Inbound COVID-19 Sentiment Tracker

Wave 2 – April 2021
Fieldwork: 24th March – 5th April 2021

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

Survey specifications

- **Markets surveyed**: Australia, Brazil*, Canada, China, Denmark*, France, Germany, India, Irish Republic, Italy, Japan*, Netherlands, Norway, Russia*, Saudi Arabia, South Korea*, Spain, Sweden, UAE*, USA
- **Target**: people who have travelled abroad at least once in the past 3 years
- **Fieldwork period (Wave 2)**: 24th March – 5th April
- **Data collection**: online interviews on Access Panel; Quotas on gender, age and regions, same questionnaire basis as for wave 1 with some additional questions
- **Sample Size**: 11,000 interviews. Trended data is calculated at a constant perimeter (based on the 14 markets surveyed in Wave 1 – click here to access the Wave 1 report)
- **Note**: international surveys involve a cultural factor in the way respondents express their opinion. Commonly, Indians and Chinese tend to be very positive in their answers compared to European markets. It is advised to take account of this cultural factors in cross-market analysis, particularly between long-haul and short-haul results.

**General guidance on statistical confidence level:**

<table>
<thead>
<tr>
<th>Sample Size</th>
<th>100</th>
<th>200</th>
<th>300</th>
<th>400</th>
<th>500</th>
<th>700</th>
<th>1,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Margin Error</td>
<td>+/- 8%</td>
<td>+/- 6%</td>
<td>+/- 5%</td>
<td>+/- 4%</td>
<td>+/- 4%</td>
<td>+/- 4%</td>
<td>+/- 3%</td>
</tr>
</tbody>
</table>

**Sample Sizes:**

<table>
<thead>
<tr>
<th>Country</th>
<th>Sample Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>500</td>
</tr>
<tr>
<td>Brazil*</td>
<td>500</td>
</tr>
<tr>
<td>Canada</td>
<td>500</td>
</tr>
<tr>
<td>China</td>
<td>1,000</td>
</tr>
<tr>
<td>India</td>
<td>500</td>
</tr>
<tr>
<td>Japan*</td>
<td>500</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>500</td>
</tr>
<tr>
<td>South Korea*</td>
<td>500</td>
</tr>
<tr>
<td>UAE*</td>
<td>500</td>
</tr>
<tr>
<td>USA</td>
<td>1,000</td>
</tr>
<tr>
<td><strong>Total long-haul</strong></td>
<td><strong>6,000</strong></td>
</tr>
<tr>
<td>Denmark*</td>
<td>500</td>
</tr>
<tr>
<td>France</td>
<td>500</td>
</tr>
<tr>
<td>Germany</td>
<td>500</td>
</tr>
<tr>
<td>Irish Republic</td>
<td>500</td>
</tr>
<tr>
<td>Italy</td>
<td>500</td>
</tr>
<tr>
<td>Netherlands</td>
<td>500</td>
</tr>
<tr>
<td>Norway</td>
<td>500</td>
</tr>
<tr>
<td>Russia*</td>
<td>500</td>
</tr>
<tr>
<td>Spain</td>
<td>500</td>
</tr>
<tr>
<td>Sweden</td>
<td>500</td>
</tr>
<tr>
<td><strong>Total short-haul</strong></td>
<td><strong>5,000</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>11,000</strong></td>
</tr>
</tbody>
</table>

*Markets added in Wave 2
Understanding consumer sentiment towards international travel during the COVID-19 pandemic:

- VisitBritain, Visit Wales, VisitScotland and London & Partners commissioned research to understand international consumer sentiment towards international travel, in order to inform their destination planning during the challenging era of the COVID-19 pandemic.
- The research aims at scoping the overall travel sentiment and attitudes, mapping triggers of travel, measuring the competitive position of Britain’s destinations in consumers’ minds and mapping drivers of a visit to Britain. Data must help stakeholders prioritize marketing efforts in 2021.
- This report shows results of the second wave, which took place from 24th March to 5th April 2021. It includes trended data vs wave 1 conducted from 4th to 15th December 2020.

Interpreting the survey results in a changing travel context

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

(*) UNWTO Recovery Tracker: [https://www.unwto.org/unwto-tourism-recovery-tracker](https://www.unwto.org/unwto-tourism-recovery-tracker)
Britain-related Reputation context during the fieldwork

Net Sentiment Index – 2020/2021 (All Britain destinations, All markets)

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

Fieldwork Period Wave 1

UK COVID-19 variant conversations

Fieldwork Period Wave 2

Careful “optimism” back in web social conversations (reopening, vaccine…)

Source: Travelsat “sentiment” data measure the state and dynamic of destinations’ and travel brands’ e-reputation built from global web social conversations “at large”, shared by medias, consumers, companies, citizens, brands and officials. Sentiment is not predictive alone of travelers’ planning, BUT a positive e-reputation is essential to generate favorability towards destinations and travel brands, particularly in post-crisis management context.
Respondents’ financial situation (Short-haul)

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

Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: All respondents (n = 11,000)
Respondents’ financial situation (Long-haul)

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

Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: All respondents (n = 11,000)
Respondents’ financial situation (Trends)

Trended data indicates a small movement from “Cautious to Alright” attitudes in relation to consumers’ spending power.

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

- Better off than before: 16% → 15%
- Not really affected: 36% → 37%
- Uncertain: 40% → 41%
- Impacted negatively: 7% → 7%

Trend calculated at constant perimeter (14 markets consolidated)
Overall travel intentions
Overall travel intentions: summary

• International travel demand remains strong and has even increased vs March 2020 while past hesitant travellers are now thinking of planning a trip. A minority have booked yet (logically) and destination choice is still very open.

• Motivation for holidays as a purpose has increased with summer approaching, while visiting friends or relatives remains a strong expectation for a third of respondents.

• Summer at large (including September) is now a clear “not-to-be-missed” window for many trip planners, however a third of respondents still have either no idea on when they would travel or look at 2022 and beyond. Travel planning still spans over a larger window among LH travellers.

• The younger generation still shows the highest propensity to travel internationally across most markets, however vaccination increases willingness to travel across all segments including older generations.

• Receiving a vaccination is the primary trigger of travel and greatly boosts short-term demand for summer and 2021, however vaccination alone is not enough: the COVID-19-safety context, quarantine policies and the “money-back” issue also influence.

• A high proportion of vaccinated people at destination and the concept of a vaccine passport fuel trust, but the effective number of COVID-19 cases remain the most tangible criteria for assessing the health context at destination.

• Travellers are getting more responsible and willing to discover new / less crowded places in a safer and more sustainable way. The role of travel agents is valued in the uncertainty context, while leaving booking until last minute remains obviously dominant in the current market conditions.

• Attitudes to travel among Britain intenders are generally more positive and confirms an opportunity to attract post-vaccine “crowd-escapers”. The sensitiveness towards sustainability is also stronger among potential planners to Britain destinations.
Trends: December 2020 vs March 2021

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

**Travel consideration**
- **Definitely 40%**
  - Dec. 20: 40%
  - March 21: 41%
- **Probably 30%**
  - Dec. 20: 32%
  - March 21: 32%
- **Maybe 18%**
  - Dec. 20: 18%
  - March 21: 16%
- **Probably/ Definitely not 12%**
  - Dec. 20: 12%
  - March 21: 11%

**Trip planning stage**
- **I have booked travel or accommodation**
  - Dec. 20: 7.2%
  - March 21: 8%
- **I have decided where to go but not yet booked travel or accommodation**
  - Dec. 20: 30%
  - March 21: 30%
- **I have started thinking about the trip but not yet decided where to go**
  - Dec. 20: 31%
  - March 21: 35%
- **I'd like to go at some point, but haven’t given it much thought**
  - Dec. 20: 32%
  - March 21: 27%

Trend calculated at constant perimeter (14 markets consolidated)
Travel consideration for an international leisure trip (Short-haul)

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

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

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

Q5: How likely would you consider an international leisure trip for more than one night in the next 12 months? Base: All respondents (n = 11,000)
Age impact on propensity to travel internationally (Short-haul)

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

Leisure travel intention (% Definitely + Probably)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Short-haul</th>
<th>Denmark</th>
<th>France</th>
<th>Germany</th>
<th>Irish Republic</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Russia</th>
<th>Spain</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34 yrs</td>
<td>83%</td>
<td>77%</td>
<td>89%</td>
<td>71%</td>
<td>76%</td>
<td>88%</td>
<td>87%</td>
<td>60%</td>
<td>84%</td>
<td>86%</td>
<td>68%</td>
</tr>
<tr>
<td>35-54 yrs</td>
<td>78%</td>
<td>70%</td>
<td>78%</td>
<td>74%</td>
<td>69%</td>
<td>85%</td>
<td>65%</td>
<td>54%</td>
<td>87%</td>
<td>73%</td>
<td>71%</td>
</tr>
<tr>
<td>55+ yrs</td>
<td>67%</td>
<td>70%</td>
<td>77%</td>
<td>63%</td>
<td>61%</td>
<td>75%</td>
<td>69%</td>
<td>59%</td>
<td>85%</td>
<td>74%</td>
<td>67%</td>
</tr>
</tbody>
</table>

Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?
Q3: What is your age?
Base: Respondents who plan on taking a European leisure trip in 2021 (n = 6,255)
Age impact on propensity to travel internationally (Long-haul)

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

Leisure travel intention (% Definitely + Probably)

(Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?)

(Q3: What is your age?)

Base: Respondents who plan on taking a European leisure trip in 2021 (n = 6,255)
Opportunity to travel for those who are better off (or not impacted) financially remains high, while financial situation uncertainty is not hugely detrimental to travel intentions. The financial factor seems less important in Nordic markets also.

### Leisure travel intention (% Definitely + Probably)

<table>
<thead>
<tr>
<th>Financial Situation</th>
<th>Denmark</th>
<th>France</th>
<th>Germany</th>
<th>Irish Republic</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Russia</th>
<th>Spain</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better off than before</td>
<td>76%</td>
<td>87%</td>
<td>73%</td>
<td>73%</td>
<td>89%</td>
<td>74%</td>
<td>57%</td>
<td>85%</td>
<td>84%</td>
<td>67%</td>
</tr>
<tr>
<td>Not really affected</td>
<td>67%</td>
<td>72%</td>
<td>60%</td>
<td>60%</td>
<td>76%</td>
<td>67%</td>
<td>50%</td>
<td>81%</td>
<td>73%</td>
<td>67%</td>
</tr>
<tr>
<td>Uncertain</td>
<td>68%</td>
<td>67%</td>
<td>60%</td>
<td>60%</td>
<td>76%</td>
<td>67%</td>
<td>50%</td>
<td>81%</td>
<td>73%</td>
<td>67%</td>
</tr>
<tr>
<td>Impacted negatively</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?
Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: All respondents (n = 11,000)
Financial uncertainties act more as an obstacle among markets showing more risk-averse attitude to travel internationally (Japan, South Korea, Australia).

Leisure travel intention (% Definitely + Probably)

<table>
<thead>
<tr>
<th></th>
<th>Better off than before</th>
<th>Not really affected</th>
<th>Uncertain</th>
<th>Impacted negatively</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positive / Not impacted</td>
<td>84%</td>
<td>75%</td>
<td>68%</td>
<td>67%</td>
</tr>
<tr>
<td>Uncertain</td>
<td>67%</td>
<td>53%</td>
<td>81%</td>
<td>36%</td>
</tr>
<tr>
<td>Impacted negatively</td>
<td>62%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?
Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: All respondents (n = 11,000)
Vaccination is confirmed to be a significant trigger of travel, particularly among long-haul markets where the average gap of intention between vaccinated and non-vaccinated respondents reaches nearly 20 percentage points. In Short Haul markets the gap is around 10 percentage points.

Leisure travel intention (% Definitely + Probably)

<table>
<thead>
<tr>
<th></th>
<th>Short-haul</th>
<th>Long-haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes – I have been fully vaccinated</td>
<td>83%</td>
<td>84%</td>
</tr>
<tr>
<td>Yes – I have been partially vaccinated</td>
<td>76%</td>
<td>84%</td>
</tr>
<tr>
<td>No – I haven't had the opportunity yet but will when I can</td>
<td>71%</td>
<td>67%</td>
</tr>
<tr>
<td>No – I will not be taking a vaccine</td>
<td>74%</td>
<td>65%</td>
</tr>
</tbody>
</table>

Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?
Q26: Have you had a COVID-19 vaccination?
Base: All respondents (n = 11,000)
Despite a stronger travel sentiment compared to December 2020, only a small minority have booked while a majority have yet to decide where to go - especially in France, Germany, Irish Republic and Italy.
Trip planning stage per market (Long-haul)

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

Q8: Which of the following best describes where you stand with your plans for your next international leisure trip?
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)

- I have booked travel or accommodation
- I have decided where to go but not yet booked travel or accommodation
- I have started thinking about the trip but not yet decided where to go
- I’d like to go at some point, but haven’t given it much thought
Among leisure travel intenders considering Britain, only a very small minority have booked and most are actually waiting to see and considering a wider set of destinations.

Q8: Which of the following best describes where you stand with your plans for your next international leisure trip?

Base: Europe Int. (n = 6,255) – Britain Int. (n = 1,360) – England potential visitors (n = 6,171) – Scotland potential visitors (n = 3,975) – Wales potential visitors (n = 1,601) – London potential visitors (n = 2,552) – Large City Int. (n = 5,230)
### Travel horizon for next international leisure trip (Short-haul)

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

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Short-haul</th>
<th>Denmark</th>
<th>France</th>
<th>Germany</th>
<th>Irish Republic</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Russia</th>
<th>Spain</th>
<th>Sweden</th>
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</thead>
<tbody>
<tr>
<td>April 2021</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
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<td>1%</td>
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<td>1%</td>
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<td>1%</td>
<td>2%</td>
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<tr>
<td>May 2021</td>
<td>4%</td>
<td>3%</td>
<td>6%</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>7%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>June 2021</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
<td>7%</td>
<td>6%</td>
<td>4%</td>
<td>6%</td>
<td>4%</td>
<td>6%</td>
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<td>6%</td>
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</tr>
<tr>
<td>July 2021</td>
<td>9%</td>
<td>11%</td>
<td>11%</td>
<td>13%</td>
<td>8%</td>
<td>13%</td>
<td>14%</td>
<td>8%</td>
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<td>10%</td>
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<td></td>
</tr>
<tr>
<td>August 2021</td>
<td>11%</td>
<td>13%</td>
<td>11%</td>
<td>17%</td>
<td>15%</td>
<td>7%</td>
<td>16%</td>
<td>16%</td>
<td>6%</td>
<td>20%</td>
<td>15%</td>
<td>10%</td>
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<tr>
<td>September 2021</td>
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<td>13%</td>
<td>14%</td>
<td>16%</td>
<td>12%</td>
<td>15%</td>
<td>16%</td>
<td>10%</td>
<td>18%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>October 2021</td>
<td>9%</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
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<td>6%</td>
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<td>November 2021</td>
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<td>1%</td>
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</tr>
<tr>
<td>December 2021</td>
<td>7%</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>3%</td>
<td>7%</td>
<td>9%</td>
<td>4%</td>
<td>5%</td>
<td>2%</td>
<td>7%</td>
<td>4%</td>
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<tr>
<td>Jan-March 2022</td>
<td>8%</td>
<td>5%</td>
<td>8%</td>
<td>6%</td>
<td>3%</td>
<td>7%</td>
<td>5%</td>
<td>3%</td>
<td>6%</td>
<td>4%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Apr-June 2022</td>
<td>7%</td>
<td>7%</td>
<td>6%</td>
<td>5%</td>
<td>9%</td>
<td>14%</td>
<td>6%</td>
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</table>

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

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

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<tr>
<th></th>
<th>Total</th>
<th>Long-haul</th>
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<td>2023/beyond</td>
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Don't know yet: 11% 10%

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

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

Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)
As expected, vaccination greatly accelerates motivations for travelling in the short term. As the vaccinations are rolled out, we expect this to extend to the rest of 2021.

Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)
Trends: December 2020 vs March 2021

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

**Purpose of leisure travel**

- **For Holiday**: 79% (Dec. 20) vs 83% (March 21)
- **To visit friends or relatives**: 35% (Dec. 20) vs 35% (March 21)
- **For other leisure purposes**: 29% (Dec. 20) vs 26% (March 21)

**Travel attitudes (Completely+Somewhat agree)**

- **I will look for less crowded places to visit, even if it means “missing” must-see attractions**: 74% (Dec. 20) vs 71% (March 21)
- **I will leave booking until later/last minute**: 63% (Dec. 20) vs 61% (March 21)
- **I will favour local destinations in my home country instead of traveling**: 60% (Dec. 20) vs 61% (March 21)
- **I will be intending to take fewer but longer holidays**: 55% (Dec. 20) vs 54% (March 21)
- **I would be comfortable using public transport within the destination**: 51% (Dec. 20) vs 56% (March 21)
- **I will favor destinations I have been before rather than new places**: 50% (Dec. 20) vs 51% (March 21)

Trend calculated at constant perimeter (14 markets consolidated)
Purpose of leisure travel (Short-haul)

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

* Russia is not included due to limited data comparability, however the VFR motivation reaches 20.4% in this market.

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

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

Q6: Considering your next international leisure trip, for what purpose(s) would you travel? (Multiple Answers)

Base: All respondents (n = 11,000)
Activators for an international leisure trip (Short-haul)

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

<table>
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<th>France</th>
<th>Germany</th>
<th>Irish Republic</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Russia</th>
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<tr>
<td>A significant decrease in coronavirus cases at destination</td>
<td>34%</td>
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<td>Removal of quarantine policies in destination country</td>
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<td>Hygiene &amp; safety protocols in place at destination</td>
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<td>A high proportion of the population being vaccinated in the destination country</td>
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<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
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Q20: What would make you more likely to travel internationally for leisure in the next 12 months? (Multiple Answers)
Base: All respondents (n = 11,000)
Activators for an international leisure trip (Long-haul)

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

<table>
<thead>
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<th>Activator</th>
<th>Total</th>
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<td>Removal of quarantine policies in destination country</td>
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<td>The introduction of a vaccine passport</td>
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<td>Your Government’s advice on international travel</td>
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<td>14%</td>
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<td>19%</td>
<td>27%</td>
<td>22%</td>
<td>17%</td>
<td>16%</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>Stable political environment in destination country</td>
<td>19%</td>
<td>21%</td>
<td>12%</td>
<td>19%</td>
<td>15%</td>
<td>29%</td>
<td>20%</td>
<td>28%</td>
<td>21%</td>
<td>19%</td>
<td>24%</td>
<td>18%</td>
</tr>
<tr>
<td>Welcoming locals in destination country</td>
<td>16%</td>
<td>18%</td>
<td>10%</td>
<td>20%</td>
<td>11%</td>
<td>25%</td>
<td>24%</td>
<td>13%</td>
<td>18%</td>
<td>12%</td>
<td>20%</td>
<td>17%</td>
</tr>
<tr>
<td>Mandatory coronavirus testing at some point during the trip</td>
<td>15%</td>
<td>16%</td>
<td>17%</td>
<td>16%</td>
<td>14%</td>
<td>14%</td>
<td>25%</td>
<td>15%</td>
<td>16%</td>
<td>13%</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>Assurance that there will be a range of things to do</td>
<td>14%</td>
<td>15%</td>
<td>8%</td>
<td>21%</td>
<td>9%</td>
<td>20%</td>
<td>18%</td>
<td>14%</td>
<td>14%</td>
<td>12%</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Voucher-back guarantee should I wish to cancel my trip</td>
<td>13%</td>
<td>13%</td>
<td>12%</td>
<td>16%</td>
<td>10%</td>
<td>14%</td>
<td>16%</td>
<td>10%</td>
<td>15%</td>
<td>6%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Official national hygiene label in accommodation and attractions in destination</td>
<td>13%</td>
<td>16%</td>
<td>9%</td>
<td>24%</td>
<td>11%</td>
<td>25%</td>
<td>25%</td>
<td>17%</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Relaxation of visa requirements</td>
<td>8%</td>
<td>10%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>18%</td>
<td>25%</td>
<td>N/A</td>
<td>31%</td>
<td>N/A</td>
<td>32%</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Q20: What would make you more likely to travel internationally for leisure in the next 12 months? (Multiple Answers)
Base: All respondents (n = 11,000)
**Activators for an international leisure trip among intenders to Europe**

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

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

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

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

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

Q22: Some people have expressed various opinions about the coronavirus outbreak and their travel plans and preferences. To what extent do you agree with the following statements? Base: All Respondents (n = 11,000)
Attitudes to travel (Long-haul)

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

<table>
<thead>
<tr>
<th>(% Completely + Somewhat agree)</th>
<th>Total</th>
<th>Long-haul</th>
<th>Australia</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>India</th>
<th>Japan</th>
<th>Saudi Arabia</th>
<th>South Korea</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would be happy to take a pre-trip COVID-19 test should that be required before my next international trip</td>
<td>83%</td>
<td>86%</td>
<td>82%</td>
<td>92%</td>
<td>83%</td>
<td>89%</td>
<td>90%</td>
<td>78%</td>
<td>86%</td>
<td>86%</td>
<td>90%</td>
<td>81%</td>
</tr>
<tr>
<td>I will look for less crowded places to visit, even if it means “missing” must-see attractions</td>
<td>70%</td>
<td>74%</td>
<td>65%</td>
<td>69%</td>
<td>66%</td>
<td>87%</td>
<td>87%</td>
<td>61%</td>
<td>82%</td>
<td>74%</td>
<td>82%</td>
<td>66%</td>
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<td>86%</td>
<td>40%</td>
<td>82%</td>
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<td>82%</td>
<td>57%</td>
</tr>
<tr>
<td>Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning</td>
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<td>25%</td>
<td>66%</td>
<td>52%</td>
<td>67%</td>
<td>47%</td>
</tr>
</tbody>
</table>

Q22: Some people have expressed various opinions about the coronavirus outbreak and their travel plans and preferences. To what extent do you agree with the following statements? Base: All Respondents (n = 11,000)
Attitudes to travel among intenders to Europe are generally more positive compared to intenders to Europe on average and confirms an opportunity to attract post-vaccine “crowd-escapers”. The sensitiveness towards sustainability is also strong and consistent among Britain destinations’ potential visitors.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Europe Intenders</th>
<th>Britain Intenders</th>
<th>England pot. visitors</th>
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<td>56%</td>
<td>60%</td>
</tr>
<tr>
<td>I would be comfortable using public transport within the destination</td>
<td>57%</td>
<td>65%</td>
<td>63%</td>
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<td>65%</td>
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<td>65%</td>
</tr>
<tr>
<td>I will be intending to take fewer but longer holidays</td>
<td>52%</td>
<td>58%</td>
<td>60%</td>
<td>57%</td>
<td>65%</td>
<td>56%</td>
<td>59%</td>
</tr>
<tr>
<td>I will favour destinations I have been before rather than new places</td>
<td>49%</td>
<td>51%</td>
<td>51%</td>
<td>46%</td>
<td>49%</td>
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<tr>
<td>Due to COVID-19 restrictions, I will have more annual leave to use for holidays in 2021</td>
<td>45%</td>
<td>53%</td>
<td>52%</td>
<td>49%</td>
<td>49%</td>
<td>56%</td>
<td>47%</td>
</tr>
</tbody>
</table>

Q22: Some people have expressed various opinions about the coronavirus outbreak and their travel plans and preferences. To what extent do you agree with the following statements?

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

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

- Europe remains the most considered region and has gained 1 point in intention to visit vs December 2020.
- While popularity for Southern/Mediterranean destinations (Spain, Italy, Greece) rises as summer approaches, Britain has significantly increased its overall competitive position, recording the second largest rise in visit intention in Europe in 3 months.
- The gain of popularity for Britain is very high in long-haul markets in particular (China, India) but also in Germany and Irish Republic, while France and Russia are more “at risk” with low travel intentions to Britain.
- The boost of consideration for Britain destinations is fueled by a spectacular improvement of their COVID-19 safety image, particularly for England which is now considered as a safe place to go for a majority.
- While younger generations express higher intentions to visit Britain in overall (and England / London notably), propensity to visit Britain widely rises among vaccinated respondents, offering opportunities to market all vaccinated generations, particularly among travellers who already visited the destination in the past and would easily see Britain as a “safe-haven” post-COVID-19 destination.
- In short-haul markets, England would be the nation on top of the list for a potential visit to Britain, but Scotland and Wales are also well considered. London would be considered by 4 in 10 potential visitors to England. Potential trip to Britain from Long-Haul markets would be England first but not exclusively, showing open attitude to visiting multiple destinations across Britain, beyond iconic places.
- General trust levels in transportation modes to and within Britain are high, including for flights, trains and ferries with various degrees of potential use per market (but no obvious “ban” or concerns expressed). Public transport is also gaining trust.
- Travellers are still open to using a variety of channels to plan their next trip. Travel agents/tour operators online remain the most popular channel while travel comparison websites are still popular among younger planners; the use of expert intermediaries is reassuring in the current uncertain travel scenario. Official destination websites and accommodation gain further importance in the booking process. The large share of VFR travel intentions gives friends and relatives a significant role too.
While Europe remains the most considered region, **Britain records the second largest increase** in visit intention in Europe between December 2020 and March 2021 when we look at the 14 market trend. Interest has gone from 12.5% to 14.2%. Looking at the top 5 European markets of interest, interest in France has stayed level whilst interest in Spain has increased, and interest for Germany and Italy has decreased.
Trends: December 2020 vs March 2021

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

<table>
<thead>
<tr>
<th>Total</th>
<th>SH</th>
<th>LH</th>
<th>Australia</th>
<th>Canada</th>
<th>China</th>
<th>France</th>
<th>Germany</th>
<th>India</th>
<th>Irish Republic</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Saudi Arabia</th>
<th>Spain</th>
<th>Sweden</th>
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<td>Sweden</td>
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<td>-0.1%</td>
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<tr>
<td>Switzerland</td>
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<td>0.7%</td>
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<td>-0.7%</td>
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<td>-0.1%</td>
<td>1.4%</td>
<td>0.3%</td>
<td>-0.1%</td>
<td>4.4%</td>
<td>1.5%</td>
<td>1.4%</td>
</tr>
</tbody>
</table>

Q10. To which destination(s) in Europe in particular? (Multiple Answers - among leisure trip intenders)
In a few months, the COVID-19 safety image has widely improved for all Britain destinations, particularly for England which is now considered as a safe place to go for a majority.

**Perception of England**
COVID-19 sanitary safety

- Safe: 45% in December 2020, 55% in March 2021
- Unsafe: 43% in December 2020, 35% in March 2021
- Don’t know: 12% in December 2020, 10% in March 2021

**Perception of Scotland**
COVID-19 sanitary safety

- Safe: 48% in December 2020, 56% in March 2021
- Unsafe: 34% in December 2020, 28% in March 2021
- Don’t know: 17% in December 2020, 15% in March 2021

**Perception of Wales**
COVID-19 sanitary safety

- Safe: 53% in December 2020, 60% in March 2021
- Unsafe: 31% in December 2020, 26% in March 2021
- Don’t know: 16% in December 2020, 13% in March 2021

Trend calculated at constant perimeter (14 markets consolidated)
The COVID-19 safety image has improved in most markets except China where the image rating for other destinations have also decreased on average.

### W2/W1 Evolution (+/-)

<table>
<thead>
<tr>
<th>Benchmark</th>
<th>Total</th>
<th>SH</th>
<th>LH</th>
</tr>
</thead>
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<tr>
<td></td>
<td>1.4%</td>
<td>2.1%</td>
<td>0.7%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Total</th>
<th>SH</th>
<th>LH</th>
</tr>
</thead>
<tbody>
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<td>China</td>
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</tr>
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<td>France</td>
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<td>India</td>
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<td>Irish Republic</td>
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<tr>
<td>Neths.</td>
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<td>Norway</td>
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<td>Saudi Arabia</td>
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<td>Spain</td>
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<tr>
<td>USA</td>
<td>9.6%</td>
<td>9.6%</td>
<td>9.6%</td>
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</tbody>
</table>

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus? Base: All Respondents (n = 11,000)
Overall, Europe remains by far the most attractive region among short-haul European markets at 72% interest, while Russia will also look towards Asia. However, Europe is not exclusively in European markets’ mind with 15% wanting to go to Asia and 12% wanting to go to North America.

<table>
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<th>Total</th>
<th>Short-haul</th>
<th>Denmark</th>
<th>France</th>
<th>Germany</th>
<th>Irish Republic</th>
<th>Italy</th>
<th>Neths.</th>
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<td>13%</td>
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<tr>
<td>Australia/Oceania</td>
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</table>

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

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

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<td>23%</td>
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<tr>
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<tr>
<td>South/Central America/Caribbean</td>
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<tr>
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Q9: Where do you plan to travel on your next international leisure trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)
Top European destinations for travelers in short-haul markets

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

Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking an European leisure trip in 2021 (n=6,255)
Top European destinations for travelers in long-haul markets

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

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

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

**Short-haul markets**

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

**Long-haul markets**

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

Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1,360)
Impact of age and gender on propensity to consider Britain

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

### Intention to visit Britain (%)

<table>
<thead>
<tr>
<th>Gender</th>
<th>Age</th>
<th>Total</th>
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<th>Long-haul</th>
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</table>

### Incidence % among:

- 18-34
- 35-54
- 55+

- England potential visitors: 67% 57% 41%
- Scotland potential visitors: 35% 38% 35%
- Wales potential visitors: 15% 16% 12%
- London potential visitors: 28% 24% 16%

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

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

Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: Europe Int. (n = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552) – Large City Int. (n = 5,230)
The vaccination in source markets positively drives intentions to visit Britain, particularly compared to the impact seen among Europe intenders in average, confirming the “vaccination” theme is a competitive trigger for choosing Britain. With 17% of intentions among vaccinated travellers, Britain is ranked second in Europe just behind France (18%).

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

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

Q27. Have you visited Britain (England, Scotland, Wales) for a leisure trip for more than one night in the past five year?
Base: Europe Int. (n = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552) – Large City Int. (n = 5,230)
Reasons for not considering a trip in Britain (open end)

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

Q11b. Why wouldn’t you consider a trip to Britain (England, Scotland, Wales) in the short term? (Open Question)
Base: Respondents who responded “I don’t know yet at Q11a. (n = 2,104)
Destinations in Britain considered for a leisure trip (Short-haul)

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

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<thead>
<tr>
<th>Country</th>
<th>Total</th>
<th>Short-haul</th>
<th>Denmark</th>
<th>France</th>
<th>Germany</th>
<th>Irish Republic</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Russia</th>
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<tr>
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<tr>
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<tr>
<th>Region</th>
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<th>Denmark</th>
<th>France</th>
<th>Germany</th>
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<th>Neths.</th>
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<tr>
<td>North West (e.g. Manchester, Liverpool, Lake District)</td>
<td>32%</td>
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<tr>
<td>East of England (e.g. Cambridge, Norfolk Broads, Norwich)</td>
<td>30%</td>
<td>21%</td>
<td>22%</td>
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<tr>
<td>South East (e.g. Brighton, Oxford, Kent, Windsor)</td>
<td>30%</td>
<td>28%</td>
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<tr>
<td>East Midlands (e.g. Leicester, Derby, Peak District)</td>
<td>20%</td>
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<tr>
<td>South West (e.g. Bristol, Bath, Devon, Cornwall)</td>
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<tr>
<td>West Midlands (e.g. Birmingham, Stratford Upon Avon, Coventry)</td>
<td>17%</td>
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<td>12%</td>
<td>13%</td>
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<tr>
<td>Yorkshire &amp; the Humber (e.g. Leeds, York, Yorkshire Dales)</td>
<td>14%</td>
<td>11%</td>
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<tr>
<td>North East (e.g. Newcastle, Durham)</td>
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</table>

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

Q12: Which destination(s) in England? (Multiple Answers)
Base: Respondents who have chosen England in Q11a (n = 6,171)
For long-haul prospects, a possible trip to Britain would be to England first but not exclusively, showing open attitude to visiting multiple destinations across Britain, beyond iconic places.

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

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<tr>
<th></th>
<th>Total</th>
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<td>57%</td>
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<td>65%</td>
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<td><strong>Wales</strong></td>
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<td><strong>Yorkshire &amp; the Humber</strong></td>
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</table>

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

Q12: Which destination(s) in England? (Multiple Answers)
Base: Respondents who have chosen England in Q11a (n = 6,171)
Comfort levels with transport to get to Britain (Short-haul)

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

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

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

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

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

Q13: If you were to travel to Britain in the next 12 months, how comfortable would you feel using the following to get to Britain? (Multiple Answers)
Base: Respondents choosing either England, Scotland or Wales in Q11a (n = 8,700)
The overall trust level for public and collective transportation means is high and should not stop potential visitors to explore the destination, be that travelling on their own or via transportation means at disposal. A clear preference for using their own car is expressed in Ireland, Netherlands, France and Germany.

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

Q14. Thinking about travelling within Britain, which of the following would you be comfortable with?  (Multiple Answers)  
Base: Respondents selecting England, Scotland or Wales in Q11a (n = 8,700)
Among long-haul markets, there should be no particular “new” or unusual obstacles in using / combining various types of transportation at destination, including public transport or taxi services. Transport should therefore not be a major obstacle in visiting rural and urban environment and plan multiple destinations within Britain.

<table>
<thead>
<tr>
<th>% of Consideration</th>
<th>Total</th>
<th>Long-haul</th>
<th>Australia</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>India</th>
<th>Japan</th>
<th>Saudi Arabia</th>
<th>South Korea</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public transport - Train</td>
<td>43%</td>
<td>43%</td>
<td>44%</td>
<td>46%</td>
<td>47%</td>
<td>33%</td>
<td>44%</td>
<td>65%</td>
<td>38%</td>
<td>39%</td>
<td>37%</td>
<td>42%</td>
</tr>
<tr>
<td>Rented car/vehicle</td>
<td>40%</td>
<td>40%</td>
<td>53%</td>
<td>50%</td>
<td>53%</td>
<td>29%</td>
<td>50%</td>
<td>29%</td>
<td>33%</td>
<td>40%</td>
<td>36%</td>
<td>37%</td>
</tr>
<tr>
<td>Public transport - Tube/subway</td>
<td>39%</td>
<td>41%</td>
<td>36%</td>
<td>42%</td>
<td>40%</td>
<td>47%</td>
<td>39%</td>
<td>54%</td>
<td>34%</td>
<td>45%</td>
<td>40%</td>
<td>37%</td>
</tr>
<tr>
<td>Domestic flight</td>
<td>34%</td>
<td>38%</td>
<td>45%</td>
<td>45%</td>
<td>38%</td>
<td>35%</td>
<td>57%</td>
<td>8%</td>
<td>32%</td>
<td>27%</td>
<td>34%</td>
<td>47%</td>
</tr>
<tr>
<td>Public transport - Bus</td>
<td>31%</td>
<td>31%</td>
<td>33%</td>
<td>29%</td>
<td>34%</td>
<td>35%</td>
<td>34%</td>
<td>43%</td>
<td>23%</td>
<td>30%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>Own car vehicle</td>
<td>31%</td>
<td>26%</td>
<td>39%</td>
<td>29%</td>
<td>29%</td>
<td>28%</td>
<td>32%</td>
<td>5%</td>
<td>22%</td>
<td>15%</td>
<td>22%</td>
<td>29%</td>
</tr>
<tr>
<td>Taxi</td>
<td>28%</td>
<td>32%</td>
<td>33%</td>
<td>36%</td>
<td>34%</td>
<td>39%</td>
<td>39%</td>
<td>31%</td>
<td>18%</td>
<td>21%</td>
<td>27%</td>
<td>31%</td>
</tr>
<tr>
<td>Uber/other sharing app</td>
<td>22%</td>
<td>29%</td>
<td>22%</td>
<td>48%</td>
<td>24%</td>
<td>19%</td>
<td>40%</td>
<td>12%</td>
<td>33%</td>
<td>28%</td>
<td>31%</td>
<td>28%</td>
</tr>
<tr>
<td>Private coach/minibus</td>
<td>21%</td>
<td>24%</td>
<td>32%</td>
<td>19%</td>
<td>30%</td>
<td>20%</td>
<td>35%</td>
<td>25%</td>
<td>19%</td>
<td>14%</td>
<td>17%</td>
<td>30%</td>
</tr>
</tbody>
</table>
Travellers are still open to using a variety of channels to plan their next trip. Online travel agents/tour operators are the most popular channel; the use of expert intermediaries is reassuring to consumers in the current uncertain travel scenario. Official destination websites, transport and accommodation providers play a significant role in the booking process across most markets, again confirming the importance of reassurance and trust.

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

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

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

<table>
<thead>
<tr>
<th>Q19: How would you envisage booking your trip? (Multiple Answers)</th>
<th>Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Through a travel agent/tour operator online</td>
<td>Total</td>
</tr>
<tr>
<td></td>
<td>37%</td>
</tr>
<tr>
<td>A travel comparison website</td>
<td>36%</td>
</tr>
<tr>
<td>Direct with airline/train/ferry operator</td>
<td>33%</td>
</tr>
<tr>
<td>Direct from the official website of the destination</td>
<td>30%</td>
</tr>
<tr>
<td>Direct with accommodation provider</td>
<td>29%</td>
</tr>
<tr>
<td>Through a travel agent/tour operator at a storefront</td>
<td>26%</td>
</tr>
<tr>
<td>Through friends and family in the destination</td>
<td>14%</td>
</tr>
</tbody>
</table>
Planned booking channel for a trip to Britain

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

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

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

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

### Short-haul markets

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

### Long-haul markets

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

Q19: How would you envisage booking your trip? (Multiple Answers)  
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1,360)
In North America and Australia, British destinations generate a safer image than other large competitive destinations in Europe such as France, Italy or Spain. England has started making up the gap vs Scotland and Wales observed in December.

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All Respondents (n = 11,000)
In Asian markets, the image of Britain with COVID-19 is also consistent and competitive, only Switzerland and Germany tend to generate (slightly) better perceptions. Reflecting an overall careful attitude to travel now, the Japanese perceive all destinations as unsafe in majority.

<table>
<thead>
<tr>
<th>Country</th>
<th>Safe</th>
<th>Don’t know</th>
<th>Unsafe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>33%</td>
<td>22%</td>
<td>45%</td>
</tr>
<tr>
<td>Scotland</td>
<td>23%</td>
<td>22%</td>
<td>55%</td>
</tr>
<tr>
<td>Wales</td>
<td>22%</td>
<td>23%</td>
<td>55%</td>
</tr>
<tr>
<td>Germany</td>
<td>21%</td>
<td>17%</td>
<td>62%</td>
</tr>
<tr>
<td>England</td>
<td>20%</td>
<td>17%</td>
<td>63%</td>
</tr>
<tr>
<td>France</td>
<td>14%</td>
<td>14%</td>
<td>71%</td>
</tr>
<tr>
<td>Spain</td>
<td>12%</td>
<td>17%</td>
<td>71%</td>
</tr>
<tr>
<td>Italy</td>
<td>11%</td>
<td>15%</td>
<td>74%</td>
</tr>
</tbody>
</table>

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus? Base: All Respondents (n = 11,000)
The COVID-19 safety image has improved significantly in Saudi Arabia. Switzerland benefits from the best image in the UAE, however Britain destinations are seen as safe in absolute value by a majority of respondents.

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All Respondents (n = 11,000)
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.

<table>
<thead>
<tr>
<th>Country</th>
<th>Safety</th>
<th>Don't Know</th>
<th>Unsafe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>90%</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>England</td>
<td>82%</td>
<td>5%</td>
<td>12%</td>
</tr>
<tr>
<td>Scotland</td>
<td>84%</td>
<td>2%</td>
<td>15%</td>
</tr>
<tr>
<td>Ireland</td>
<td>81%</td>
<td>5%</td>
<td>15%</td>
</tr>
<tr>
<td>Wales</td>
<td>81%</td>
<td>5%</td>
<td>15%</td>
</tr>
<tr>
<td>Germany</td>
<td>79%</td>
<td>4%</td>
<td>17%</td>
</tr>
<tr>
<td>Portugal</td>
<td>75%</td>
<td>5%</td>
<td>20%</td>
</tr>
<tr>
<td>Spain</td>
<td>67%</td>
<td>4%</td>
<td>30%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>63%</td>
<td>7%</td>
<td>30%</td>
</tr>
<tr>
<td>France</td>
<td>61%</td>
<td>4%</td>
<td>35%</td>
</tr>
<tr>
<td>Italy</td>
<td>60%</td>
<td>4%</td>
<td>36%</td>
</tr>
</tbody>
</table>

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?  
Base: All Respondents (n = 11,000)
COVID-19 safety perception (5)

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

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All Respondents (n = 11,000)
A clear positive dynamic is observed in the Irish Republic, Italy and (to a lesser extend for England) Spain where Britain destinations now enjoy a competitive position in relation to COVID-19 safety.

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?

Base: All Respondents (n = 11,000)
COVID-19 safety perception (7)

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

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus? Base: All Respondents (n = 11,000)
COVID-19 safety perception (8)

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

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All Respondents (n = 11,000)
Travel Preferences
Travel preferences: summary

- The overall travel sentiment increase concerns all types of destination’s types (large and smaller cities, rural, coastal, mountain areas…) and reveals stronger desire for exploring and roaming around, suggesting existence of a “catching-up” sentiment after a long period of restriction (also known as the “revenge tourism” concept driven by cumulated frustrations).

- The combined wish expressed to see both iconic places AND visit secondary destinations also accelerates demand for roaming around, particularly high in long-haul markets and giving Britain destinations further opportunity to promote multiple destinations / tours beyond iconic gateways in the region.

- Friends travel demand is on the rise. Intenders to Britain confirm envisaging a quite larger than average travel cell including children or other adult travel companions, possibly boosting or spreading spent at destinations while they express higher intention to roam around.

- Most accommodation types benefit from increased trust levels. While hotel chains seem still high on planners’ mind, interest for various types of accommodations remain (boutique hotels, B&Bs, self-catered properties…) confirming special affinities per market and destinations such as historic houses in Britain, hotel chains in London or holiday villages/centres and historic houses/castles in Scotland and Wales.

- Sign of an expected return to normal, cultural and sport events are gaining interest in travellers’ mind too. The desire amongst some to return to many pre-pandemic activities when on holiday is confirmed, including interest in iconic tourist attractions but also lively activities (dining out, local lifestyle, shopping…). Socializing with local people is somewhat less on the bucket list compared to March 2020, probably linked to some growing concerns around local residents' welcome to foreign tourists.
The overall travel sentiment increase concerns all types of areas and reveals a desire for exploring and roaming around in the destination. Events are regaining interest in travellers’ mind too – a possible sign of an expected return to normal.

**Main types of destinations envisaged**

- Large city: 45% (Dec. 20) vs 48% (March 21)
- Coastline: 38% (Dec. 20) vs 40% (March 21)
- Small/mid-sized city/town: 25% (Dec. 20) vs 29% (March 21)
- Mountains or hills: 21% (Dec. 20) vs 25% (March 21)
- Countryside or village: 20% (Dec. 20) vs 27% (March 21)

**Interest level in activities (W2/W1 Evol. %)**

- Attending sport events: 1.6%
- Exploring history and heritage: 1.2%
- Guided tours/day-excursions: 1.0%
- Attending cultural events: 0.7%
- Playing sports: 0.5%
- Visiting cultural attractions: 0.1%
- Shopping: 0.0%
- Learning new skills: -0.1%
- Visiting famous/iconic tourist attractions: -0.2%
- Self-driving tours: -0.2%
- Experiencing destination’s nightlife: -0.3%
- Outdoor nature activities: -0.5%
- Dining in restaurants/bars, cafes or pubs: -0.5%
- Culinary activities: -0.7%
- Outdoor activities (hiking, cycling, etc): -1.4%
- Experiencing local lifestyle: -1.5%
- Spa/wellness activities: -2.0%

Trend calculated at constant perimeter (14 markets consolidated)
Visiting large cities and coastal areas are still top of mind, but intentions widely differ from one market to another: for example, many Germans are looking for coastal experiences, while Italians, Spanish and Swedish are more open to planning city breaks than average. Russians and Italians will also want to roam around and visit many types of places.

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

Q15: Which of the following best describes the main types of destination where you are likely to stay during your next international leisure trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)
Main destination types for an international leisure trip (Long-haul)

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

Q15: Which of the following best describes the main types of destination where you are likely to stay during your next international leisure trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)
Main destination types for a leisure trip in Europe

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

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

Q15: Which of the following best describes the main types of destination where you are likely to stay during your next international leisure trip? (Multiple Answers)
Base: Europe Int. (n = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552)
Trends: December 2020 vs March 2021

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

**Travel party**

- With your spouse/partner: 70% (Dec. 20) vs 71% (Mar. 21)
- With children (under 18): 29% (Dec. 20) vs 27% (Mar. 21)
- With friends: 21% (Dec. 20) vs 23% (Mar. 21)
- With adult family members: 20% (Dec. 20) vs 19% (Mar. 21)
- Alone: 18% (Dec. 20) vs 19% (Mar. 21)

**Accommodation (W2/W1 Evol. %)**

- Historic house/castle: 5.2% (Mar. 21) vs 4.5% (Dec. 20)
- Bed and breakfast: 5.1% (Mar. 21) vs 4.5% (Dec. 20)
- Hotel chain: 4.5% (Mar. 21) vs 3.6% (Dec. 20)
- Friend’s/family house as a paying guest: 3.6% (Mar. 21) vs 3.6% (Dec. 20)
- Self catered property: 3.6% (Mar. 21) vs 2.7% (Dec. 20)
- Friend’s/family house as a free guest: 2.7% (Mar. 21) vs 2.7% (Dec. 20)
- Boutique hotel: 2.6% (Mar. 21) vs 2.4% (Dec. 20)
- Caravan/motorhome: 2.4% (Mar. 21) vs 2.3% (Dec. 20)
- Cruise: 2.3% (Mar. 21) vs 2.3% (Dec. 20)
- Private rental: 1.6% (Mar. 21) vs 1.5% (Dec. 20)
- Campsite: 1.5% (Mar. 21) vs 1.5% (Dec. 20)
- Hostel/university/school: 1.0% (Mar. 21) vs 1.0% (Dec. 20)
- Own second home/timeshare: 0.6% (Mar. 21) vs 0.4% (Dec. 20)
- Holiday village/centre (e.g. Center Parcs): 0.4% (Mar. 21) vs 0.4% (Dec. 20)

Trend calculated at constant perimeter (14 markets consolidated)
Couples (with or without children) will strongly drive trip recovery in 2021 in a context where many couples and parents are still looking for family reconnection after repetitive long lock-down periods. Solo and friends’ trips are more likely to be considered in Sweden and Norway compared to the average.

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

Q18: Would you envisage traveling… (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)
Families trips are particularly considered in GCC markets and Brazil while trips with spouse/partners from the US is expected to be very popular. Transversally, tour group seems low in consideration across markets.

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

Q18: Would you envisage traveling... (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)
Travel party for a leisure trip in Europe/Britain

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

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

Q18: Would you envisage traveling… (Multiple Answers)
Base: Europe Int. (n = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552) – Large City Int. (n = 5,230)
Hotel chains are confirmed by most to be a preferred choice for a next leisure trip abroad, potentially suggesting a higher level of trust in COVID-19 protocols implemented in well known brands. Self-catered accommodation is also confirmed as a popular option in COVID-19 era. The consideration levels for self-catering and B&Bs are on the same level in Europe.

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Total</th>
<th>Denmark</th>
<th>France</th>
<th>Germany</th>
<th>Irish Republic</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Russia</th>
<th>Spain</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel chain</td>
<td>64%</td>
<td>65%</td>
<td>72%</td>
<td>45%</td>
<td>62%</td>
<td>61%</td>
<td>66%</td>
<td>77%</td>
<td>65%</td>
<td>67%</td>
<td>75%</td>
</tr>
<tr>
<td>Bed and breakfast</td>
<td>35%</td>
<td>39%</td>
<td>48%</td>
<td>24%</td>
<td>35%</td>
<td>36%</td>
<td>54%</td>
<td>44%</td>
<td>40%</td>
<td>45%</td>
<td>15%</td>
</tr>
<tr>
<td>Boutique hotel</td>
<td>33%</td>
<td>28%</td>
<td>20%</td>
<td>37%</td>
<td>30%</td>
<td>35%</td>
<td>28%</td>
<td>27%</td>
<td>18%</td>
<td>11%</td>
<td>48%</td>
</tr>
<tr>
<td>Self-catered</td>
<td>32%</td>
<td>39%</td>
<td>44%</td>
<td>20%</td>
<td>49%</td>
<td>45%</td>
<td>36%</td>
<td>47%</td>
<td>42%</td>
<td>36%</td>
<td>27%</td>
</tr>
<tr>
<td>Property (rented</td>
<td>32%</td>
<td>39%</td>
<td>44%</td>
<td>20%</td>
<td>49%</td>
<td>45%</td>
<td>36%</td>
<td>47%</td>
<td>42%</td>
<td>36%</td>
<td>27%</td>
</tr>
<tr>
<td>House, cottage,</td>
<td>27%</td>
<td>30%</td>
<td>33%</td>
<td>20%</td>
<td>28%</td>
<td>44%</td>
<td>25%</td>
<td>29%</td>
<td>31%</td>
<td>17%</td>
<td>28%</td>
</tr>
<tr>
<td>Chalet, apartment)</td>
<td>27%</td>
<td>30%</td>
<td>28%</td>
<td>30%</td>
<td>25%</td>
<td>29%</td>
<td>34%</td>
<td>28%</td>
<td>25%</td>
<td>29%</td>
<td>30%</td>
</tr>
<tr>
<td>Private rental</td>
<td>27%</td>
<td>30%</td>
<td>28%</td>
<td>30%</td>
<td>25%</td>
<td>29%</td>
<td>34%</td>
<td>28%</td>
<td>25%</td>
<td>29%</td>
<td>30%</td>
</tr>
<tr>
<td>Historic house</td>
<td>25%</td>
<td>25%</td>
<td>29%</td>
<td>9%</td>
<td>21%</td>
<td>20%</td>
<td>26%</td>
<td>32%</td>
<td>31%</td>
<td>15%</td>
<td>31%</td>
</tr>
<tr>
<td>Castle</td>
<td>25%</td>
<td>25%</td>
<td>29%</td>
<td>9%</td>
<td>21%</td>
<td>20%</td>
<td>26%</td>
<td>32%</td>
<td>31%</td>
<td>15%</td>
<td>31%</td>
</tr>
<tr>
<td>Holiday village/</td>
<td>22%</td>
<td>22%</td>
<td>22%</td>
<td>17%</td>
<td>24%</td>
<td>22%</td>
<td>26%</td>
<td>34%</td>
<td>24%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Centre (e.g.</td>
<td>22%</td>
<td>22%</td>
<td>22%</td>
<td>17%</td>
<td>24%</td>
<td>22%</td>
<td>26%</td>
<td>34%</td>
<td>24%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Centre Parcs)</td>
<td>22%</td>
<td>22%</td>
<td>22%</td>
<td>17%</td>
<td>24%</td>
<td>22%</td>
<td>26%</td>
<td>34%</td>
<td>24%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Cruise</td>
<td>19%</td>
<td>17%</td>
<td>19%</td>
<td>8%</td>
<td>16%</td>
<td>12%</td>
<td>17%</td>
<td>18%</td>
<td>25%</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>Friend’s/family</td>
<td>17%</td>
<td>18%</td>
<td>17%</td>
<td>12%</td>
<td>26%</td>
<td>22%</td>
<td>15%</td>
<td>23%</td>
<td>10%</td>
<td>7%</td>
<td>17%</td>
</tr>
<tr>
<td>House as a paying guest</td>
<td>17%</td>
<td>18%</td>
<td>17%</td>
<td>12%</td>
<td>26%</td>
<td>22%</td>
<td>15%</td>
<td>23%</td>
<td>10%</td>
<td>7%</td>
<td>17%</td>
</tr>
<tr>
<td>Campsite</td>
<td>13%</td>
<td>14%</td>
<td>18%</td>
<td>11%</td>
<td>18%</td>
<td>15%</td>
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<td>23%</td>
<td>13%</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>Hostel/</td>
<td>13%</td>
<td>14%</td>
<td>18%</td>
<td>11%</td>
<td>18%</td>
<td>15%</td>
<td>10%</td>
<td>23%</td>
<td>13%</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>University/school</td>
<td>13%</td>
<td>14%</td>
<td>18%</td>
<td>11%</td>
<td>18%</td>
<td>15%</td>
<td>10%</td>
<td>23%</td>
<td>13%</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>Own second home</td>
<td>12%</td>
<td>14%</td>
<td>29%</td>
<td>7%</td>
<td>12%</td>
<td>14%</td>
<td>12%</td>
<td>18%</td>
<td>10%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Timeshare</td>
<td>12%</td>
<td>14%</td>
<td>29%</td>
<td>7%</td>
<td>12%</td>
<td>14%</td>
<td>12%</td>
<td>18%</td>
<td>10%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Caravan/motorhome</td>
<td>12%</td>
<td>13%</td>
<td>17%</td>
<td>6%</td>
<td>20%</td>
<td>13%</td>
<td>7%</td>
<td>23%</td>
<td>13%</td>
<td>5%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Q17: For your next international leisure trip, would you be comfortable staying in a… (Multiple Answers)  
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)
Accommodation types for an international leisure trip (Long-haul)

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

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

Q17: For your next international leisure trip, would you be comfortable staying in a … (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)
Accommodation types for a leisure trip in Europe

Britain intenders are considering a range of accommodation experiences, including hotel chains and boutique properties, but also B&Bs, historic houses and private rentals. London intenders are particularly drawn to hotel chains. Scotland and Wales potential visitors over-index on holiday villages/centres and historic houses/castles.

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

Q17: For your next international leisure trip, would you be comfortable staying in a … (Multiple Answers)
Base: Europe Int. (n = 6,255) – Britain Int. (n = 1,360) – England pot. visitors (n = 6,171) – Scotland pot. visitors (n = 3,975) – Wales pot. visitors (n = 1,601) – London pot. visitors (n = 2,552) – Large City Int. (n = 5,230)
The desire amongst some to return to many pre-pandemic behaviours when on holiday is confirmed, including interest in iconic tourist attractions but also lively and socialising activities (dining out, local lifestyle, shopping...), particularly among Nordic markets. Outdoor nature activities still rank highly. Self-driving touring is driving a lot of interest in France and the Netherlands, while Russia would take guided excursions. Southern Europeans and Russians as well as the French want to see the history & heritage and sights again.

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

Q16: Thinking about your level of confidence related to sanitary safety, how interested would you be in the following activities during your next international trip?

Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)
Level of interest in activities (Long-haul)

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

<table>
<thead>
<tr>
<th>(% very interested)</th>
<th>Total</th>
<th>Long-haul</th>
<th>Australia</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>India</th>
<th>Japan</th>
<th>Saudi Arabia</th>
<th>South Korea</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exploring history and heritage</td>
<td>44%</td>
<td>48%</td>
<td>39%</td>
<td>60%</td>
<td>49%</td>
<td>40%</td>
<td>62%</td>
<td>43%</td>
<td>43%</td>
<td>46%</td>
<td>50%</td>
<td>48%</td>
</tr>
<tr>
<td>Visiting famous/iconic tourist attractions</td>
<td>44%</td>
<td>50%</td>
<td>39%</td>
<td>62%</td>
<td>45%</td>
<td>42%</td>
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<td>36%</td>
<td>54%</td>
<td>46%</td>
<td>60%</td>
<td>53%</td>
</tr>
<tr>
<td>Dining in restaurants/bars, cafes or pubs</td>
<td>43%</td>
<td>44%</td>
<td>32%</td>
<td>59%</td>
<td>40%</td>
<td>31%</td>
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<td>45%</td>
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<tr>
<td>Outdoor nature activities</td>
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<td>45%</td>
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<td>54%</td>
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<td>41%</td>
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<td>54%</td>
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<td>57%</td>
<td>43%</td>
</tr>
<tr>
<td>Visiting cultural attractions</td>
<td>41%</td>
<td>45%</td>
<td>31%</td>
<td>59%</td>
<td>37%</td>
<td>42%</td>
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<td>46%</td>
<td>45%</td>
<td>51%</td>
<td>44%</td>
</tr>
<tr>
<td>Experiencing local lifestyle, socialising with locals</td>
<td>34%</td>
<td>37%</td>
<td>28%</td>
<td>44%</td>
<td>31%</td>
<td>40%</td>
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<td>27%</td>
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</tr>
<tr>
<td>Shopping</td>
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<td>32%</td>
</tr>
<tr>
<td>Outdoor activ. (hiking, cycling...)</td>
<td>33%</td>
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<td>41%</td>
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<tr>
<td>Guided tours/day-excursions</td>
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<tr>
<td>Self-driving tours</td>
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<tr>
<td>Attending cultural events</td>
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<tr>
<td>Culinary activities</td>
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<tr>
<td>Spa/wellness activities</td>
<td>24%</td>
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<td>24%</td>
</tr>
<tr>
<td>Experiencing destination’s nightlife</td>
<td>23%</td>
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<td>42%</td>
<td>15%</td>
<td>32%</td>
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<td>12%</td>
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<td>N/A</td>
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<tr>
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<td>18%</td>
<td>30%</td>
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</tr>
<tr>
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<td>34%</td>
<td>14%</td>
<td>38%</td>
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<td>13%</td>
<td>31%</td>
<td>18%</td>
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</tbody>
</table>

Q16: Thinking about your level of confidence related to sanitary safety, how interested would you be in the following activities during your next international trip?  
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10,804)
## Level of interest in activities in Europe/Britain

Britain intenders show a strong appetite for exploring iconic, cultural and natural attractions/activities during their next trip.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Europe Intenders</th>
<th>Britain Intenders</th>
<th>England pot. visitors</th>
<th>Scotland pot. visitors</th>
<th>Wales pot. visitors</th>
<th>London pot. visitors</th>
<th>Large City Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exploring history and heritage</td>
<td>46%</td>
<td>51%</td>
<td>48%</td>
<td>53%</td>
<td>56%</td>
<td>48%</td>
<td>49%</td>
</tr>
<tr>
<td>Visiting famous/iconic tourist attractions</td>
<td>44%</td>
<td>49%</td>
<td>49%</td>
<td>49%</td>
<td>55%</td>
<td>50%</td>
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</tr>
<tr>
<td>Dining in restaurants/bars, cafes or pubs</td>
<td>44%</td>
<td>46%</td>
<td>47%</td>
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<td>47%</td>
<td>50%</td>
</tr>
<tr>
<td>Visiting cultural attractions</td>
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<tr>
<td>Outdoor nature activities</td>
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<td>41%</td>
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<tr>
<td>Experiencing local lifestyle, socialising with locals</td>
<td>34%</td>
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<td>Outdoor activ. (hiking, cycling..)</td>
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<tr>
<td>Guided tours/day-excursions</td>
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<td>35%</td>
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<tr>
<td>Self-driving tours</td>
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<td>38%</td>
<td>27%</td>
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<td>Attending cultural events</td>
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<td>32%</td>
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<td>30%</td>
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<tr>
<td>Experiencing destination's nightlife</td>
<td>24%</td>
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<tr>
<td>Attending sport events</td>
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<tr>
<td>Learning new skills</td>
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<td>25%</td>
<td>23%</td>
<td>30%</td>
<td>21%</td>
<td>25%</td>
</tr>
<tr>
<td>Playing sports</td>
<td>18%</td>
<td>22%</td>
<td>22%</td>
<td>21%</td>
<td>27%</td>
<td>18%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Q16: Thinking about your level of confidence related to sanitary safety, how interested would you be in the following activities during your next international trip?

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

What has changed since Dec. 2020?

Saffron Walden: ©VisitBritain/ Herewegoagain.blog
1. **Desire to travel internationally remains very high** and has increased in most markets surveyed both in December and March. Japan, South Korea, Australia and Norway show lower intentions to travel abroad compared to the other markets.

2. Travel plans are **getting more concrete**, but bookings are still low and **destination choice remains very open in consumers’ mind**.

3. While **high expectations focus on summer 2021** - either for planning holidays abroad and/or reconnecting with friends or relatives as soon as possible - **a third of planners envisage 2022 and beyond as horizon or just do not know yet** when they would go.

4. **Vaccination** is confirmed to play a **critical role in triggering short term travel intention and booking**, opening more opportunities to market vaccinated people regardless age groups and segments.

5. **The age continues driving travel sentiment** as younger generations show the strongest intentions to take a trip abroad this year.

6. While vaccination (in markets as well as at destination) accelerates positive travel sentiment, **other obstacles for travel remain very influential in decision making process**: COVID-19 cases at destination, quarantine policies, refund/cancellation flexibility, political environment).

7. Travellers’ set of mind shows little changes since last wave and confirms **general expectations for living the full destination experience in safe conditions**, taking the most profit from the stay to explore both iconic and secondary sites.

8. The overall increased positive sentiment benefits to many destination types, activities and accommodation options. There is no evidence that vaccination would trigger **different expectations in terms of activities**: the incremental confidence vaccination creates helps envisaging **more activities or more of activities that were unavailable so far** (such as sport or cultural events).

9. Attitudes towards a more **responsible and sustainable travel** are clearly expressed. It remains yet to be seen how far they will be converted into effective responsible and sustainable behaviours at destination.

10. While socializing is expected as integral part of the next experience at destination, **the concept of immersive social experiences with locals may be less obvious to define**, particularly for Asian markets who report growing concerns on potential lack of locals’ welcome.
Key Takeaways – perceptions of destinations/Britain

1. Europe maintains and often amplifies its status of favourite region in most markets

2. In a few months and fuelled by a spectacular improvement of its COVID-19 sanitary image, Britain has gained in popularity and competitiveness, recording the second largest increase in Europe in visit intentions after Spain.

3. Britain is now particularly attractive amongst vaccinated travellers, sharing the pole position in Europe with France in this group

4. Providing pre-COVID-19 visits’ volumes, intention levels and COVID-19 image, the competitive position of Britain is summarized as follows:
   - 1 market in highly favourable competitive position: China (also very keen at travelling abroad overall)
   - 8 markets in favourable competitive position: US, Canada, India, Italy, Spain, Sweden, Norway and Irish Republic
   - 8 markets in average competitive position: Brazil, Australia, S.Korea, UAE, Saudi Arabia, Denmark, Germany and Netherlands
   - 3 markets in at-risk competitive position: France, Russia and (also due to low travel intentions to Europe) Japan

5. Among the 14 markets surveyed in December 2020:
   - 5 markets have improved their competitive position: US, India, Germany, Netherlands and Irish Republic
   - 6 markets have kept their favourable competitive position: Sweden, Norway, Italy, Spain, China and Canada
   - 2 markets have kept their average competitive position: Saudi Arabia and Australia
   - 1 market remains at risk: France
Key Takeaways – Segments to target

Confirmed segments and experiences to prioritize for Britain

- Couples / Young parents / Family / Friends reconnection trips
- Secondary destinations explorers / Crowd-escapers / Coastal itineraries
- Cross-UK “no borders” Families Tourers / Van / Motorhome trips offering Slow / Micro adventure
- City breaks deals (London, Edinburgh…) – Friendship reconnection in an urban lively environment / “socializing bubbles”
- Nature/outdoor active deals: Golf, Electric bike + B&Bs self-guided tours…
- Foodies and hybrid experiences including gastronomy
- “Under sanitary control” first-in-Europe festive events
- Sensorial trip experiences (Arts in gardens, Suspended bridges, Big Wheels, panoramic views etc).
- Affluent visitors targeting the “lucky ones” whom spending power have risen through the crisis
- Historic houses’ lovers for long week-ends / mid-weeks
- VFR combined/extended trips
- Bleisure visitors (business trip with a leisure experience)
- … and other niche / passion-based tourism known as very efficient in boosting destination’ reputation in COVID-19 times:
  - Film locations (Netflix and other streaming platforms influence and usage massively growing since COVID-19)
  - Wineries/Breweries/whiskey producers tours
  - Fine Arts lovers offered exclusive museum visit at night
  - UK Football and other Sport Clubs Fan tours
  - Memorial sites…
Key Takeaways - Channels

Planning, booking and influencing channels

1. **OTAs/TOs** well considered across all short-haul markets and among younger generations too. **Intermediaries are seen as trusted channels** in times of uncertainties and should offer **flexible cancellation policies**.

2. **Official destination websites increasingly influential** in the trip planning process as trusted source on both COVID-19-safety (simplified) information and guidance on the “full experience” promotion. Promoting best rated performers (hotels, attractions) in terms of Sanitary Safety is recommended, as well as a timely inventory of what is open and not at destination (Google status).

3. “**Experiential Packages**” including guided / self-guided excursions for roaming travellers in search of maximizing the full experience.

4. **SoMe and digital marketing** can generate high ROI as Millennials are to resume international travel sooner.

5. **Transport operators** are expected to offer the most flexible cancellation policies possible. This also applies to Travel Packages.

6. **Travel comparison websites** have a massive influence in sort-haul markets, as consumers are trying to best inform their decision.

7. **Visitor pre-trip consistent and timely information** required to both **end-consumers** and **the Trade** particularly in long-haul markets.

8. **Selling Britain as the “safest post-vaccine Europe gateway”** among long-haul markets as **Europe is still top of mind**.

9. **Promoting multi-modal transport flexibility** while travellers are increasingly building trust in flights, trains, ferries and public transport.

10. Providing clear **itineraries and road maps** (on destination apps) for **roaming travellers using their own/rented cars**.
Market Summaries
Australia Market Summary

Travel intentions

62% Intend to travel abroad for leisure*

Among leisure trip intenders:
- 29% consider Europe
- 10% consider Britain

Among Britain intenders:
- 65% consider England
- 37% consider Scotland
- 26% consider London
- 22% consider Wales

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

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

Travel preferences

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

Destination types
- 37% Country/village
- 46% Large city
- 34% Small/mid-sized city/town
- 30% Mountains or hills
- 31% Coastline

Travel drivers

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

Travel attitudes**

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

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

Travel intentions

82% Intend to travel abroad for leisure*

Among leisure trip intenders:

- 63% consider Europe
- 10% consider Britain

Among Britain intenders:

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

Journey purpose

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

Planning stage

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

Travel preferences

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

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

Travel drivers

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

Travel attitudes**

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

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

Travel intentions

63% Intend to travel abroad for leisure*

Among leisure trip intenders:
- 45% consider Europe
- 12% consider Britain

Among Britain intenders:
- 62% consider England
- 35% consider Scotland
- 23% consider London
- 15% consider Wales

63% Intend to travel abroad for leisure*

Journey purpose

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

Planning stage

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

Travel drivers

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

Travel attitudes**

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

Travel preferences

Top activities

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

Destination types

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

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

**Travel intentions**

82% Intend to travel abroad for leisure*

Among leisure trip intenders:

- 62% consider Europe
- 32% consider Britain

Among Britain intenders:

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

Journey purpose

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>73%</td>
</tr>
<tr>
<td>For other leisure purposes</td>
<td>38%</td>
</tr>
<tr>
<td>To visit friends or relatives</td>
<td>13%</td>
</tr>
</tbody>
</table>

Planning stage

<table>
<thead>
<tr>
<th>Stage</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intend to travel</td>
<td>23%</td>
</tr>
<tr>
<td>Trip planned</td>
<td>55%</td>
</tr>
<tr>
<td>Destination chosen</td>
<td>18%</td>
</tr>
<tr>
<td>Trip booked</td>
<td>4%</td>
</tr>
</tbody>
</table>

**Travel preferences**

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

- Destination types:
  - 31% Country/village
  - 61% Large city
  - 21% Mountains or hills
  - 38% Small/mid-sized city/town
  - 42% Coastline
  - 50% Will roam around

**Travel drivers**

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

**Travel attitudes**

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

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

Travel intentions

72% Intend to travel abroad for leisure*
Among leisure trip intenders:
77% consider Europe
10% consider Britain

Among Britain intenders:
44% consider England
34% consider Scotland
19% consider London
9% consider Wales

Journey purpose
- Holiday: 81%
- Visit friends or relatives: 31%
- Other leisure purposes: 13%

Planning stage
- Intend to travel: 25%
- Trip planned: 25%
- Destination chosen: 37%
- Trip booked: 12%

Travel preferences
- Top activities:
  - Dining out: 43%
  - Iconic tourist attractions: 33%
  - Outdoor nature activities: 33%
  - History and heritage: 28%
  - Visiting cultural attractions: 27%

Destination types
- 22% Country/village
- 40% Large city
- 25% Small/mid-sized city/town
- 38% Will roam around
- 22% Mountains or hills
- 40% Coastline

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

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

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

**Travel intentions**

80% Intend to travel abroad for leisure*

Among leisure trip intenders:
- 67% consider Europe
- 6% consider Britain

Among Britain intenders:
- 43% consider England
- 43% consider Scotland
- 21% consider London
- 12% consider Wales

Journey purpose

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

Planning stage

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

**Travel preferences**

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

Destination types
- 22% Country/village
- 37% Large city
- 34% Will roam around
- 14% Mountains or hills
- 25% Small/mid-sized city/town
- 35% Coastline

**Travel drivers**

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

**Travel attitudes**

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

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

**Travel intentions**

- **67%** Intend to travel abroad for leisure*

  Among leisure trip intenders:
  - **72%** consider Europe
  - **9%** consider Britain

- Among Britain intenders:
  - **48%** consider Scotland
  - **36%** consider England
  - **17%** consider London
  - **12%** consider Wales

**Journey purpose**

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

**Planning stage**

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

**Travel preferences**

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

**Destination types**

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

**Travel drivers**

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

**Travel attitudes**

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

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

**% completely & somewhat agree
India Market Summary

Travel intentions

90% Intend to travel abroad for leisure*

Among leisure trip intenders:
- 45% consider Europe
- 16% consider Britain

Among Britain intenders:
- 77% consider England
- 50% consider Scotland
- 27% consider Wales
- 24% consider London

Journey purpose

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

Planning stage

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

Travel preferences

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

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

Travel drivers

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

Travel attitudes**

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

* (% definitely & probably) in the next 12 months
** % completely & somewhat agree
Irish Republic Market Summary

**Travel intentions**

68% Intend to travel abroad for leisure*

78% contribute Europe

15% consider Britain

Among leisure trip intenders:

68% Intend to travel abroad for leisure*

78% consider Europe

15% consider Britain

Among Britain intenders:

56% consider England

33% consider Scotland

23% consider London

12% consider Wales

Among leisure trip intenders:

Journey purpose

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

Planning stage

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

**Travel preferences**

Top activities

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

Destination types

- Country/village: 24%
- Large city: 47%
- Smaller/mid-sized city/town: 26%
- Mountains or hills: 17%
- Coastline: 40%

**Travel drivers**

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

**Travel attitudes**

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

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

**% completely & somewhat agree
Italy Market Summary

**Travel intentions**

- **81%** Intend to travel abroad for leisure*
- **70%** consider Europe
- **14%** consider Britain
- **57%** consider England
- **47%** consider Scotland
- **25%** consider London
- **13%** consider Wales

**Journey purpose**

- Holiday: **32%**
- Visit friends or relatives: **25%**
- Other leisure purposes: **25%**

**Planning stage**

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

**Travel preferences**

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

- Destination types:
  - Country/village: **22%**
  - Large city: **57%**
  - Small/mid-sized city/town: **35%**
  - Mountains or hills: **21%**
  - Coastline: **37%**

**Travel drivers**

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

**Travel attitudes**

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

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

Travel intentions

42% Intend to travel abroad for leisure*

Among leisure trip intenders:

37% consider Europe
10% consider Britain

Among Britain intenders:

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

Journey purpose

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>61%</td>
</tr>
<tr>
<td>Other leisure purposes</td>
<td>59%</td>
</tr>
<tr>
<td>Visit friends or relatives</td>
<td>14%</td>
</tr>
</tbody>
</table>

Planning stage

<table>
<thead>
<tr>
<th>Stage</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intend to travel</td>
<td>19%</td>
</tr>
<tr>
<td>Trip planned</td>
<td>38%</td>
</tr>
<tr>
<td>Destination chosen</td>
<td>39%</td>
</tr>
<tr>
<td>Trip booked</td>
<td>4%</td>
</tr>
</tbody>
</table>

Travel drivers

- Decrease in coronavirus cases at destination: 54%
- Receiving a Covid-19 vaccination: 48%
- Removal of quarantine policies in home country: 36%
- Removal of quarantine policies in destination country: 35%
- Stable political environment in destination country: 28%

Travel attitudes**

- Booking through a travel agent is a safer option at the moment: 78%
- I will be happy to take a pre-trip Covid-19 test if required: 72%
- I would be comfortable using public transport within the destination: 70%
- I will be intending to take fewer but longer holidays: 61%
- I will look for less crowded places to visit, even if I miss attractions: 61%
- Booking through a travel agent is a safer option at the moment: 61%

Travel preferences

- Top activities:
  - History and heritage: 43%
  - Visiting cultural attractions: 42%
  - Dining out: 39%
  - Iconic tourist attractions: 36%
  - Shopping: 36%

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

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

Travel intentions

72% Intend to travel abroad for leisure*

Among leisure trip intenders:
- 71% consider Europe
- 8% consider Britain

Among Britain intenders:
- 44% consider England
- 35% consider Scotland
- 18% consider London
- 13% consider Wales

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

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

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

Travel attitudes**
- Booking through a travel agent is a safer option at the moment 71%
- I will leave booking until later/last minute 70%
- I will travel internationally as soon as I can after I get the vaccine 66%
- I will look for less crowded places to visit, even if I miss attractions 65%
- Booking through a travel agent is a safer option at the moment 56%

Travel preferences

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

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

Travel intentions

53% Intend to travel abroad for leisure*

76% consider Europe

14% consider Britain

Among leisure trip intenders:

60% consider England

28% consider Scotland

28% consider London

10% consider Wales

Among Britain intenders:

60% consider England

28% consider Scotland

28% consider London

10% consider Wales

Journey purpose

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

Planning stage

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

Travel drivers

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

Travel attitudes**

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

Top activities

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

Destination types

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

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

Travel intentions

83% Intend to travel abroad for leisure*

Among leisure trip intenders:

- 53% consider Europe
- 2% consider Britain

Among Britain intenders:

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

Journey purpose

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Intended</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure purposes</td>
<td>84%</td>
</tr>
<tr>
<td>Visit friends or relatives</td>
<td>20%</td>
</tr>
</tbody>
</table>

Planning stage

<table>
<thead>
<tr>
<th>Planning stage</th>
<th>Intend to travel</th>
<th>Trip planned</th>
<th>Destination chosen</th>
<th>Trip booked</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>11%</td>
<td>46%</td>
<td>40%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Travel preferences

Top activities

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

Destination types

- Country/village: 13%
- Large city: 39%
- Small/mid-sized city/town: 25%
- Mountains or hills: 24%
- Will roam around: 56%
- Coastline: 50%

Travel drivers

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

Travel attitudes**

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

* (% definitely & probably) in the next 12 months
**% completely & somewhat agree
Saudi Arabia Market Summary

**Travel intentions**

- 85% Intend to travel abroad for leisure* (85% definitely & probably)
- 33% consider Europe
- 7% consider Britain
- Among leisure trip intenders:
  - 33% consider Europe
  - 7% consider Britain
- Among Britain intenders:
  - 58% consider England
  - 19% consider Scotland
  - 17% consider London
  - 12% consider Wales

**Journey purpose**

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

**Planning stage**

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

**Travel preferences**

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

**Destination types**

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

**Travel drivers**

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

**Travel attitudes**

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

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree
South Korea Market Summary

**Travel intentions**

- 56% intend to travel abroad for leisure*
- Among leisure trip intenders:
  - 39% consider Europe
  - 11% consider Britain
- Among Britain intenders:
  - 64% consider England
  - 35% consider Scotland
  - 23% consider London
  - 14% consider Wales

**Journey purpose**

- Holiday: 94%
- Other leisure purposes: 22%
- Visit friends or relatives: 16%

**Planning stage**

- Intend to travel: 26%
- Trip planned: 45%
- Destination chosen: 28%
- Trip booked: 1%

**Travel preferences**

- Top activities:
  - Iconic tourist attractions: 46%
  - History and heritage: 46%
  - Visiting cultural attractions: 45%
  - Dining out: 42%
  - Outdoor nature activities: 39%

- Destination types:
  - 23% Country/village
  - 52% Large city
  - 54% Will roam around
  - 19% Mountains or hills
  - 32% Small/mid-sized city/town
  - 43% Coastline

**Travel drivers**

- Receiving a Covid-19 vaccination: 60%
- Decrease in coronavirus cases at destination: 45%
- High proportion of destination population being vaccinated: 38%
- Hygiene & safety protocols in place at destination: 35%
- Removal of quarantine policies in destination country: 28%

**Travel attitudes**

- I would be happy to take a pre-trip covid-19 test if required: 86%
- I will think more about sustainability and the environmental impact: 80%
- I will look for less crowded places to visit, even if I miss attractions: 74%
- I will favour local destinations instead of traveling internationally: 71%
- Booking through a travel agent is a safer option at the moment: 65%

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

Travel intentions

77% Intend to travel abroad for leisure*

Among leisure trip intenders:
77% consider Europe
14% consider Britain

Among Britain intenders:
51% consider England
50% consider Scotland
24% consider London
13% consider Wales

Journey purpose

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

Planning stage

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

Travel preferences

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

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

Travel drivers

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

Travel attitudes**

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

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

**Travel intentions**

67% Intend to travel abroad for leisure*

Among leisure trip intenders:
- 77% consider Europe
- 14% consider Britain

Among Britain intenders:
- 50% consider England
- 31% consider Scotland
- 25% consider London
- 8% consider Wales

**Journey purpose**
- Holiday: 84%
- Visit friends or relatives: 40%
- Other leisure purposes: 23%

**Planning stage**
- Intend to travel: 24%
- Trip planned: 34%
- Destination chosen: 35%
- Trip booked: 7%

**Travel preferences**

Top activities:
- Dining out: 52%
- History and heritage: 35%
- Outdoor nature activities: 35%
- Iconic tourist attractions: 32%
- Visiting cultural attractions: 30%

**Destination types**
- 26% Country/village
- 52% Large city
- 29% Small/mid-sized city/town
- 16% Mountains or hills
- 36% Coastline

**Travel drivers**
- Receiving a Covid-19 vaccination: 60%
- Money-back guarantee should I wish to cancel my trip: 45%
- Decrease in coronavirus cases at destination: 33%
- High proportion of destination population being vaccinated: 32%
- The introduction of a vaccine passport: 30%

**Travel attitudes**
- I will think more about sustainability and the environmental impact: 76%
- I will favour local destinations instead of traveling internationally: 59%
- I will travel internationally as soon as I can after I get the vaccine: 58%
- I will look for less crowded places to visit, even if I miss attractions: 55%
- I would be happy to take a pre-trip covid-19 test if required: 52%

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

Travel intentions

86% Intend to travel abroad for leisure*

Among leisure trip intenders:

38% consider Europe
7% consider Britain

Among Britain intenders:

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

Journey purpose

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

Planning stage

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

Travel preferences

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

Top activities

- 38% Country/village
- 46% Large city
- 51% Will roam around

Destination types

- 43% Mountains or hills
- 23% Small/mid-sized city/town
- 42% Coastline

Travel drivers

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

Travel attitudes**

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

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

Travel intentions

73% Intend to travel abroad for leisure*

Among leisure trip intenders:
- 52% consider Europe
- 13% consider Britain

Among Britain intenders:
- 63% consider England
- 36% consider Scotland
- 25% consider London
- 16% consider Wales

Journey purpose

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Intend to travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>85%</td>
</tr>
<tr>
<td>Visit friends or relatives</td>
<td>32%</td>
</tr>
<tr>
<td>Other leisure purposes</td>
<td>29%</td>
</tr>
</tbody>
</table>

Planning stage

<table>
<thead>
<tr>
<th>Stage</th>
<th>Intend to travel</th>
<th>Trip planned</th>
<th>Destination chosen</th>
<th>Trip booked</th>
</tr>
</thead>
<tbody>
<tr>
<td>26%</td>
<td>34%</td>
<td>25%</td>
<td>16%</td>
<td></td>
</tr>
</tbody>
</table>

Travel preferences

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

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

Travel drivers

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

Travel attitudes**

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

*(% definitely & probably) in the next 12 months
**% completely & somewhat agree
## Britain – Intenders Profile

### Travel intentions & Profile

<table>
<thead>
<tr>
<th>Channel booking</th>
<th>Total</th>
<th>Short Haul</th>
<th>Long Haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAs/TOs - Online</td>
<td>42%</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Travel comparison website</td>
<td>42%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Airline/train/ferry operator</td>
<td>42%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Destination website direct</td>
<td>38%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>Accomp. Provider direct</td>
<td>35%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>TAs/TOs - Storefront</td>
<td>30%</td>
<td>10%</td>
<td>10%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Travel Party</th>
<th>% intending to visit the UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>With your spouse/partner</td>
<td>72%</td>
</tr>
<tr>
<td>With children (under 18)</td>
<td>33%</td>
</tr>
<tr>
<td>With friends</td>
<td>27%</td>
</tr>
<tr>
<td>With adult family members</td>
<td>23%</td>
</tr>
<tr>
<td>Alone</td>
<td>23%</td>
</tr>
<tr>
<td>As part of a tour group</td>
<td>4%</td>
</tr>
</tbody>
</table>

### Age

<table>
<thead>
<tr>
<th>Age</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 35 y.o.</td>
<td>41%</td>
</tr>
<tr>
<td>35-54 y.o.</td>
<td>37%</td>
</tr>
<tr>
<td>55+ y.o.</td>
<td>22%</td>
</tr>
</tbody>
</table>

### Ever visited Britain

<table>
<thead>
<tr>
<th>Ever visited</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Several times</td>
<td>38%</td>
</tr>
<tr>
<td>Once</td>
<td>35%</td>
</tr>
<tr>
<td>No</td>
<td>28%</td>
</tr>
</tbody>
</table>

Note: TA/TO = Travel Agencies/Tour Operators

### Travel preferences

#### Top activities

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

#### Destination types

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

### Travel drivers

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

### Travel attitudes (% completely & somewhat agree)

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

Base: Respondents intending to visit the UK on your next international leisure trip (n = 1,360)
Britain – Intenders Profile (Short-haul)

### Travel intentions & Profile

- **% intending to visit the UK**
  - Short Haul: 17%
  - DK: 10%
  - FR: 6%
  - GE: 9%
  - IR: 15%
  - IT: 14%
  - NL: 14%
  - NO: 14%
  - RU: 2%
  - ES: 14%
  - SE: 14%

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

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

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

- **Ever visited Britain**
  - Several times: 44%
  - Once: 31%
  - No: 25%

### Travel drivers

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

### Travel attitudes (% completely & somewhat agree)

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

### Travel preferences

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

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK on your next international leisure trip (n = 524)
Britain – Intenders Profile (Long-haul)

Travel intentions & Profile

<table>
<thead>
<tr>
<th>Channel booking</th>
<th>Long Haul</th>
<th>AU</th>
<th>BR</th>
<th>CA</th>
<th>CN</th>
<th>IN</th>
<th>JP</th>
<th>SA</th>
<th>KR</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAs/TOs - Online</td>
<td>49%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Destination website direct</td>
<td>44%</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Travel comparison website</td>
<td>42%</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Airline/train/ferry operator</td>
<td>38%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TAs/TOs - Storefront</td>
<td>37%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Accom. Provider direct</td>
<td>35%</td>
<td></td>
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<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Travel Party</th>
<th>With your spouse/partner</th>
<th>77%</th>
<th>With children (under 18)</th>
<th>37%</th>
<th>With friends</th>
<th>22%</th>
<th>With adult family members</th>
<th>21%</th>
<th>Alone</th>
<th>20%</th>
<th>As part of a tour group</th>
<th>4%</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>&lt; 35 y.o.</th>
<th>35-54 y.o.</th>
<th>55+ y.o.</th>
</tr>
</thead>
<tbody>
<tr>
<td>41%</td>
<td>37%</td>
<td>22%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ever visited Britain</th>
<th>34%</th>
<th>37%</th>
<th>29%</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Travel drivers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receiving a COVID-19 vaccination</td>
</tr>
<tr>
<td>A significant decrease in coronavirus cases at destination</td>
</tr>
<tr>
<td>A high proportion of destination population being vaccinated</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Travel attitudes (% completely &amp; somewhat agree)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would be happy to take a pre-trip COVID-19 test if required</td>
</tr>
<tr>
<td>Booking through a travel agent is a safer option at the moment</td>
</tr>
<tr>
<td>I will think more about sustainability and the environmental impact</td>
</tr>
<tr>
<td>I will look for less crowded places, even if I miss attractions</td>
</tr>
<tr>
<td>I will travel internationally as soon as I can after I get the vaccine</td>
</tr>
</tbody>
</table>

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

**Travel intentions & Profile**

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Total Short Haul</th>
<th>Total Long Haul</th>
<th>Short Haul</th>
<th>Long Haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>AU</td>
<td>13%</td>
<td>11%</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>BR</td>
<td>10%</td>
<td>9%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>CA</td>
<td>13%</td>
<td>12%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>CN</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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<td>DK</td>
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<tr>
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<td>KR</td>
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<td>14%</td>
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<tr>
<td>UAE</td>
<td>8%</td>
<td>6%</td>
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<td>6%</td>
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<tr>
<td>USA</td>
<td>13%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
</tr>
</tbody>
</table>

**Channel booking**
- TAs/TOs - Online: 44%
- Travel comparison website: 43%
- Airline/train/ferry operator: 42%
- Accommodation provider direct: 39%
- Destination website direct: 35%
- TAs/TOs - Storefront: 31%

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

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

**Ever visited Britain**
- Several times: 39%
- Once: 35%
- No: 26%

**Travel preferences**

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

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

**Travel drivers**

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

**Travel attitudes (% completely & somewhat agree)**

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

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

Travel intentions & Profile

<table>
<thead>
<tr>
<th>Channel booking</th>
<th>% Intending to visit the UK</th>
<th>% of those intending to visit the UK who would consider visiting England</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airline/train/ferry operator</td>
<td>51%</td>
<td>27%</td>
</tr>
<tr>
<td>Travel comparison website</td>
<td>41%</td>
<td>27%</td>
</tr>
<tr>
<td>Accom. Provider direct</td>
<td>34%</td>
<td>36%</td>
</tr>
<tr>
<td>TAs/TOs - Online</td>
<td>33%</td>
<td>29%</td>
</tr>
<tr>
<td>Destination website direct</td>
<td>29%</td>
<td>27%</td>
</tr>
<tr>
<td>TAs/TOs - Storefront</td>
<td>18%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Travel Party

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

Age

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

Ever visited Britain

- Several times: 31%
- Once: 47%
- No: 22%

Travel drivers

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

Travel attitudes (% completely & somewhat agree)

- I would be comfortable using public transport within the destination: 60%
- I will leave booking until later/last minute: 55%
- I will look for less crowded places, even if I miss attractions: 66%
- I will travel internationally as soon as I can after I get the vaccine: 66%
- I would be happy to take a pre-trip COVID-19 test if required: 82%

Travel preferences

Top activities

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

Destination types

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

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

Travel intentions & Profile

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

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

Travel Party
- With your spouse/partner: 42%
- With children (under 18): 38%
- With friends: 32%
- With adult family members: 31%
- Alone: 21%
- As part of a tour group: 19%

Age
- < 35 y.o.: 34%
- 35-54 y.o.: 38%
- 55+ y.o.: 28%

Ever visited Britain
- Several times: 34%
- Once: 38%
- No: 28%

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

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

Travel preferences
- Top activities
  - History and heritage: 53%
  - Iconic tourist attractions: 50%
  - Visiting cultural attractions: 48%
  - Outdoor nature activities: 47%
  - Dining out: 44%

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

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

**Travel intentions & Profile**

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

**Channel booking**

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

**Age**

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

**Ever visited Britain**

- Several times: 39%
- Once: 32%
- Never: 29%

**Travel preferences**

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

**Destination types**

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

**Travel drivers**

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

**Travel attitudes (% completely & somewhat agree)**

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Scotland in the next 12 months (n = 636)
Scotland – Potential Visitors Profile (Short-haul)

**Travel intentions & Profile**

<table>
<thead>
<tr>
<th>Channel booking</th>
<th>Travel Party</th>
<th>Age</th>
<th>Ever visited Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel comparison website</td>
<td>46%</td>
<td>&lt; 35 y.o.</td>
<td>40%</td>
</tr>
<tr>
<td>Airline/train/ferry operator</td>
<td>45%</td>
<td>35-54 y.o.</td>
<td>34%</td>
</tr>
<tr>
<td>Accom. Provider direct</td>
<td>40%</td>
<td>55+ y.o.</td>
<td>26%</td>
</tr>
<tr>
<td>Destination website direct</td>
<td>37%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TAs/TOs - Online</td>
<td>35%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TAs/TOs - Storefront</td>
<td>20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>With your spouse/partner</td>
<td>69%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>With friends</td>
<td>37%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alone</td>
<td>30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>With children (under 18)</td>
<td>28%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>With adult family members</td>
<td>26%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>As part of a tour group</td>
<td>4%</td>
<td></td>
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</tr>
<tr>
<td>% intending to visit the UK</td>
<td>11%</td>
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<td></td>
</tr>
<tr>
<td>% of those intending to visit the UK who would consider visiting Scotland</td>
<td>10%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Channel booking**

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

**Travel Party**

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

**Age**

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

**Ever visited Britain**

- Several times: 40%
- Once: 34%
- No: 26%

**Travel preferences**

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

**Destination types**

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

**Travel drivers**

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

**Travel attitudes**

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

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

**Travel intentions & Profile**

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Long Haul</th>
<th>AU</th>
<th>BR</th>
<th>CA</th>
<th>CN</th>
<th>IN</th>
<th>JP</th>
<th>SA</th>
<th>KR</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>14%</td>
<td>8%</td>
<td>10%</td>
<td>10%</td>
<td>12%</td>
<td>6%</td>
<td>19%</td>
<td>16%</td>
<td>10%</td>
<td>6%</td>
<td>7%</td>
<td>11%</td>
</tr>
</tbody>
</table>

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

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

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

**Ever visited Britain**
- Several times: 39%
- Once: 32%
- No: 30%

**Travel preferences**

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

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

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

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

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

**Travel intentions & Profile**

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

| Channel booking | Total Short Long Haul | AU | BR | CA | CN | DK | FR | GE | IN | IR | IT | JP | NL | NO | RU | SA | KR | ES | SE | UAE | USA |
|------------------|-----------------------|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
| Destination website direct | 58% | 57% | 55% | 55% | 45% | 45% | | | | | | | | | | | | | | | |
| TAs/TOs - Online | | | | | | | | | | | | | | | | | | | | |
| Travel comparison website | | | | | | | | | | | | | | | | | | | | |
| Airline/train/ferry operator | | | | | | | | | | | | | | | | | | | | |
| Accom. Provider direct | | | | | | | | | | | | | | | | | | | | |
| TAs/TOs - Storefront | | | | | | | | | | | | | | | | | | | | |

**Travel Party**

- Travel with your spouse/partner: 79%
- Travel with children (under 18): 51%
- Travel with friends: 33%
- Travel with adult family members: 31%
- Travel alone: 24%
- Travel as part of a tour group: 7%

**Age**

- < 35 y.o.: 35%
- 35-54 y.o.: 51%
- 55+ y.o.: 14%

**Ever visited Britain**

- Several times: 45%
- Once: 29%
- No: 26%

**Travel preferences**

**Top activities**

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

**Destination types**

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

**Travel drivers**

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

**Travel attitudes (% completely & somewhat agree)**

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Wales in the next 12 months (n = 341)
Wales – Potential Visitors Profile (Short-haul)

Travel intentions & Profile

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

Channel booking

<table>
<thead>
<tr>
<th>Channel</th>
<th>Short Haul</th>
<th>DK</th>
<th>FR</th>
<th>GE</th>
<th>IR</th>
<th>IT</th>
<th>NL</th>
<th>NO</th>
<th>RU</th>
<th>ES</th>
<th>SE</th>
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<tbody>
<tr>
<td>Airline/train/ferry operator</td>
<td>63%</td>
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<tr>
<td>Travel comparison website</td>
<td>56%</td>
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<tr>
<td>Accom. Provider direct</td>
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<tr>
<td>Destination website direct</td>
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<tr>
<td>TAs/TOs - Online</td>
<td>38%</td>
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<tr>
<td>TAs/TOs - Storefront</td>
<td>27%</td>
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</tbody>
</table>

Travel Party

<table>
<thead>
<tr>
<th>Party</th>
<th>Short Haul</th>
<th>DK</th>
<th>FR</th>
<th>GE</th>
<th>IR</th>
<th>IT</th>
<th>NL</th>
<th>NO</th>
<th>RU</th>
<th>ES</th>
<th>SE</th>
</tr>
</thead>
<tbody>
<tr>
<td>With your spouse/partner</td>
<td>72%</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>With children (under 18)</td>
<td>45%</td>
<td></td>
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<td></td>
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<td></td>
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</tr>
<tr>
<td>With friends</td>
<td>41%</td>
<td></td>
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<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Alone</td>
<td>37%</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>With adult family members</td>
<td>28%</td>
<td></td>
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<tr>
<td>As part of a tour group</td>
<td>5%</td>
<td></td>
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<td></td>
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<td></td>
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</tr>
</tbody>
</table>

Age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Short Haul</th>
<th>DK</th>
<th>FR</th>
<th>GE</th>
<th>IR</th>
<th>IT</th>
<th>NL</th>
<th>NO</th>
<th>RU</th>
<th>ES</th>
<th>SE</th>
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</thead>
<tbody>
<tr>
<td>&lt; 35 y.o.</td>
<td>56%</td>
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<tr>
<td>35-54 y.o.</td>
<td>40%</td>
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<tr>
<td>55+ y.o.</td>
<td>12%</td>
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</tbody>
</table>

Ever visited Britain

<table>
<thead>
<tr>
<th>Ever visited</th>
<th>Short Haul</th>
<th>DK</th>
<th>FR</th>
<th>GE</th>
<th>IR</th>
<th>IT</th>
<th>NL</th>
<th>NO</th>
<th>RU</th>
<th>ES</th>
<th>SE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Several times</td>
<td>56%</td>
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<td></td>
<td></td>
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<tr>
<td>Once</td>
<td>27%</td>
<td></td>
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<td></td>
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<tr>
<td>No</td>
<td>17%</td>
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</tr>
</tbody>
</table>

Travel drivers

<table>
<thead>
<tr>
<th>Reason</th>
<th>DK</th>
<th>FR</th>
<th>GE</th>
<th>IR</th>
<th>IT</th>
<th>NL</th>
<th>NO</th>
<th>RU</th>
<th>ES</th>
<th>SE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receiving a COVID-19 vaccination</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Money-back guarantee should I wish to cancel my trip</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A high proportion of destination population being vaccinated</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A significant decrease in coronavirus cases at destination</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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</tbody>
</table>

Travel attitudes (% completely & somewhat agree)

<table>
<thead>
<tr>
<th>Attitude</th>
<th>DK</th>
<th>FR</th>
<th>GE</th>
<th>IR</th>
<th>IT</th>
<th>NL</th>
<th>NO</th>
<th>RU</th>
<th>ES</th>
<th>SE</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would be happy to take a pre-trip COVID-19 test if required</td>
<td></td>
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</tr>
<tr>
<td>I will travel internationally as soon as I can after I get the vaccine</td>
<td></td>
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<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>I will look for less crowded places, even if I miss attractions</td>
<td></td>
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</tr>
<tr>
<td>I will think more about sustainability and the environmental impact</td>
<td></td>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>I will favour local destinations in my home country</td>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

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

**Travel intentions & Profile**

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Long Haul</th>
<th>AU</th>
<th>BR</th>
<th>CA</th>
<th>CN</th>
<th>IN</th>
<th>JP</th>
<th>SA</th>
<th>KR</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>14%</td>
<td>10%</td>
<td>10%</td>
<td>12%</td>
<td>32%</td>
<td>11%</td>
<td>16%</td>
<td>10%</td>
<td>3%</td>
<td>11%</td>
<td>13%</td>
</tr>
</tbody>
</table>

**Channel booking**

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

**Travel Party**

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

**Age**

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

**Ever visited Britain**

- Several times: 42%
- Once: 30%
- No: 29%

**Travel preferences**

**Top activities**

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

**Destination types**

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

**Travel drivers**

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

**Travel attitudes (% completely & somewhat agree)**

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

*Note: TA/TO = Travel Agencies/Tour Operators*

*Base: Respondents intending to visit the UK who would consider visiting Wales in the next 12 months (n = 263)
London – Potential Visitors Profile

**Travel intentions & Profile**

- **% intending to visit the UK**
  - Total: 13%
  - Short Haul: 5%
  - Long Haul: 11%
  - AU: 4%
  - BR: 10%
  - CA: 14%
  - CN: 10%
  - DK: 9%
  - FR: 6%
  - GE: 3%
  - IN: 5%
  - IR: 16%
  - IT: 4%
  - JP: 3%
  - NL: 6%
  - NO: 12%
  - RU: 3%
  - SA: 3%
  - KR: 10%
  - ES: 14%
  - SE: 6%
  - UAE: 13%
  - USA: 14%

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

**Channel booking**

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

**Travel Party**

- With your spouse/partner: 43%
- With children (under 18): 33%
- With friends: 29%
- With adult family members: 25%
- Alone: 25%
- As part of a tour group: 4%

**Travel drivers**

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

**Travel attitudes (% completely & somewhat agree )**

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

**Travel preferences**

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

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 543)
**London – Potential Visitors Profile (Short-haul)**

### Travel preferences

<table>
<thead>
<tr>
<th>Top activities</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iconic tourist attractions</td>
<td>54%</td>
</tr>
<tr>
<td>Visiting cultural attractions</td>
<td>52%</td>
</tr>
<tr>
<td>History and heritage</td>
<td>51%</td>
</tr>
<tr>
<td>Dining out</td>
<td>50%</td>
</tr>
<tr>
<td>Shopping</td>
<td>39%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel chain</td>
<td>76%</td>
</tr>
<tr>
<td>Bed and breakfast</td>
<td>46%</td>
</tr>
<tr>
<td>Self catered property</td>
<td>43%</td>
</tr>
<tr>
<td>Boutique hotel</td>
<td>41%</td>
</tr>
<tr>
<td>Friend’s/family house as a free guest</td>
<td>36%</td>
</tr>
</tbody>
</table>

### Channel booking

- Airline/train/ferry operator: 49%
- Travel comparison website: 46%
- Accom. Provider direct: 36%
- TAs/TOs - Online: 35%
- Destination website direct: 31%
- TAs/TOs - Storefront: 19%

### Travel Party

- With your spouse/partner: 65%
- With friends: 42%
- With adult family members: 31%
- Alone: 30%
- With children (under 18): 27%
- As part of a tour group: 5%

### Age

- < 35 y.o.: 43%
- 35-54 y.o.: 36%
- 55+ y.o.: 21%

### Ever visited Britain

- Several times: 42%
- Once: 31%
- No: 27%

### Travel drivers

- Receiving a COVID-19 vaccination: 51%
- Money-back guarantee should I wish to cancel my trip: 48%
- A significant decrease in coronavirus cases at destination: 38%
- Removal of quarantine policies in destination country: 36%
- A high proportion of destination population being vaccinated: 33%

### Travel attitudes (% completely & somewhat agree)

- I would be happy to take a pre-trip COVID-19 test if required: 83%
- I will look for less crowded places, even if I miss attractions: 68%
- I will leave booking until later/last minute: 67%
- I will travel internationally as soon as I can after I get the vaccine: 65%
- I will think more about sustainability and the environmental impact: 59%

---

Note: TA/TO = Travel Agencies/Tour Operators

Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 198)
London – Potential Visitors Profile (Long-haul)

**Travel intentions & Profile**

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

<table>
<thead>
<tr>
<th>Long-Haul</th>
<th>AU</th>
<th>BR</th>
<th>CA</th>
<th>CN</th>
<th>IN</th>
<th>JP</th>
<th>SA</th>
<th>KR</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>14%</td>
<td>6%</td>
<td>10%</td>
<td>10%</td>
<td>12%</td>
<td>3%</td>
<td>14%</td>
<td>16%</td>
<td>6%</td>
<td>10%</td>
<td>12%</td>
</tr>
</tbody>
</table>

**Channel booking**

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

**Travel Party**

- With your spouse/partner: 43%
- With children (under 18): 37%
- With friends: 22%
- Alone: 22%
- With adult family members: 21%
- As part of a tour group: 3%

**Age**

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

**Ever visited Britain**

- Several times: 35%
- Once: 43%
- No: 21%

**Top activities**

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

**Accommodation**

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

**Travel drivers**

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

**Travel attitudes (% completely & somewhat agree)**

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

**Note:** TA/TO = Travel Agencies/Tour Operators

Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 345)
Trends: December 2020 vs March 2021

What conversion funnels measure

~ International travel consideration (*) +1%

~ Europe consideration +1%

~ Britain consideration +2%

(*) Would definitely, probably or maybe consider an international leisure trip for more than one night in the next 12 months

Base: All Respondents (n = 11,000)
Conversion Funnel summary

**Market: All**

- **All Respondents**: 100%
- **International Leisure Trip Intenders (**)**: 88%
- **European Leisure Trip Intenders**: 57%
- **Britain Leisure Trip Intenders**: 12%

**What conversion funnels measure**

- ~International travel consideration (**)~
- ~Europe consideration~
- ~Britain consideration~

**Market: long-haul**

- **All Respondents**: 100%
- **International Leisure**: 86%
- **European Leisure Trip Intenders**: 45%
- **Britain Leisure Trip Intenders**: 14%

**Market: short-haul**

- **All Respondents**: 100%
- **International Leisure Trip Intenders**: 90%
- **European Leisure Trip Intenders**: 71%
- **Britain Leisure Trip Intenders**: 10%

(*) 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

Long-haul markets

**Market: Australia**
- All Respondents: 100%
  - International Leisure Trip Intenders: 80%
  - European Leisure Trip Intenders: 29%
  - Britain Leisure Trip Intenders: 10%

**Market: Brazil**
- All Respondents: 100%
  - International Leisure Trip Intenders: 94%
  - European Leisure Trip Intenders: 62%
  - Britain Leisure Trip Intenders: 10%

**Market: Canada**
- All Respondents: 100%
  - International Leisure Trip Intenders: 85%
  - European Leisure Trip Intenders: 45%
  - Britain Leisure Trip Intenders: 12%

**Market: China**
- All Respondents: 100%
  - International Leisure Trip Intenders: 88%
  - European Leisure Trip Intenders: 58%
  - Britain Leisure Trip Intenders: 30%

**Market: India**
- All Respondents: 100%
  - International Leisure Trip Intenders: 97%
  - European Leisure Trip Intenders: 45%
  - Britain Leisure Trip Intenders: 16%

**Market: Japan**
- All Respondents: 100%
  - International Leisure Trip Intenders: 56%
  - European Leisure Trip Intenders: 35%
  - Britain Leisure Trip Intenders: 10%

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

Long-haul markets

**Market: Saudi Arabia**
- All Respondents: 100%
- International Leisure Trip Intenders: 95%
- European Leisure Trip Intenders: 33%
- Britain Leisure Trip Intenders: 7%

**Market: South Korea**
- All Respondents: 100%
- International Leisure Trip Intenders: 77%
- European Leisure Trip Intenders: 38%
- Britain Leisure Trip Intenders: 11%

**Market: UAE**
- All Respondents: 100%
- International Leisure Trip Intenders: 96%
- European Leisure Trip Intenders: 37%
- Britain Leisure Trip Intenders: 7%

**Market: USA**
- All Respondents: 100%
- International Leisure Trip Intenders: 89%
- European Leisure Trip Intenders: 52%
- Britain Leisure Trip Intenders: 13%

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

Short-haul markets

**Market: Denmark**
- All Respondents: 100%
- International Leisure Trip Intenders: 87%
- European Leisure Trip Intenders: 74%
- Britain Leisure Trip Intenders: 9%

**Market: France**
- All Respondents: 100%
- International Leisure Trip Intenders: 93%
- European Leisure Trip Intenders: 66%
- Britain Leisure Trip Intenders: 6%

**Market: Germany**
- All Respondents: 100%
- International Leisure Trip Intenders: 90%
- European Leisure Trip Intenders: 70%
- Britain Leisure Trip Intenders: 8%

**Market: Irish Republic**
- All Respondents: 100%
- International Leisure Trip Intenders: 88%
- European Leisure Trip Intenders: 76%
- Britain Leisure Trip Intenders: 14%

**Market: Italy**
- All Respondents: 100%
- International Leisure Trip Intenders: 95%
- European Leisure Trip Intenders: 70%
- Britain Leisure Trip Intenders: 14%

**Market: Netherlands**
- All Respondents: 100%
- International Leisure Trip Intenders: 90%
- European Leisure Trip Intenders: 70%
- Britain Leisure Trip Intenders: 8%

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

Short-haul markets

Market: Norway

- All Respondants: 100%
- International Leisure Trip Intenders: 80%
- European Leisure Trip Intenders: 75%
- Britain Leisure Trip Intenders: 13%

Market: Russia

- All Respondants: 100%
- International Leisure Trip Intenders: 96%
- European Leisure Trip Intenders: 53%
- Britain Leisure Trip Intenders: 2%

Market: Spain

- All Respondants: 100%
- International Leisure Trip Intenders: 93%
- European Leisure Trip Intenders: 76%
- Britain Leisure Trip Intenders: 14%

Market: Sweden

- All Respondants: 100%
- International Leisure Trip Intenders: 86%
- European Leisure Trip Intenders: 77%
- Britain Leisure Trip Intenders: 14%

Q: / Base: All Respondents (n = 11,000)
**Britain Intenders – Travel Horizons**

<table>
<thead>
<tr>
<th></th>
<th>Short-haul (n = 524)</th>
<th>Long-haul (n = 836)</th>
<th>Total (n = 1360)</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 21-June 21</td>
<td>8%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Later in 2021</td>
<td>48%</td>
<td>52%</td>
<td>50%</td>
</tr>
<tr>
<td>Later in 2022</td>
<td>26%</td>
<td>21%</td>
<td>23%</td>
</tr>
<tr>
<td>Later in 2023 and beyond</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Base: Respondents who plan on taking a leisure trip in Britain (n = 1360)
Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10804)
Travel horizon for next international leisure trip (LH)

Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in 2021 (n = 10804)
Sample description (SH)

<table>
<thead>
<tr>
<th>Sample Description</th>
<th>Total</th>
<th>Short-haul</th>
<th>Denmark</th>
<th>France</th>
<th>Germany</th>
<th>Irish Republic</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Russia</th>
<th>Spain</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Male</strong></td>
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<td>52%</td>
<td>50%</td>
<td>48%</td>
<td>49%</td>
<td>51%</td>
<td>49%</td>
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<td>48%</td>
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<td>55%</td>
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<td>47%</td>
<td>52%</td>
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Base: All Respondents (n = 11,000)
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