

Impact of the war in Ukraine on travellers' intent

23 March 2022



Wast Water, Lake District, Cumbria, England. Person standing at the edge of the lake, watching a rainbow in cloudy sky.
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Executive summary

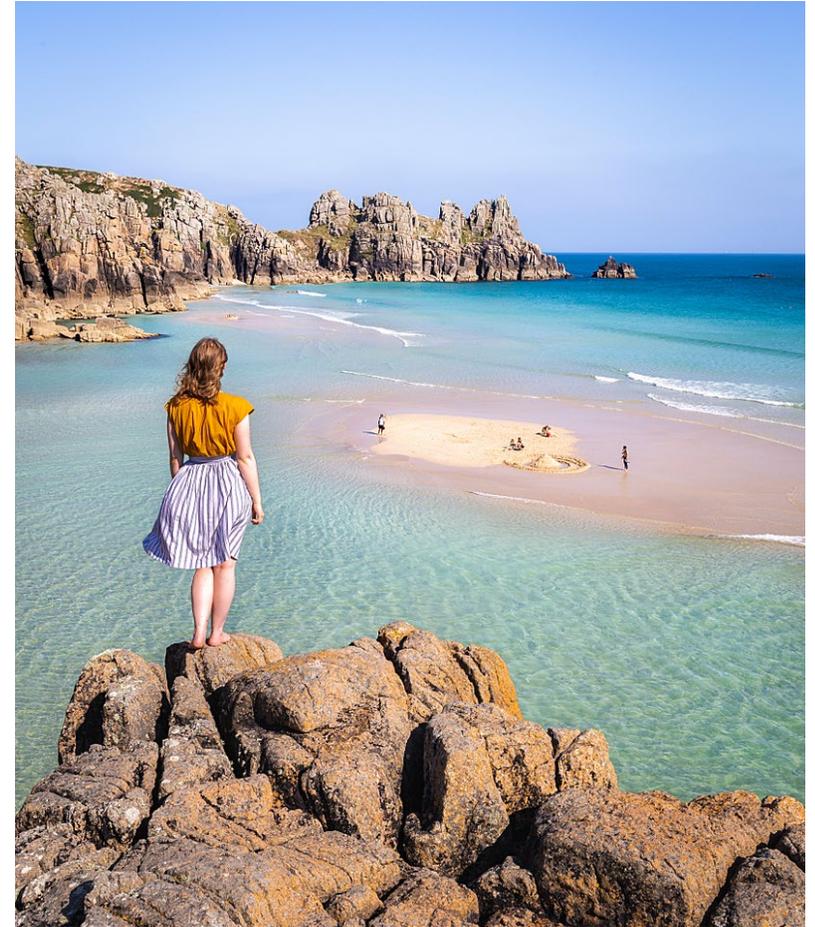
While the willingness of the majority of international travellers to travel abroad/beyond North America for a holiday in the next 6 months is affected to varying degrees, more than half of those affected are taking a wait and see approach before making a decision about their holidays.

- The impact of the war in Ukraine on international travellers' perceptions of safety and security is felt most among Eastern European destinations at this stage.
- Britain is perceived as a safe and secure destination by a majority of international travellers (65%), especially by Britain considerers.
- Southern European destinations are most considered for a holiday in the next 6 months, followed by Western Europe and Britain.
- On average Britain is considered for a holiday in the next 6 months by more than a quarter (29%), with highest consideration levels achieved among Swedish, Italian, Spanish and US travellers closely followed by Canadian travellers.
- The share of those international travellers saying that the war in Ukraine has affected their willingness to travel abroad for a holiday in the next 6 months to at least some degree is highest among Italians (85%), and Americans (85%), followed Spanish (83%) and Polish travellers (83%). US, Canadian, Italian and Spanish respondents state the strongest impact on willingness to travel generally. Just one in five (20%) international travellers say their willingness to travel abroad for a holiday in the next 6 months remains unaffected at present.
- The share of those saying that the war in Ukraine has affected their willingness to travel abroad for a holiday in the next 6 months is slightly higher among Britain holiday considerers with more than four in five affected to some degree. The share of those who say their willingness to travel has been affected or strongly affected is slightly higher among Britain considerers to varying degree depending on the market, but lower among US travellers who consider a holiday in Britain.
- More than half of those international travellers who state their willingness to travel has been affected say they will wait and see before making a decision about their holiday. 14% of those affected were unsure. This means, for most of those who say that the war in Ukraine has affected their willingness to travel abroad for a holiday in the next 6 months it has not translated into concrete actions like postponing their holiday, choosing an alternative destination or cancelling their holiday, yet. While market differences apply, the overall pattern of reaction is also applicable to Britain considerers who state that their willingness to travel is affected by the war in Ukraine.

Background and methodology

Aim of the survey: Understand the impact of the war in Ukraine on international travellers' willingness to travel

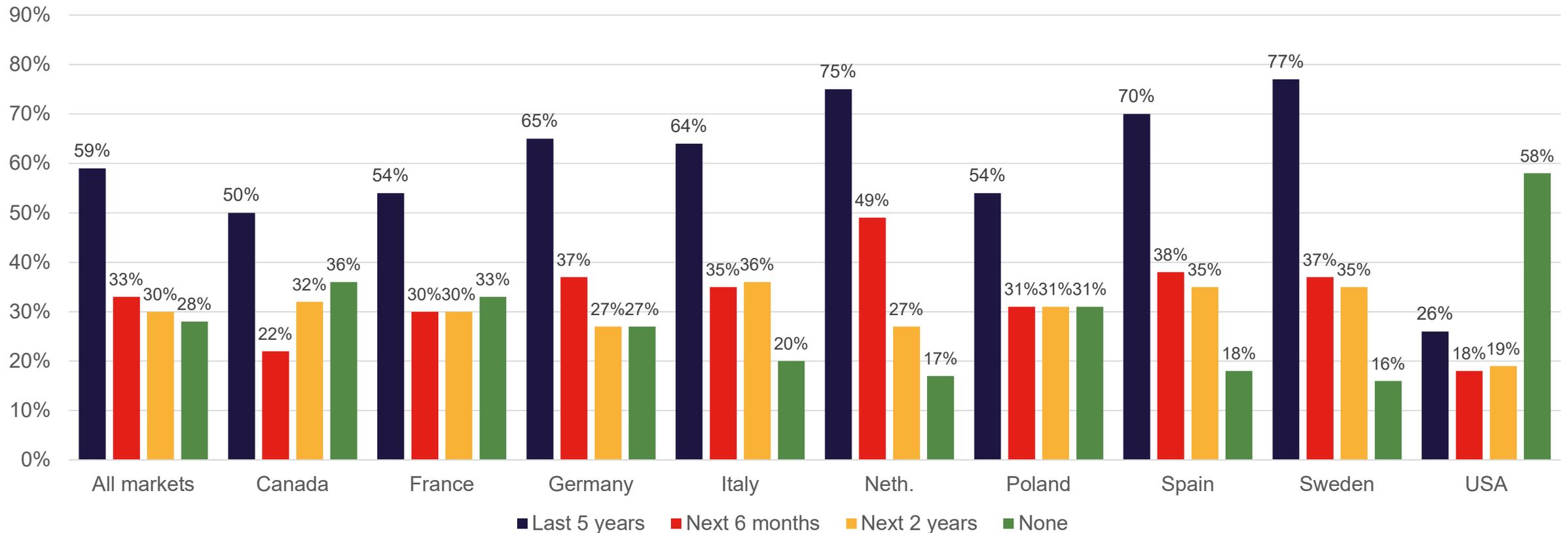
- On 24 February 2022, Russia started a full scale invasion of Ukraine
- This study set out to understand early sentiment of travellers and assess the uncertainty created for international travellers, with VisitBritain commissioning questions on an online omnibus survey conducted by Kantar
- Markets covered: Canada, France, Germany, Italy, Netherlands, Poland, Spain, Sweden, and USA
- Fieldwork dates: 10 March – 14 March 2022
- Nationally representative sample aged 18-64 of 1,000 per market as starting point
- The results are based on responses amongst international travellers. International travellers were defined as having travelled abroad for Europeans or for the Canadian and US markets as outside of North America within in the last 5 years and/or planning to in the next 2 years.
- Weighted sample sizes of international travellers by market:
All markets: 6776, Canada: 676, France: 705, Germany: 764, Italy: 846, Netherlands: 881, Poland: 718, Spain: 861, Sweden: 877, and USA: 447.



Past & prospective travel: identifying international travellers

The majority of the sample has travelled internationally in the past 5 years and a third were intending to take a holiday abroad/outside North America in the next 6 months, and almost as many were planning to travel in the timeframe of the next 2 years.

Past travel and prospective travel



Source: VisitBritain/Kantar March 2022, To Europeans: Have you travelled abroad for a holiday in the past five years? Are you planning to take a holiday abroad in the next two years?, To Canadian and US respondents: Have you travelled abroad for a vacation outside of North America in the past five years? Are you planning to take a vacation outside of North America in the next two years? Base: all respondents

Safety and security perceptions of European holiday destinations

The impact of the war of Ukraine on international travellers' perceptions of safety and security is felt mostly felt among Eastern European destinations at this stage. Britain is perceived as a safe and secure destination to varying degrees, ranging from almost three in five in Italy and Germany to almost three quarters in Sweden.

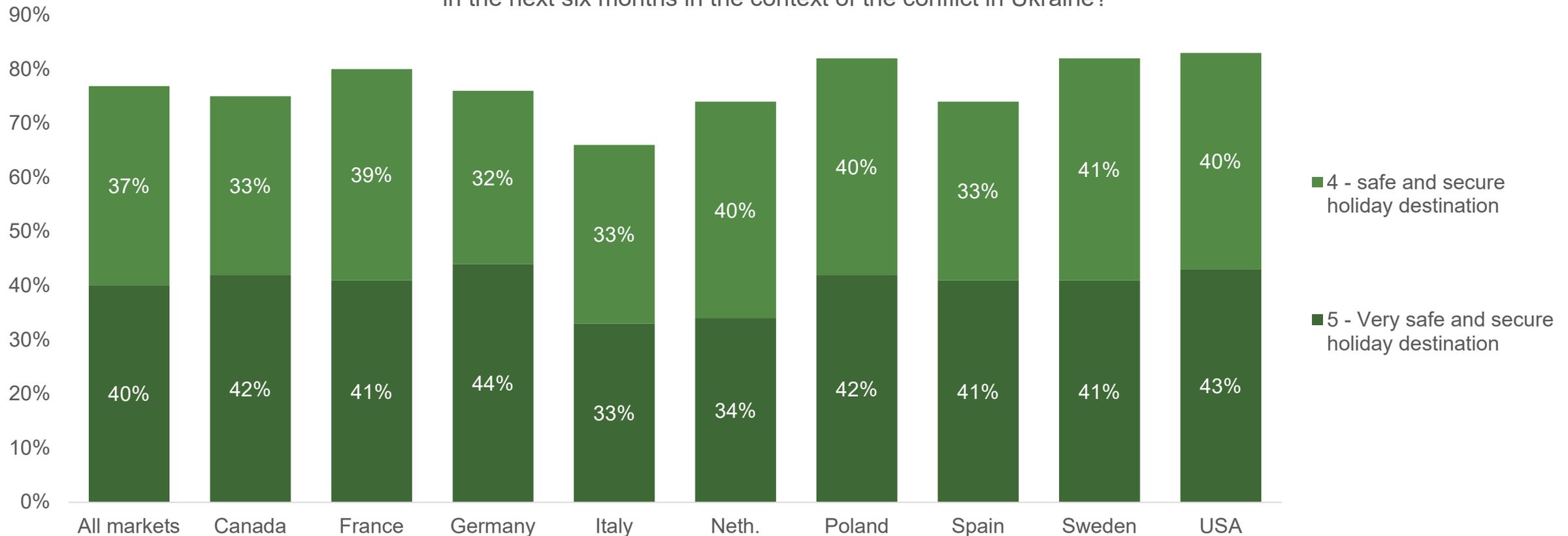
% consider holiday destination 'safe and secure' or 'very safe and secure'	All markets	Canada	France	Germany	Italy	Neth.	Poland	Spain	Sweden	USA
...Britain (England, Wales, Scotland)	65%	61%	61%	59%	59%	65%	73%	63%	74%	67%
...Ireland (Republic of Ireland and Northern Ireland)	65%	60%	60%	62%	63%	64%	74%	64%	74%	64%
...Scandinavia (e.g. Sweden, Norway, Finland, Denmark)	61%	57%	54%	62%	57%	60%	74%	50%	75%	63%
... Central and Eastern Europe (e.g. Poland, Czech Republic, Slovakia, Slovenia, Latvia, Lithuania, Estonia, Hungary, Croatia, Romania)	23%	26%	19%	22%	16%	17%	45%	19%	20%	33%
... Southern Europe (e.g. Spain, Portugal, Italy, Greece)	66%	54%	72%	63%	62%	64%	76%	70%	68%	59%
... Western Europe (e.g. France, Belgium, Netherlands, Germany, Switzerland, Austria)	64%	55%	60%	69%	58%	70%	73%	62%	66%	56%
None of these	14%	23%	11%	14%	16%	16%	8%	14%	10%	17%

Source: VisitBritain/Kantar March 2022, How much, if at all, do you think that the following are safe and secure holiday destinations in the next six months in the context of the conflict in Ukraine? Net safe displayed (code 4-5 of 5-point scale ranging from 1 – 'Not at all safe and secure holiday destination' to 5 – "Very safe and secure holiday destination"), Base: International travelers; European respondents were not shown their own country in the prompts to make them think of travel abroad.

Safety & security perceptions of Britain among Britain considerers

Perceptions of Britain being a 'safe and secure holiday destination' or a 'very safe and secure holiday destination' are higher among those who consider Britain as a potential destination for a holiday within the next 6 months compared to the average respondent with almost four in five Britain considerers seeing it as safe in the context of the conflict in Ukraine.

How much, if at all, do you think that Britain is a safe and secure holiday destinations in the next six months in the context of the conflict in Ukraine?



Source: VisitBritain/Kantar March 2022, How much, if at all, do you think that the following are safe and secure holiday destinations in the next six months in the context of the conflict in Ukraine? Net safe displayed (code 4-5 of 5-point scale ranging from 1 – 'Not at all safe and secure holiday destination' to 5 – "Very safe and secure holiday destination"), Base: Britain considerers for a holiday in the next 6 months

Consideration of destinations for holiday in next 6 months

Southern European destinations are most considered for a holiday in the next 6 months, followed by Western Europe and Britain. On average Britain is considered for a holiday in the next 6 months by more than a quarter (29%), with highest consideration levels achieved among Swedish, Italian, Spanish and US travellers closely followed by Canadian travellers.

% considering holiday in the next six months in...	All markets	Canada	France	Germany	Italy	Neth.	Poland	Spain	Sweden	USA
...Britain (England, Wales, Scotland)	29%	30%	21%	18%	34%	21%	19%	33%	48%	32%
...Ireland (Republic of Ireland and Northern Ireland)	18%	17%	19%	14%	19%	11%	10%	19%	28%	27%
...Scandinavia (e.g. Sweden, Norway, Finland, Denmark)	23%	16%	15%	23%	23%	21%	17%	17%	51%	20%
...Central and Eastern Europe (e.g. Poland, Czech Republic, Slovakia, Slovenia, Latvia, Lithuania, Estonia, Hungary, Croatia, Romania)	20%	9%	16%	21%	21%	13%	30%	20%	27%	16%
... Southern Europe (e.g. Spain, Portugal, Italy, Greece)	54%	32%	57%	53%	60%	52%	62%	50%	68%	38%
... Western Europe (e.g. France, Belgium, Netherlands, Germany, Switzerland, Austria)	37%	32%	20%	34%	43%	43%	24%	45%	50%	35%
None of these	11%	29%	11%	10%	5%	9%	4%	9%	5%	24%

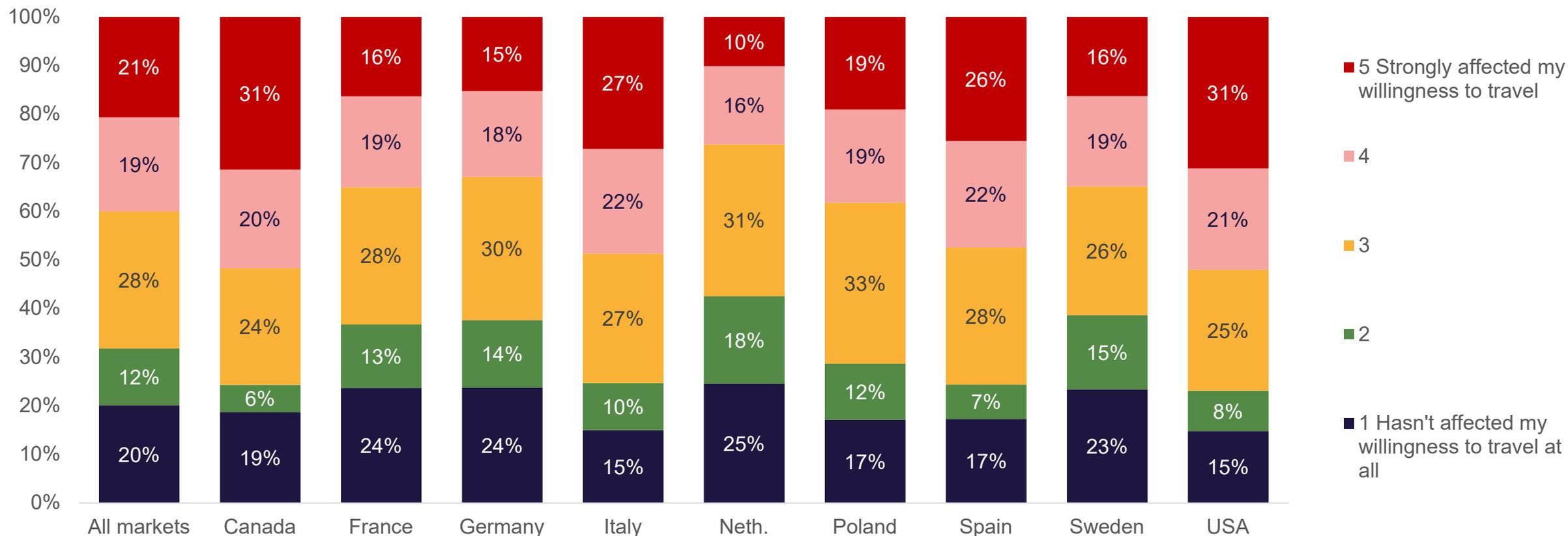
Source: VisitBritain/Kantar March 2022, Which, if any, of these European destinations would you consider for a holiday in the next six months? (Multiple answers permitted, an average of two holiday destination options were mentioned)

Base: international travellers

Impact of war in Ukraine on travellers' behaviour

The share of those international travellers saying that the war in Ukraine has affected their willingness to travel abroad for a holiday in the next 6 months to some degree is highest among Italians (85%), and Americans (85%), followed Spanish (83%) and Polish travellers (83%). US, Canadian, Italian and Spanish respondents state the strongest impact on willingness to travel generally. Just one in five international travellers say their willingness to travel abroad for a holiday in the next 6 months remains unaffected at present.

How, if at all, has the conflict in Ukraine affected your willingness to travel abroad for a holiday in the next 6 months?



Source: VisitBritain/Kantar March 2022, How, if at all, has the conflict in Ukraine affected your willingness to travel abroad/to travel outside of North America for a holiday in the next 6 months?

Base: international travellers

Reaction by those whose willingness to travel is affected

More than half of those international travellers who state to be affected say they will wait and see before making a decision about their holiday. 14% of those affected were unsure. This means, for most of those who say that the war in Ukraine has affected their willingness to travel abroad for a holiday in the next 6 months it has not translated into concrete actions like postponing their holiday, choosing an alternative destination or cancelling their holiday, yet.

Reaction among international travellers affected	All markets	Canada	France	Germany	Italy	Neth.	Poland	Spain	Sweden	USA
I will wait before making a decision about my holiday	52%	48%	49%	54%	59%	45%	52%	57%	56%	41%
I will choose an alternative destination as my current destination of choice is too close to the conflict	17%	21%	20%	9%	16%	15%	16%	23%	10%	28%
I will postpone my holiday	15%	22%	15%	12%	15%	11%	15%	15%	10%	24%
I will cancel my holiday	5%	9%	3%	5%	3%	6%	7%	5%	4%	7%
Other	4%	3%	3%	6%	2%	6%	3%	2%	6%	2%
Don't know	14%	9%	16%	18%	10%	23%	15%	8%	19%	9%

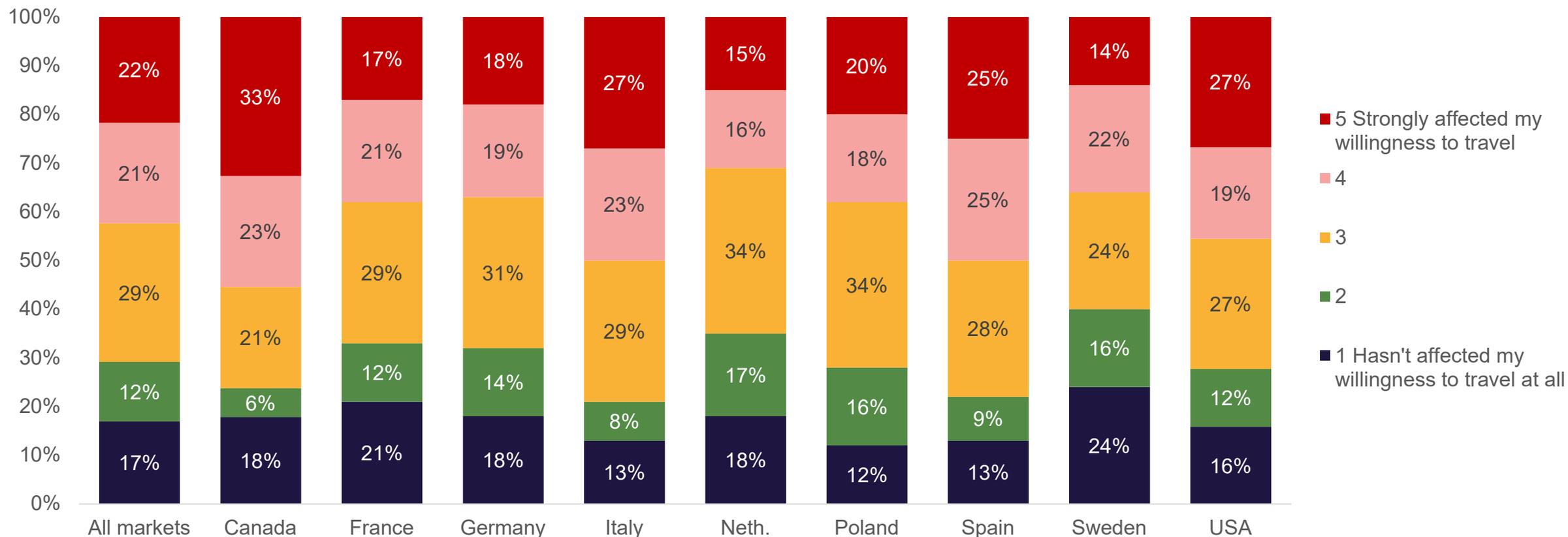
Source: VisitBritain/Kantar March 2022, And how does the conflict in Ukraine affect your plans for travelling abroad for a holiday in the next 6 months?
(Multiple answers permitted, but most stated one reaction).

Base: International travellers whose willingness to travel abroad for a holiday in the next 6 months has been affected to some degree

Impact of war in Ukraine among Britain considerers

The share of those saying that the war in Ukraine has affected their willingness to travel abroad for a holiday in the next 6 months is slightly higher among Britain holiday considerers with more than four in five affected to some degree. The share of those who say their willingness to travel has been affected or strongly affected is slightly higher among Britain considerers to varying degree depending on the market, but lower among US travellers who consider a holiday in Britain.

How, if at all, has the conflict in Ukraine affected your willingness to travel abroad for a holiday in the next 6 months?



Source: VisitBritain/Kantar March 2022, How, if at all, has the conflict in Ukraine affected your willingness to travel abroad/to travel outside of North America for a holiday in the next 6 months?

Base: Among Britain considers for a holiday in the next 6 months.

Reaction by those impacted among Britain considerers

More than half of those who consider Britain for a holiday in the next 6 months and who state that their willingness to travel has been affected by the war in Ukraine, plan to wait before making a decision about their holiday. Comparing Britain considerers with international travellers generally, there is little difference in reaction on the all market level; however, market variations apply.

Reaction among those affected	All markets	Canada	France	Germany	Italy	Neth.	Poland	Spain	Sweden	USA
I will wait before making a decision about my holiday	53%	56%	44%	48%	59%	52%	55%	61%	59%	43%
I will choose an alternative destination as my current destination of choice is too close to the conflict	20%	22%	24%	11%	17%	14%	21%	26%	9%	32%
I will postpone my holiday	17%	21%	18%	17%	16%	11%	16%	18%	8%	26%
I will cancel my holiday	5%	6%	6%	6%	3%	4%	8%	4%	3%	5%
Other	3%	1%	2%	7%	3%	6%	2%	1%	8%	1%
Don't know	14%	10%	19%	18%	9%	18%	17%	6%	18%	7%

Source: VisitBritain/Kantar March 2022, And how does the conflict in Ukraine affect your plans for travelling abroad for a holiday in the next 6 months? (Multiple answers permitted, but most stated one reaction).

Base: All whose willingness to travel abroad for a holiday in the next 6 months has been affected to some degree among Britain considerers

