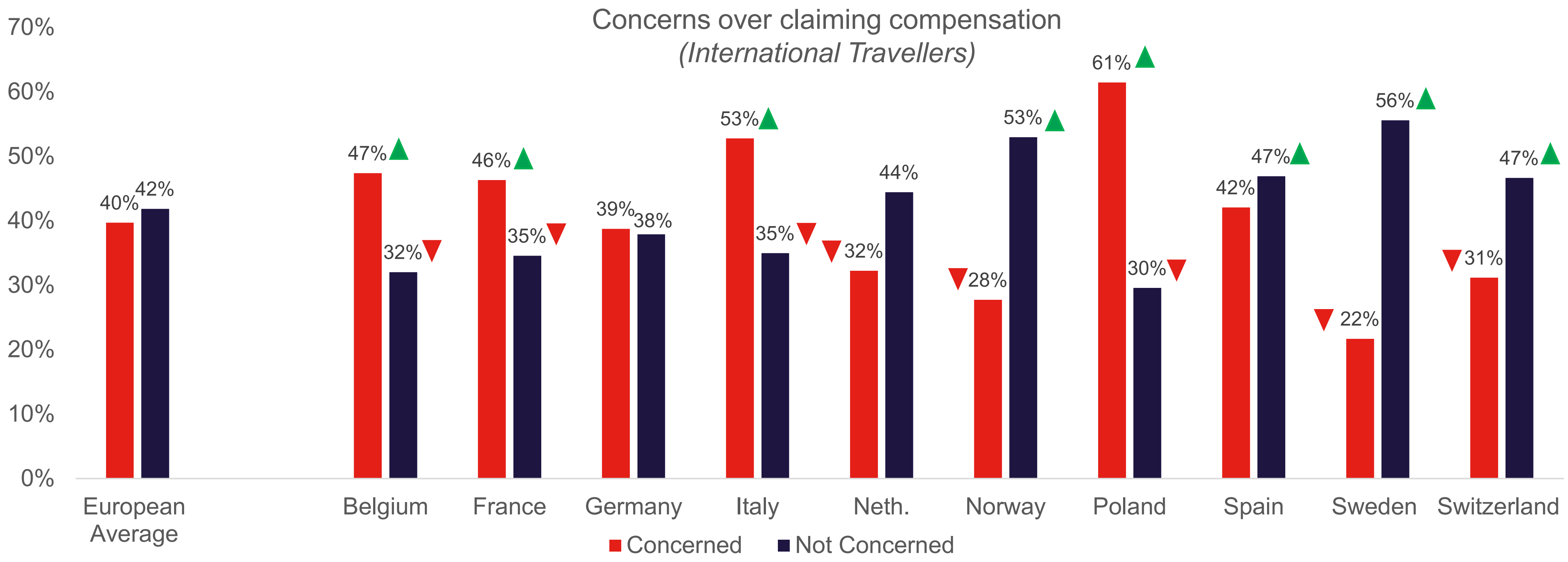


Q9_1. Thinking about the possibility of visiting Britain in future, to what extent, if at all, are you personally concerned you could encounter any of the following? When considering your level of concern, please think about it in the context of the UK's exit from the EU, not as a result of the COVID-19 pandemic. Increased costs for travel insurance. (Codes 'Don't know' and 'Not applicable' not shown)
Base size: All international travellers : All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

▲ / ▼ Indicates significantly higher / lower than European average

Difficulty for visitors to Britain to claim compensation if travel arrangements are cancelled

About two in five of European travellers are concerned and not concerned (40% and 42% respectively) that they may find it more difficult to claim compensation if travel arrangements are cancelled. Polish, Italian and Belgian travellers are particularly concerned, while travellers from Sweden, Switzerland and Norway are less concerned than the European average.

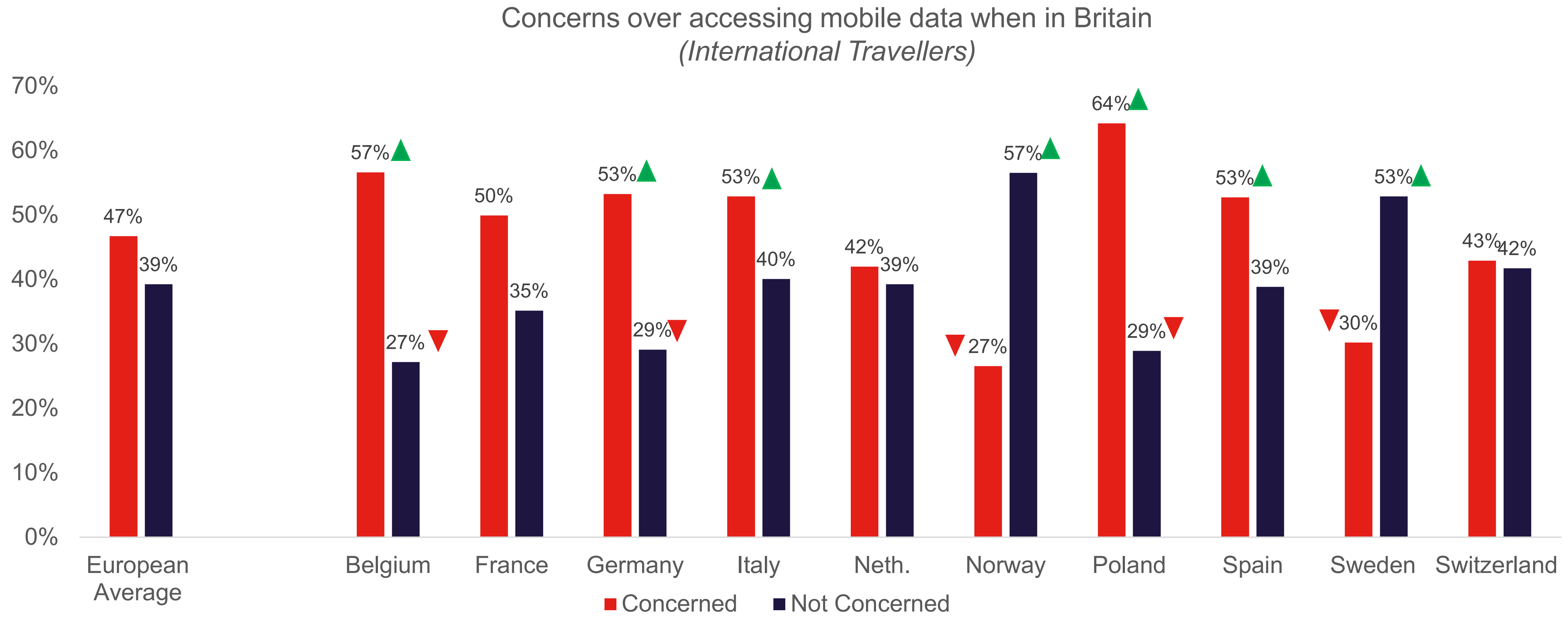


Q9_2. Thinking about the possibility of visiting Britain in future, to what extent, if at all, are you personally concerned you could encounter any of the following? When considering your level of concern, please think about it in the context of the UK's exit from the EU, not as a result of the COVID-19 pandemic. Difficulty for visitors to Britain to claim compensation if travel arrangements are cancelled. (Codes 'Don't know' and 'Not applicable' not shown)
Base size: All international travellers : All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

▲ / ▼ Indicates significantly higher / lower than European average

Increased costs of accessing mobile data

Almost half (47%) of international travellers are concerned about encountering increasing costs of mobile data, a sentiment most pronounced in Poland and Belgium. Over half of Norwegian and Swedish travellers do not find this issue a concern.



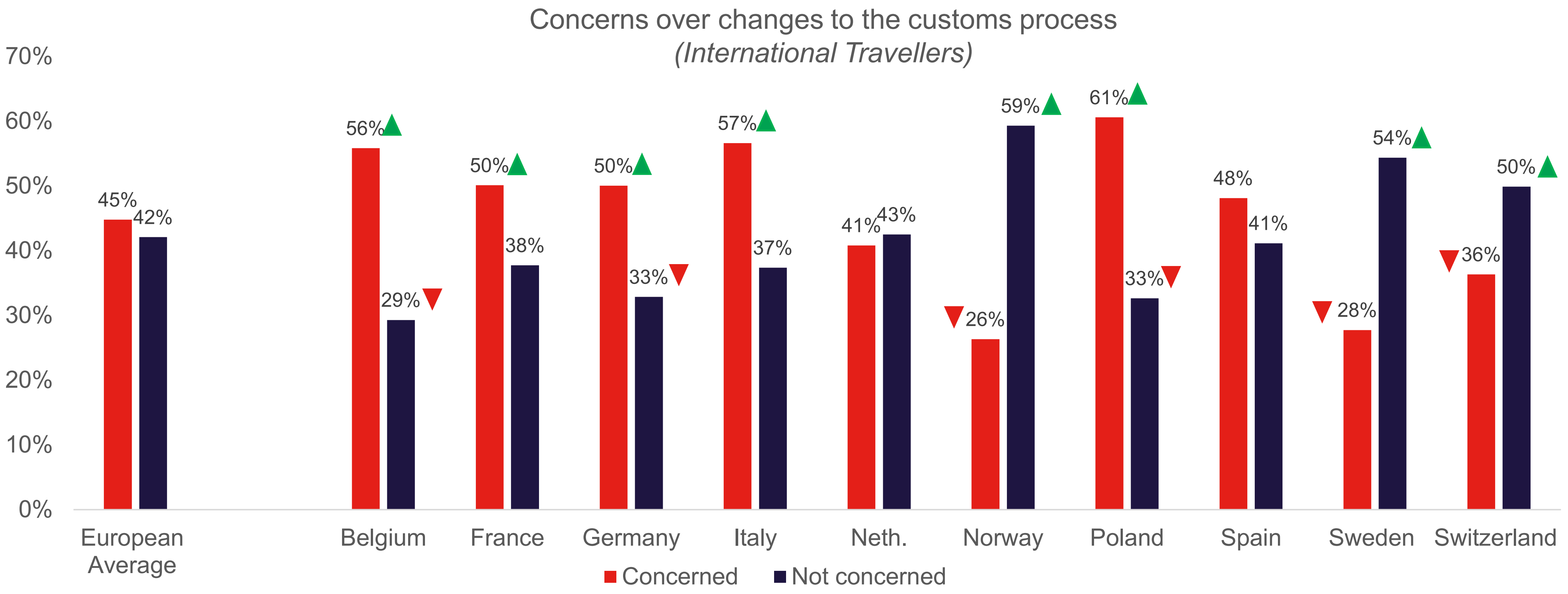
Q9_3. Thinking about the possibility of visiting Britain in future, to what extent, if at all, are you personally concerned you could encounter any of the following? When considering your level of concern, please think about it in the context of the UK's exit from the EU, not as a result of the COVID-19 pandemic. Increased costs of accessing mobile data (on phone or other mobile device) while in Britain. (Codes 'Don't know' and 'Not applicable' not shown)

Base size: All international travellers : All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

▲ / ▼ Indicates significantly higher / lower than European average

Concerns over changes to the customs process

Close to half (45%) of international travellers state concerns over the changes to the customs process. Those from Poland, Italy and Belgium are finding this more concerning than the European average.



Q9_4. Thinking about the possibility of visiting Britain in future, to what extent, if at all, are you personally concerned you could encounter any of the following? When considering your level of concern, please think about it in the context of the UK's exit from the EU, not as a result of the COVID-19 pandemic. Changes to the customs process which could make it more expensive to take my shopping back home with me from Britain. (Codes 'Don't know' and 'Not applicable' not shown)
Base size: All international travellers : All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

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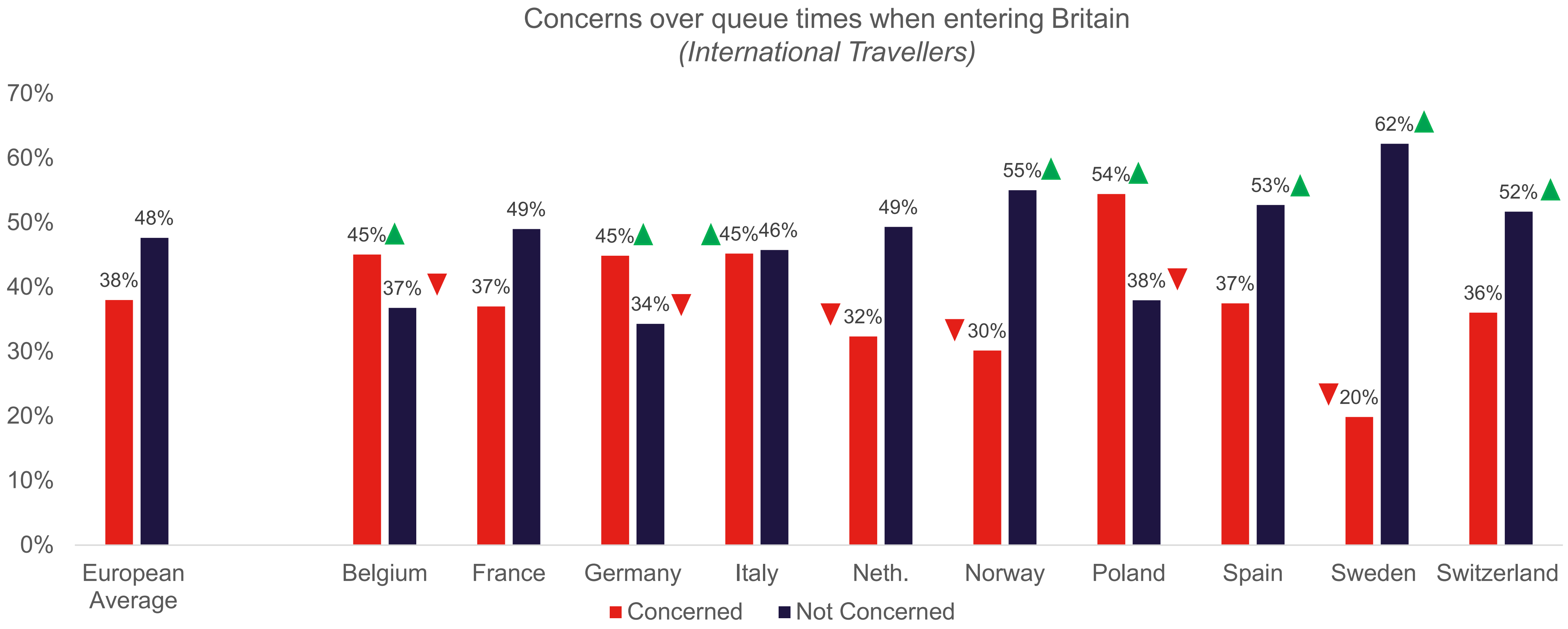
Queue time on entry to Britain

Two in five (38%) international travellers are concerned about the potential for longer queues on entry to Britain. It causes most particular concern in Poland, Italy, Belgium and Germany; less so in Norway, Sweden and Switzerland.

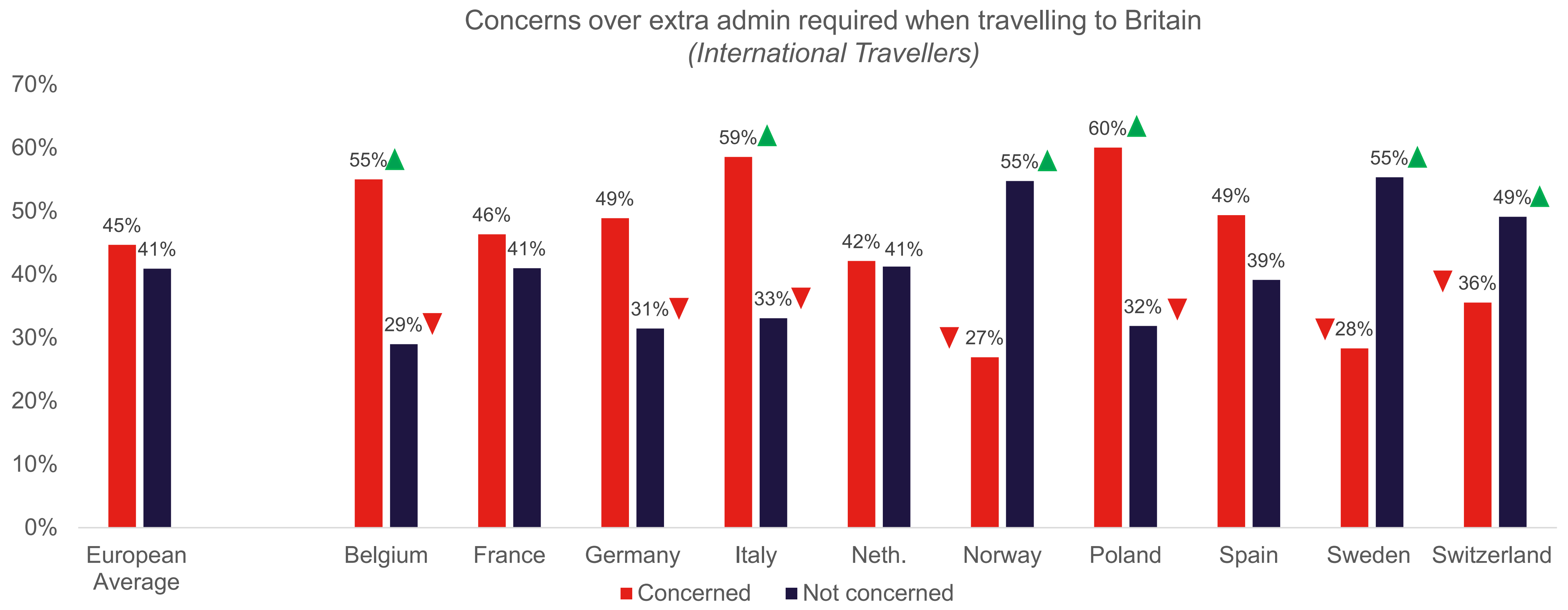


Q9_5. Thinking about the possibility of visiting Britain in future, to what extent, if at all, are you personally concerned you could encounter any of the following? When considering your level of concern, please think about it in the context of the UK's exit from the EU, not as a result of the COVID-19 pandemic. Longer queues on entry to Britain. (Codes 'Don't know' and 'Not applicable' not shown)
Base size: All international travellers : All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

▲ / ▼ Indicates significantly higher / lower than European average

Extra admin when travelling to Britain

Just under half (45%) of European travellers think that the extra admin caused by Britain leaving the EU is a cause of concern. This proportion rises to around six in ten people in Poland, Italy and Belgium.



Q9_6. Thinking about the possibility of visiting Britain in future, to what extent, if at all, are you personally concerned you could encounter any of the following? When considering your level of concern, please think about it in the context of the UK's exit from the EU, not as a result of the COVID-19 pandemic. Extra admin when travelling to Britain now that the country has left the EU. (Codes 'Don't know' and 'Not applicable' not shown)
Base size: All international travellers : All markets (4177), Germany (390), France (374), Spain (401), Italy (364), Poland (405), Belgium (430), The Netherlands (439), Sweden (426), Switzerland (464), Norway (454)

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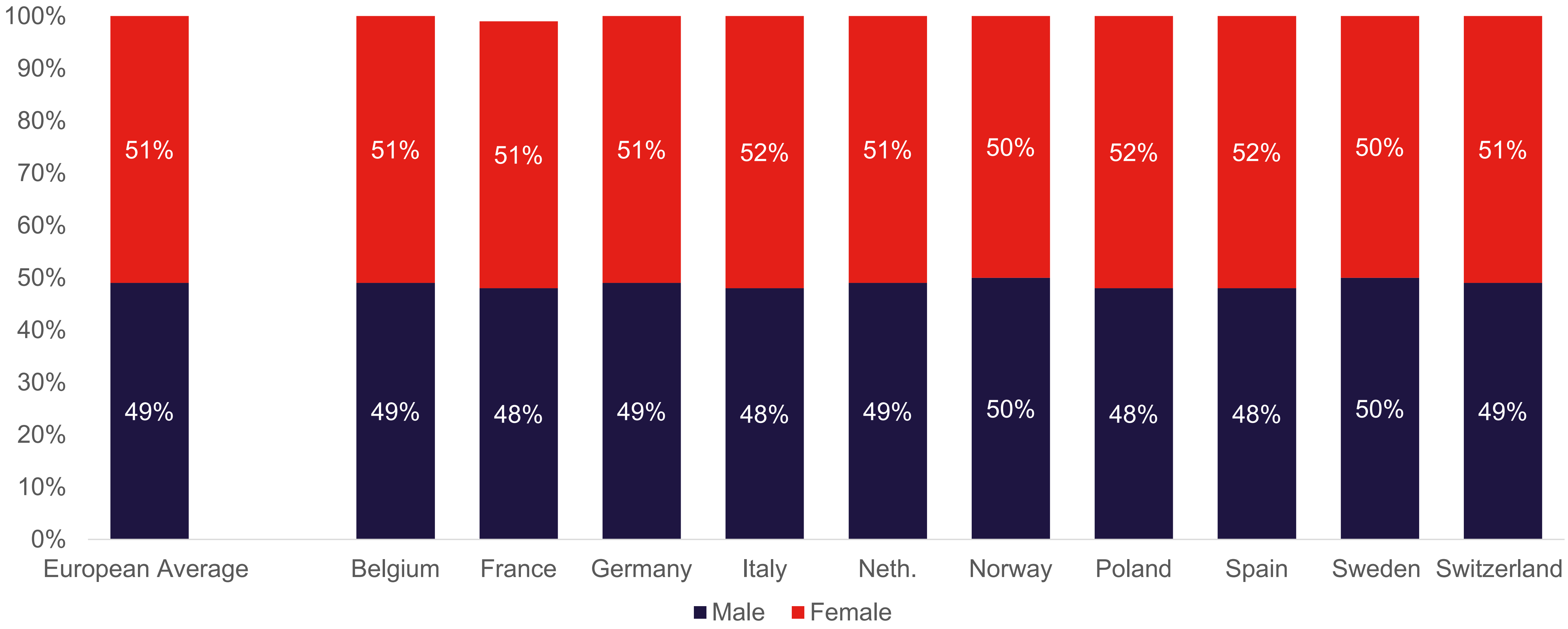
Ben Eighe, Torridon, Scotland, Photo by Daniel Grandfield on Unsplash

5. Overview of respondent demographics

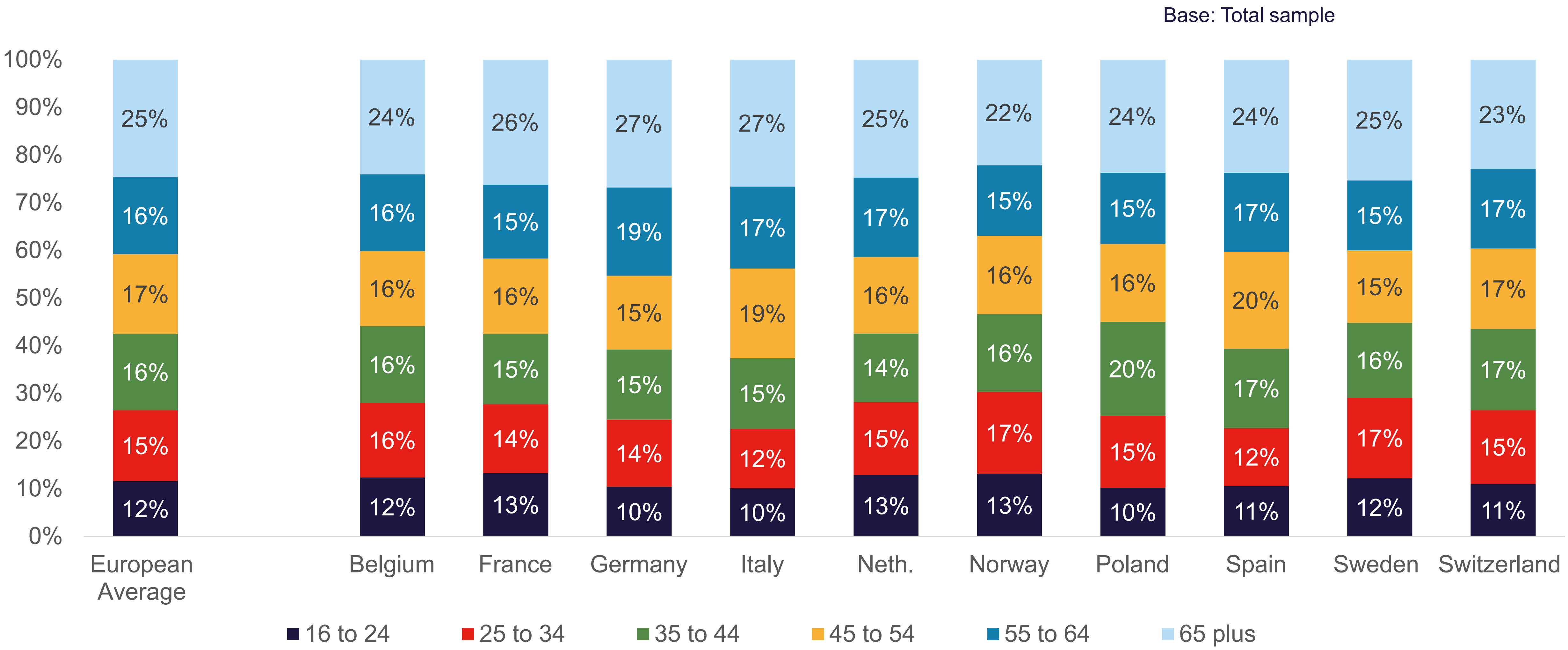
Gender

Base: Total sample



Which of the following describes how you think of yourself?
Base size: All respondents: All markets (5014), Germany (504), France (501), Spain (506), Italy (500), Poland (500), Belgium (500), The Netherlands (501), Sweden (500), Switzerland (501), Norway (501)

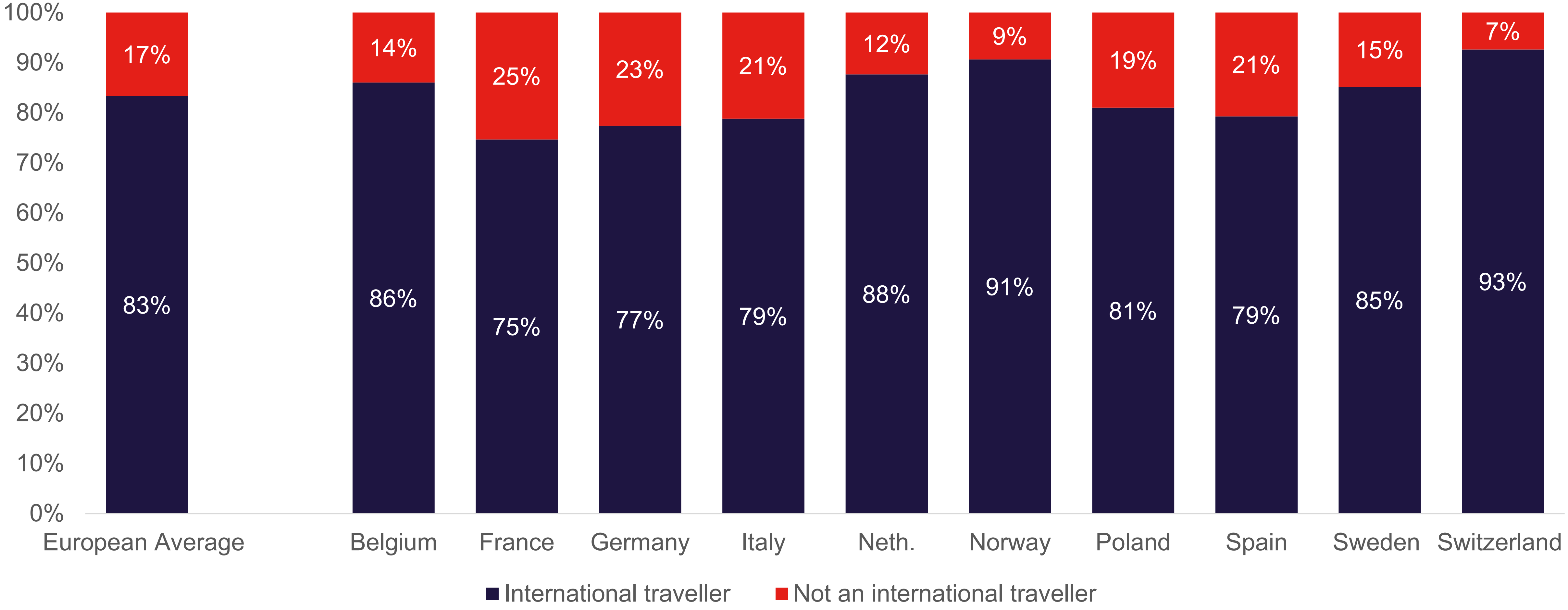
Age



To which of these age bands do you belong?
Base size: All respondents: All markets (5014), Germany (504), France (501), Spain (506), Italy (500), Poland (500), Belgium (500), The Netherlands (501), Sweden (500), Switzerland (501), Norway (501)

International travellers

Base: Total sample



Q1a. Have you taken a holiday abroad in the last five years?
Q1b. And do you plan to take a holiday abroad in the next two years?
Base size: All respondents: All markets (5014), Germany (504), France (501), Spain (506), Italy (500), Poland (500), Belgium (500), The Netherlands (501), Sweden (500), Switzerland (501), Norway (501)

European post EU-exit research

VisitBritain
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