Inbound COVID-19 Sentiment Tracker

Wave 3 – September 2021
Fieldwork: 23rd August – 6th September 2021

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

Bristol Balloon Fiesta: Destination Bristol ©Gary Newman
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Methodology

Survey specifications

• **Markets surveyed**: Australia, Canada, China, France, Germany, India, Irish Republic, Italy, Netherlands, Norway, Spain, Sweden, USA

• **Target**: people who have travelled abroad at least once in the past 3 years

• **Fieldwork period (Wave 3)**: 23rd August – 6th September 2021

• **Data collection**: online interviews on Access Panel; Quotas on gender, age and regions, same questionnaire basis as for wave 1 and 2 with some additional questions

• **Sample Size**: 7,500 interviews. Trended data is calculated at a constant perimeter (based on the 13 markets surveyed in Wave 1 and 2. You can read reports from the first two waves on vb.org: Wave 1 report / Wave 2 report.

• **Note**: international surveys involve a cultural factor in the way respondents express their opinion. Commonly, Indian and Chinese respondents tend to be very positive in their answers compared to European markets. It is advised to take account of this cultural factors in cross-market analysis, particularly between long-haul and short-haul results.

### Sample Sizes:

<table>
<thead>
<tr>
<th>Market</th>
<th>Sample Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
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</tr>
<tr>
<td>Germany</td>
<td>500</td>
</tr>
<tr>
<td>Irish Republic</td>
<td>500</td>
</tr>
<tr>
<td>Italy</td>
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</tr>
<tr>
<td>Netherlands</td>
<td>500</td>
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<td>Norway</td>
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<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>4,000</strong></td>
</tr>
<tr>
<td>Australia</td>
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</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>USA</td>
<td>1,000</td>
</tr>
<tr>
<td><strong>Total Long-haul</strong></td>
<td><strong>3,500</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>7,500</strong></td>
</tr>
</tbody>
</table>

### Useful definitions:

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

### General guidance on statistical confidence level:

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<th>300</th>
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<th>1,000</th>
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</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>
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</tr>
</tbody>
</table>
Survey context and interpretation

Understanding consumer sentiment towards international travel during the COVID-19 pandemic:

• VisitBritain, Visit Wales, VisitScotland and London & Partners commissioned research to understand international consumer sentiment towards international travel, in order to inform their destination planning during the challenging era of the COVID-19 pandemic.

• The research aims at scoping the overall travel sentiment and attitudes, mapping triggers of travel, measuring the competitive position of Britain’s destinations in consumers’ minds and mapping drivers of a visit to Britain. Data must help stakeholders prioritise marketing efforts in 2021.

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

Interpreting the survey results in a changing travel context

• Consumers’ sentiments are in essence subject to the context evolution and particularly the sanitary environment impacting travel restrictions and effective choices of destinations available to consumers, which are changing almost every week. Travel intent should therefore be interpreted more as travel “desire” and not actual booking behaviours. This is a study about people’s perception, travel intention and reassurances needed for future, rather than what they can do now or at the time they were surveyed.

• Based on the TCI-Travelsat Sentiment Tracker monitoring e-reputation of travel and destinations(*), the reputation of Britain in social conversations was still below the European average but had been on a stable/positive trend for months, with no major detrimental UK-related stories to be reported and a mixed sentiment driven by positive drivers (UK secret spots, back to normal life, events and festivals, golf tourism, van life trips…) and negative drivers (paying PCR tests, increase in COVID cases, airport “chaos”, lack of qualified tourism staff to meet the demand…) Please see the next slide to see this illustrated.

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

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

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

Fieldwork
Wave 1
Fieldwork
Wave 2
Fieldwork
Wave 3

Covid crisis start


<table>
<thead>
<tr>
<th>Country</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
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<tbody>
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<td>-10</td>
<td>0</td>
<td>19</td>
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<td>25</td>
</tr>
<tr>
<td>Italy</td>
<td>46</td>
<td>53</td>
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<td>61</td>
<td>54</td>
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<tr>
<td>Mexico</td>
<td>-17</td>
<td>-5</td>
<td>12</td>
<td>32</td>
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<td>Thailand</td>
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<td>25</td>
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<td>27</td>
<td>19</td>
<td>9</td>
</tr>
<tr>
<td>World</td>
<td>17</td>
<td>30</td>
<td>30</td>
<td>32</td>
<td>35</td>
<td>41</td>
<td>36</td>
<td>33</td>
</tr>
</tbody>
</table>

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

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

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

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

Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: All respondents (n = 7,500)
Overall travel intentions
Overall travel intentions: summary

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

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

- 4 in 10 respondents in Short-Haul (SH) markets envisage a trip by the end of the year. 2022 spring and summer are also in mind. Long-Haul (LH) markets’ travel intentions for 2021 focus on the festive period and then span over the first quarter of 2022. The horizon is not yet defined for a significant part of consumers in the Nordics and Australia, reflecting a more careful travel attitude in these countries.

- Propensity to travel in the very short term remains higher among young potential travellers. Older demographics show high interest in holidaying in Spring 2022. Vaccination accelerates motivations for travelling by the end of 2021, but while a very large majority of respondents are vaccinated, non-vaccination is no longer a major obstacle to envisage short to mid-term trip planning.

- While vaccination and other health and hygiene factors in destination countries still act as key activators for planning a trip, the attitudinal shift from health-centric to money-centric is tangible: money-back guarantee is now mentioned as #1 activator in 10 out of 13 markets surveyed, and attention paid to attractive deals grows. Insurance for COVID-19 travel is also often mentioned as a trigger.

- The portrayal of a more responsible traveller is confirmed, still keen to travel for discovering new / less crowded places in a safer and more sustainable way. With vaccination, the willingness to take pre-trip testing remains high but has slightly decreased.

- Last-minute booking is still widely considered to accommodate the market uncertainties, but less than before.

- Respect of COVID-19 rules by other people, access to healthcare and change in quarantine requirements are the most frequent concerns among those wishing to go to Britain. This should encourage all players of the destination ecosystem to provide the most accurate and updated information for international trip planners looking for reinsurance.
Previously hesitant consumers now express firm desires for travelling: today, half of respondents definitely plan a trip abroad in the coming 12 months. While bookings have increased, the choice of the destination remains open among other planners.

Trend calculated at constant perimeter (13 markets consolidated)
Travel consideration for an international leisure trip

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

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

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

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 the next 12 months (n = 4,664)
Impact of financial situation on propensity to travel

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

Leisure travel intention (% Definitely + Probably)

<table>
<thead>
<tr>
<th></th>
<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>Spain</th>
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<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
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<td>83%</td>
<td>83%</td>
<td>83%</td>
<td>83%</td>
<td>89%</td>
<td>92%</td>
<td>84%</td>
<td>97%</td>
<td>84%</td>
<td>91%</td>
<td>84%</td>
<td>74%</td>
<td>88%</td>
<td>77%</td>
<td>82%</td>
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<tr>
<td>Uncertain</td>
<td>75%</td>
<td>78%</td>
<td>71%</td>
<td>78%</td>
<td>71%</td>
<td>74%</td>
<td>82%</td>
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<td>59%</td>
<td>77%</td>
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<tr>
<td>Impacted negatively</td>
<td>73%</td>
<td>71%</td>
<td>78%</td>
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<td>N/A</td>
<td>N/A</td>
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</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 = 7,500)
Impact of vaccination on propensity to travel

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

Leisure travel intention (% Definitely + Probably)

<table>
<thead>
<tr>
<th></th>
<th>SH</th>
<th>LH</th>
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</thead>
<tbody>
<tr>
<td>Yes – I have been fully vaccinated</td>
<td>81%</td>
<td>80%</td>
</tr>
<tr>
<td>Yes – I have been partially vaccinated (i.e. received one of two doses)</td>
<td>77%</td>
<td>83%</td>
</tr>
<tr>
<td>No – I haven't had the opportunity yet but will when I can</td>
<td>79%</td>
<td>77%</td>
</tr>
<tr>
<td>No – I will not be taking a vaccine</td>
<td>79%</td>
<td>69%</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 = 7,500)
Trip planning stage per market

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

Q8: Which of the following best describes where you stand with your plans for your next international leisure trip?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7,450)

- 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
Trip planning stage among Intenders to Europe

Among leisure travel intenders considering Britain, only a very small minority have booked. There is still a ‘wait and see’ attitude with many considering a wider set of destinations.

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

Base: Europe Int. (n = 4,664) – Britain Int. (n = 991) – England potential visitors (n = 4,083) – Scotland potential visitors (n = 2,936) – Wales potential visitors (n = 1,324) – London potential visitors (n = 1,619) – Large City Int. (n = 3,573)
Travel horizon for next international leisure trip

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

Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7,450)

<table>
<thead>
<tr>
<th>Date</th>
<th>Total</th>
<th>SH</th>
<th>LH</th>
<th>Australia</th>
<th>Canada</th>
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Age impact on travel horizon

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

Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7,450)
Vaccination impact on travel horizon

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

Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7,450)
Beyond holiday motivations, the need for reconnection with friends and relatives is still expressed by a third of respondents on average and half of them in Irish Republic, India and Australia. Demand for a holiday trip has increased in most markets.

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

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

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

- I will look for less crowded places to visit, even if it means “missing” must-see attractions. 73% 70% 71%
- I will leave booking until later/last minute 64%
- I will favour local destinations in my home country instead of traveling 59% 60% 61%
- I will be intending to take fewer but longer holidays 54% 56% 58%
- I would be comfortable using public transport within the destination 51% 53% 54%
- I will favor destinations I have been before rather than new places 50%

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

- I would be happy to take a pre-trip covid-19 test should that be required before my next international trip, 82% 79%
- I will travel internationally as soon as I can after I get the vaccine, 64% 64% 62%
- I will think more about sustainability and the environmental impact when planning future holidays, 62% 64% 62%
- Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning, 62% 63% 63%
- Due to covid-restrictions, I will have more annual leave to use for holidays in 2021, 46% 46% 46%

Trend calculated at constant perimeter (13 markets consolidated)
Activators for an international leisure trip

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

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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 = 7,500)
Activators for a leisure trip to Britain are quite similar to the ones measured for international trips overall (including trends in COVID-19 cases), yet the ranking suggests a slightly higher relative weight given for deals and attractive offers (ranked 4th vs 6th).

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<td>A significant decrease in coronavirus cases at destination</td>
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<td>22%</td>
<td>17%</td>
<td>22%</td>
<td>20%</td>
<td>17%</td>
<td>15%</td>
<td>25%</td>
<td>21%</td>
<td>11%</td>
<td>15%</td>
</tr>
<tr>
<td>Your Government's advice on international travel</td>
<td>16%</td>
<td>15%</td>
<td>18%</td>
<td>24%</td>
<td>17%</td>
<td>17%</td>
<td>9%</td>
<td>11%</td>
<td>22%</td>
<td>25%</td>
<td>11%</td>
<td>12%</td>
<td>25%</td>
<td>9%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Welcoming locals in destination country</td>
<td>14%</td>
<td>12%</td>
<td>16%</td>
<td>9%</td>
<td>11%</td>
<td>20%</td>
<td>15%</td>
<td>12%</td>
<td>21%</td>
<td>11%</td>
<td>12%</td>
<td>9%</td>
<td>15%</td>
<td>14%</td>
<td>8%</td>
<td>15%</td>
</tr>
<tr>
<td>Assurance that there will be a range of/enough things to do</td>
<td>14%</td>
<td>12%</td>
<td>15%</td>
<td>7%</td>
<td>11%</td>
<td>18%</td>
<td>20%</td>
<td>18%</td>
<td>19%</td>
<td>7%</td>
<td>9%</td>
<td>14%</td>
<td>6%</td>
<td>17%</td>
<td>8%</td>
<td>17%</td>
</tr>
<tr>
<td>Stable political environment in destination country</td>
<td>13%</td>
<td>10%</td>
<td>17%</td>
<td>7%</td>
<td>12%</td>
<td>25%</td>
<td>11%</td>
<td>14%</td>
<td>21%</td>
<td>7%</td>
<td>11%</td>
<td>8%</td>
<td>7%</td>
<td>13%</td>
<td>8%</td>
<td>15%</td>
</tr>
<tr>
<td>Voucher-back guarantee should I wish to cancel my trip</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
<td>12%</td>
<td>13%</td>
<td>9%</td>
<td>15%</td>
<td>13%</td>
<td>22%</td>
<td>13%</td>
<td>7%</td>
<td>20%</td>
<td>8%</td>
<td>15%</td>
</tr>
<tr>
<td>Official national hygiene label in accommodation and attractions in destination</td>
<td>12%</td>
<td>9%</td>
<td>16%</td>
<td>7%</td>
<td>9%</td>
<td>23%</td>
<td>8%</td>
<td>9%</td>
<td>27%</td>
<td>10%</td>
<td>10%</td>
<td>9%</td>
<td>6%</td>
<td>14%</td>
<td>5%</td>
<td>13%</td>
</tr>
<tr>
<td>Mandatory coronavirus testing at some point during the trip</td>
<td>11%</td>
<td>9%</td>
<td>14%</td>
<td>12%</td>
<td>11%</td>
<td>13%</td>
<td>8%</td>
<td>6%</td>
<td>21%</td>
<td>12%</td>
<td>14%</td>
<td>8%</td>
<td>6%</td>
<td>12%</td>
<td>6%</td>
<td>15%</td>
</tr>
<tr>
<td>Relaxation of visa requirements</td>
<td>4%</td>
<td>N/A</td>
<td>8%</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>25%</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>

Q20: What would make you more likely to travel to Britain (England, Scotland, Wales) for leisure in the next 12 months? (Multiple Answers)

Base: All respondents (n = 7,500)
Concerns about next international leisure trip

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

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

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

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

<table>
<thead>
<tr>
<th>Concern</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>
</tr>
</thead>
<tbody>
<tr>
<td>Other people not following COVID-19 policies and procedures during the journey and in destination</td>
<td>78%</td>
<td>85%</td>
<td>80%</td>
<td>80%</td>
<td>82%</td>
<td>78%</td>
<td>80%</td>
</tr>
<tr>
<td>Access to healthcare if I contract COVID-19 abroad</td>
<td>74%</td>
<td>82%</td>
<td>78%</td>
<td>79%</td>
<td>81%</td>
<td>75%</td>
<td>78%</td>
</tr>
<tr>
<td>Change in quarantine requirements on my return home</td>
<td>73%</td>
<td>80%</td>
<td>78%</td>
<td>78%</td>
<td>80%</td>
<td>75%</td>
<td>78%</td>
</tr>
<tr>
<td>Contracting COVID-19 during my journey/trip</td>
<td>69%</td>
<td>79%</td>
<td>74%</td>
<td>73%</td>
<td>78%</td>
<td>71%</td>
<td>74%</td>
</tr>
<tr>
<td>Extra admin involved with new policy/rules during the trip</td>
<td>69%</td>
<td>77%</td>
<td>74%</td>
<td>74%</td>
<td>77%</td>
<td>70%</td>
<td>74%</td>
</tr>
<tr>
<td>Limited / restricted experiences at destination</td>
<td>68%</td>
<td>74%</td>
<td>74%</td>
<td>73%</td>
<td>77%</td>
<td>73%</td>
<td>74%</td>
</tr>
<tr>
<td>Affordability of robust travel insurance (to cover COVID-19 related travel changes)</td>
<td>65%</td>
<td>75%</td>
<td>72%</td>
<td>71%</td>
<td>75%</td>
<td>68%</td>
<td>72%</td>
</tr>
<tr>
<td>Costs of mandatory COVID-19 tests</td>
<td>63%</td>
<td>71%</td>
<td>68%</td>
<td>69%</td>
<td>71%</td>
<td>64%</td>
<td>70%</td>
</tr>
<tr>
<td>Accessibility of affordable air fares</td>
<td>61%</td>
<td>70%</td>
<td>68%</td>
<td>68%</td>
<td>73%</td>
<td>65%</td>
<td>69%</td>
</tr>
<tr>
<td>Locals’ attitude towards international tourists</td>
<td>59%</td>
<td>68%</td>
<td>65%</td>
<td>65%</td>
<td>71%</td>
<td>61%</td>
<td>66%</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Statement</th>
<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 Rep.</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Spain</th>
<th>Sweden</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>79%</td>
<td>73%</td>
<td>86%</td>
<td>86%</td>
<td>80%</td>
<td>87%</td>
<td>74%</td>
<td>72%</td>
<td>92%</td>
<td>78%</td>
<td>82%</td>
<td>60%</td>
<td>74%</td>
<td>76%</td>
<td>64%</td>
<td>85%</td>
</tr>
<tr>
<td>I will look for less crowded places to visit, even if it means “missing” must-see attractions</td>
<td>71%</td>
<td>65%</td>
<td>77%</td>
<td>70%</td>
<td>69%</td>
<td>83%</td>
<td>58%</td>
<td>64%</td>
<td>91%</td>
<td>72%</td>
<td>72%</td>
<td>65%</td>
<td>62%</td>
<td>72%</td>
<td>57%</td>
<td>73%</td>
</tr>
<tr>
<td>I will think more about sustainability and the environmental impact when planning future holidays</td>
<td>64%</td>
<td>56%</td>
<td>73%</td>
<td>58%</td>
<td>57%</td>
<td>85%</td>
<td>60%</td>
<td>50%</td>
<td>95%</td>
<td>55%</td>
<td>67%</td>
<td>53%</td>
<td>43%</td>
<td>70%</td>
<td>52%</td>
<td>65%</td>
</tr>
<tr>
<td>Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning</td>
<td>63%</td>
<td>54%</td>
<td>74%</td>
<td>62%</td>
<td>65%</td>
<td>82%</td>
<td>58%</td>
<td>58%</td>
<td>88%</td>
<td>51%</td>
<td>58%</td>
<td>54%</td>
<td>51%</td>
<td>59%</td>
<td>59%</td>
<td>68%</td>
</tr>
<tr>
<td>I will travel internationally as soon as I can after I get the vaccine</td>
<td>62%</td>
<td>59%</td>
<td>66%</td>
<td>54%</td>
<td>51%</td>
<td>72%</td>
<td>71%</td>
<td>56%</td>
<td>88%</td>
<td>52%</td>
<td>70%</td>
<td>62%</td>
<td>52%</td>
<td>66%</td>
<td>40%</td>
<td>62%</td>
</tr>
<tr>
<td>I would be comfortable using public transport within the destination</td>
<td>61%</td>
<td>56%</td>
<td>68%</td>
<td>59%</td>
<td>52%</td>
<td>80%</td>
<td>67%</td>
<td>49%</td>
<td>79%</td>
<td>57%</td>
<td>51%</td>
<td>54%</td>
<td>59%</td>
<td>58%</td>
<td>51%</td>
<td>62%</td>
</tr>
<tr>
<td>I will favour local destinations in my home country instead of traveling internationally</td>
<td>61%</td>
<td>54%</td>
<td>69%</td>
<td>69%</td>
<td>65%</td>
<td>73%</td>
<td>54%</td>
<td>51%</td>
<td>75%</td>
<td>56%</td>
<td>51%</td>
<td>45%</td>
<td>51%</td>
<td>72%</td>
<td>48%</td>
<td>64%</td>
</tr>
<tr>
<td>I will leave booking until later/last minute</td>
<td>58%</td>
<td>54%</td>
<td>63%</td>
<td>63%</td>
<td>52%</td>
<td>74%</td>
<td>58%</td>
<td>60%</td>
<td>72%</td>
<td>58%</td>
<td>53%</td>
<td>63%</td>
<td>43%</td>
<td>63%</td>
<td>35%</td>
<td>52%</td>
</tr>
<tr>
<td>I will be intending to take fewer but longer holidays</td>
<td>54%</td>
<td>41%</td>
<td>69%</td>
<td>58%</td>
<td>49%</td>
<td>82%</td>
<td>43%</td>
<td>33%</td>
<td>89%</td>
<td>50%</td>
<td>48%</td>
<td>38%</td>
<td>37%</td>
<td>50%</td>
<td>30%</td>
<td>61%</td>
</tr>
<tr>
<td>I will favour destinations I have been before rather than new places</td>
<td>52%</td>
<td>45%</td>
<td>60%</td>
<td>54%</td>
<td>48%</td>
<td>67%</td>
<td>38%</td>
<td>44%</td>
<td>75%</td>
<td>57%</td>
<td>38%</td>
<td>45%</td>
<td>52%</td>
<td>46%</td>
<td>40%</td>
<td>56%</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>32%</td>
<td>61%</td>
<td>52%</td>
<td>40%</td>
<td>76%</td>
<td>33%</td>
<td>26%</td>
<td>81%</td>
<td>38%</td>
<td>35%</td>
<td>38%</td>
<td>21%</td>
<td>42%</td>
<td>24%</td>
<td>52%</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 = 7,500)
### Attitudes to travel among intenders to Europe

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

<table>
<thead>
<tr>
<th>Statement</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>
</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>78%</td>
<td>84%</td>
<td>82%</td>
<td>82%</td>
<td>84%</td>
<td>81%</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>71%</td>
<td>75%</td>
<td>72%</td>
<td>73%</td>
<td>76%</td>
<td>67%</td>
<td>71%</td>
</tr>
<tr>
<td>I will think more about sustainability and the environmental impact when planning future holidays</td>
<td>64%</td>
<td>73%</td>
<td>69%</td>
<td>69%</td>
<td>74%</td>
<td>64%</td>
<td>69%</td>
</tr>
<tr>
<td>I will travel internationally as soon as I can after I get the vaccine</td>
<td>63%</td>
<td>65%</td>
<td>69%</td>
<td>65%</td>
<td>69%</td>
<td>65%</td>
<td>68%</td>
</tr>
<tr>
<td>I would be comfortable using public transport within the destination</td>
<td>62%</td>
<td>70%</td>
<td>69%</td>
<td>67%</td>
<td>69%</td>
<td>66%</td>
<td>69%</td>
</tr>
<tr>
<td>Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning</td>
<td>61%</td>
<td>66%</td>
<td>67%</td>
<td>67%</td>
<td>71%</td>
<td>60%</td>
<td>65%</td>
</tr>
<tr>
<td>I will favour local destinations in my home country instead of traveling</td>
<td>59%</td>
<td>64%</td>
<td>63%</td>
<td>63%</td>
<td>66%</td>
<td>57%</td>
<td>63%</td>
</tr>
<tr>
<td>I will leave booking until later/last minute</td>
<td>58%</td>
<td>61%</td>
<td>60%</td>
<td>62%</td>
<td>63%</td>
<td>55%</td>
<td>60%</td>
</tr>
<tr>
<td>I will favor destinations I have been before rather than new places</td>
<td>51%</td>
<td>54%</td>
<td>56%</td>
<td>51%</td>
<td>56%</td>
<td>49%</td>
<td>56%</td>
</tr>
<tr>
<td>I will be intending to take fewer but longer holidays</td>
<td>51%</td>
<td>60%</td>
<td>62%</td>
<td>59%</td>
<td>67%</td>
<td>55%</td>
<td>61%</td>
</tr>
<tr>
<td>Due to covid-restrictions, I will have more annual leave to use for holidays in 2021</td>
<td>43%</td>
<td>53%</td>
<td>54%</td>
<td>51%</td>
<td>60%</td>
<td>46%</td>
<td>53%</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 = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)
Destination Planning
Destination planning: summary

• Europe reinforces its pole position at the top of regions envisaged among trip planners.

• Britain, like most large destinations in Europe, is considered less while smaller destinations are driving more interest, yet it now rivals Italy and Spain and surpasses Germany significantly.

• The COVID-19 safety image has continued to improve for all British destinations, with 2 out of 3 respondents now rating the destination as COVID-19 safe compared to a minority having this opinion in December 2020.

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

• In SH markets, England would be the top nation on the list for a potential visit to Britain, but Scotland and Wales are also well considered, particularly among Germans, Italians and Spaniards. London would be considered by nearly 1 in 2 potential visitors to England. For LH prospects, a possible trip to Britain would be to England first but not exclusively, showing open attitude to visiting multiple destinations across Britain, beyond iconic places.

• Flight remains a confident transport option while ferry and tunnel are equally considered in the closest markets. LH markets would feel comfortable using all types of transportation means to get to Britain including Eurostar/Train as part of a trip involving multiple countries.

• The overall trust level for public and collective transportation means is confirmed and should encourage exploring rural and urban environments as well as planning multiple destinations within Britain.

• The use of expert intermediaries still is reassuring to consumers in the current uncertain travel scenario. Official destination websites, transport and accommodation providers play a significant role in the booking process across most markets, again confirming the importance of reassurance and trust.
Europe reinforces its pole position on top of regions envisaged among trip planners. Britain has lost 1.4 points of intention vs March 2021 but has simultaneously improved its competitive position compared to other large destinations in Europe, now rivalling Italy and Spain. The competitive gap vs Germany is also higher (+3 points vs 0.2 points in December 2020).

**Destinations envisaged**

Europe 61%  
North America 19%  
Asia 22%  
Australia/Oceania 14%  
South/Central America/Caribbean 11%  
Middle East 6%  
Africa 6%  

December 20  March 21  August 21

**European destinations envisaged (TOP 5)**

- **France** 15.5% 15.2% 15.5%
- **Italy** 13.4% 14.3% 13.4%
- **Spain** 13.3% 15.2% 13.1%
- **Britain** 12.9% 14.7% 13.3%
- **Germany** 12.7% 12.3% 10.3%

December 20  March 21  August 21

Trend calculated at constant perimeter (13 markets consolidated)
In SH markets, Britain has gained consideration shares in the Republic of Ireland, France, the Netherlands and Italy. Like other large destinations (France, Germany, Italy...), Britain has lost some individuals wishing to travel from China and North America but has gained more from Australia and India.

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<tr>
<th>Destination</th>
<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>Spain</th>
<th>Sweden</th>
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</tr>
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<td>-0.8%</td>
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<td>-2.0%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Turkey</td>
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</tr>
<tr>
<td>Spain</td>
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<td></td>
</tr>
<tr>
<td>Sweden</td>
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<td></td>
</tr>
<tr>
<td>Switzerland</td>
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<td>0.0%</td>
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<td>1.0%</td>
<td>-1.9%</td>
<td>-0.7%</td>
<td>0.6%</td>
<td>0.4%</td>
<td>-2.2%</td>
<td>-0.2%</td>
<td>-0.4%</td>
<td>-2.2%</td>
<td>-0.3%</td>
</tr>
</tbody>
</table>

Q10. To which destination(s) in Europe in particular? (Multiple Answers - among leisure trip intenders)
The COVID-19 perception of safety has continued widely improving for all British destinations, with 2 out 3 respondents now rating the destination as COVID-19 safe while they were a minority having this opinion in December 2020.

Perception of England COVID-19 sanitary safety
- Safe 45%
- Unsafe 43%
- Don’t know 11%

Perception of Scotland COVID-19 sanitary safety
- Safe 54%
- Unsafe 31%
- Don’t know 15%

Perception of Wales COVID-19 sanitary safety
- Safe 49%
- Unsafe 34%
- Don’t know 17%

Trend calculated at constant perimeter (13 markets consolidated)
Trends: March 2021 vs August 2021 (gap of %)

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

W3/W2 Evolution (+/-)

<table>
<thead>
<tr>
<th></th>
<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>
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<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Spain</th>
<th>Sweden</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>England</strong></td>
<td>7.5%</td>
<td>3.4%</td>
<td>12.3%</td>
<td>21.4%</td>
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</tr>
<tr>
<td><strong>Scotland</strong></td>
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<tr>
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<tr>
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</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 = 7,500)*
Regional destinations for a next international leisure trip

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Total</th>
<th>SH</th>
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<th>Canada</th>
<th>China</th>
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<tr>
<td>I don't know yet</td>
<td>6%</td>
<td>4%</td>
<td>7%</td>
<td>5%</td>
<td>5%</td>
<td>15%</td>
<td>5%</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>7%</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

Q9: Where do you plan to travel on your next international leisure trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7,450)
Britain has increased its competitive ranking in most SH markets surveyed except in Spain and Germany, now enjoying a position in the top 3 in Nordic markets after gaining 2 places in the ranking. The increased consideration in France is real yet probably still below pre-COVID levels.

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

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

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

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

**Short-haul markets**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>25%</td>
</tr>
<tr>
<td>France</td>
<td>25%</td>
</tr>
<tr>
<td>Spain</td>
<td>22%</td>
</tr>
<tr>
<td>Germany</td>
<td>19%</td>
</tr>
<tr>
<td>Greece</td>
<td>16%</td>
</tr>
<tr>
<td>Portugal</td>
<td>13%</td>
</tr>
<tr>
<td>Denmark</td>
<td>13%</td>
</tr>
<tr>
<td>Croatia</td>
<td>12%</td>
</tr>
<tr>
<td>Austria</td>
<td>11%</td>
</tr>
<tr>
<td>Belgium</td>
<td>10%</td>
</tr>
<tr>
<td>Sweden</td>
<td>9%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>9%</td>
</tr>
<tr>
<td>Norway</td>
<td>8%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>7%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>7%</td>
</tr>
</tbody>
</table>

**Long-haul markets**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>38%</td>
</tr>
<tr>
<td>Germany</td>
<td>26%</td>
</tr>
<tr>
<td>Italy</td>
<td>24%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>22%</td>
</tr>
<tr>
<td>Denmark</td>
<td>18%</td>
</tr>
<tr>
<td>Austria</td>
<td>16%</td>
</tr>
<tr>
<td>Belgium</td>
<td>16%</td>
</tr>
<tr>
<td>Finland</td>
<td>15%</td>
</tr>
<tr>
<td>Spain</td>
<td>15%</td>
</tr>
<tr>
<td>Greece</td>
<td>14%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>13%</td>
</tr>
<tr>
<td>Sweden</td>
<td>13%</td>
</tr>
<tr>
<td>Irish Republic</td>
<td>13%</td>
</tr>
<tr>
<td>Norway</td>
<td>12%</td>
</tr>
<tr>
<td>Croatia</td>
<td>11%</td>
</tr>
</tbody>
</table>

Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 991)
Impact of age and gender on propensity to consider Britain

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

### Intention to visit Britain (%)

<table>
<thead>
<tr>
<th>Gender</th>
<th>Age</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></td>
<td></td>
<td>18-34</td>
<td>35-54</td>
<td>55+</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>Male 14%</td>
<td>Female 13%</td>
<td>Less than 35 16%</td>
<td>From 35 to 54 13%</td>
<td>55 and over 10%</td>
</tr>
<tr>
<td></td>
<td>Male 11%</td>
<td>Female 12%</td>
<td>SH 15%</td>
<td>From 35 to 54 10%</td>
<td>55 and over 9%</td>
</tr>
<tr>
<td></td>
<td>Male 17%</td>
<td>Female 14%</td>
<td>LH 17%</td>
<td>From 35 to 54 17%</td>
<td>55 and over 11%</td>
</tr>
</tbody>
</table>

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

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

Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: Europe Int. (n = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)
Impact of vaccination on propensity to consider Britain

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

Q26. Have you had a COVID-19 vaccination?
Base: Europe Int. (n = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)
Propensity to consider Britain logically increases with past experiences of the destinations, however we measure an increase of intention among potential first-timers.

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

Base: Europe Int. (n = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)
### Reasons for not considering a trip in Britain (open end)

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Total</th>
<th>SH</th>
<th>LH</th>
</tr>
</thead>
<tbody>
<tr>
<td>No interest / not attracted</td>
<td>21%</td>
<td>22%</td>
<td>23%</td>
</tr>
<tr>
<td>High Covid-19 rate</td>
<td>20%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Prefer to travel elsewhere / other destinations</td>
<td>15%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Already been</td>
<td>10%</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>Brexit / Political situation</td>
<td>8%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Weather / temperature</td>
<td>8%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Too expensive / prices too high</td>
<td>5%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>I will first visit family / friends elsewhere</td>
<td>3%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Do not want to go there</td>
<td>3%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Planned trip but later / not for the moment</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Covid-19 related measures</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Too many uncertainties related to Covid-19</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Too far / Flight too long</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Visa procedures</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Border restrictions</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>UK Variant</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Transport: too complicated to get there</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>English cuisine</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Feeling of discrimination from Britain</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Change currency</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Don't speak English</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Left hand traffic</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

**Q11b. Why wouldn’t you consider a trip to Britain (England, Scotland, Wales) in the short term? (Open Question)**

**Base:** Respondents who responded “I wouldn’t consider a trip to Britain” at Q11a. (n = 922)
Destinations in Britain considered for a leisure trip

In SH markets, England would be the top nation on the list for a potential visit to Britain, but Scotland and Wales are also well considered, particularly among Germans, Italians and Spaniards. London would be considered by nearly 1 in 2 potential visitors to England. For LH prospects, a possible trip to Britain would be to England first but not exclusively, showing open attitude to visiting multiple destinations across Britain, beyond iconic places.

<table>
<thead>
<tr>
<th>Destination</th>
<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>Spain</th>
<th>Sweden</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>55%</td>
<td>49%</td>
<td>62%</td>
<td>64%</td>
<td>57%</td>
<td>50%</td>
<td>47%</td>
<td>38%</td>
<td>79%</td>
<td>58%</td>
<td>55%</td>
<td>48%</td>
<td>49%</td>
<td>49%</td>
<td>46%</td>
<td>66%</td>
</tr>
<tr>
<td>Scotland</td>
<td>39%</td>
<td>36%</td>
<td>43%</td>
<td>38%</td>
<td>37%</td>
<td>49%</td>
<td>38%</td>
<td>40%</td>
<td>52%</td>
<td>34%</td>
<td>47%</td>
<td>32%</td>
<td>25%</td>
<td>49%</td>
<td>25%</td>
<td>37%</td>
</tr>
<tr>
<td>Wales</td>
<td>18%</td>
<td>11%</td>
<td>25%</td>
<td>23%</td>
<td>16%</td>
<td>30%</td>
<td>14%</td>
<td>11%</td>
<td>31%</td>
<td>11%</td>
<td>14%</td>
<td>11%</td>
<td>8%</td>
<td>16%</td>
<td>6%</td>
<td>22%</td>
</tr>
<tr>
<td>I wouldn’t consider a trip to Britain</td>
<td>12%</td>
<td>8%</td>
<td>8%</td>
<td>16%</td>
<td>16%</td>
<td>3%</td>
<td>16%</td>
<td>22%</td>
<td>4%</td>
<td>13%</td>
<td>7%</td>
<td>19%</td>
<td>22%</td>
<td>8%</td>
<td>21%</td>
<td>8%</td>
</tr>
<tr>
<td>I don’t know yet</td>
<td>9%</td>
<td>8%</td>
<td>10%</td>
<td>6%</td>
<td>9%</td>
<td>18%</td>
<td>8%</td>
<td>8%</td>
<td>1%</td>
<td>5%</td>
<td>4%</td>
<td>10%</td>
<td>10%</td>
<td>6%</td>
<td>16%</td>
<td>8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Destination</th>
<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>Spain</th>
<th>Sweden</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>40%</td>
<td>46%</td>
<td>34%</td>
<td>45%</td>
<td>37%</td>
<td>30%</td>
<td>46%</td>
<td>47%</td>
<td>27%</td>
<td>42%</td>
<td>50%</td>
<td>41%</td>
<td>42%</td>
<td>52%</td>
<td>50%</td>
<td>34%</td>
</tr>
<tr>
<td>South East (e.g. Brighton, Oxford, Kent, Windsor)</td>
<td>31%</td>
<td>29%</td>
<td>33%</td>
<td>39%</td>
<td>34%</td>
<td>39%</td>
<td>35%</td>
<td>36%</td>
<td>32%</td>
<td>21%</td>
<td>35%</td>
<td>22%</td>
<td>23%</td>
<td>36%</td>
<td>23%</td>
<td>25%</td>
</tr>
<tr>
<td>East of England (e.g. Cambridge, Norfolk Broads, Norwich)</td>
<td>30%</td>
<td>21%</td>
<td>38%</td>
<td>34%</td>
<td>27%</td>
<td>55%</td>
<td>23%</td>
<td>20%</td>
<td>46%</td>
<td>12%</td>
<td>28%</td>
<td>20%</td>
<td>16%</td>
<td>31%</td>
<td>14%</td>
<td>26%</td>
</tr>
<tr>
<td>North West (e.g. Manchester, Liverpool, Lake District)</td>
<td>28%</td>
<td>24%</td>
<td>31%</td>
<td>29%</td>
<td>33%</td>
<td>31%</td>
<td>22%</td>
<td>26%</td>
<td>37%</td>
<td>26%</td>
<td>24%</td>
<td>20%</td>
<td>30%</td>
<td>28%</td>
<td>19%</td>
<td>28%</td>
</tr>
<tr>
<td>South West (e.g. Bristol, Bath, Devon, Cornwall)</td>
<td>21%</td>
<td>17%</td>
<td>24%</td>
<td>27%</td>
<td>22%</td>
<td>27%</td>
<td>12%</td>
<td>27%</td>
<td>24%</td>
<td>13%</td>
<td>21%</td>
<td>18%</td>
<td>16%</td>
<td>16%</td>
<td>14%</td>
<td>21%</td>
</tr>
<tr>
<td>East Midlands (e.g. Leicester, Derby, Peak District)</td>
<td>19%</td>
<td>14%</td>
<td>23%</td>
<td>20%</td>
<td>12%</td>
<td>31%</td>
<td>17%</td>
<td>18%</td>
<td>32%</td>
<td>10%</td>
<td>22%</td>
<td>14%</td>
<td>9%</td>
<td>15%</td>
<td>11%</td>
<td>17%</td>
</tr>
<tr>
<td>West Midlands (e.g. Birmingham, Stratford Upon Avon, Coventry)</td>
<td>17%</td>
<td>12%</td>
<td>21%</td>
<td>18%</td>
<td>17%</td>
<td>28%</td>
<td>13%</td>
<td>9%</td>
<td>26%</td>
<td>10%</td>
<td>16%</td>
<td>15%</td>
<td>10%</td>
<td>13%</td>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td>Yorkshire &amp; the Humber (e.g. Leeds, York, Yorkshire Dales)</td>
<td>16%</td>
<td>11%</td>
<td>20%</td>
<td>20%</td>
<td>18%</td>
<td>23%</td>
<td>10%</td>
<td>9%</td>
<td>26%</td>
<td>9%</td>
<td>18%</td>
<td>9%</td>
<td>7%</td>
<td>15%</td>
<td>7%</td>
<td>16%</td>
</tr>
<tr>
<td>North East (e.g. Newcastle, Durham)</td>
<td>14%</td>
<td>9%</td>
<td>18%</td>
<td>15%</td>
<td>11%</td>
<td>26%</td>
<td>10%</td>
<td>9%</td>
<td>20%</td>
<td>7%</td>
<td>11%</td>
<td>14%</td>
<td>5%</td>
<td>11%</td>
<td>7%</td>
<td>14%</td>
</tr>
<tr>
<td>I don’t know yet</td>
<td>11%</td>
<td>10%</td>
<td>12%</td>
<td>13%</td>
<td>16%</td>
<td>13%</td>
<td>12%</td>
<td>6%</td>
<td>4%</td>
<td>6%</td>
<td>8%</td>
<td>11%</td>
<td>14%</td>
<td>11%</td>
<td>17%</td>
<td>14%</td>
</tr>
</tbody>
</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 the next 12 months (n = 7,450)

Q12: Which destination(s) in England? (Multiple Answers)
Base: Respondents who have chosen England in Q11a (n = 4,083)
Comfort levels with transport to get to Britain

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

Q13: If you were to travel to Britain in the next 12 months, how comfortable would you feel using the following to get to Britain? (Multiple Answers)
Base: Respondents choosing either England, Scotland or Wales in Q11a (n = 5,862)

<table>
<thead>
<tr>
<th>(% Very + Quite comfortable</th>
<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>Spain</th>
<th>Sweden</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plane – via nonstop flight</td>
<td>89%</td>
<td>89%</td>
<td>89%</td>
<td>83%</td>
<td>88%</td>
<td>89%</td>
<td>89%</td>
<td>80%</td>
<td>95%</td>
<td>88%</td>
<td>91%</td>
<td>82%</td>
<td>91%</td>
<td>95%</td>
<td>91%</td>
<td>89%</td>
</tr>
<tr>
<td>Plane – via connecting flight</td>
<td>78%</td>
<td>74%</td>
<td>82%</td>
<td>81%</td>
<td>74%</td>
<td>75%</td>
<td>71%</td>
<td>67%</td>
<td>95%</td>
<td>70%</td>
<td>83%</td>
<td>76%</td>
<td>65%</td>
<td>79%</td>
<td>78%</td>
<td>86%</td>
</tr>
<tr>
<td>Own/rented vehicle – via Ferry</td>
<td>56%</td>
<td>54%</td>
<td>57%</td>
<td>50%</td>
<td>53%</td>
<td>57%</td>
<td>63%</td>
<td>59%</td>
<td>64%</td>
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<td>62%</td>
<td>56%</td>
<td>34%</td>
<td>45%</td>
<td>42%</td>
<td>57%</td>
</tr>
<tr>
<td>Own/rented vehicle – via Channel Tunnel</td>
<td>55%</td>
<td>52%</td>
<td>58%</td>
<td>54%</td>
<td>55%</td>
<td>57%</td>
<td>62%</td>
<td>60%</td>
<td>64%</td>
<td>58%</td>
<td>48%</td>
<td>57%</td>
<td>35%</td>
<td>47%</td>
<td>47%</td>
<td>59%</td>
</tr>
<tr>
<td>On foot – via Eurostar/Train</td>
<td>51%</td>
<td>48%</td>
<td>54%</td>
<td>48%</td>
<td>47%</td>
<td>55%</td>
<td>62%</td>
<td>47%</td>
<td>60%</td>
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<td>51%</td>
<td>53%</td>
<td>29%</td>
<td>48%</td>
<td>37%</td>
<td>55%</td>
</tr>
<tr>
<td>On foot – via Ferry</td>
<td>49%</td>
<td>45%</td>
<td>52%</td>
<td>43%</td>
<td>47%</td>
<td>55%</td>
<td>53%</td>
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<td>67%</td>
<td>45%</td>
<td>49%</td>
<td>31%</td>
<td>35%</td>
<td>35%</td>
<td>53%</td>
</tr>
<tr>
<td>Coach – via Channel Tunnel</td>
<td>47%</td>
<td>40%</td>
<td>55%</td>
<td>46%</td>
<td>49%</td>
<td>55%</td>
<td>52%</td>
<td>41%</td>
<td>68%</td>
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<td>39%</td>
<td>28%</td>
<td>36%</td>
<td>32%</td>
<td>57%</td>
</tr>
<tr>
<td>Coach – via Ferry</td>
<td>47%</td>
<td>39%</td>
<td>56%</td>
<td>43%</td>
<td>48%</td>
<td>55%</td>
<td>50%</td>
<td>40%</td>
<td>68%</td>
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<td>46%</td>
<td>39%</td>
<td>27%</td>
<td>35%</td>
<td>33%</td>
<td>58%</td>
</tr>
</tbody>
</table>
Perception of transport mode within Britain

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

Q14. Thinking about travelling within Britain, which of the following would you be comfortable with? (Multiple Answers)
Base: Respondents selecting England, Scotland or Wales in Q11a (n = 5,862)

<table>
<thead>
<tr>
<th>% of Consideration</th>
<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>Spain</th>
<th>Sweden</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public transport - Train</td>
<td>42%</td>
<td>44%</td>
<td>39%</td>
<td>49%</td>
<td>50%</td>
<td>27%</td>
<td>48%</td>
<td>35%</td>
<td>46%</td>
<td>46%</td>
<td>44%</td>
<td>41%</td>
<td>53%</td>
<td>34%</td>
<td>53%</td>
<td>37%</td>
</tr>
<tr>
<td>Public transport - Tube/subway</td>
<td>39%</td>
<td>39%</td>
<td>40%</td>
<td>48%</td>
<td>43%</td>
<td>41%</td>
<td>46%</td>
<td>29%</td>
<td>41%</td>
<td>40%</td>
<td>44%</td>
<td>36%</td>
<td>37%</td>
<td>27%</td>
<td>52%</td>
<td>32%</td>
</tr>
<tr>
<td>Rented car/vehicle</td>
<td>39%</td>
<td>36%</td>
<td>42%</td>
<td>56%</td>
<td>47%</td>
<td>32%</td>
<td>41%</td>
<td>30%</td>
<td>51%</td>
<td>42%</td>
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<td>29%</td>
<td>34%</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>Domestic flight</td>
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<td>31%</td>
<td>48%</td>
<td>54%</td>
<td>47%</td>
<td>37%</td>
<td>33%</td>
<td>16%</td>
<td>57%</td>
<td>46%</td>
<td>31%</td>
<td>22%</td>
<td>25%</td>
<td>41%</td>
<td>24%</td>
<td>49%</td>
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<tr>
<td>Own car vehicle</td>
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<td>39%</td>
<td>31%</td>
<td>33%</td>
<td>29%</td>
<td>27%</td>
<td>42%</td>
<td>38%</td>
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<td>46%</td>
<td>26%</td>
<td>31%</td>
<td>35%</td>
<td>32%</td>
</tr>
<tr>
<td>Public transport - Bus</td>
<td>32%</td>
<td>33%</td>
<td>32%</td>
<td>38%</td>
<td>37%</td>
<td>31%</td>
<td>44%</td>
<td>28%</td>
<td>35%</td>
<td>35%</td>
<td>35%</td>
<td>32%</td>
<td>32%</td>
<td>19%</td>
<td>44%</td>
<td>25%</td>
</tr>
<tr>
<td>Taxi</td>
<td>31%</td>
<td>28%</td>
<td>34%</td>
<td>32%</td>
<td>41%</td>
<td>34%</td>
<td>29%</td>
<td>17%</td>
<td>37%</td>
<td>40%</td>
<td>34%</td>
<td>20%</td>
<td>28%</td>
<td>11%</td>
<td>47%</td>
<td>32%</td>
</tr>
<tr>
<td>Private coach/minibus</td>
<td>22%</td>
<td>16%</td>
<td>29%</td>
<td>32%</td>
<td>31%</td>
<td>21%</td>
<td>16%</td>
<td>14%</td>
<td>36%</td>
<td>22%</td>
<td>23%</td>
<td>14%</td>
<td>13%</td>
<td>10%</td>
<td>14%</td>
<td>30%</td>
</tr>
<tr>
<td>Uber/other sharing app</td>
<td>22%</td>
<td>16%</td>
<td>28%</td>
<td>31%</td>
<td>28%</td>
<td>21%</td>
<td>21%</td>
<td>10%</td>
<td>40%</td>
<td>19%</td>
<td>22%</td>
<td>14%</td>
<td>12%</td>
<td>12%</td>
<td>19%</td>
<td>26%</td>
</tr>
</tbody>
</table>

% of Consideration: Total, SH (Scotland and Wales), LH (England)
Travellers are still open to using a variety of channels to plan their next trip. Online travel agents/tour operators are the most popular channel in LH markets; the use of expert intermediaries still is reassuring to consumers in the current uncertain travel scenario. Official destination websites, transport and accommodation providers play a significant role in the booking process across most markets, again confirming the importance of reassurance and trust. The role of expert intermediaries is even higher in LH markets (online and at a storefront), particularly in China. Airlines are also channels highly envisaged in North America, while the large share of VFR travel intentions gives friends and relatives a significant role, notably for Indians and Chinese potential visitors.

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7,450)
With diverse booking channels and possible use of several in the same booking process (including personal contacts in the UK), destinations are encouraged to provide consistent promotional and informative content throughout all channels, particularly as travellers look for trusted sources to activate last-minute and longer-in-advance trips in changing constraints with high level of administrative requirements. The role of official websites is confirmed to be essential in the planning and booking process.

### Planned booking channel for a trip to Britain

<table>
<thead>
<tr>
<th>Booking channel</th>
<th>Total</th>
<th>SH</th>
<th>LH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct with airline/train/ferry operator</td>
<td>43%</td>
<td>46%</td>
<td>41%</td>
</tr>
<tr>
<td>Through a travel agent/tour operator online</td>
<td>42%</td>
<td>32%</td>
<td>50%</td>
</tr>
<tr>
<td>A travel comparison website</td>
<td>40%</td>
<td>41%</td>
<td>39%</td>
</tr>
<tr>
<td>Direct from the official website of the destination</td>
<td>37%</td>
<td>30%</td>
<td>43%</td>
</tr>
<tr>
<td>Direct with accommodation provider</td>
<td>34%</td>
<td>33%</td>
<td>35%</td>
</tr>
<tr>
<td>Through a travel agent/tour operator at a storefront</td>
<td>29%</td>
<td>18%</td>
<td>38%</td>
</tr>
<tr>
<td>Through friends and family in the destination country</td>
<td>20%</td>
<td>15%</td>
<td>24%</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 = 991)
Travel comparison websites and official destinations’ websites are confirmed to be popular options among young people intending to travel to Britain, while the older generation are more likely to book directly through transport operators. The online TOs/OTAs channel is also considered the top choice among younger generations in LH markets.

### SH markets

<table>
<thead>
<tr>
<th>Booking 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>42%</td>
<td>45%</td>
<td>55%</td>
</tr>
<tr>
<td>A travel comparison website</td>
<td>49%</td>
<td>41%</td>
<td>25%</td>
</tr>
<tr>
<td>Direct with accommodation provider</td>
<td>34%</td>
<td>38%</td>
<td>26%</td>
</tr>
<tr>
<td>Through a travel agent/tour operator online</td>
<td>31%</td>
<td>32%</td>
<td>33%</td>
</tr>
<tr>
<td>Direct from the official website of the destination</td>
<td>30%</td>
<td>34%</td>
<td>22%</td>
</tr>
<tr>
<td>Through a travel agent/tour operator at a storefront</td>
<td>18%</td>
<td>15%</td>
<td>20%</td>
</tr>
<tr>
<td>Through friends and family in the destination country</td>
<td>20%</td>
<td>14%</td>
<td>8%</td>
</tr>
</tbody>
</table>

### LH markets

<table>
<thead>
<tr>
<th>Booking 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>52%</td>
<td>52%</td>
<td>42%</td>
</tr>
<tr>
<td>Direct from the official website of the destination</td>
<td>49%</td>
<td>40%</td>
<td>37%</td>
</tr>
<tr>
<td>Direct with airline/train/ferry operator</td>
<td>38%</td>
<td>39%</td>
<td>53%</td>
</tr>
<tr>
<td>A travel comparison website</td>
<td>42%</td>
<td>44%</td>
<td>26%</td>
</tr>
<tr>
<td>Through a travel agent/tour operator at a storefront</td>
<td>44%</td>
<td>38%</td>
<td>28%</td>
</tr>
<tr>
<td>Direct with accommodation provider</td>
<td>33%</td>
<td>34%</td>
<td>40%</td>
</tr>
<tr>
<td>Through friends and family in the destination country</td>
<td>31%</td>
<td>23%</td>
<td>14%</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 = 991)
In North America and Australia, British destinations capitalise on a safer image compared to other large competitive destinations in Europe such as France, Italy or Spain. England nearly matches the level of positivity of other British destinations.

<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>65%</td>
<td>15%</td>
<td>20%</td>
</tr>
<tr>
<td>Scotland</td>
<td>61%</td>
<td>15%</td>
<td>23%</td>
</tr>
<tr>
<td>Wales</td>
<td>58%</td>
<td>17%</td>
<td>25%</td>
</tr>
<tr>
<td>England</td>
<td>57%</td>
<td>10%</td>
<td>33%</td>
</tr>
<tr>
<td>Germany</td>
<td>51%</td>
<td>17%</td>
<td>32%</td>
</tr>
<tr>
<td>France</td>
<td>46%</td>
<td>15%</td>
<td>39%</td>
</tr>
<tr>
<td>Spain</td>
<td>40%</td>
<td>17%</td>
<td>43%</td>
</tr>
<tr>
<td>Italy</td>
<td>38%</td>
<td>14%</td>
<td>48%</td>
</tr>
<tr>
<td>Scotland</td>
<td>63%</td>
<td>16%</td>
<td>22%</td>
</tr>
<tr>
<td>Ireland</td>
<td>62%</td>
<td>16%</td>
<td>22%</td>
</tr>
<tr>
<td>England</td>
<td>61%</td>
<td>11%</td>
<td>28%</td>
</tr>
<tr>
<td>Wales</td>
<td>58%</td>
<td>17%</td>
<td>25%</td>
</tr>
<tr>
<td>Germany</td>
<td>56%</td>
<td>16%</td>
<td>28%</td>
</tr>
<tr>
<td>France</td>
<td>51%</td>
<td>13%</td>
<td>36%</td>
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<tr>
<td>Spain</td>
<td>48%</td>
<td>15%</td>
<td>37%</td>
</tr>
<tr>
<td>Italy</td>
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</tr>
<tr>
<td>England</td>
<td>76%</td>
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</tr>
<tr>
<td>Scotland</td>
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</tr>
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<td>Wales</td>
<td>73%</td>
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<td>Germany</td>
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<td>Ireland</td>
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</tr>
<tr>
<td>France</td>
<td>69%</td>
<td>12%</td>
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</tr>
<tr>
<td>Italy</td>
<td>65%</td>
<td>12%</td>
<td>24%</td>
</tr>
<tr>
<td>Spain</td>
<td>64%</td>
<td>13%</td>
<td>23%</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 = 7,500)
COVID-19 safety perception (2)

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

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All Respondents (n = 7,500)
A perception gap between England and the other destinations in Britain still exists in France, Germany and the Netherlands, however Britain destinations’ image has improved in those markets with more positive than negative sentiment today in relation to the COVID-19 perception.

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?  
Base: All Respondents (n = 7,500)
Perceptions in Republic of Ireland and Spain are still positive but other destinations (Switzerland, Austria, Germany) are also seen today as safer than England. Even if the overall COVID-19 safety sentiment towards England remains more positive than negative in Italy, other destinations are perceived as safer today, maybe partly based on experiences lived in the summer.

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus? Base: All Respondents (n = 7,500)
The Nordic markets have a positive image of other Northern European/Nordic countries while British destinations maintain a competitive advantage vs. France, Italy or other Southern/Mediterranean destinations (Greece, Portugal). In both markets however, England is still seen as more unsafe than safe.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Safe</th>
<th>Don't know</th>
<th>Unsafe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norway</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Denmark</td>
<td>66%</td>
<td>10%</td>
<td>24%</td>
</tr>
<tr>
<td>Germany</td>
<td>53%</td>
<td>15%</td>
<td>32%</td>
</tr>
<tr>
<td>Sweden</td>
<td>51%</td>
<td>11%</td>
<td>38%</td>
</tr>
<tr>
<td>Wales</td>
<td>51%</td>
<td>21%</td>
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</tr>
<tr>
<td>Scotland</td>
<td>51%</td>
<td>20%</td>
<td>29%</td>
</tr>
<tr>
<td>Ireland</td>
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</tr>
<tr>
<td>Austria</td>
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<td>31%</td>
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<td>Spain</td>
<td>42%</td>
<td>11%</td>
<td>47%</td>
</tr>
<tr>
<td>England</td>
<td>41%</td>
<td>14%</td>
<td>45%</td>
</tr>
<tr>
<td>Greece</td>
<td>41%</td>
<td>16%</td>
<td>44%</td>
</tr>
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<td>Portugal</td>
<td>40%</td>
<td>19%</td>
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<td>France</td>
<td>39%</td>
<td>17%</td>
<td>45%</td>
</tr>
<tr>
<td>Italy</td>
<td>38%</td>
<td>16%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Sweden

<table>
<thead>
<tr>
<th>Destination</th>
<th>Safe</th>
<th>Don't know</th>
<th>Unsafe</th>
</tr>
</thead>
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<tr>
<td>Norway</td>
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</tr>
<tr>
<td>Denmark</td>
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<tr>
<td>Wales</td>
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<td>20%</td>
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</tr>
<tr>
<td>Ireland</td>
<td>40%</td>
<td>21%</td>
<td>39%</td>
</tr>
<tr>
<td>Austria</td>
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<td>20%</td>
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<td>Netherlands</td>
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<td>France</td>
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</tr>
<tr>
<td>Poland</td>
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<td>56%</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 = 7,500)
Travel preferences: summary

- The desire amongst some to return to many pre-pandemic behaviours when travelling grows further, including for lively, immersive socialising activities (dining out, local lifestyle, shopping…), with usual affinities per market. Outdoor nature activities still rank highly.

- The interest in Food and Gastronomy-related activities is now massive across markets, as it combines a way of socialising, of exploring one facet of the local heritage while enjoying oneself after a difficult period.

- The desire to roam around is still high in LH markets offering a great opportunity of promoting multiple Britain destinations, while visiting large cities and coastal areas are still top of mind in SH markets.

- Germans confirm interest in coastal experiences whilst Italians, the Irish and Spaniards are open to planning city breaks. Italians still want to roam around and visit many types of places.

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

- Confirming previous wave’s results, hotel chains are a preferred choice, while self-catered accommodation remains a popular option in the COVID-19 era.

- The consideration levels for self-catering and B&Bs are on the same level in Europe. LH markets also envisage boutique hotels beyond chains. Cruises maintain a fair level of interest in the US and India.
While desire for exploring and roaming around in the destination mitigates as summer ends, the “return to normal” in destination experience is tangible though the increased interest expressed for all types of activities, including socialising and lively experiences. A growing demand for food-related experiences is also visible.

### Main types of destinations envisaged

- **Large city**: 45% (49% → 48%)
- **Coastline**: 38% (40% → 38%)
- **Small/mid-sized city/town**: 25% (30% → 29%)
- **Mountains or hills**: 21% (26% → 24%)
- **Countryside or village**: 20% (24% → 25%)

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

- **Dining in restaurants/bars/cafes/pubs**: 7.3%
- **Culinary activities**: 6.3%
- **Outdoor activities (hiking, cycling, etc)**: 6.3%
- **Shopping**: 6.1%
- **Experiencing local lifestyle**: 5.8%
- **Spa/wellness activities**: 5.6%
- **Learning new skills**: 5.1%
- **Self-driving tours**: 4.9%
- **Visiting famous/iconic tourist attractions**: 4.6%
- **Exploring history and heritage**: 4.5%
- **Guided tours/day-excursions**: 4.5%
- **Attending cultural events**: 4.3%
- **Experiencing destination’s nightlife**: 4.3%
- **Attending sport events**: 4.3%
- **Outdoor nature activities**: 4.3%
- **Visiting cultural attractions**: 4.1%
- **Spa/wellness activities**: 4.0%

Trend calculated at constant perimeter (13 markets consolidated)
Main destination types for an international leisure trip

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

Q15: Which of the following best describes the main types of destination where you are likely to stay during your next international leisure trip?  (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7,450)
Main destination types for a leisure trip in Europe

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

<table>
<thead>
<tr>
<th>Destination Type</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>
</tr>
</thead>
<tbody>
<tr>
<td>Large city</td>
<td>50%</td>
<td>66%</td>
<td>61%</td>
<td>49%</td>
<td>56%</td>
<td>68%</td>
</tr>
<tr>
<td>Coasline</td>
<td>39%</td>
<td>40%</td>
<td>37%</td>
<td>44%</td>
<td>50%</td>
<td>36%</td>
</tr>
<tr>
<td>I will roam around, visiting many types of places</td>
<td>36%</td>
<td>46%</td>
<td>41%</td>
<td>47%</td>
<td>52%</td>
<td>42%</td>
</tr>
<tr>
<td>Small/mid-sized city/town</td>
<td>31%</td>
<td>40%</td>
<td>33%</td>
<td>37%</td>
<td>45%</td>
<td>30%</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>26%</td>
<td>35%</td>
<td>29%</td>
<td>36%</td>
<td>44%</td>
<td>24%</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>25%</td>
<td>28%</td>
<td>27%</td>
<td>34%</td>
<td>41%</td>
<td>23%</td>
</tr>
<tr>
<td>I’m not sure</td>
<td>5%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>4%</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 = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619)
Trended data

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

Travel party

- With your spouse/partner: 70% to 71%
- With children (under 18): 28% to 26% to 26%
- With friends: 21% to 23% to 23%
- With adult family members: 20% to 20% to 19%
- Alone: 18% to 19% to 19%
- As part of a tour group: 3% to 3% to 3%

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

- Own second home/timeshare: +1.0%
- Holiday village/centre (e.g. Center Parcs): +0.7%
- Private rental: +0.5%
- Historic house/castle: +0.4%
- Hostel/university/school: +0.3%
- Cruise: -0.2%
- Campsite: -0.2%
- Bed and breakfast: -0.4%
- Friend’s/family house as a free guest: -0.6%
- Caravan/motorhome: -0.6%
- Friend’s/family house as a paying guest: -0.8%
- Self catered property: -1.0%
- Boutique hotel: -1.0%
- Hotel chain: -2.0%

Trend calculated at constant perimeter (13 markets consolidated)
Travel party for an international leisure trip

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

<table>
<thead>
<tr>
<th>Travel Party</th>
<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>Spain</th>
<th>Sweden</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>With your spouse/partner</td>
<td>71%</td>
<td>70%</td>
<td>73%</td>
<td>71%</td>
<td>68%</td>
<td>76%</td>
<td>67%</td>
<td>68%</td>
<td>71%</td>
<td>70%</td>
<td>76%</td>
<td>72%</td>
<td>64%</td>
<td>75%</td>
<td>70%</td>
<td>73%</td>
</tr>
<tr>
<td>With children (under 18)</td>
<td>26%</td>
<td>26%</td>
<td>27%</td>
<td>22%</td>
<td>18%</td>
<td>20%</td>
<td>24%</td>
<td>26%</td>
<td>45%</td>
<td>31%</td>
<td>21%</td>
<td>28%</td>
<td>24%</td>
<td>31%</td>
<td>24%</td>
<td>31%</td>
</tr>
<tr>
<td>With friends</td>
<td>23%</td>
<td>26%</td>
<td>20%</td>
<td>16%</td>
<td>18%</td>
<td>22%</td>
<td>21%</td>
<td>23%</td>
<td>27%</td>
<td>20%</td>
<td>23%</td>
<td>26%</td>
<td>33%</td>
<td>23%</td>
<td>38%</td>
<td>17%</td>
</tr>
<tr>
<td>With adult family members</td>
<td>19%</td>
<td>20%</td>
<td>19%</td>
<td>15%</td>
<td>18%</td>
<td>21%</td>
<td>16%</td>
<td>14%</td>
<td>29%</td>
<td>20%</td>
<td>11%</td>
<td>20%</td>
<td>26%</td>
<td>19%</td>
<td>33%</td>
<td>15%</td>
</tr>
<tr>
<td>Alone</td>
<td>19%</td>
<td>21%</td>
<td>16%</td>
<td>18%</td>
<td>19%</td>
<td>13%</td>
<td>14%</td>
<td>20%</td>
<td>19%</td>
<td>22%</td>
<td>14%</td>
<td>26%</td>
<td>27%</td>
<td>15%</td>
<td>32%</td>
<td>17%</td>
</tr>
<tr>
<td>As part of a tour group</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
<td>5%</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>6%</td>
<td>2%</td>
<td>7%</td>
<td>4%</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Travel Party</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>
</tr>
</thead>
<tbody>
<tr>
<td>With your spouse/partner</td>
<td>72%</td>
<td>72%</td>
<td>71%</td>
<td>75%</td>
<td>78%</td>
<td>70%</td>
<td>71%</td>
</tr>
<tr>
<td>With children (under 18)</td>
<td>28%</td>
<td>29%</td>
<td>32%</td>
<td>29%</td>
<td>37%</td>
<td>28%</td>
<td>31%</td>
</tr>
<tr>
<td>With friends</td>
<td>24%</td>
<td>28%</td>
<td>24%</td>
<td>22%</td>
<td>22%</td>
<td>28%</td>
<td>26%</td>
</tr>
<tr>
<td>Alone</td>
<td>20%</td>
<td>24%</td>
<td>21%</td>
<td>18%</td>
<td>19%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>With adult family members</td>
<td>19%</td>
<td>24%</td>
<td>21%</td>
<td>20%</td>
<td>21%</td>
<td>23%</td>
<td>21%</td>
</tr>
<tr>
<td>As part of a tour group</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<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 Rep.</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Spain</th>
<th>Sweden</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel chain</td>
<td>61%</td>
<td>64%</td>
<td>57%</td>
<td>70%</td>
<td>66%</td>
<td>42%</td>
<td>46%</td>
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<td>69%</td>
<td>64%</td>
<td>64%</td>
<td>69%</td>
<td>67%</td>
<td>77%</td>
<td>65%</td>
</tr>
<tr>
<td>Bed and breakfast</td>
<td>37%</td>
<td>38%</td>
<td>35%</td>
<td>45%</td>
<td>35%</td>
<td>27%</td>
<td>27%</td>
<td>38%</td>
<td>41%</td>
<td>37%</td>
<td>54%</td>
<td>43%</td>
<td>40%</td>
<td>16%</td>
<td>47%</td>
<td>36%</td>
</tr>
<tr>
<td>Boutique hotel</td>
<td>35%</td>
<td>31%</td>
<td>39%</td>
<td>47%</td>
<td>36%</td>
<td>38%</td>
<td>34%</td>
<td>26%</td>
<td>37%</td>
<td>42%</td>
<td>25%</td>
<td>26%</td>
<td>16%</td>
<td>47%</td>
<td>29%</td>
<td>38%</td>
</tr>
<tr>
<td>Self catered property (rented house, cottage, chalet, apartment)</td>
<td>33%</td>
<td>38%</td>
<td>27%</td>
<td>37%</td>
<td>23%</td>
<td>23%</td>
<td>22%</td>
<td>47%</td>
<td>38%</td>
<td>51%</td>
<td>34%</td>
<td>41%</td>
<td>36%</td>
<td>28%</td>
<td>28%</td>
<td>22%</td>
</tr>
<tr>
<td>Private rental such as Airbnb, Couchsurfing, FlipKey</td>
<td>29%</td>
<td>29%</td>
<td>29%</td>
<td>36%</td>
<td>32%</td>
<td>16%</td>
<td>35%</td>
<td>25%</td>
<td>42%</td>
<td>35%</td>
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<td>24%</td>
<td>26%</td>
<td>32%</td>
<td>23%</td>
<td>30%</td>
</tr>
<tr>
<td>Friend’s/family house as a free guest</td>
<td>28%</td>
<td>31%</td>
<td>26%</td>
<td>35%</td>
<td>30%</td>
<td>12%</td>
<td>20%</td>
<td>31%</td>
<td>38%</td>
<td>45%</td>
<td>26%</td>
<td>29%</td>
<td>29%</td>
<td>29%</td>
<td>36%</td>
<td>27%</td>
</tr>
<tr>
<td>Historic house/castle</td>
<td>28%</td>
<td>26%</td>
<td>31%</td>
<td>32%</td>
<td>26%</td>
<td>31%</td>
<td>13%</td>
<td>24%</td>
<td>37%</td>
<td>27%</td>
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<td>27%</td>
<td>28%</td>
<td>28%</td>
<td>35%</td>
<td>30%</td>
</tr>
<tr>
<td>Holiday village/centre (e.g. Center Parcs)</td>
<td>25%</td>
<td>22%</td>
<td>28%</td>
<td>22%</td>
<td>16%</td>
<td>40%</td>
<td>17%</td>
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<td>20%</td>
<td>15%</td>
<td>17%</td>
<td>19%</td>
</tr>
<tr>
<td>Cruise</td>
<td>19%</td>
<td>17%</td>
<td>21%</td>
<td>19%</td>
<td>19%</td>
<td>11%</td>
<td>10%</td>
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<td>29%</td>
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<td>16%</td>
<td>22%</td>
<td>17%</td>
<td>20%</td>
<td>29%</td>
</tr>
<tr>
<td>Friend’s/family house as a paying guest</td>
<td>18%</td>
<td>19%</td>
<td>17%</td>
<td>19%</td>
<td>18%</td>
<td>7%</td>
<td>11%</td>
<td>24%</td>
<td>34%</td>
<td>24%</td>
<td>18%</td>
<td>22%</td>
<td>11%</td>
<td>15%</td>
<td>24%</td>
<td>17%</td>
</tr>
<tr>
<td>Own second home/timeshare</td>
<td>14%</td>
<td>13%</td>
<td>14%</td>
<td>11%</td>
<td>9%</td>
<td>13%</td>
<td>4%</td>
<td>15%</td>
<td>24%</td>
<td>16%</td>
<td>13%</td>
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<td>14%</td>
</tr>
<tr>
<td>Campsite</td>
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<td>13%</td>
<td>13%</td>
<td>10%</td>
<td>8%</td>
<td>13%</td>
<td>12%</td>
<td>16%</td>
<td>24%</td>
<td>14%</td>
<td>9%</td>
<td>18%</td>
<td>14%</td>
<td>9%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Caravan/motorhome</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>13%</td>
<td>10%</td>
<td>11%</td>
<td>5%</td>
<td>16%</td>
<td>22%</td>
<td>16%</td>
<td>8%</td>
<td>17%</td>
<td>13%</td>
<td>10%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Hostel/university/school</td>
<td>12%</td>
<td>10%</td>
<td>14%</td>
<td>10%</td>
<td>10%</td>
<td>13%</td>
<td>10%</td>
<td>8%</td>
<td>26%</td>
<td>9%</td>
<td>9%</td>
<td>12%</td>
<td>7%</td>
<td>14%</td>
<td>13%</td>
<td>13%</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 the next 12 months (n = 7,450)
Accommodation types for a leisure trip in Europe

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

<table>
<thead>
<tr>
<th>Accommodation Type</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>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel chain</td>
<td>64%</td>
<td>65%</td>
<td>64%</td>
<td>63%</td>
<td>62%</td>
<td>72%</td>
<td>66%</td>
</tr>
<tr>
<td>Bed and breakfast</td>
<td>39%</td>
<td>44%</td>
<td>39%</td>
<td>43%</td>
<td>43%</td>
<td>41%</td>
<td>38%</td>
</tr>
<tr>
<td>Self catered property (rented house, cottage, chalet, apartment)</td>
<td>35%</td>
<td>41%</td>
<td>34%</td>
<td>37%</td>
<td>37%</td>
<td>35%</td>
<td>33%</td>
</tr>
<tr>
<td>Boutique hotel</td>
<td>35%</td>
<td>41%</td>
<td>38%</td>
<td>40%</td>
<td>43%</td>
<td>44%</td>
<td>40%</td>
</tr>
<tr>
<td>Private rental such as Airbnb, Couchsurfing, FlipKey</td>
<td>30%</td>
<td>37%</td>
<td>33%</td>
<td>34%</td>
<td>38%</td>
<td>38%</td>
<td>33%</td>
</tr>
<tr>
<td>Historic house/castle</td>
<td>30%</td>
<td>36%</td>
<td>30%</td>
<td>37%</td>
<td>39%</td>
<td>31%</td>
<td>30%</td>
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<tr>
<td>Friend's/family house as a free guest</td>
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<td>Holiday village/centre (e.g. Center Parcs)</td>
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<tr>
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<td>Own second home/timeshare</td>
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Q17: For your next international leisure trip, would you be comfortable staying in a … (Multiple Answers)
Base: Europe Int. (n = 4,664) – Britain Int. (n = 991) – England pot. visitors (n = 4,083) – Scotland pot. visitors (n = 2,936) – Wales pot. visitors (n = 1,324) – London pot. visitors (n = 1,619) – Large City Int. (n = 3,573)
### Level of interest in activities

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

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<th>(% very interested)</th>
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<td>Exploring history and heritage</td>
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</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 the next 12 months (n = 7,450)
## Level of interest in activities in Europe/Britain

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

<table>
<thead>
<tr>
<th>(% very interested)</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>
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<td>Exploring history and heritage</td>
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Q16: Thinking about your level of confidence related to sanitary safety, how interested would you be in the following activities during your next international trip?

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

What has changed since March 2021?
Key Takeaways – Overall travel sentiment

1. Desire to travel internationally remains very high and has increased in all markets surveyed. **8 in 10 respondents** now intend to travel internationally certainly or probably in the coming 12 months, accelerated by vaccination and an improved spending power.

2. With more bookings made, travel plans are becoming more concrete, however destination choice remains very open in consumers’ mind.

3. **4 in 10 respondents in SH markets envisage a trip by the end of the year**, including in shoulder or summer season and the festive season. 2022 spring and summer are also already in mind. LH markets are also looking at the festive season.

4. The vaccination continues to be a trigger of travel among LH markets but the gap of intention between vaccinated and non-vaccinated consumers has diminished in SH markets where 8 in 10 non-vaccinated people envisage a trip abroad (vs 7 in 10 before summer).

5. The younger generation still shows the highest propensity to travel internationally across most markets, however with vaccination widely adopted across all age groups, sentiment towards travel grows in older generations. Younger people are also less decided in the destination choice and booking.

6. While Health factors still act as key activators for a trip planning, the **money-centric attitude is high too** with consumers looking for money-back guarantees and attractive deals. They also pay more attention to insurance for COVID-19 travel.

7. The “money factor” is an important trigger for travel intentions to Britain as affordability is a common obstacle to visit.

8. Travellers’ intentions show increasing expectations for living the full destination experience, including socialising activities and a high demand for food-related experiences.

9. Attitudes towards a more responsible and sustainable travel are confirmed. However, with primary concerns expressed on “other people not respecting the rules” (visible this summer in reopening destinations), a gap between attitudes and effective behaviours remains accelerating the potential challenges in offering a full, immersive and safe experience.

10. While socialising is expected as integral part of the experience at the next destination, **6 in 10 travellers express concerns about locals’ attitudes towards international tourists.**
Key Takeaways – perceptions of destinations/Britain

1. Europe further consolidates its status as the favourite region in most markets.

2. Britain, like most large destinations in Europe, is less considered while smaller destinations are driving more interest, yet it now rivals Italy and Spain and surpasses Germany significantly, fuelled by a continuous improvement of its COVID-19 sanitary image.

3. Providing pre-COVID-19 volumes of visits, intention levels and COVID-19 image, the competitive position of Britain is summarised as follows:
   - 1 market in a highly favourable competitive position: China
   - 6 markets in favourable competitive positions: India, Italy, Sweden, Norway, Australia and the Republic of Ireland
   - 5 markets in average competitive positions: the US, Canada, Spain, Germany and the Netherlands
   - 1 market in an at-risk competitive position: France

4. Among the 13 markets surveyed in August 2021:
   - 4 markets have improved their competitive positions: Norway, Sweden, Italy and the Netherlands
   - 5 markets have kept a favourable competitive position: the Republic of Ireland, Spain, China, India and Australia
   - 2 markets remain competitive but have lost their places in the ranking: the US and Canada
   - 2 markets have become or remain at risk: France (despite higher intentions) and Germany
Key Takeaways – Potential targets

Confirmed prioritised motivations and experiences to promote for Britain

- **Foodies** and hybrid experiences including culinary activities
- Shoulder or summer season - **Last-minute deals on thematic trips** (Golf, Spas, Fine dining, Active/ Outdoor packages…)
- “Under sanitary control” **2021/22 festive events / New-Year Holidays**
- **City break deals** (London, Edinburgh…) – Friendship reconnection in a lively urban environment / “socialising bubbles”
- Couples / **Young parents / Family / Friends trips for reconnecting** (London and large cities)
- Secondary destinations explorers / **Crowd-escapers / Responsible travel experiences**
- **Cross-UK “no borders” touring families / Van / Motorhome trips offering Slow / Micro adventure**
- **Sensorial trip experiences** (Arts in gardens, Suspended bridges, Big Wheels, panoramic views etc).
- **Affluent visitors** targeting the “lucky ones” whom spending power have risen through the crisis
- **Lovers of stays in historic houses** for long week-ends / mid-weeks
- **VFR combined/extended trips**
- **‘Workation’ deals** in remote destinations for digital nomads
- … and other niche / passion-based tourism known for being very efficient in boosting the reputation of destinations in COVID-19 times:
  - Film locations
  - Wineries/Breweries/Whiskey producer tours
  - Fine Arts lovers offered exclusive museum visit at night
  - UK Football and other Sport Clubs Fan tours
  - Memorial sites…
Key Takeaways - Channels

Planning, booking and influencing channels

1. OTAs/TOs still well considered across all SH markets and among younger generations too.
2. Intermediaries overall are seen as trusted channels in times of uncertainties and should offer flexible cancellation policies.
3. Official destination websites influential in the trip planning process as trusted sources on both COVID-19-safety (simplified) information and guidance on the “full experience” promotion.
4. Promoting best rated performers (hotels, attractions) in terms of Health Precaution is recommended, as well as a timely inventory of what is open and not at destination (Google status).
5. Promoting secret British spots to LH markets who have already visited Britain in the past.
7. Providing timely information on when to visit attractions so as to mitigate concerns on flow management/crowding issues.
8. “Experiential Packages” including guided / self-guided excursions for roaming travellers in search of maximising the full experience
9. SoMe and digital marketing can generate fast ROI as Millennials plan to travel sooner than other generations.
10. Transport operators are expected to offer the most flexible cancellation policies possible. This also applies to Travel Packages.
11. Travel comparison websites have a massive influence in short-haul markets, as consumers are trying to best inform their decision.
12. Consistent and timely pre-trip visitor information is required for both end-consumers and particularly the Trade in LH markets.
13. Promoting multi-modal transport flexibility while travellers now have trust in flights, trains, ferries and public transport.
14. Providing clear itineraries and road maps (on destination apps) for roaming travellers using their own/rented cars.
Market Summaries

Paddleboarding: ©VisitBritain/Matthew Williamson Ellis
Short-Haul Markets Summary

**Travel intentions**

Intending to travel abroad for leisure*:

- Wave 1: 67%
- Wave 2: 71%
- Wave 3: 81%

Journey purpose:

- Holiday: 88%
- Visit friends or relatives: 34%
- Other purposes: 19%

Planning stage:

- Trip booked: 6%
- Destination chosen: 31%
- Trip planned: 30%
- Intend to travel: 33%

Among leisure trip intenders:

- 75% consider Europe
- 11% consider Britain

Among Britain intenders:

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

**Travel preferences**

Top activities:

- Dining out: 52%
- History and heritage: 45%
- Outdoor nature activities: 43%
- Iconic tourist attractions: 42%
- Visiting cultural attractions: 39%

Top Travel Companions:

- With your spouse/partner: 70%
- With children (under 18): 26%
- With friends: 26%
- Alone: 21%
- With adult family members: 20%
- As part of a tour group: 3%

Top Accommodation:

- Hotel chain: 64%
- Bed and breakfast: 38%
- Self catered property: 38%
- Boutique hotel: 31%
- Friend’s/family house (free guest): 31%

**Destination types**

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

Top modes of transport within Britain:

- Public transport - Train: 44%
- Own car vehicle: 39%
- Public transport - Tube/subway: 39%

Top modes of transport to Britain:

- Plane – via nonstop flight: 89%
- Plane – via connecting flight: 74%
- Own/rented vehicle – via Ferry: 54%

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

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

**Top travel drivers**

*for any international trip*
- Money-back guarantee should I wish to cancel my trip: 39%
- Decrease in coronavirus cases at destination: 30%
- Removal of quarantine policies in destination country: 30%
- An attractive offer e.g. discounts on flights or accommodation: 27%
- High proportion of destination population being vaccinated: 24%

*for a trip to Britain*
- Money-back guarantee should I wish to cancel my trip: 30%
- Decrease in coronavirus cases at destination: 26%
- Removal of quarantine policies in destination country: 24%
- An attractive offer e.g. discounts on flights or accommodation: 22%
- High proportion of destination population being vaccinated: 19%

**Travel Concerns – for travel to Britain**

- Other people not following COVID-19 policy/procedures: 72%
- Access to healthcare if I contract COVID-19 abroad: 67%
- Change in quarantine requirements on my return home: 67%
- Extra admin involved with new policy/rules during the trip: 64%
- Contracting COVID-19 during my journey/trip: 61%
- Limited / restricted experiences at destination: 61%
- Costs of mandatory COVID-19 tests: 58%
- Affordability of robust travel insurance: 56%
- Accessibility of affordable air fares: 53%
- Locals' attitude towards international tourists: 50%

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

---

**Travel attitudes**

1. I would be happy to take a pre-trip covid-19 test should that be required: 73% Agree, 5% Disagree, 23% No opinion
2. I will look for less crowded places, even if I miss attractions: 65% Agree, 5% Disagree, 30% No opinion
3. I will travel internationally as soon as I can after I get the vaccine: 59% Agree, 8% Disagree, 33% No opinion
4. I will think more about sustainability when planning future holidays: 56% Agree, 8% Disagree, 35% No opinion
5. I would be comfortable using public transport within the destination: 56% Agree, 5% Disagree, 39% No opinion
6. I will leave booking until later/last minute: 54% Agree, 6% Disagree, 40% No opinion
7. Booking through a travel agent is a safer option at the moment: 54% Agree, 11% Disagree, 35% No opinion
8. I will favour local destinations instead of traveling internationally: 54% Agree, 6% Disagree, 40% No opinion
9. I will favor destinations I have been before rather than new places: 45% Agree, 7% Disagree, 48% No opinion
10. I will be intending to take fewer but longer holidays: 41% Agree, 13% Disagree, 46% No opinion
11. Due to covid-restrictions, I will have more annual leave to use: 32% Agree, 15% Disagree, 53% No opinion

---

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

**Travel intentions**

- **Intending to travel abroad for leisure**
  - Wave 1: 71%
  - Wave 2: 75%
  - Wave 3: 80%

**Journey purpose**

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

**Planning stage**

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

**Among leisure trip intenders:**

- 48% consider Europe
- 15% consider Britain

**Among Britain intenders:**

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

**Travel preferences**

**Top activities**

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

**Top Travel Companions**

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

**Destination types**

- Will roam around
  - Europe: 44%
  - Britain: 52%
- Country/village
  - Mountains or hills: 33%
- Small/mid-sized city/town: 33%

**Top modes of transport within Britain**

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

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

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021

All data is from Wave 3, unless stated.
Long-Haul Markets Summary

**Top travel drivers**

<table>
<thead>
<tr>
<th>For any international trip</th>
<th>...for a trip to Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>Decrease in coronavirus cases at destination</td>
</tr>
<tr>
<td>Money-back guarantee should I wish to cancel my trip</td>
<td>Money-back guarantee should I wish to cancel my trip</td>
</tr>
<tr>
<td>Hygiene &amp; safety protocols in place at destination</td>
<td>Hygiene &amp; safety protocols in place at destination</td>
</tr>
<tr>
<td>Receiving a Covid-19 vaccination</td>
<td>Receiving a Covid-19 vaccination</td>
</tr>
<tr>
<td>High proportion of destination population being vaccinated</td>
<td>High proportion of destination population being vaccinated</td>
</tr>
<tr>
<td>31%</td>
<td>27%</td>
</tr>
<tr>
<td>30%</td>
<td>26%</td>
</tr>
<tr>
<td>29%</td>
<td>26%</td>
</tr>
<tr>
<td>29%</td>
<td>25%</td>
</tr>
<tr>
<td>27%</td>
<td>24%</td>
</tr>
</tbody>
</table>

**Travel Concerns – for travel to Britain***

<table>
<thead>
<tr>
<th>Concern</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other people not following COVID-19 policy/procedures</td>
<td>86%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Access to healthcare if I contract COVID-19 abroad</td>
<td>86%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Change in quarantine requirements on my return home</td>
<td>84%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>Contracting COVID-19 during my journey/trip</td>
<td>82%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Limited / restricted experiences at destination</td>
<td>81%</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>Affordability of robust travel insurance</td>
<td>81%</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>Extra admin involved with new policy/rules during the trip</td>
<td>78%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Accessibility of affordable air fares</td>
<td>80%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Locals’ attitude towards international tourists</td>
<td>78%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>Costs of mandatory COVID-19 tests</td>
<td>73%</td>
<td>7%</td>
<td>3%</td>
</tr>
</tbody>
</table>

*% very & somewhat concerned

**Travel attitudes**

- I would be happy to take a pre-trip COVID-19 test should that be required: 86% Agree, 3% Disagree
- I will look for less crowded places, even if I miss attractions: 77% Agree, 3% Disagree
- Booking through a travel agent is a safer option at the moment: 74% Agree, 6% Disagree
- I will think more about sustainability when planning future holidays: 73% Agree, 6% Disagree
- I will be intending to take fewer but longer holidays: 69% Agree, 8% Disagree
- I will favour local destinations instead of traveling internationally: 69% Agree, 5% Disagree
- I would be comfortable using public transport within the destination: 68% Agree, 4% Disagree
- I will travel internationally as soon as I can after I get the vaccine: 66% Agree, 5% Disagree
- I will leave booking until later/last minute: 63% Agree, 4% Disagree
- Due to covid-restrictions, I will have more annual leave to use: 61% Agree, 13% Disagree
- I will favor destinations I have been before rather than new places: 60% Agree, 5% Disagree

All data is from Wave 3, unless stated.

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021

*% very & somewhat concerned

**% completely & somewhat agree
Travel intentions

Intending to travel abroad for leisure*

<table>
<thead>
<tr>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>62%</td>
<td>62%</td>
<td>63%</td>
</tr>
</tbody>
</table>

Journey purpose

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

Planning stage

- Trip booked: 7%
- Destination chosen: 28%
- Trip planned: 36%
- Intend to travel: 90%

Among leisure trip intenders:

- 35% consider Europe
- 12% consider Britain

Among Britain intenders:

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

Travel preferences

Top activities

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

Top Travel Companions

- With your spouse/partner: 71%
- With children (under 18): 22%
- Alone: 18%
- With friends: 16%
- With adult family members: 15%

Top Accommodation

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

Destination types

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

Top modes of transport within Britain

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

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

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

## Top travel drivers

### ...for any international trip
- Money-back guarantee should I wish to cancel my trip: 44%
- Insurance for COVID-19 related travel/regulations changes: 39%
- Removal of quarantine policies in home country: 36%
- Removal of quarantine policies in destination country: 34%
- Receiving a Covid-19 vaccination: 32%

### ...for a trip to Britain
- Money-back guarantee should I wish to cancel my trip: 38%
- Insurance for COVID-19 related travel/regulations changes: 32%
- Removal of quarantine policies in home country: 30%
- A significant decrease in coronavirus cases at destination: 27%
- The introduction of a vaccine passport: 25%

## Travel Concerns – for travel to Britain*

<table>
<thead>
<tr>
<th>Concern</th>
<th>Wave 3</th>
<th>Wave 2</th>
<th>Wave 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in quarantine requirements on my return home</td>
<td>86%</td>
<td>82%</td>
<td>91%</td>
</tr>
<tr>
<td>Other people not following COVID-19 policies/procedures</td>
<td>82%</td>
<td>81%</td>
<td>94%</td>
</tr>
<tr>
<td>Access to healthcare if I contract COVID-19 abroad</td>
<td>80%</td>
<td>78%</td>
<td>77%</td>
</tr>
<tr>
<td>Affordability of robust travel insurance</td>
<td>78%</td>
<td>77%</td>
<td>76%</td>
</tr>
<tr>
<td>Accessibility of affordable air fares</td>
<td>77%</td>
<td>76%</td>
<td>75%</td>
</tr>
<tr>
<td>Contracting COVID-19 during my journey/trip</td>
<td>73%</td>
<td>72%</td>
<td>71%</td>
</tr>
<tr>
<td>Limited / restricted experiences at destination</td>
<td>66%</td>
<td>65%</td>
<td>64%</td>
</tr>
<tr>
<td>Extra admin involved with new policy/rules during the trip</td>
<td>65%</td>
<td>64%</td>
<td>63%</td>
</tr>
<tr>
<td>Costs of mandatory COVID-19 tests</td>
<td>57%</td>
<td>56%</td>
<td>55%</td>
</tr>
</tbody>
</table>

*% very & somewhat concerned

## Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 86%
- I will look for less crowded places, even if I miss attractions: 70%
- I will favor local destinations instead of traveling internationally: 69%
- I will leave booking until later/last minute: 63%
- Booking through a travel agent is a safer option at the moment: 62%
- I would be comfortable using public transport within the destination: 59%
- I will think more about sustainability when planning future holidays: 58%
- I will be intending to take fewer but longer holidays: 58%
- I will favor destinations I have been before rather than new places: 54%
- I will travel internationally as soon as I can after I get the vaccine: 54%
- Due to covid-restrictions, I will have more annual leave to use: 52%

Agree: 86% | No opinion: 4% | Disagree: 0%

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

---

*T% completely & somewhat agree

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VisitScotland | Alba VisitBritain
Canada Market Summary

**Travel intentions**

Intending to travel abroad for leisure *

<table>
<thead>
<tr>
<th>Wave</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>67%</td>
<td>63%</td>
<td>71%</td>
<td></td>
</tr>
</tbody>
</table>

Journey purpose

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>88%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit friends or relatives</td>
<td>33%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other leisure purposes</td>
<td>14%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Planning stage

<table>
<thead>
<tr>
<th>Wave</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>7%</td>
<td>6%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>28%</td>
<td>30%</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>29%</td>
<td>32%</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>37%</td>
<td>32%</td>
<td>26%</td>
<td></td>
</tr>
</tbody>
</table>

Among leisure trip intenders:

- 42% consider Europe
- 10% consider Britain

Among Britain intenders:

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

**Travel preferences**

Top Travel Companions

- With your spouse/partner: 68%
- Alone: 19%
- With adult family members: 18%
- With friends: 18%
- With children (under 18): 18%
- As part of a tour group: 4%

Top Accommodation

- Hotel chain: 66%
- Boutique hotel: 36%
- Bed and breakfast: 35%
- Private rental: 32%
- Friend’s/family house as...: 30%

Top Travel Preferences

- History and heritage: 49%
- Iconic tourist attractions: 47%
- Dining out: 47%
- Outdoor nature activities: 45%
- Visiting cultural attractions: 43%

Destination types

- Will roam around: 39%
- Large city: 44%
- Small/mid-sized city/town: 31%
- Coastline: 34%
- Mountains or hills: 20%
- Country/ village: 27%

Top modes of transport within Britain

- Public transport - Train: 50%
- Domestic flight: 47%
- Public transport - Tube/subway: 43%
- Taxi: 41%
- Public transport - Bus: 37%
- Private coach/minibus: 31%
- Own car vehicle: 29%
- Uber/other sharing app: 28%

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021

All data is from Wave 3, unless stated.
Canada Market Summary

**Top travel drivers**

...for any international trip

- Money-back guarantee should I wish to cancel my trip: 41%
- A significant decrease in coronavirus cases at destination: 35%
- Insurance for COVID-19 related travel/regulations changes: 33%
- The introduction of a vaccine passport: 33%
- Removal of quarantine policies in destination country: 32%

...for a trip to Britain

- Money-back guarantee should I wish to cancel my trip: 34%
- A significant decrease in coronavirus cases at destination: 28%
- High proportion of destination population being vaccinated: 26%
- The introduction of a vaccine passport: 25%
- Removal of quarantine policies in destination country: 25%

**Travel Concerns – for travel to Britain***

- Other people not following COVID-19 policies/procedures: 86%
- Access to healthcare if I contract COVID-19 abroad: 85%
- Change in quarantine requirements on my return home: 79%
- Affordability of robust travel insurance: 78%
- Contracting COVID-19 during my journey/trip: 76%
- Limited / restricted experiences at destination: 76%
- Extra admin involved with new policy/rules during the trip: 76%
- Accessibility of affordable air fares: 75%
- Costs of mandatory COVID-19 tests: 74%
- Locals’ attitude towards international tourists: 66%

*% very & somewhat concerned

**% completely & somewhat agree

**Travel attitudes**

I would be happy to take a pre-trip covid-19 test should that be required: 80% Agree, 4% No opinion, 6% Disagree

I will look for less crowded places, even if I miss attractions: 69% Agree, 6% No opinion, 24% Disagree

I will favour local destinations instead of traveling internationally: 65% Agree, 6% No opinion, 29% Disagree

Booking through a travel agent is a safer option at the moment: 65% Agree, 12% No opinion, 31% Disagree

I will think more about sustainability when planning future holidays: 57% Agree, 12% No opinion, 31% Disagree

I would be comfortable using public transport within the destination: 52% Agree, 8% No opinion, 40% Disagree

I will leave booking until later/last minute: 52% Agree, 8% No opinion, 40% Disagree

I will travel internationally as soon as I can after I get the vaccine: 51% Agree, 7% No opinion, 42% Disagree

I will be intending to take fewer but longer holidays: 49% Agree, 14% No opinion, 37% Disagree

I will favor destinations I have been before rather than new places: 48% Agree, 7% No opinion, 45% Disagree

Due to covid-restrictions, I will have more annual leave to use: 40% Agree, 20% No opinion, 40% Disagree
China Market Summary

Travel intentions

Intending to travel abroad for leisure*

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

Journey purpose

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

Planning stage

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

Among leisure trip intenders:

52% consider Europe 25% consider Britain

Among Britain intenders:

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

Travel preferences


All data is from Wave 3, unless stated

Top activities

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

Top Travel Companions

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

Top Accommodation

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

Top modes of transport within Britain

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

Destination types

Coastline Large city Small/mid-sized city/town Will roam around Mountains or hills Country/village

49% 55% 37% 47% 25% 29%

*(% definitely & probably) in the next 12 months
# China Market Summary

## Top travel drivers

<table>
<thead>
<tr>
<th>Factor</th>
<th>For any international trip</th>
<th>For a trip to Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receiving a Covid-19 vaccination</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Stable political environment in destination country</td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td>Hygiene &amp; safety protocols in place at destination</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>Official national hygiene label in destination</td>
<td>22%</td>
<td>23%</td>
</tr>
</tbody>
</table>

## Travel Concerns – for travel to Britain*

- Access to healthcare if I contract COVID-19 abroad: **90%**
- Other people not following COVID-19 policies/procedures: **90%**
- Change in quarantine requirements on my return home: **90%**
- Contracting COVID-19 during my journey/trip: **89%**
- Affordability of robust travel insurance: **88%**
- Limited / restricted experiences at destination: **88%**
- Locals’ attitude towards international tourists: **88%**
- Extra admin involved with new policy/rules during the trip: **86%**
- Costs of mandatory COVID-19 tests: **85%**
- Accessibility of affordable air fares: **85%**

## Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: **87%**
- I will think more about sustainability when planning future holidays: **85%**
- I will look for less crowded places, even if I miss attractions: **83%**
- I will be intending to take fewer but longer holidays: **82%**
- Booking through a travel agent is a safer option at the moment: **82%**
- I would be comfortable using public transport within the destination: **80%**
- Due to covid-restrictions, I will have more annual leave to use: **76%**
- I will leave booking until later/last minute: **74%**
- I will favour local destinations instead of traveling internationally: **73%**
- I will travel internationally as soon as I can after I get the vaccine: **72%**
- I will favor destinations I have been before rather than new places: **67%**

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

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021

All data is from Wave 3, unless stated.
France Market Summary

Travel intentions

<table>
<thead>
<tr>
<th></th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intending to travel abroad for leisure*</td>
<td>79%</td>
<td>80%</td>
<td>87%</td>
</tr>
</tbody>
</table>

Journey purpose

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>90%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit friends or relatives</td>
<td>29%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other leisure purposes</td>
<td>19%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Planning stage

<table>
<thead>
<tr>
<th>Stage</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip booked</td>
<td>7%</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Destination chosen</td>
<td>28%</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Trip planned</td>
<td>36%</td>
<td>36%</td>
<td>28%</td>
</tr>
<tr>
<td>Intend to travel</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Among leisure trip intenders:

- 67% consider Europe
- 7% consider Britain

Among Britain intenders:

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

Travel preferences

<table>
<thead>
<tr>
<th>Top activities</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoor nature activities</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
</tr>
<tr>
<td>Dining out</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self-driving tours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>History and heritage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Iconic tourist attractions</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Destination types

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

Top Travel Companions

<table>
<thead>
<tr>
<th>Companions</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>With your spouse/partner</td>
<td>67%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>With children (under 18)</td>
<td></td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>With friends</td>
<td></td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>With adult family members</td>
<td></td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Alone</td>
<td></td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>As part of a tour group</td>
<td></td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

Top Accommodation

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel chain</td>
<td>46%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private rental</td>
<td>35%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Boutique hotel</td>
<td>34%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bed and breakfast</td>
<td>27%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self catered property</td>
<td>22%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Top modes of transport within Britain

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

Top modes of transport to Britain

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

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

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

**Top travel drivers**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Money-back guarantee should I wish to cancel my trip</td>
<td>42%</td>
<td>31%</td>
<td>28%</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurance for COVID-19 related travel/regulations changes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Removal of quarantine policies in home country</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>25%</td>
<td>27%</td>
<td>28%</td>
</tr>
</tbody>
</table>

**Travel Concerns – for travel to Britain**

- Access to healthcare if I contract COVID-19 abroad: 71%
- Other people not following COVID-19 policies/procedures: 70%
- Change in quarantine requirements on my return home: 68%
- Extra admin involved with new policy/rules during the trip: 67%
- Limited / restricted experiences at destination: 67%
- Costs of mandatory COVID-19 tests: 65%
- Accessibility of affordable air fares: 63%
- Affordability of robust travel insurance: 60%
- Contracting COVID-19 during my journey/trip: 57%
- Locals’ attitude towards international tourists: 55%

**Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 74% Agree, 5% Disagree, 21% No opinion
- I will travel internationally as soon as I can after I get the vaccine: 71% Agree, 7% Disagree, 22% No opinion
- I would be comfortable using public transport within the destination: 67% Agree, 4% Disagree, 29% No opinion
- I will think more about sustainability when planning future holidays: 60% Agree, 7% Disagree, 33% No opinion
- Booking through a travel agent is a safer option at the moment: 58% Agree, 7% Disagree, 35% No opinion
- I will leave booking until later/last minute: 58% Agree, 4% Disagree, 38% No opinion
- I will look for less crowded places, even if I miss attractions: 58% Agree, 4% Disagree, 38% No opinion
- I will favour local destinations instead of traveling internationally: 54% Agree, 5% Disagree, 41% No opinion
- I will be intending to take fewer but longer holidays: 43% Agree, 9% Disagree, 49% No opinion
- I will favor destinations I have been before rather than new places: 38% Agree, 7% Disagree, 55% No opinion
- Due to covid-restrictions, I will have more annual leave to use: 33% Agree, 15% Disagree, 52% No opinion

*% very & somewhat concerned
**% completely & somewhat agree
Germany Market Summary

**Travel intentions**

Intending to travel abroad for leisure*

<table>
<thead>
<tr>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>65%</td>
<td>67%</td>
<td>81%</td>
</tr>
</tbody>
</table>

Journey purpose

<table>
<thead>
<tr>
<th></th>
<th>Holiday</th>
<th>Visit friends or relatives</th>
<th>Other leisure purposes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wave 1</td>
<td>91%</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td>Wave 2</td>
<td>81%</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td>Wave 3</td>
<td>81%</td>
<td>27%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Planning stage

<table>
<thead>
<tr>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>8%</td>
<td>9%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Among leisure trip intenders:

78% consider Europe

5% consider Britain

Among Britain intenders:

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

**Travel preferences**

Top activities

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

Top Travel Companions

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

Top Accommodation

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

Top modes of transport within Britain

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

Top modes of transport to Britain

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

Destination types

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

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

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021

All data is from Wave 3, unless stated.
Germany Market Summary

**Top travel drivers**

- 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: 32%
- Removal of quarantine policies in home country: 27%
- Stable political environment in destination country: 26%
- Stable political environment in destination country: 26%

**...for any international trip**

**...for a trip to Britain**

- Removal of quarantine policies in destination country: 27%
- Money-back guarantee should I wish to cancel my trip: 25%
- Decrease in coronavirus cases at destination: 21%
- An attractive offer e.g. discounts on flights or accommodation: 18%
- Assurance that there will be a range of enough things to do: 18%

**Travel Concerns – for travel to Britain**

- Change in quarantine requirements on my return home: 53%
- Other people not following COVID-19 policies/procedures: 51%
- Access to healthcare if I contract COVID-19 abroad: 45%
- Limited / restricted experiences at destination: 45%
- Costs of mandatory COVID-19 tests: 42%
- Extra admin involved with new policy/rules during the trip: 41%
- Contracting COVID-19 during my journey/trip: 39%
- Affordability of robust travel insurance: 38%
- Accessibility of affordable air fares: 35%
- Locals’ attitude towards international tourists: 30%

*% very & somewhat concerned

**% completely & somewhat agree

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

**Travel intentions**

- **Intending to travel abroad for leisure**
  - Wave 1: 92%
  - Wave 2: 90%
  - Wave 3: 94%

**Journey purpose**

- **Holiday**
  - Wave 1: 54%
  - Wave 2: 55%
  - Wave 3: 83%

- **Visit friends or relatives**
  - Wave 1: 14%
  - Wave 2: 14%
  - Wave 3: 18%

- **Other leisure purposes**
  - Wave 1: 17%
  - Wave 2: 11%
  - Wave 3: 15%

**Planning stage**

- **Trip booked**
  - Wave 1: 36%
  - Wave 2: 38%
  - Wave 3: 37%

- **Destination chosen**
  - Wave 1: 33%
  - Wave 2: 37%
  - Wave 3: 31%

- **Trip planned**
  - Wave 1: 17%
  - Wave 2: 11%
  - Wave 3: 15%

- **Intend to travel**
  - Wave 1: 14%
  - Wave 2: 14%
  - Wave 3: 18%

**Among leisure trip intenders:**

- **50% consider Europe**
- **18% consider Britain**

**Among Britain intenders:**

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

**Travel preferences**

**Top activities**

- **Outdoor nature activities**
  - Wave 1: 70%
  - Wave 2: 69%
  - Wave 3: 68%

- **Iconic tourist attractions**
  - Wave 1: 69%
  - Wave 2: 68%
  - Wave 3: 68%

- **History and heritage**
  - Wave 1: 68%
  - Wave 2: 68%
  - Wave 3: 68%

- **Shopping**
  - Wave 1: 66%
  - Wave 2: 66%
  - Wave 3: 66%

- **Dining out**
  - Wave 1: 66%
  - Wave 2: 66%
  - Wave 3: 66%

**Top Travel Companions**

- **With your spouse/partner**
  - Wave 1: 71%
  - Wave 2: 45%
  - Wave 3: 52%

- **With children (under 18)**
  - Wave 1: 45%
  - Wave 2: 29%
  - Wave 3: 19%

- **With adult family members**
  - Wave 1: 27%
  - Wave 2: 27%
  - Wave 3: 19%

- **With friends**
  - Wave 1: 27%
  - Wave 2: 27%
  - Wave 3: 27%

- **Alone**
  - Wave 1: 19%
  - Wave 2: 19%
  - Wave 3: 19%

- **As part of a tour group**
  - Wave 1: 5%
  - Wave 2: 5%
  - Wave 3: 5%

**Top Accommodation**

- **Hotel chain**
  - Wave 1: 52%
  - Wave 2: 42%
  - Wave 3: 52%

- **Private rental**
  - Wave 1: 42%
  - Wave 2: 42%
  - Wave 3: 42%

- **Holiday village/centre**
  - Wave 1: 41%
  - Wave 2: 41%
  - Wave 3: 41%

- **Bed and breakfast**
  - Wave 1: 41%
  - Wave 2: 41%
  - Wave 3: 41%

- **Self catered property**
  - Wave 1: 38%
  - Wave 2: 38%
  - Wave 3: 38%

**Top modes of transport within Britain**

- **Domestic flight**
  - Wave 1: 57%
  - Wave 2: 51%
  - Wave 3: 51%

- **Rent car/vehicle**
  - Wave 1: 46%
  - Wave 2: 41%
  - Wave 3: 41%

- **Public transport - Train**
  - Wave 1: 40%
  - Wave 2: 40%
  - Wave 3: 40%

- **Uber/other sharing app**
  - Wave 1: 37%
  - Wave 2: 37%
  - Wave 3: 37%

- **Private coach/Minibus**
  - Wave 1: 36%
  - Wave 2: 36%
  - Wave 3: 36%

- **Public transport - Tube/Subway**
  - Wave 1: 35%
  - Wave 2: 35%
  - Wave 3: 35%

- **Own car vehicle**
  - Wave 1: 33%
  - Wave 2: 33%
  - Wave 3: 33%

**Destination types**

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

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

Top travel drivers

**...for any international trip**

- Hygiene & safety protocols in place at destination: 40%
- Receiving a Covid-19 vaccination: 38%
- Decrease in coronavirus cases at destination: 31%
- Insurance for COVID-19 related travel/regulations changes: 30%
- An attractive offer e.g. discounts on flights or accommodation: 29%

**...for a trip to Britain**

- Hygiene & safety protocols in place at destination: 38%
- High proportion of destination population being vaccinated: 30%
- Decrease in coronavirus cases at destination: 30%
- Insurance for COVID-19 related travel/regulations changes: 28%
- An attractive offer e.g. discounts on flights or accommodation: 28%

Travel Concerns – for travel to Britain*

- Access to healthcare if I contract COVID-19 abroad: 94%
- Contracting COVID-19 during my journey/trip: 93%
- Other people not following COVID-19 policies/procedures: 92%
- Change in quarantine requirements on my return home: 91%
- Affordability of robust travel insurance: 90%
- Limited / restricted experiences at destination: 89%
- Extra admin involved with new policy/rules during the trip: 89%
- Accessibility of affordable air fares: 87%
- Locals’ attitude towards international tourists: 87%
- Costs of mandatory COVID-19 tests: 83%

Travel attitudes**

- I will think more about sustainability when planning future holidays: 95%
- I would be happy to take a pre-trip covid-19 test should that be required: 92%
- I will look for less crowded places, even if I miss attractions: 91%
- I will be intending to take fewer but longer holidays: 89%
- Booking through a travel agent is a safer option at the moment: 88%
- I will travel internationally as soon as I can after I get the vaccine: 88%
- Due to covid-restrictions, I will have more annual leave to use: 81%
- I would be comfortable using public transport within the destination: 79%
- I will favor destinations I have been before rather than new places: 75%
- I will favour local destinations instead of traveling internationally: 75%
- I will leave booking until later/last minute: 72%

*% very & somewhat concerned

**% completely & somewhat agree

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

Travel intentions

Intending to travel abroad for leisure*:
- Wave 1: 71%
- Wave 2: 68%
- Wave 3: 82%

Journey purpose:
- Holiday: 85%
- Visit friends or relatives: 52%
- Other leisure purposes: 18%

Planning stage:
- Trip booked: 9%
- Destination chosen: 30%
- Trip planned: 32%
- Intend to travel: 32%

Among leisure trip intenders:
- 79% consider Europe
- 17% consider Britain

Among Britain intenders:
- 58% consider England
- 34% consider Scotland
- 24% consider London
- 11% consider Wales

Travel preferences

Top activities:
- Dining out: 51%
- Outdoor nature activities: 48%
- Iconic tourist attractions: 42%
- History and heritage: 41%
- Visiting cultural attractions: 37%

Top Travel Companions:
- With your spouse/partner: 70%
- With children (under 18): 31%
- Alone: 22%
- With friends: 20%
- With adult family members: 20%
- As part of a tour group: 1%

Destination types:
- Coastline: 36%
- Large city: 49%
- Will roam around: 22%
- Small/mid-sized city/town: 25%
- Mountains or hills: 16%

Top modes of transport within Britain:
- Own car vehicle: 57%
- Public transport - Train: 46%
- Domestic flight: 46%

Top modes of transport to Britain:
- Plane – via nonstop flight: 88%
- Plane – via connecting flight: 70%
- Own/rented vehicle – via Ferry: 70%
Irish Republic Market Summary

Top travel drivers

...for any international trip

- Money-back guarantee should I wish to cancel my trip: 41%
- Decrease in coronavirus cases at destination: 36%
- Hygiene & safety protocols in place at destination: 33%
- Your Government's advice on international travel: 31%
- An attractive offer e.g. discounts on flights or accommodation: 30%

...for a trip to Britain

- Decrease in coronavirus cases at destination: 34%
- Money-back guarantee should I wish to cancel my trip: 31%
- Hygiene & safety protocols in place at destination: 28%
- High proportion of destination population being vaccinated: 27%
- An attractive offer e.g. discounts on flights or accommodation: 25%

Travel Concerns – for travel to Britain*

- Other people not following COVID-19 policies/procedures: 82%
- Change in quarantine requirements on my return home: 81%
- Access to healthcare if I contract COVID-19 abroad: 78%
- Contracting COVID-19 during my journey/trip: 71%
- Limited / restricted experiences at destination: 70%
- Costs of mandatory COVID-19 tests: 69%
- Affordability of robust travel insurance: 69%
- Accessibility of affordable air fares: 69%
- Extra admin involved with new policy/rules during the trip: 65%
- Locals' attitude towards international tourists: 59%

*% very & somewhat concerned

Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: Agree 78% No opinion 3% Disagree 19%
- I will look for less crowded places, even if I miss attractions: Agree 72% No opinion 5% Disagree 23%
- I will leave booking until later/last minute: Agree 58% No opinion 4% Disagree 38%
- I would be comfortable using public transport within the destination: Agree 57% No opinion 3% Disagree 40%
- I will favor destinations I have been before rather than new places: Agree 57% No opinion 8% Disagree 35%
- I will favour local destinations instead of traveling internationally: Agree 56% No opinion 4% Disagree 40%
- I will think more about sustainability when planning future holidays: Agree 55% No opinion 8% Disagree 37%
- I will travel internationally as soon as I can after I get the vaccine: Agree 52% No opinion 8% Disagree 39%
- Booking through a travel agent is a safer option at the moment: Agree 51% No opinion 14% Disagree 34%
- I will be intending to take fewer but longer holidays: Agree 50% No opinion 12% Disagree 38%
- Due to covid-restrictions, I will have more annual leave to use: Agree 38% No opinion 18% Disagree 44%

**% completely & somewhat agree

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

### Travel intentions

<table>
<thead>
<tr>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intending to travel abroad for leisure*</td>
<td>77%</td>
<td>81%</td>
</tr>
</tbody>
</table>

**Journey purpose**

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

### Planning stage

<table>
<thead>
<tr>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip booked</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Destination chosen</td>
<td>40%</td>
<td>34%</td>
</tr>
<tr>
<td>Trip planned</td>
<td>37%</td>
<td>41%</td>
</tr>
<tr>
<td>Intend to travel</td>
<td>20%</td>
<td>21%</td>
</tr>
</tbody>
</table>

### Among leisure trip intenders:

- 75% consider Europe
- 15% consider Britain

### Among Britain intenders:

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

---

### Travel preferences

#### Top activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>History and heritage</td>
<td>57%</td>
<td>55%</td>
<td>53%</td>
</tr>
<tr>
<td>Visiting cultural attractions</td>
<td>49%</td>
<td>49%</td>
<td>55%</td>
</tr>
<tr>
<td>Iconic tourist attractions</td>
<td>49%</td>
<td>49%</td>
<td>55%</td>
</tr>
<tr>
<td>Outdoor nature activities</td>
<td>49%</td>
<td>49%</td>
<td>55%</td>
</tr>
<tr>
<td>Dining out</td>
<td>49%</td>
<td>49%</td>
<td>55%</td>
</tr>
</tbody>
</table>

#### Destination types

<table>
<thead>
<tr>
<th>Type</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will roam around</td>
<td>51%</td>
<td>44%</td>
<td>47%</td>
</tr>
<tr>
<td>Large city</td>
<td>53%</td>
<td>44%</td>
<td>47%</td>
</tr>
<tr>
<td>Small/mid-sized city/town</td>
<td>34%</td>
<td>44%</td>
<td>47%</td>
</tr>
<tr>
<td>Country/village</td>
<td>21%</td>
<td>21%</td>
<td>21%</td>
</tr>
</tbody>
</table>

#### Top Travel Companions

<table>
<thead>
<tr>
<th>Companion</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>With your spouse/partner</td>
<td>76%</td>
<td>76%</td>
<td>76%</td>
</tr>
<tr>
<td>With friends</td>
<td>23%</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>With children (under 18)</td>
<td>14%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Alone</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>As part of a tour group</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

#### Top Accommodation

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel chain</td>
<td>64%</td>
<td>64%</td>
<td>64%</td>
</tr>
<tr>
<td>Bed and breakfast</td>
<td>54%</td>
<td>54%</td>
<td>54%</td>
</tr>
<tr>
<td>Self catered property</td>
<td>34%</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>Private rental</td>
<td>31%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Friend’s/family house as...</td>
<td>26%</td>
<td>26%</td>
<td>26%</td>
</tr>
</tbody>
</table>

#### Top modes of transport within Britain

<table>
<thead>
<tr>
<th>Mode</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rented car/vehicle</td>
<td>47%</td>
<td>47%</td>
<td>47%</td>
</tr>
<tr>
<td>Public transport - Train</td>
<td>44%</td>
<td>44%</td>
<td>44%</td>
</tr>
<tr>
<td>Public transport - Tube/subway</td>
<td>44%</td>
<td>44%</td>
<td>44%</td>
</tr>
</tbody>
</table>

#### Top modes of transport to Britain

<table>
<thead>
<tr>
<th>Mode</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plane – via nonstop flight</td>
<td>91%</td>
<td>91%</td>
<td>91%</td>
</tr>
<tr>
<td>Plane – via connecting flight</td>
<td>83%</td>
<td>83%</td>
<td>83%</td>
</tr>
<tr>
<td>Own/rented vehicle – via Ferry</td>
<td>62%</td>
<td>62%</td>
<td>62%</td>
</tr>
</tbody>
</table>

---

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

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

Top travel drivers

<table>
<thead>
<tr>
<th>...for any international trip</th>
<th>...for a trip to Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Money-back guarantee should I wish to cancel my trip</td>
<td>39%</td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>34%</td>
</tr>
<tr>
<td>Hygiene &amp; safety protocols in place at destination</td>
<td>32%</td>
</tr>
<tr>
<td>The introduction of a vaccine passport</td>
<td>30%</td>
</tr>
<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
<td>28%</td>
</tr>
</tbody>
</table>

Travel Concerns – for travel to Britain*

<table>
<thead>
<tr>
<th>Concern</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other people not following COVID-19 policies/procedures</td>
<td>74%</td>
<td>69%</td>
<td>74%</td>
</tr>
<tr>
<td>Access to healthcare if I contract COVID-19 abroad</td>
<td>74%</td>
<td>67%</td>
<td>74%</td>
</tr>
<tr>
<td>Contracting COVID-19 during my journey/trip</td>
<td>67%</td>
<td>67%</td>
<td>67%</td>
</tr>
<tr>
<td>Change in quarantine requirements on my return home</td>
<td>67%</td>
<td>67%</td>
<td>67%</td>
</tr>
<tr>
<td>Limited / restricted experiences at destination</td>
<td>67%</td>
<td>67%</td>
<td>67%</td>
</tr>
<tr>
<td>Extra admin involved with new policy/rules during the trip</td>
<td>61%</td>
<td>61%</td>
<td>61%</td>
</tr>
<tr>
<td>Affordability of robust travel insurance</td>
<td>58%</td>
<td>58%</td>
<td>58%</td>
</tr>
<tr>
<td>Costs of mandatory COVID-19 tests</td>
<td>57%</td>
<td>57%</td>
<td>57%</td>
</tr>
<tr>
<td>Accessibility of affordable air fares</td>
<td>52%</td>
<td>52%</td>
<td>52%</td>
</tr>
<tr>
<td>Locals’ attitude towards international tourists</td>
<td>51%</td>
<td>51%</td>
<td>51%</td>
</tr>
</tbody>
</table>

Travel attitudes**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would be happy to take a pre-trip covid-19 test should that be required</td>
<td>82%</td>
<td>72%</td>
<td>67%</td>
</tr>
<tr>
<td>I will look for less crowded places, even if I miss attractions</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>I will travel internationally as soon as I can after I get the vaccine</td>
<td>4%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>I will think more about sustainability when planning future holidays</td>
<td>25%</td>
<td>23%</td>
<td>24%</td>
</tr>
<tr>
<td>Booking through a travel agent is a safer option at the moment</td>
<td>51%</td>
<td>58%</td>
<td>58%</td>
</tr>
<tr>
<td>I will leave booking until later/last minute</td>
<td>4%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>I will favour local destinations instead of traveling internationally</td>
<td>1%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>I would be comfortable using public transport within the destination</td>
<td>44%</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>I will be intending to take fewer but longer holidays</td>
<td>1%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>I will favor destinations I have been before rather than new places</td>
<td>39%</td>
<td>56%</td>
<td>56%</td>
</tr>
<tr>
<td>Due to covid-restrictions, I will have more annual leave to use</td>
<td>35%</td>
<td>41%</td>
<td>41%</td>
</tr>
</tbody>
</table>

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

Intending to travel abroad for leisure*

<table>
<thead>
<tr>
<th>Wave</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intending to travel abroad for leisure*</td>
<td>63%</td>
<td>72%</td>
<td>83%</td>
</tr>
<tr>
<td>Visit friends or relatives</td>
<td>33%</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>Other leisure purposes</td>
<td>19%</td>
<td>24%</td>
<td>28%</td>
</tr>
</tbody>
</table>

**Journey purpose**

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

**Planning stage**

- Trip booked: 8%
- Destination chosen: 24%
- Trip planned: 43%
- Intend to travel: 43%

**Among leisure trip intenders:**

- 75% consider Europe
- 10% consider Britain

**Among Britain intenders:**

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

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

**Travel preferences**

**Top activities**

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

**Destination types**

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

**Top Travel Companions**

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

**Top Accommodation**

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

**Top modes of transport within Britain**

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

**Top modes of transport to Britain**

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

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

#### Top travel drivers

<table>
<thead>
<tr>
<th>...for any international trip</th>
<th>...for a trip to Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Money-back guarantee should I wish to cancel my trip</td>
<td>39%</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td>32%</td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>26%</td>
</tr>
<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
<td>23%</td>
</tr>
<tr>
<td>Insurance for COVID-19 related travel/regulations changes</td>
<td>22%</td>
</tr>
</tbody>
</table>

#### Travel Concerns – for travel to Britain*

- Other people not following COVID-19 policies/procedures: 71%
- Extra admin involved with new policy/rules during the trip: 69%
- Access to healthcare if I contract COVID-19 abroad: 63%
- Change in quarantine requirements on my return home: 63%
- Contracting COVID-19 during my journey/trip: 59%
- Limited / restricted experiences at destination: 56%
- Costs of mandatory COVID-19 tests: 55%
- Affordability of robust travel insurance: 54%
- Accessibility of affordable air fares: 48%
- Locals’ attitude towards international tourists: 44%

**% very & somewhat concerned

### Travel attitudes**

- I will look for less crowded places, even if I miss attractions: 65% Agree, 4% No opinion, 31% Disagree
- I will leave booking until later/last minute: 63% Agree, 3% No opinion, 34% Disagree
- I will travel internationally as soon as I can after I get the vaccine: 62% Agree, 8% No opinion, 30% Disagree
- I would be happy to take a pre-trip covid-19 test should that be required: 60% Agree, 5% No opinion, 34% Disagree
- Booking through a travel agent is a safer option at the moment: 54% Agree, 6% No opinion, 40% Disagree
- I would be comfortable using public transport within the destination: 54% Agree, 6% No opinion, 41% Disagree
- I will think more about sustainability when planning future holidays: 53% Agree, 6% No opinion, 41% Disagree
- I will favour local destinations instead of traveling internationally: 45% Agree, 6% No opinion, 49% Disagree
- I will favor destinations I have been before rather than new places: 45% Agree, 5% No opinion, 51% Disagree
- I will be intending to take fewer but longer holidays: 38% Agree, 6% No opinion, 55% Disagree
- Due to covid-restrictions, I will have more annual leave to use: 38% Agree, 12% No opinion, 50% Disagree

*% completely & somewhat agree

---

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021

All data is from Wave 3, unless stated.
Norway Market Summary

Travel intentions

<table>
<thead>
<tr>
<th>Intending to travel abroad for leisure*</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>53%</td>
<td>53%</td>
<td>68%</td>
</tr>
<tr>
<td>Visit friends or relatives</td>
<td>53%</td>
<td>53%</td>
<td>68%</td>
</tr>
<tr>
<td>Other leisure purposes</td>
<td>14%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Journey purpose

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

Planning stage

- Trip booked: 5%
- Destination chosen: 33%
- Trip planned: 40%
- Intend to travel: 43%

Travel preferences

Top activities

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

Top Travel Companions

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

Top Accommodation

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

Top modes of transport within Britain

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

Top modes of transport to Britain

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

Destination types

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

Travel intentions

- Among leisure trip intenders: 79% consider Europe
- Among Britain intenders: 49% consider England
- 25% consider Scotland
- 21% consider London
- 8% consider Wales

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

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021

All data is from Wave 3, unless stated.
Norway Market Summary

Top travel drivers

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

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

Travel Concerns – for travel to Britain*

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

*% very & somewhat concerned

Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 74%
- I will look for less crowded places, even if I miss attractions: 62%
- I would be comfortable using public transport within the destination: 59%
- I will travel internationally as soon as I can after I get the vaccine: 52%
- I will favor destinations I have been before rather than new places: 52%
- Booking through a travel agent is a safer option at the moment: 51%
- I will favour local destinations instead of traveling internationally: 51%
- I will think more about sustainability when planning future holidays: 43%
- I will leave booking until later/last minute: 43%
- I will be intending to take fewer but longer holidays: 37%
- Due to covid-restrictions, I will have more annual leave to use: 21%

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

*% very & somewhat concerned

**% completely & somewhat agree
Spain Market Summary

Travel intentions

- Intending to travel abroad for leisure*
  - Wave 1: 72%
  - Wave 2: 77%
  - Wave 3: 81%

Journey purpose

- Holiday: 90%
- Visit friends or relatives: 30%
- Other leisure purposes: 21%

Planning stage

- Trip booked: 3%
- Destination chosen: 36%
- Trip planned: 35%
- Intend to travel: 27%

Among leisure trip intenders:

- 78% consider Europe
- 12% consider Britain

Among Britain intenders:

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

Travel preferences

Top activities

- History and heritage: 60%
- Visiting cultural attractions: 47%
- Outdoor nature activities: 44%
- Dining out: 44%
- Iconic tourist attractions: 44%

Top Travel Companions

- With your spouse/partner: 75%
- With children (under 18): 31%
- With friends: 23%
- With adult family members: 19%
- Alone: 15%
- As part of a tour group: 2%

Top Accommodation

- Hotel chain: 67%
- Boutique hotel: 47%
- Private rental: 32%
- Friend’s/family house (free guest): 29%
- Self catered property: 28%

Destination types

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

Top modes of transport within Britain

- Domestic flight: 41%
- Public transport - Train: 34%
- Rented car/vehicle: 34%

Top modes of transport to Britain

- Plane – via nonstop flight: 95%
- Plane – via connecting flight: 79%
- On foot – via Eurostar/Train: 48%

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

### Top travel drivers

<table>
<thead>
<tr>
<th>For any international trip</th>
<th>For a trip to Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Money-back guarantee should I wish to cancel my trip</td>
<td>Money-back guarantee should I wish to cancel my trip</td>
</tr>
<tr>
<td>Hygiene &amp; safety protocols in place at destination</td>
<td>Decrease in coronavirus cases at destination</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td>Removal of quarantine policies in destination country</td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>Hygiene &amp; safety protocols in place at destination</td>
</tr>
<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
</tr>
</tbody>
</table>

- **Money-back guarantee should I wish to cancel my trip**: 40% for any trip, 38% for Britain
- **Hygiene & safety protocols in place at destination**: 37% for any trip, 30% for Britain
- **Removal of quarantine policies in destination country**: 32% for any trip, 29% for Britain
- **Decrease in coronavirus cases at destination**: 31% for any trip, 28% for Britain
- **An attractive offer e.g. discounts on flights or accommodation**: 30% for any trip, 26% for Britain

### Travel Concerns – for travel to Britain*

- **Other people not following COVID-19 policies/procedures**: 86%
- **Access to healthcare if I contract COVID-19 abroad**: 86%
- **Change in quarantine requirements on my return home**: 83%
- **Contracting COVID-19 during my journey/trip**: 86%
- **Limited / restricted experiences at destination**: 83%
- **Costs of mandatory COVID-19 tests**: 83%
- **Extra admin involved with new policy/rules during the trip**: 82%
- **Affordability of robust travel insurance**: 79%
- **Accessibility of affordable air fares**: 75%
- **Locals’ attitude towards international tourists**: 73%

### Travel attitudes**

- **I would be happy to take a pre-trip covid-19 test should that be required**: 76% Agree, 3% Disagree
- **I will favour local destinations instead of traveling internationally**: 72% Agree, 6% Disagree
- **I will look for less crowded places, even if I miss attractions**: 72% Agree, 4% Disagree
- **I will think more about sustainability when planning future holidays**: 70% Agree, 7% Disagree
- **I will travel internationally as soon as I can after I get the vaccine**: 66% Agree, 7% Disagree
- **I will leave booking until later/last minute**: 63% Agree, 5% Disagree
- **Booking through a travel agent is a safer option at the moment**: 59% Agree, 10% Disagree
- **I would be comfortable using public transport within the destination**: 58% Agree, 6% Disagree
- **I will be intending to take fewer but longer holidays**: 50% Agree, 9% Disagree
- **I will favor destinations I have been before rather than new places**: 46% Agree, 6% Disagree
- **Due to covid-restrictions, I will have more annual leave to use**: 42% Agree, 11% Disagree

---

*% very & somewhat concerned

**% completely & somewhat agree

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

## Travel intentions

### Intending to travel abroad for leisure*

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

### Journey purpose

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

### Planning stage

- Trip booked: 32% Wave 1, 35% Wave 2, 32% Wave 3
- Destination chosen: 34% Wave 1, 34% Wave 2, 34% Wave 3
- Trip planned: 32% Wave 1, 34% Wave 2, 34% Wave 3
- Intend to travel: 31% Wave 1, 24% Wave 2, 19% Wave 3

## Among leisure trip intenders:

- 74% consider Europe
- 13% consider Britain

## Among Britain intenders:

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

## Travel preferences

### Top activities

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

### Top Travel Companions

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

### Top Accommodation

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

### Destination types

- 34% Coastline
- 43% Large city
- 22% Will roam around
- 9% Mountains or hills
- 21% Country/village

### Top modes of transport within Britain

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

### Top modes of transport to Britain

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

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

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021

All data is from Wave 3, unless stated
Sweden Market Summary

Top travel drivers

<table>
<thead>
<tr>
<th>Factor</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Money-back guarantee should I wish to cancel my trip</td>
<td>43%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>35%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The introduction of a vaccine passport</td>
<td>34%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurance for COVID-19 related travel/regulations changes</td>
<td>29%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>High proportion of destination population being vaccinated</td>
<td>28%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Travel Concerns – for travel to Britain*

<table>
<thead>
<tr>
<th>Concern</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extra admin involved with new policy/rules during the trip</td>
<td>64%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to healthcare if I contract COVID-19 abroad</td>
<td>59%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contracting COVID-19 during my journey/trip</td>
<td>57%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in quarantine requirements on my return home</td>
<td>53%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limited / restricted experiences at destination</td>
<td>49%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Costs of mandatory COVID-19 tests</td>
<td>48%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Affordability of robust travel insurance</td>
<td>43%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Locals’ attitude towards international tourists</td>
<td>42%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accessibility of affordable air fares</td>
<td>39%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Travel attitudes**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would be happy to take a pre-trip covid-19 test should that be required</td>
<td>64%</td>
<td>7%</td>
<td>30%</td>
</tr>
<tr>
<td>I will look for less crowded places, even if I miss attractions</td>
<td>57%</td>
<td>9%</td>
<td>34%</td>
</tr>
<tr>
<td>I will think more about sustainability when planning future holidays</td>
<td>52%</td>
<td>8%</td>
<td>40%</td>
</tr>
<tr>
<td>I would be comfortable using public transport within the destination</td>
<td>51%</td>
<td>6%</td>
<td>44%</td>
</tr>
<tr>
<td>I will favour local destinations instead of traveling internationally</td>
<td>48%</td>
<td>9%</td>
<td>43%</td>
</tr>
<tr>
<td>I will favor destinations I have been before rather than new places</td>
<td>40%</td>
<td>12%</td>
<td>48%</td>
</tr>
<tr>
<td>Booking through a travel agent is a safer option at the moment</td>
<td>40%</td>
<td>19%</td>
<td>41%</td>
</tr>
<tr>
<td>I will travel internationally as soon as I can after I get the vaccine</td>
<td>40%</td>
<td>8%</td>
<td>52%</td>
</tr>
<tr>
<td>I will leave booking until later/last minute</td>
<td>35%</td>
<td>11%</td>
<td>54%</td>
</tr>
<tr>
<td>I will be intending to take fewer but longer holidays</td>
<td>30%</td>
<td>19%</td>
<td>51%</td>
</tr>
<tr>
<td>Due to covid-restrictions, I will have more annual leave to use</td>
<td>24%</td>
<td>22%</td>
<td>53%</td>
</tr>
</tbody>
</table>

*% very & somewhat concerned

**% completely & somewhat agree

All data is from Wave 3, unless stated.
USA Market Summary

**Travel intentions**

- Intending to travel abroad for leisure*: 69% 73% 80%
  - Wave 1
  - Wave 2
  - Wave 3

**Journey purpose**

- Holiday: 85%
- Visit friends or relatives: 35%
- Other leisure purposes: 32%

Among leisure trip intenders:

- 52% consider Europe
- 9% consider Britain

**Planning stage**

- Trip booked: 14% 16% 21%
- Destination chosen: 24% 25% 23%
- Trip planned: 28% 34% 32%
- Intend to travel: 33% 26% 23%

Among Britain intenders:

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

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

**Travel preferences**

**Top activities**

- History and heritage: 57%
- Iconic tourist attractions: 57%
- Dining out: 54%
- Visiting cultural attractions: 53%
- Outdoor nature activities: 51%

**Top Travel Companions**

- With your spouse/partner: 73%
- With children (under 18): 31%
- With friends: 17%
- Alone: 17%
- With adult family members: 15%
- As part of a tour group: 4%

**Destination types**

- Will roam around: 39%
- Large city: 50%
- Country/village: 29%
- Small/mid-sized city/town: 26%
- Mountains or hills: 28%

**Top modes of transport within Britain**

- Domestic flight: 49%
- Rented car/vehicle: 38%
- Public transport - Train: 37%
- Public transport - Tube/subway: 32%
- Own car vehicle: 32%
- Taxi: 32%
- Private coach/minibus: 30%
- Uber/other sharing app: 26%
- Public transport - Bus: 25%

**Top Accommodation**

- Hotel chain: 65%
- Boutique hotel: 38%
- Bed and breakfast: 36%
- Private rental: 30%
- Historic house/castle: 30%

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

### Top travel drivers

#### …for any international trip

- Decrease in coronavirus cases at destination: 35%
- Money-back guarantee should I wish to cancel my trip: 35%
- High proportion of destination population being vaccinated: 32%
- Hygiene & safety protocols in place at destination: 31%
- Receiving a Covid-19 vaccination: 26%

#### …for a trip to Britain

- Decrease in coronavirus cases at destination: 30%
- Money-back guarantee should I wish to cancel my trip: 30%
- High proportion of destination population being vaccinated: 29%
- Hygiene & safety protocols in place at destination: 26%
- An attractive offer e.g. discounts on flights or accommodation: 25%

### Travel Concerns – for travel to Britain*

- Other people not following COVID-19 policies/procedures: 82%
- Access to healthcare if I contract COVID-19 abroad: 79%
- Limited / restricted experiences at destination: 77%
- Change in quarantine requirements on my return home: 75%
- Contracting COVID-19 during my journey/trip: 74%
- Extra admin involved with new policy/rules during the trip: 72%
- Affordability of robust travel insurance: 68%
- Locals’ attitude towards international tourists: 68%
- Accessibility of affordable air fares: 67%
- Costs of mandatory COVID-19 tests: 60%

*% very & somewhat concerned

### Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 85%
- I will look for less crowded places, even if I miss attractions: 73%
- Booking through a travel agent is a safer option at the moment: 68%
- I will think more about sustainability when planning future holidays: 65%
- I will favour local destinations instead of traveling internationally: 64%
- I would be comfortable using public transport within the destination: 62%
- I will travel internationally as soon as I can after I get the vaccine: 62%
- I will be intending to take fewer but longer holidays: 61%
- I will favor destinations I have been before rather than new places: 56%
- Due to covid-restrictions, I will have more annual leave to use: 52%
- I will leave booking until later/last minute: 52%

**% completely & somewhat agree

---

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

Loch Ness: ©VisitBritain/Andrew Pickett
Britain – Intenders Profile

Travel intentions & Profile

<table>
<thead>
<tr>
<th>Channel booking</th>
<th>Travel Party</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airline/train/ferry operator</td>
<td>With your spouse/partner</td>
<td>72%</td>
</tr>
<tr>
<td>TAs/TOs - Online</td>
<td>With children (under 18)</td>
<td>29%</td>
</tr>
<tr>
<td>Travel comparison website</td>
<td>With friends</td>
<td>28%</td>
</tr>
<tr>
<td>Destination website direct</td>
<td>With adult family members</td>
<td>24%</td>
</tr>
<tr>
<td>Accom. Provider direct</td>
<td>Alone</td>
<td>24%</td>
</tr>
<tr>
<td>TAs/TOs - Storefront</td>
<td>As part of a tour group</td>
<td>3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Travel preferences</th>
</tr>
</thead>
<tbody>
<tr>
<td>History and heritage</td>
</tr>
<tr>
<td>Iconic tourist attractions</td>
</tr>
<tr>
<td>Visiting cultural attractions</td>
</tr>
<tr>
<td>Dining out</td>
</tr>
<tr>
<td>Outdoor nature activities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Destination types</th>
</tr>
</thead>
<tbody>
<tr>
<td>35% Country/village</td>
</tr>
<tr>
<td>28% Mountains or hills</td>
</tr>
<tr>
<td>66% Large city</td>
</tr>
<tr>
<td>40% Small/mid-sized city/town</td>
</tr>
<tr>
<td>46% Will roam around</td>
</tr>
<tr>
<td>40% Coastline</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 = 991)
Britain – Intenders Profile (SH)

Travel intentions & Profile

<table>
<thead>
<tr>
<th>Channel booking</th>
<th>Travel Party</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airline/train/ferry operator</td>
<td>68%</td>
<td>45%</td>
</tr>
<tr>
<td>Travel comparison website</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>Accom. Provider direct</td>
<td>30%</td>
<td>51%</td>
</tr>
<tr>
<td>TAs/TOs - Storefront</td>
<td>26%</td>
<td>29%</td>
</tr>
<tr>
<td>Destination website direct</td>
<td>3%</td>
<td>20%</td>
</tr>
</tbody>
</table>

% intending to visit the UK

<table>
<thead>
<tr>
<th>Short Haul</th>
<th>FR</th>
<th>GE</th>
<th>IR</th>
<th>IT</th>
<th>NL</th>
<th>NO</th>
<th>ES</th>
<th>SE</th>
</tr>
</thead>
<tbody>
<tr>
<td>11%</td>
<td>7%</td>
<td>5%</td>
<td>15%</td>
<td>10%</td>
<td>12%</td>
<td>12%</td>
<td>13%</td>
<td></td>
</tr>
</tbody>
</table>

Travel Party

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

Age

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

Ever visited Britain

- Several times: 51%
- Once: 29%
- No: 20%

Travel preferences

Top activities

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

Destination types

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

Travel attitudes (% completely & somewhat agree)

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

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

### Travel intentions & Profile

<table>
<thead>
<tr>
<th>Region</th>
<th>% intending to visit the UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long Haul</td>
<td>15%</td>
</tr>
<tr>
<td>AU</td>
<td>12%</td>
</tr>
<tr>
<td>CA</td>
<td>10%</td>
</tr>
<tr>
<td>CN</td>
<td>25%</td>
</tr>
<tr>
<td>IN</td>
<td>18%</td>
</tr>
<tr>
<td>USA</td>
<td>9%</td>
</tr>
</tbody>
</table>

### Channel booking

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

### Travel Party

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

### Age

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

### Ever visited Britain

- **Several times**: 37%
- **Once**: 30%
- **No**: 33%

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

- **I would be happy to take a pre-trip COVID-19 test if required**: 89%
- **I will think more about sustainability and the environmental impact**: 82%
- **I will look for less crowded places, even if I miss attractions**: 82%
- **I would be comfortable using public transport within the destination**: 77%
- **Booking through a travel agent is a safer option at the moment**: 77%

### Travel preferences

#### Top activities

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

#### Destination types

- **Iconic tourist attractions**: 68%
- **Country/village**: 54%
- **Mountains or hills**: 49%
- **Large city**: 46%
- **Small/mid-sized city/town**: 44%
- **Coastline**: 41%
England – Potential Visitors Profile

Travel intentions & Profile

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

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

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

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

Ever visited Britain
- Several times: 48%
- Once: 30%
- No: 23%

Travel preferences
- Top activities:
  - Iconic tourist attractions: 56%
  - History and heritage: 56%
  - Dining out: 56%
  - Visiting cultural attractions: 55%
  - Outdoor nature activities: 51%

Destination types
- 35% Country/village
- 70% Large city
- 47% Will roam around
- 29% Mountains or hills
- 41% Small/mid-sized city/town
- 40% Coastline

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting England in the next 12 months (n = 816)
England – Potential Visitors Profile (SH)

Travel intentions & Profile

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

<table>
<thead>
<tr>
<th>Short Haul</th>
<th>FR</th>
<th>GE</th>
<th>IR</th>
<th>IT</th>
<th>NL</th>
<th>NO</th>
<th>ES</th>
<th>SE</th>
</tr>
</thead>
<tbody>
<tr>
<td>11%</td>
<td>7%</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
<td>17%</td>
<td>15%</td>
<td>13%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Channel booking

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

Travel Party

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

Age

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

Ever visited Britain

- 55% Several times
- 27% Once
- 18% No

Travel preferences

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

Destination types

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

Travel attitudes (% completely & somewhat agree)

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting England in the next 12 months (n = 377)
England – Potential Visitors Profile (LH)

Travel intentions & Profile

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Long Haul</th>
<th>AU</th>
<th>CA</th>
<th>CN</th>
<th>IN</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>15%</td>
<td>13%</td>
<td>12%</td>
<td>11%</td>
<td>10%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Channel booking

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

Travel Party

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

Age

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

Ever visited Britain

- Several times: 41%
- Once: 32%
- No: 27%

Travel preferences

Top activities

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

Destination types

- Country/village: 45%
- Large city: 70%
- Small/mid-sized city/town: 48%
- Coastline: 50%
- Will roam around: 58%

Travel attitudes (% completely & somewhat agree)

- Booking through a travel agent is a safer option at the moment: 91%
- 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: 82%
- I would be comfortable using public transport within the destination: 78%
- Booking through a travel agent is a safer option at the moment: 77%

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting England in the next 12 months (n = 439)
Scotland – Potential Visitors Profile

Travel intentions & Profile
- % intending to visit the UK
- % of those intending to visit the UK who would consider visiting Scotland

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

Travel Party
- With your spouse/partner: 43%
- With children (under 18): 32%
- With friends: 28%
- With adult family members: 27%
- Alone: 21%
- As part of a tour group: 4%

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

Travel Party

Ever visited Britain
- Several times: 41%
- Once: 30%
- No: 29%

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

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

Destination types

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Scotland in the next 12 months (n = 493)
Scotland – Potential Visitors Profile (SH)

**Travel intentions & Profile**

<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 Scotland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel comparison website</td>
<td>42%</td>
<td>52%</td>
</tr>
<tr>
<td>Airline/train/ferry operator</td>
<td>40%</td>
<td>31%</td>
</tr>
<tr>
<td>Accom. Provider direct</td>
<td>38%</td>
<td>29%</td>
</tr>
<tr>
<td>TAs/TOs - Online</td>
<td>38%</td>
<td>35%</td>
</tr>
<tr>
<td>Destination website direct</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>TAs/TOs - Storefront</td>
<td>21%</td>
<td></td>
</tr>
</tbody>
</table>

**Travel Party**

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

**Age**

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

**Ever visited Britain**

- Several times: 47%
- Once: 30%
- No: 23%

**Britain travel drivers**

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

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

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

**Travel preferences**

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

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

Note: TA/TO = Travel Agencies/Tour Operators  
Base: Respondents intending to visit the UK who would consider visiting Scotland in the next 12 months (n = 173)
Scotland – Potential Visitors Profile (LH)

Travel intentions & Profile
- % intending to visit the UK
- % of those intending to visit the UK who would consider visiting Scotland

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

Travel Party
- With your spouse/partner: 78%
- With children (under 18): 30%
- With adult family members: 28%
- With friends: 25%
- Alone: 16%
- As part of a tour group: 12%

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

Ever visited Britain
- Several times: 38%
- Once: 30%
- No: 32%

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

Destination types
- 54% Country/village
- 52% Small/mid-sized city/town
- 59% Coastline
- 68% Large city
- 60% Will roam around

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

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Scotland in the next 12 months (n = 320)
Wales – Potential Visitors Profile

**Travel intentions & Profile**

- **% intending to visit the UK**:
  - Total: 13%
  - Short Haul: 4%
  - Long Haul: 11%
  - AU: 15%
  - CA: 12%
  - CN: 10%
  - FR: 7%
  - GE: 2%
  - IN: 18%
  - IR: 9%
  - IT: 3%
  - NL: 2%
  - NO: 10%
  - ES: 13%
  - SE: 12%
  - USA: 9%

- **% of those intending to visit the UK who would consider visiting Wales**:
  - TAs/TOs - Storefront: 25%
  - Accom. Provider direct: 12%
  - Airline/train/ferry operator: 12%
  - Travel comparison website: 7%
  - TAs/TOs - Online: 4%

**Channel booking**

- With your spouse/partner: 52%
- With children (under 18): 40%
- With adult family members: 30%
- With friends: 28%
- Alone: 20%
- As part of a tour group: 14%

**Age**

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

**Travel Party**

- 85% Ever visited Britain
- 47% Several times
- 30% Once
- 23% No

**Travel preferences**

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

**Destination types**

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

**Britain travel drivers**

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

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

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

---

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Wales in the next 12 months (n = 288)
Wales – Potential Visitors Profile (SH)

Travel intentions & Profile

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

Channel booking

- Travel comparison website: 51%
- Airline/train/ferry operator: 43%
- Accom. Provider direct: 42%
- Destination website direct: 42%
- TAs/TOs - Online: 39%
- TAs/TOs - Storefront: 24%

Travel Party

- With your spouse/partner: 81%
- With children (under 18): 47%
- Alone: 38%
- With friends: 28%
- With adult family members: 26%
- As part of a tour group: 3%

Age

- < 35 y.o.: 54%
- 35-54 y.o.: 31%
- 55+ y.o.: 15%

Ever visited Britain

- 61% - Several times
- 23% - Once
- 16% - No

Travel preferences

Top activities

- Visiting cultural attractions: 64%
- History and heritage: 61%
- Outdoor nature activities: 57%
- Dining out: 55%
- Self-driving tours: 53%

Destination types

- Country/village: 43%
- Mountains or hills: 38%
- Large city: 66%
- Small/mid-sized city/town: 46%
- Coastline: 49%
- Will roam around: 50%

Travel attitudes (% completely & somewhat agree)

- I would be happy to take a pre-trip COVID-19 test if required: 78%
- I will look for less crowded places, even if I miss attractions: 78%
- I will think more about sustainability and the environmental impact: 73%
- I will favour local destinations in my home country instead of traveling: 70%
- I will travel internationally as soon as I can after I get the vaccine: 66%

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Wales in the next 12 months (n = 74)
Wales – Potential Visitors Profile (LH)

Travel intentions & Profile
- % intending to visit the UK
- % of those intending to visit the UK who would consider visiting Wales

<table>
<thead>
<tr>
<th>Channel booking</th>
<th>Long Haul</th>
<th>AU</th>
<th>CA</th>
<th>CN</th>
<th>IN</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAs/TOs - Online</td>
<td>57%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel comparison website</td>
<td>52%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Destination website direct</td>
<td>52%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Airline/train/ferry operator</td>
<td>44%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TAs/TOs - Storefront</td>
<td>41%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Accom. Provider direct</td>
<td>40%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Age
- < 35 y.o.: 37%
- 35-54 y.o.: 50%
- 55+ y.o.: 14%
- Ever visited Britain
  - Several times: 43%
  - Once: 32%
  - No: 26%

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

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

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

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

Travel intentions & Profile

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

Channel booking
- Airline/train/ferry operator: 49%
- Travel comparison website: 46%
- TAs/TOs - Online: 40%
- Destination website direct: 39%
- Accomp. Provider direct: 35%
- TAs/TOs - Storefront: 25%

Travel Party
- With your spouse/partner: 68%
- With friends: 33%
- With children (under 18): 28%
- With adult family members: 27%
- Alone: 27%
- As part of a tour group: 3%

Age
- < 35 y.o.: 48%
- 35-54 y.o.: 34%
- 55+ y.o.: 18%

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

Travel drivers

- Decrease in coronavirus cases at destination: 36%
- Receiving a COVID-19 vaccination: 34%
- Money-back guarantee should I wish to cancel my trip: 33%
- High proportion of destination population being vaccinated: 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: 84%
- I will think more about sustainability and the environmental impact: 72%
- I will look for less crowded places, even if I miss attractions: 70%
- I would be comfortable using public transport within the destination: 68%
- I will travel internationally as soon as I can after I get the vaccine: 64%

Travel preferences

Top activities
- Dining out: 60%
- Iconic tourist attractions: 58%
- History and heritage: 54%
- Visiting cultural attractions: 53%
- Outdoor nature activities: 51%

Accommodation
- Hotel chain: 73%
- Bed and breakfast: 50%
- Private rental: 44%
- Boutique hotel: 44%
- Self catered property: 43%

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 360)
London – Potential Visitors Profile (SH)

Travel intentions & Profile

<table>
<thead>
<tr>
<th>% intending to visit the UK</th>
<th>% of those intending to visit the UK who would consider visiting London</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Haul</td>
<td>FR</td>
</tr>
<tr>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>13%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Channel booking

<table>
<thead>
<tr>
<th>Travel booking</th>
<th>Channel booking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airline/train/ferry operator</td>
<td>54%</td>
</tr>
<tr>
<td>Travel comparison website</td>
<td>47%</td>
</tr>
<tr>
<td>Destination website direct</td>
<td>32%</td>
</tr>
<tr>
<td>Accom. Provider direct</td>
<td>31%</td>
</tr>
<tr>
<td>TAs/TOs - Online</td>
<td>29%</td>
</tr>
<tr>
<td>TAs/TOs - Storefront</td>
<td>16%</td>
</tr>
</tbody>
</table>

Travel Party

<table>
<thead>
<tr>
<th>Travel Party</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>With your spouse/partner</td>
<td>63%</td>
</tr>
<tr>
<td>With friends</td>
<td>37%</td>
</tr>
<tr>
<td>Alone</td>
<td>31%</td>
</tr>
<tr>
<td>With adult family members</td>
<td>26%</td>
</tr>
<tr>
<td>With children (under 18)</td>
<td>25%</td>
</tr>
<tr>
<td>As part of a tour group</td>
<td>3%</td>
</tr>
</tbody>
</table>

Age

<table>
<thead>
<tr>
<th>Age</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 35 y.o.</td>
<td>46%</td>
</tr>
<tr>
<td>35-54 y.o.</td>
<td>34%</td>
</tr>
<tr>
<td>55+ y.o.</td>
<td>20%</td>
</tr>
</tbody>
</table>

Ever visited Britain

<table>
<thead>
<tr>
<th>Ever visited Britain</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Several times</td>
<td>49%</td>
</tr>
<tr>
<td>Once</td>
<td>28%</td>
</tr>
<tr>
<td>No</td>
<td>23%</td>
</tr>
</tbody>
</table>

Travel preferences

<table>
<thead>
<tr>
<th>Top activities</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dining out</td>
<td>64%</td>
</tr>
<tr>
<td>History and heritage</td>
<td>49%</td>
</tr>
<tr>
<td>Iconic tourist attractions</td>
<td>48%</td>
</tr>
<tr>
<td>Visiting cultural attractions</td>
<td>48%</td>
</tr>
<tr>
<td>Outdoor nature activities</td>
<td>44%</td>
</tr>
</tbody>
</table>

Accommodation

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel chain</td>
<td>77%</td>
</tr>
<tr>
<td>Bed and breakfast</td>
<td>48%</td>
</tr>
<tr>
<td>Self catered property</td>
<td>45%</td>
</tr>
<tr>
<td>Private rental</td>
<td>42%</td>
</tr>
<tr>
<td>Friend's/family house as a free guest</td>
<td>42%</td>
</tr>
</tbody>
</table>

Note: TA/TO = Travel Agencies/Tour Operators  
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 183)
London – Potential Visitors Profile (LH)

**Travel intentions & Profile**
- % intending to visit the UK
- % of those intending to visit the UK who would consider visiting London

<table>
<thead>
<tr>
<th>Region</th>
<th>Visiting UK</th>
<th>Visiting London</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long Haul</td>
<td>15%</td>
<td>25%</td>
</tr>
<tr>
<td>AU</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>CA</td>
<td>12%</td>
<td>10%</td>
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<tr>
<td>CN</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>IN</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>USA</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>USA</td>
<td>5%</td>
<td>3%</td>
</tr>
</tbody>
</table>

**Channel booking**
- TAs/TOs - Online: 51%
- Destination website: 46%
- Travel comparison website: 46%
- Airline/train/ferry operator: 44%
- Accomp. Provider direct: 40%
- TAs/TOs - Storefront: 35%

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

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

**Ever visited Britain**
- Several times: 38%
- Once: 35%
- No: 27%

**Travel preferences**
- Iconic tourist attractions: 68%
- History and heritage: 60%
- Experiencing local lifestyle: 59%
- Outdoor nature activities: 59%
- Visiting cultural attractions: 58%

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

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

**Travel attitudes (% completely & somewhat agree)**
- I would be happy to take a pre-trip COVID-19 test if required: 90%
- I will think more about sustainability and the environmental impact: 84%
- I will look for less crowded places, even if I miss attractions: 80%
- I will be intending to take fewer but longer holidays: 75%
- I would be comfortable using public transport within the destination: 72%

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 177)
Funnels
Travel Horizons
Sample profile
Trends: March 2021 vs August 2021

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

Base: All Respondents (n = 7,500)

What conversion funnels measure

- International travel consideration (*) +4%
- Europe consideration +1%
- Britain consideration +1%

Market: All

- All Respondants: 100%
- International Leisure Trip Intenders: 93%
- European Leisure Trip Intenders: 62%
- Britain Leisure Trip Intenders: 13%

Market: long-haul

- All Respondants: 100%
- International Leisure Trip Intenders: 92%
- European Leisure Trip Intenders: 48%
- Britain Leisure Trip Intenders: 15%

Market: short-haul

- All Respondants: 100%
- International Leisure Trip Intenders: 94%
- European Leisure Trip Intenders: 75%
- Britain Leisure Trip Intenders: 11%
Conversion Funnel summary

Long-haul markets

**Market: Australia**
- All Respondents: 100%
- International Leisure Trip Intenders: 83%
- European Leisure Trip Intenders: 35%
- Britain Leisure Trip Intenders: 12%

**Market: Canada**
- All Respondents: 100%
- International Leisure Trip Intenders: 86%
- European Leisure Trip Intenders: 42%
- Britain Leisure Trip Intenders: 7%

**Market: China**
- All Respondents: 100%
- International Leisure Trip Intenders: 95%
- European Leisure Trip Intenders: 52%
- Britain Leisure Trip Intenders: 25%

**Market: India**
- All Respondents: 100%
- International Leisure Trip Intenders: 98%
- European Leisure Trip Intenders: 49%
- Britain Leisure Trip Intenders: 18%

**Market: USA**
- All Respondents: 100%
- International Leisure Trip Intenders: 92%
- European Leisure Trip Intenders: 52%
- Britain Leisure Trip Intenders: 9%

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

Short-haul markets

**Market: France**
- All Respondents: 100%
- International Leisure: 96%
- European Leisure Trip Intenders: 67%
- Britain Leisure Trip Intenders: 53%

**Market: Germany**
- All Respondents: 100%
- International Leisure: 93%
- European Leisure Trip Intenders: 77%
- Britain Leisure Trip Intenders: 23%

**Market: Irish Republic**
- All Respondents: 100%
- International Leisure: 94%
- European Leisure Trip Intenders: 79%
- Britain Leisure Trip Intenders: 21%

**Market: Italy**
- All Respondents: 100%
- International Leisure: 97%
- European Leisure Trip Intenders: 74%
- Britain Leisure Trip Intenders: 26%

**Market: Netherlands**
- All Respondents: 100%
- International Leisure: 95%
- European Leisure Trip Intenders: 75%
- Britain Leisure Trip Intenders: 25%

**Market: Norway**
- All Respondents: 100%
- International Leisure: 90%
- European Leisure Trip Intenders: 79%
- Britain Leisure Trip Intenders: 21%

**Market: Spain**
- All Respondents: 100%
- International Leisure: 94%
- European Leisure Trip Intenders: 77%
- Britain Leisure Trip Intenders: 23%

**Market: Sweden**
- All Respondents: 100%
- International Leisure: 92%
- European Leisure Trip Intenders: 73%
- Britain Leisure Trip Intenders: 27%

Q: / Base: All Respondents (n = 7,500)
### Britain Intenders – Travel Horizons

<table>
<thead>
<tr>
<th></th>
<th>Short-haul (n = 454)</th>
<th>Long-haul (n = 537)</th>
<th>Total (n = 991)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept. 21 - Dec. 21</td>
<td>36%</td>
<td>35%</td>
<td>36%</td>
</tr>
<tr>
<td>Jan. 22 - March 22</td>
<td>11%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Apr. 22 - June 22</td>
<td>16%</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>July 22 - Aug. 22</td>
<td>15%</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>Sept. 22 - Dec. 22</td>
<td>5%</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>2023:beyond</td>
<td>4%</td>
<td>6%</td>
<td>5%</td>
</tr>
</tbody>
</table>

**Base:** Respondents who plan on taking a leisure trip in Britain (n = 991)
Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7450)
Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7450)
## Sample description

### Gender

<table>
<thead>
<tr>
<th></th>
<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 Rep.</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Spain</th>
<th>Sweden</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>49%</td>
<td>50%</td>
<td>50%</td>
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<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Female</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>51%</td>
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<td>50%</td>
<td>50%</td>
<td>48%</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>49%</td>
</tr>
</tbody>
</table>

### Age

<table>
<thead>
<tr>
<th></th>
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### Status

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<th>Norway</th>
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### Financial Situation

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<th>Norway</th>
<th>Spain</th>
<th>Sweden</th>
<th>USA</th>
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### Segmentation

#### Among international trip Intenders

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<th>Neths.</th>
<th>Norway</th>
<th>Spain</th>
<th>Sweden</th>
<th>USA</th>
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</thead>
<tbody>
<tr>
<td>Buzzseekers</td>
<td>29%</td>
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<td>41%</td>
</tr>
<tr>
<td>Culture Buffs</td>
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<td>23%</td>
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<td>39%</td>
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</tr>
<tr>
<td>Explorers</td>
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Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7450)

#### Among Europe Intenders

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

#### Among Britain Intenders

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