Inbound COVID-19 Sentiment Tracker

Wave 4 – March 2022
Fieldwork: 10th – 23rd February 2022

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

Survey specifications

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

Useful definitions:

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

General guidance on statistical confidence level:

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

Sample sizes:

<table>
<thead>
<tr>
<th>Country</th>
<th>Sample size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>502</td>
</tr>
<tr>
<td>Brazil</td>
<td>503</td>
</tr>
<tr>
<td>Canada</td>
<td>500</td>
</tr>
<tr>
<td>China</td>
<td>1,001</td>
</tr>
<tr>
<td>India</td>
<td>501</td>
</tr>
<tr>
<td>Japan</td>
<td>501</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>503</td>
</tr>
<tr>
<td>South Korea</td>
<td>500</td>
</tr>
<tr>
<td>UAE</td>
<td>505</td>
</tr>
<tr>
<td>USA</td>
<td>1,028</td>
</tr>
<tr>
<td><strong>Total long-haul</strong></td>
<td><strong>6,044</strong></td>
</tr>
<tr>
<td>Denmark</td>
<td>501</td>
</tr>
<tr>
<td>France</td>
<td>500</td>
</tr>
<tr>
<td>Germany</td>
<td>502</td>
</tr>
<tr>
<td>Republic of Ireland</td>
<td>500</td>
</tr>
<tr>
<td>Italy</td>
<td>500</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>500</td>
</tr>
<tr>
<td>Norway</td>
<td>501</td>
</tr>
<tr>
<td>Russia</td>
<td>509</td>
</tr>
<tr>
<td>Spain</td>
<td>500</td>
</tr>
<tr>
<td>Sweden</td>
<td>501</td>
</tr>
<tr>
<td><strong>Total short-haul</strong></td>
<td><strong>5,013</strong></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>11,057</strong></td>
</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 causes of travel, measuring the competitive position of Britain’s destinations in consumers’ minds and mapping drivers of a visit to Britain. Data must help stakeholders prioritize marketing efforts in 2022.

• This report shows results of the fourth wave, which took place 10th – 23rd February 2022. It includes data trends vs wave 1 conducted from 4th to 15th December 2020, wave 2 conducted from 24th March to 5th April 2021 and wave 3 conducted from 23rd August to 6th September 2021.

Interpreting the survey results in a changing travel context

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

• Based on the TCI-Travelsat Sentiment Tracker monitoring e-reputation of travel and destinations(‘), the reputation of Britain in social conversations was comparable to the level observed in Wave 3 (positive, but slightly below the European average). The war in Ukraine (24th Feb) started right after the fieldwork ended with the completion of the very last interviews (23rd Feb), therefore the unstable geopolitical environment in Europe had a limited impact in answers collected. Data from the Russian market should obviously be taken as a pre-war state of opinion.

• Please see the next slide to see this illustrated.

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

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

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

Fieldwork Wave 1  |  Fieldwork Wave 2  |  Fieldwork Wave 3  |  Fieldwork Wave 4

Covid crisis start  |  UK Variant


<table>
<thead>
<tr>
<th>Country</th>
<th>Jan</th>
<th>Feb</th>
<th>YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>25</td>
<td>33</td>
<td>29</td>
</tr>
<tr>
<td>France</td>
<td>33</td>
<td>36</td>
<td>34</td>
</tr>
<tr>
<td>Germany</td>
<td>48</td>
<td>21</td>
<td>35</td>
</tr>
<tr>
<td>Italy</td>
<td>61</td>
<td>52</td>
<td>57</td>
</tr>
<tr>
<td>Mexico</td>
<td>27</td>
<td>39</td>
<td>33</td>
</tr>
<tr>
<td>Spain</td>
<td>32</td>
<td>42</td>
<td>37</td>
</tr>
<tr>
<td>Thailand</td>
<td>50</td>
<td>60</td>
<td>55</td>
</tr>
<tr>
<td>Turkey</td>
<td>15</td>
<td>32</td>
<td>23</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>24</td>
<td>17</td>
<td>20</td>
</tr>
<tr>
<td>United States</td>
<td>23</td>
<td>27</td>
<td>25</td>
</tr>
<tr>
<td>World</td>
<td>37</td>
<td>39</td>
<td>38</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 of travellers’ planning alone, BUT a positive e-reputation is essential to generate favourability towards destinations and travel brands, particularly in a post-crisis management context.
Respondents’ financial situation (Trends)

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

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

Trend calculated at constant perimeter (13 markets consolidated)
Respondents’ financial situation (Short-haul)

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

Q25: How would you qualify your spending power for the next 12 months in comparison with your situation before the outbreak of coronavirus?
Base: All respondents (n = 11,057)
In LH markets, Japan, Brazil and South Korea express higher financial uncertainties, while the majority of North Americans, Chinese, GCC markets and Indians say they are not really affected or even better off than before.

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

Base: All respondents (n = 11,057)
Overall travel intentions
Overall travel intentions: summary

• While the choice of the destination remains open among most planners, the overall travel intentions continue increasing with more than half of respondents definitely planning a trip abroad in the coming 12 months.

• Beyond holiday motivations, visiting friends and relatives is still a significant purpose of travel for a third of respondents on average.

• Half of SH intenders consider May to September for the next trip abroad. Travel planning spans over a larger window among LH travellers, however, in several markets a trip by the end of summer is also considered.

• The younger generation again shows the highest propensity to travel internationally across most SH and LH markets.

• Opportunity to travel for those who are better off (or not impacted) financially remains high, but uncertainty in financial situation is not hugely detrimental to travel intentions.

• The shift from health-centric to money-centric attitudes is accelerating with a greater focus on money-back cancellation guarantees, attractive deals (ranked #2 in SH markets!) and insurance for COVID-19 travel. Expectations for a full and safe experience at destinations grow, with stable sanitary and political environment and higher freedom of movement (removal of quarantine policies) remains key for LH markets in particular.

• As part of trip activators, the money “factor” is even more important for potential visitors to Britain. Respect for COVID-19 rules by other people, access to healthcare, risks of contracting COVID-19, and change in quarantine requirements are frequent concerns among those wishing to go to Britain.

• Booking last-minute for adapting travel uncertainties is less dominant in attitudes as consumers gain confidence, confirming a shift towards pre-pandemic attitudes related to travel.

• Respondents express further interest in sustainable and responsible travel, while feeling more confident in visiting must-see sites. A sentiment of “catching up” the lost time suggest possibilities of longer stay for a next trip in several markets.
Data trends

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

Travel consideration

<table>
<thead>
<tr>
<th>Definitely</th>
<th>Probably</th>
<th>Maybe</th>
<th>Probably/Definitely not 12%</th>
</tr>
</thead>
<tbody>
<tr>
<td>39%</td>
<td>30%</td>
<td>19%</td>
<td>11%</td>
</tr>
<tr>
<td>41%</td>
<td>32%</td>
<td>16%</td>
<td>7%</td>
</tr>
<tr>
<td>50%</td>
<td>30%</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>54%</td>
<td>29%</td>
<td>12%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Trend calculated at constant perimeter (13 markets consolidated)

Trip planning stage

<table>
<thead>
<tr>
<th>December 20</th>
<th>March 21</th>
<th>August 21</th>
<th>February 22</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have booked travel or accommodation</td>
<td>7%</td>
<td>8%</td>
<td>13%</td>
</tr>
<tr>
<td>I have decided where to go but not yet booked travel or accommodation</td>
<td>31%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>I have started thinking about the trip but not yet decided where to go</td>
<td>30%</td>
<td>35%</td>
<td>32%</td>
</tr>
<tr>
<td>I'd like to go at some point, but haven't given it much thought</td>
<td>32%</td>
<td>27%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Purpose of leisure travel

<table>
<thead>
<tr>
<th>December 20</th>
<th>March 21</th>
<th>August 21</th>
<th>February 22</th>
</tr>
</thead>
<tbody>
<tr>
<td>For Holiday</td>
<td>80%</td>
<td>83%</td>
<td>86%</td>
</tr>
<tr>
<td>To visit friends or relatives</td>
<td>34%</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>For other leisure purposes</td>
<td>29%</td>
<td>25%</td>
<td>25%</td>
</tr>
</tbody>
</table>

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

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

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Definitely</th>
<th>Probably</th>
<th>Maybe</th>
<th>Probably/Definitely not</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>52%</td>
<td>67%</td>
<td>28%</td>
<td>8%</td>
</tr>
<tr>
<td>Short Haul</td>
<td>56%</td>
<td>60%</td>
<td>23%</td>
<td>12%</td>
</tr>
<tr>
<td>Denmark</td>
<td>60%</td>
<td>29%</td>
<td>30%</td>
<td>8%</td>
</tr>
<tr>
<td>France</td>
<td>58%</td>
<td>20%</td>
<td>30%</td>
<td>7%</td>
</tr>
<tr>
<td>Germany</td>
<td>57%</td>
<td>34%</td>
<td>29%</td>
<td>6%</td>
</tr>
<tr>
<td>Irish Republic</td>
<td>56%</td>
<td>30%</td>
<td>20%</td>
<td>7%</td>
</tr>
<tr>
<td>Italy</td>
<td>56%</td>
<td>26%</td>
<td>34%</td>
<td>3%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>54%</td>
<td>30%</td>
<td>30%</td>
<td>12%</td>
</tr>
<tr>
<td>Norway</td>
<td>54%</td>
<td>30%</td>
<td>30%</td>
<td>14%</td>
</tr>
<tr>
<td>Russia</td>
<td>53%</td>
<td>37%</td>
<td>23%</td>
<td>2%</td>
</tr>
<tr>
<td>Spain</td>
<td>58%</td>
<td>25%</td>
<td>18%</td>
<td>7%</td>
</tr>
<tr>
<td>Sweden</td>
<td>58%</td>
<td>25%</td>
<td>18%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Base: All respondents (n = 11,057)
In LH markets, Japan and (to a lesser extent) South Korea and Australia are the most hesitant markets. The US, India, Brazil and Gulf countries express a strong willingness to travel.

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

Base: All respondents (n = 11,057)
The younger generation shows again the highest propensity to travel internationally across most markets, excepted in Sweden and Denmark where the sentiment towards international travel is equal or higher in older generations.

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

<table>
<thead>
<tr>
<th>Age Group</th>
<th>SH</th>
<th>Denmark</th>
<th>France</th>
<th>Germany</th>
<th>Irish Republic</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Russia</th>
<th>Spain</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34 yrs</td>
<td>90%</td>
<td>76%</td>
<td>96%</td>
<td>92%</td>
<td>90%</td>
<td>96%</td>
<td>91%</td>
<td>86%</td>
<td>88%</td>
<td>96%</td>
<td>83%</td>
</tr>
<tr>
<td>35-54 yrs</td>
<td>86%</td>
<td>83%</td>
<td>92%</td>
<td>88%</td>
<td>88%</td>
<td>91%</td>
<td>80%</td>
<td>74%</td>
<td>90%</td>
<td>91%</td>
<td>84%</td>
</tr>
<tr>
<td>55+ yrs</td>
<td>80%</td>
<td>80%</td>
<td>82%</td>
<td>83%</td>
<td>82%</td>
<td>90%</td>
<td>75%</td>
<td>71%</td>
<td>72%</td>
<td>85%</td>
<td>84%</td>
</tr>
</tbody>
</table>

Q5: How likely would you be to consider an international leisure trip for more than one night in the next 12 months?
Q3: What is your age?
Base: Respondents who plan on taking a European leisure trip in the next 12 months (n = 6,411)
Impact of age on propensity to travel to Europe (Long-haul)

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

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?,?
Base: Respondents who plan on taking a European leisure trip in the next 12 months (n = 6,411)
Impact of financial situation on propensity to travel (SH)

Opportunity to travel for those who are better off (or not impacted) financially remains high, but uncertainty in financial situation is not hugely detrimental to travel intentions (82% of SH markets stating financial uncertainties still intend to travel). The financial factor seems less important in France, Italy or Germany. Financial uncertainties act more as an obstacle in the Netherlands and Nordic markets.

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

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

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

![Leisure travel intention (% Definitely + Probably)](image)

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

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

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

Leisure travel intention (% Definitely + Probably)

- Yes – I have been fully vaccinated with a booster vaccine: 82%
- Yes – I have been vaccinated but did not receive a booster vaccine yet: 78%
- No – I haven't had the opportunity yet but will when I can: 75%
- No – I will not be taking a vaccine: 73%

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

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

Q26: Have you had a COVID-19 vaccination?

Base: All respondents (n = 11,057)
Europeans have not advanced much towards the booking stage as more than half remain in the early stages of planning - an opportunity for Britain destinations to market hesitant planners. The Netherlands, Germany and the Republic of Ireland have the highest levels of booking rate among markets surveyed (over 1 in 5 have booked travel or accommodation). Spaniards and Italians – though showing a strong desire for travel - are less advanced in the trip definition process.

Q8: Which of the following best describes where you stand with your plans for your next international leisure trip?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)
The US again has the highest levels of booking rate among markets surveyed, followed by Brazilians and Canadians. Except for Brazil, where more than half of planners have decided where to go, the choice of destination is still very open across all LH markets, notably in the UAE markets, South Korea and China.

Q8: Which of the following best describes where you stand with your plans for your next international leisure trip?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)
Among leisure travel intenders considering Britain, the consideration for a wider set of possible destinations remains high. Potential visitors to London seem more decided than average intenders to Britain.

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

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

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

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

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>LH</th>
<th>Australia</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>India</th>
<th>Japan</th>
<th>Saudi Arabia</th>
<th>South Korea</th>
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<th>USA</th>
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<td>4%</td>
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<tr>
<td>Oct-Dec 23</td>
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</tr>
<tr>
<td>2024/beyond</td>
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<td>3%</td>
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<td>8%</td>
<td>1%</td>
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<td>Don’t know</td>
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<td>8%</td>
<td>2%</td>
<td>44%</td>
<td>12%</td>
<td>10%</td>
<td>3%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)
Propensity to travel in the very short term remains higher among younger potential travellers. Older demographics show high interest in holidaying after the summer peak season.

Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)
The impact of vaccination on the travel horizon is now limited.

Q7: When do you plan to go on your next international leisure trip for more than one night?
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)
While holiday motivations remain mainstream for Europeans, the need for reconnecting with friends and relatives remains for a third of respondents on average with higher rates in the Republic of Ireland.

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

* Russia is not included due to limited data comparability, however the VFR motivation reaches 22.4% in this market.
Purpose of leisure travel (LH)

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

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

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

Travel attitudes (Completely+Somewhat agree)

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

Trend calculated at constant perimeter (13 markets consolidated)

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%
- I will think more about sustainability and the environmental impact when planning future holidays, 62%
- Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning, 62%

March 21 August 21 February 22
Activators for an international leisure trip (SH)

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

Q20: What would make you more likely to travel internationally for leisure in the next 12 months? (Multiple Answers)

<table>
<thead>
<tr>
<th>Activator</th>
<th>Total</th>
<th>SH</th>
<th>Denmark</th>
<th>France</th>
<th>Germany</th>
<th>Rep. of Ireland</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Russia</th>
<th>Spain</th>
<th>Sweden</th>
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</thead>
<tbody>
<tr>
<td>Money-back guarantee should I wish to cancel my trip</td>
<td>34%</td>
<td>41%</td>
<td>43%</td>
<td>40%</td>
<td>39%</td>
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<td>40%</td>
<td>41%</td>
<td>43%</td>
<td>48%</td>
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<td>33%</td>
<td>32%</td>
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<td>22%</td>
<td>37%</td>
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<td>24%</td>
<td>38%</td>
<td>43%</td>
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<td>34%</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td>30%</td>
<td>32%</td>
<td>37%</td>
<td>26%</td>
<td>34%</td>
<td>29%</td>
<td>26%</td>
<td>29%</td>
<td>37%</td>
<td>43%</td>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>A significant decrease in coronavirus cases at destination</td>
<td>29%</td>
<td>25%</td>
<td>21%</td>
<td>23%</td>
<td>26%</td>
<td>26%</td>
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<tr>
<td>Insurance for COVID-19 related travel changes/changes to regulations</td>
<td>25%</td>
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<tr>
<td>Hygiene &amp; safety protocols in place at destination</td>
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<td>19%</td>
<td>10%</td>
<td>16%</td>
<td>25%</td>
<td>27%</td>
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<tr>
<td>Removal of quarantine policies in home country</td>
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<td>30%</td>
<td>36%</td>
<td>22%</td>
<td>19%</td>
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<tr>
<td>A high proportion of the population being vaccinated in the destination country</td>
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<td>17%</td>
<td>17%</td>
<td>12%</td>
<td>16%</td>
<td>23%</td>
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<tr>
<td>Welcoming locals in destination country</td>
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<td>22%</td>
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</tr>
<tr>
<td>Assurance that there will be a range of enough things to do</td>
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<td>16%</td>
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<td>25%</td>
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<tr>
<td>Receiving a booster COVID-19 vaccination</td>
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<td>17%</td>
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<tr>
<td>Your Government’s advice on international travel</td>
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<td>17%</td>
<td>8%</td>
<td>12%</td>
<td>21%</td>
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<td>28%</td>
<td>7%</td>
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<tr>
<td>Voucher-back guarantee should I wish to cancel my trip</td>
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<td>16%</td>
<td>16%</td>
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<td>16%</td>
<td>18%</td>
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<td>19%</td>
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<tr>
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<td>8%</td>
<td>12%</td>
<td>4%</td>
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<td>13%</td>
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<tr>
<td>Official national hygiene label in accommodation and attractions in destination</td>
<td>12%</td>
<td>8%</td>
<td>6%</td>
<td>7%</td>
<td>9%</td>
<td>10%</td>
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<tr>
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<td>N/A</td>
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</tbody>
</table>

Base: All respondents (n = 11,057)
Activators for an international leisure trip (LH)

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

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

<table>
<thead>
<tr>
<th>Activator</th>
<th>Total</th>
<th>LH</th>
<th>Australia</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>India</th>
<th>Japan</th>
<th>Saudi Arabia</th>
<th>South Korea</th>
<th>UAE</th>
<th>USA</th>
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<tbody>
<tr>
<td>Money-back guarantee should I wish to cancel my trip</td>
<td>34%</td>
<td>27%</td>
<td>40%</td>
<td>38%</td>
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<td>13%</td>
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<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
<td>30%</td>
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<td>44%</td>
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<td>28%</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td>30%</td>
<td>28%</td>
<td>32%</td>
<td>16%</td>
<td>35%</td>
<td>24%</td>
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<tr>
<td>A significant decrease in coronavirus cases at destination</td>
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<td>Insurance for COVID-19 related travel changes/changes to regulations</td>
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<td>13%</td>
<td>24%</td>
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<td>22%</td>
</tr>
<tr>
<td>Hygiene &amp; safety protocols in place at destination</td>
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</table>
Money-centric factors and removal of quarantine policies are the most frequent activators mentioned by SH markets for a potential trip to Britain. Deals have moved up from fourth to second consideration in the short-haul markets. Germans, French and Spaniards would also be sure about living the full experience at destination.

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

<table>
<thead>
<tr>
<th>Activator</th>
<th>Total</th>
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<th>France</th>
<th>Germany</th>
<th>Rep. of Ireland</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Russia</th>
<th>Spain</th>
<th>Sweden</th>
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<td>A significant decrease in coronavirus cases at destination</td>
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<td>Insurance for COVID-19 related travel changes/changes to regulations</td>
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<td>Official national hygiene label in accommodation and attractions in destination</td>
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Q20: What would make you more likely to travel to Britain (England, Scotland, Wales) for leisure in the next 12 months? (Multiple Answers)
Base: All respondents (n = 11,057)
Activators for a leisure trip to Britain (LH)

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

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

<table>
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<tr>
<th>Activator</th>
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</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 = 11,057)
Concerns about next international leisure trip (Short-haul)

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

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

<table>
<thead>
<tr>
<th>Concern</th>
<th>Total</th>
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<tr>
<td>Access to healthcare if I contract COVID-19 abroad</td>
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</tr>
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<td>Other people not following COVID-19 policies and procedures during the journey and in destination</td>
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</tr>
</tbody>
</table>
LH markets are mostly concerned about COVID-19-related risks and access to healthcare.

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<tr>
<th>(%) Very + Somewhat concerned</th>
<th>Total</th>
<th>LH</th>
<th>Australia</th>
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</tbody>
</table>

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

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

Q23: How concerned are you about the following when thinking about your next international trip?

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

<table>
<thead>
<tr>
<th>(% Very + Somewhat concerned)</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>
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</table>
**Attitudes to travel (SH)**

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

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

Base: All respondents (n = 11,057)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Total</th>
<th>SH</th>
<th>Denmark</th>
<th>France</th>
<th>Germany</th>
<th>Irish Republic</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Russia</th>
<th>Spain</th>
<th>Sweden</th>
</tr>
</thead>
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<tr>
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<td>73%</td>
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<tr>
<td>I will look for less crowded places to visit, even if it means 'missing' must-see attractions</td>
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<td>I will delay my next international trip until the sanitary context with Omicron is under control</td>
<td>63%</td>
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<td>44%</td>
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<td>62%</td>
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<tr>
<td>I will think more about sustainability and the environmental impact when planning future holidays</td>
<td>63%</td>
<td>54%</td>
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<td>56%</td>
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</tbody>
</table>
Attitudes to travel (LH)

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

<table>
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<td>69%</td>
<td>47%</td>
<td>62%</td>
<td>66%</td>
<td>58%</td>
<td>65%</td>
</tr>
<tr>
<td>I will favor destinations I have been before rather than new places</td>
<td>49%</td>
<td>54%</td>
<td>51%</td>
<td>43%</td>
<td>45%</td>
<td>63%</td>
<td>70%</td>
<td>43%</td>
<td>59%</td>
<td>42%</td>
<td>56%</td>
<td>55%</td>
</tr>
</tbody>
</table>

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

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

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

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

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

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

## Destinations envisaged

<table>
<thead>
<tr>
<th>Region</th>
<th>December 20</th>
<th>March 21</th>
<th>August 21</th>
<th>February 22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>62%</td>
<td>63%</td>
<td>63%</td>
<td></td>
</tr>
<tr>
<td>Asia</td>
<td>22%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>North America</td>
<td>19%</td>
<td></td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Australia/Oceania</td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>South/Central America</td>
<td>11%</td>
<td></td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Caribbean</td>
<td>11%</td>
<td></td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Middle East</td>
<td>7%</td>
<td></td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Africa</td>
<td>6%</td>
<td></td>
<td>5%</td>
<td></td>
</tr>
</tbody>
</table>

## European destinations envisaged (TOP 5)

<table>
<thead>
<tr>
<th>Region</th>
<th>December 20</th>
<th>March 21</th>
<th>August 21</th>
<th>February 22</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>15.5%</td>
<td></td>
<td>14.7%</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>13.4%</td>
<td></td>
<td>13.3%</td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>13.3%</td>
<td></td>
<td>14.7%</td>
<td></td>
</tr>
<tr>
<td>Britain</td>
<td>12.9%</td>
<td></td>
<td>14.8%</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>12.7%</td>
<td></td>
<td>14.9%</td>
<td></td>
</tr>
</tbody>
</table>

Trend calculated at constant perimeter (13 markets consolidated)
Britain has gained very significant consideration shares in China and is more considered in the US, Spain, Norway, Germany and France. Britain has lost some individuals wishing to travel from India, Sweden and the Irish Republic compared to 6 months ago.

<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>Britain</td>
<td>1.5%</td>
<td>0.2%</td>
<td>2.8%</td>
<td>0.1%</td>
<td>0.7%</td>
<td>10.3%</td>
<td>1.2%</td>
<td>2.0%</td>
<td>-5.2%</td>
<td>-3.8%</td>
<td>-0.4%</td>
<td>-0.6%</td>
<td>2.7%</td>
<td>3.0%</td>
<td>-2.1%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Austria</td>
<td>-0.4%</td>
<td>0.1%</td>
<td>-0.9%</td>
<td>1.0%</td>
<td>-0.4%</td>
<td>0.5%</td>
<td>-0.8%</td>
<td>0.2%</td>
<td>-5.2%</td>
<td>-2.0%</td>
<td>-1.4%</td>
<td>0.4%</td>
<td>1.6%</td>
<td>-0.6%</td>
<td>3.0%</td>
<td>-1.4%</td>
</tr>
<tr>
<td>Belgium</td>
<td>0.2%</td>
<td>0.8%</td>
<td>-0.5%</td>
<td>-0.2%</td>
<td>1.2%</td>
<td>0.7%</td>
<td>0.8%</td>
<td>0.4%</td>
<td>-3.6%</td>
<td>-2.2%</td>
<td>0.0%</td>
<td>1.6%</td>
<td>1.8%</td>
<td>2.6%</td>
<td>1.8%</td>
<td>-1.0%</td>
</tr>
<tr>
<td>Croatia</td>
<td>-0.2%</td>
<td>0.4%</td>
<td>-0.8%</td>
<td>-0.4%</td>
<td>-0.8%</td>
<td>0.7%</td>
<td>-2.6%</td>
<td>2.3%</td>
<td>-3.0%</td>
<td>-2.2%</td>
<td>3.0%</td>
<td>1.4%</td>
<td>-1.8%</td>
<td>1.0%</td>
<td>2.2%</td>
<td>-1.5%</td>
</tr>
<tr>
<td>Denmark</td>
<td>-0.2%</td>
<td>0.1%</td>
<td>-0.4%</td>
<td>-0.2%</td>
<td>-1.6%</td>
<td>0.6%</td>
<td>-1.8%</td>
<td>-0.9%</td>
<td>-1.2%</td>
<td>1.0%</td>
<td>-2.2%</td>
<td>3.0%</td>
<td>1.9%</td>
<td>0.2%</td>
<td>-0.7%</td>
<td>-0.4%</td>
</tr>
<tr>
<td>Finland</td>
<td>-0.5%</td>
<td>0.3%</td>
<td>-1.4%</td>
<td>0.2%</td>
<td>-0.8%</td>
<td>-2.4%</td>
<td>-1.2%</td>
<td>0.2%</td>
<td>-3.8%</td>
<td>0.6%</td>
<td>0.4%</td>
<td>1.8%</td>
<td>0.0%</td>
<td>-0.4%</td>
<td>1.0%</td>
<td>-0.4%</td>
</tr>
<tr>
<td>France</td>
<td>0.5%</td>
<td>-0.3%</td>
<td>1.4%</td>
<td>-2.2%</td>
<td>1.3%</td>
<td>6.6%</td>
<td>-3.0%</td>
<td>-5.0%</td>
<td>1.2%</td>
<td>0.0%</td>
<td>-2.2%</td>
<td>2.1%</td>
<td>-3.1%</td>
<td>3.0%</td>
<td>1.3%</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>0.1%</td>
<td>-0.1%</td>
<td>0.4%</td>
<td>1.5%</td>
<td>-1.5%</td>
<td>4.8%</td>
<td>-0.6%</td>
<td>-4.6%</td>
<td>-2.8%</td>
<td>-1.4%</td>
<td>2.8%</td>
<td>2.1%</td>
<td>-1.8%</td>
<td>2.1%</td>
<td>-1.2%</td>
<td></td>
</tr>
<tr>
<td>Greece</td>
<td>-0.1%</td>
<td>1.0%</td>
<td>-1.4%</td>
<td>-0.2%</td>
<td>-1.7%</td>
<td>-1.6%</td>
<td>-2.8%</td>
<td>1.5%</td>
<td>-2.8%</td>
<td>0.8%</td>
<td>0.8%</td>
<td>3.2%</td>
<td>3.3%</td>
<td>0.8%</td>
<td>0.5%</td>
<td>-1.0%</td>
</tr>
<tr>
<td>Italy</td>
<td>-0.1%</td>
<td>-0.4%</td>
<td>0.2%</td>
<td>-0.1%</td>
<td>3.1%</td>
<td>1.3%</td>
<td>-0.8%</td>
<td>2.2%</td>
<td>-4.6%</td>
<td>-2.8%</td>
<td>1.2%</td>
<td>0.9%</td>
<td>-5.5%</td>
<td>1.7%</td>
<td>0.0%</td>
<td></td>
</tr>
<tr>
<td>Netherlands</td>
<td>0.6%</td>
<td>1.2%</td>
<td>-0.1%</td>
<td>0.4%</td>
<td>-1.0%</td>
<td>0.8%</td>
<td>-1.0%</td>
<td>0.9%</td>
<td>-0.4%</td>
<td>-1.0%</td>
<td>2.6%</td>
<td>1.2%</td>
<td>0.2%</td>
<td>2.0%</td>
<td>-0.8%</td>
<td></td>
</tr>
<tr>
<td>Portugal</td>
<td>-0.2%</td>
<td>0.1%</td>
<td>-0.4%</td>
<td>-0.4%</td>
<td>-1.1%</td>
<td>0.3%</td>
<td>-2.0%</td>
<td>0.1%</td>
<td>-0.8%</td>
<td>0.2%</td>
<td>2.0%</td>
<td>2.0%</td>
<td>-0.2%</td>
<td>-2.4%</td>
<td>1.0%</td>
<td>-0.7%</td>
</tr>
<tr>
<td>Spain</td>
<td>1.5%</td>
<td>2.1%</td>
<td>0.9%</td>
<td>1.7%</td>
<td>3.8%</td>
<td>1.5%</td>
<td>-1.4%</td>
<td>1.6%</td>
<td>-2.6%</td>
<td>-2.2%</td>
<td>8.1%</td>
<td>3.4%</td>
<td>9.1%</td>
<td>0.2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sweden</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.2%</td>
<td>0.8%</td>
<td>-1.0%</td>
<td>0.6%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>-0.4%</td>
<td>0.6%</td>
<td>0.6%</td>
<td>1.4%</td>
<td>-0.5%</td>
<td>-1.4%</td>
<td>0.5%</td>
<td></td>
</tr>
<tr>
<td>Switzerland</td>
<td>-0.4%</td>
<td>-0.1%</td>
<td>-0.7%</td>
<td>-2.4%</td>
<td>-0.5%</td>
<td>1.5%</td>
<td>-0.4%</td>
<td>0.6%</td>
<td>-4.6%</td>
<td>0.0%</td>
<td>-2.2%</td>
<td>0.4%</td>
<td>0.0%</td>
<td>-0.6%</td>
<td>1.8%</td>
<td>-0.1%</td>
</tr>
<tr>
<td>Turkey</td>
<td>0.4%</td>
<td>0.6%</td>
<td>0.1%</td>
<td>0.4%</td>
<td>0.0%</td>
<td>-0.1%</td>
<td>1.4%</td>
<td>1.4%</td>
<td>-1.0%</td>
<td>-0.8%</td>
<td>0.4%</td>
<td>0.2%</td>
<td>2.2%</td>
<td>-2.2%</td>
<td>2.6%</td>
<td>0.8%</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 improving widely for all British destinations, with nearly ¾ of respondents now rating the destination as COVID-19 safe.

**Data trends**

Trend calculated at constant perimeter (13 markets consolidated)
The COVID-19 perception of safety of Britain has improved further compared to the average destinations and sees its reputation massively improved in Sweden and Norway. The increase in safety image is more significant in SH markets.

W4/W3 Evolution (+/-)

<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>Rep. of Ireland</th>
<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>9.1%</td>
<td>14.3%</td>
<td>3.0%</td>
<td>1.4%</td>
<td>10.0%</td>
<td>1.2%</td>
<td>8.8%</td>
<td>6.8%</td>
<td>-3.0%</td>
<td>16.2%</td>
<td>12.4%</td>
<td>16.4%</td>
<td>25.0%</td>
<td>10.2%</td>
<td>19.1%</td>
<td>4.9%</td>
</tr>
<tr>
<td><strong>Scotland</strong></td>
<td>7.0%</td>
<td>10.5%</td>
<td>3.0%</td>
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<td>9.0%</td>
<td>1.3%</td>
<td>5.0%</td>
<td>5.5%</td>
<td>-1.4%</td>
<td>12.6%</td>
<td>8.6%</td>
<td>10.6%</td>
<td>19.4%</td>
<td>6.8%</td>
<td>15.9%</td>
<td>5.4%</td>
</tr>
<tr>
<td><strong>Wales</strong></td>
<td>7.6%</td>
<td>11.4%</td>
<td>3.2%</td>
<td>2.6%</td>
<td>12.0%</td>
<td>2.5%</td>
<td>6.6%</td>
<td>8.6%</td>
<td>-4.0%</td>
<td>14.8%</td>
<td>10.6%</td>
<td>13.6%</td>
<td>17.8%</td>
<td>5.6%</td>
<td>13.9%</td>
<td>3.2%</td>
</tr>
<tr>
<td><strong>Benchmark</strong></td>
<td>7.9%</td>
<td>7.4%</td>
<td>2.7%</td>
<td>3.5%</td>
<td>12.4%</td>
<td>6.1%</td>
<td>8.2%</td>
<td>8.1%</td>
<td>-1.7%</td>
<td>16.4%</td>
<td>11.1%</td>
<td>12.2%</td>
<td>18.5%</td>
<td>7.2%</td>
<td>16.5%</td>
<td>5.3%</td>
</tr>
</tbody>
</table>
Regional destinations for a next international leisure trip (SH)

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

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

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

<table>
<thead>
<tr>
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<th>USA</th>
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<tr>
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<tr>
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<td>7%</td>
<td>24%</td>
<td>11%</td>
<td>26%</td>
</tr>
<tr>
<td>Australia/Oceania</td>
<td>11%</td>
<td>17%</td>
<td>25%</td>
<td>7%</td>
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<td>25%</td>
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<td>12%</td>
</tr>
<tr>
<td>Middle East</td>
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<td>13%</td>
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<td>4%</td>
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<td>5%</td>
<td>33%</td>
<td>4%</td>
<td>28%</td>
<td>7%</td>
</tr>
<tr>
<td>South/Central America/Caribbean</td>
<td>9%</td>
<td>11%</td>
<td>6%</td>
<td>24%</td>
<td>24%</td>
<td>6%</td>
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<td>19%</td>
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<td>Africa</td>
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<td>26%</td>
<td>2%</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>I don't know yet</td>
<td>5%</td>
<td>6%</td>
<td>10%</td>
<td>2%</td>
<td>5%</td>
<td>7%</td>
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<td>12%</td>
<td>11%</td>
<td>4%</td>
<td>3%</td>
<td>6%</td>
</tr>
</tbody>
</table>

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

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

Q10: To which destination(s) in Europe in particular? (Multiple Answers)
Base: Respondents who plan on taking a European leisure trip in the next 12 months (n=6,411)
The competitive position of Britain is steady in all LH markets and has reverted back to 3rd place in the US, in the Gulf markets and in South Korea. Britain remains the favourite destination envisaged in China and Australia.

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

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

**Q10: To which destination(s) in Europe in particular? (Multiple Answers)**

Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1,403)

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

### Long Haul Markets
- France: 43%
- Germany: 31%
- Italy: 25%
- Switzerland: 22%
- Denmark: 19%
- Spain: 19%
- Austria: 18%
- Belgium: 14%
- Greece: 14%
- Netherlands: 14%
- Finland: 13%
- Portugal: 13%
- Sweden: 13%
- Norway: 12%
- Turkey: 11%
Impact of age and gender on propensity to consider Britain

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

Intention to visit Britain (%)

<table>
<thead>
<tr>
<th>Gender</th>
<th>Age</th>
<th>Total</th>
<th>SH</th>
<th>LH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>Less than 35</td>
<td>13%</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td></td>
<td>From 35 to 54</td>
<td>14%</td>
<td>12%</td>
<td>15%</td>
</tr>
<tr>
<td></td>
<td>55 and over</td>
<td>11%</td>
<td>8%</td>
<td>15%</td>
</tr>
</tbody>
</table>

<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>Male</td>
<td>Less than 35</td>
<td>67%</td>
<td>36%</td>
<td>19%</td>
<td>29%</td>
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<tr>
<td></td>
<td>From 35 to 54</td>
<td>57%</td>
<td>39%</td>
<td>18%</td>
<td>22%</td>
</tr>
<tr>
<td></td>
<td>55 and over</td>
<td>43%</td>
<td>33%</td>
<td>14%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Q10. To which destination(s) in Europe in particular?
Base: Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588)
The financial situation is a determinant of travel to England more so than to European destinations, with opportunity confirmed for marketing to affluent travellers who are better off than before. The gap is more visible for potential visitors to England than Scotland or Wales.

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

Base: Europe Int. (n = 6,411) – Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588) – Large City Int. (n = 5,398)
Propensity to consider Britain increases with past experiences of the destinations.

Impact of previous visit on propensity to consider Britain

**Q27.** Have you visited Britain (England, Scotland, Wales) for a leisure trip for more than one night in the past five year?  
Base: Europe Int. (n = 6,411) – Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588) – Large City Int. (n = 5,398)
## Reasons for not considering a trip in Britain (open end)

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Total</th>
<th>Short Haul</th>
<th>Long Haul</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefer to travel elsewhere</td>
<td>18%</td>
<td>20%</td>
<td>16%</td>
</tr>
<tr>
<td>No interest / Not attracted</td>
<td>17%</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>Weather / Temperature</td>
<td>11%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>Too expensive / Prices too high</td>
<td>11%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Covid-related risks</td>
<td>9%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Already been</td>
<td>8%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Too far / Flight too long</td>
<td>6%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>Don't want to go there</td>
<td>5%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Brexit / Not part of the EU</td>
<td>4%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Not in my plans/Not a priority</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Don't want to go there</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Visa procedures / Don't have a passport</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Maybe in the future / Not for the moment</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Will first visit family / Friends elsewhere</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Don't speak English</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Change / Different currency</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Feeling of hostility from Britain</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>English cuisine</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Unstability</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Covid-related restrictions</td>
<td>1%</td>
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<tr>
<td>Not enough Covid-related restrictions</td>
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<td>1%</td>
</tr>
<tr>
<td>Left hand traffic</td>
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<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Prefer to travel in my home country / region</td>
<td>1%</td>
<td>1%</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 = 1367)
Destinations in Britain considered for a leisure trip (SH)

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

<table>
<thead>
<tr>
<th>Total</th>
<th>SH</th>
<th>Denmark</th>
<th>France</th>
<th>Germany</th>
<th>Rep. of Ireland</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Russia</th>
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<tr>
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<td>48%</td>
<td>57%</td>
<td>45%</td>
<td>52%</td>
</tr>
<tr>
<td>Scotland</td>
<td>36%</td>
<td>37%</td>
<td>28%</td>
<td>44%</td>
<td>40%</td>
<td>31%</td>
<td>53%</td>
<td>38%</td>
<td>32%</td>
<td>34%</td>
<td>43%</td>
</tr>
<tr>
<td>Wales</td>
<td>18%</td>
<td>13%</td>
<td>7%</td>
<td>14%</td>
<td>14%</td>
<td>12%</td>
<td>20%</td>
<td>14%</td>
<td>10%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>I wouldn’t consider a trip to Britain</td>
<td>12%</td>
<td>15%</td>
<td>21%</td>
<td>13%</td>
<td>18%</td>
<td>14%</td>
<td>4%</td>
<td>14%</td>
<td>13%</td>
<td>20%</td>
<td>7%</td>
</tr>
<tr>
<td>I don’t know yet</td>
<td>8%</td>
<td>8%</td>
<td>11%</td>
<td>5%</td>
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<td>4%</td>
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<table>
<thead>
<tr>
<th>Total</th>
<th>SH</th>
<th>Denmark</th>
<th>France</th>
<th>Germany</th>
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<th>Russia</th>
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<th>Sweden</th>
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<tbody>
<tr>
<td>London</td>
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<td>46%</td>
<td>58%</td>
<td>38%</td>
<td>52%</td>
<td>37%</td>
<td>47%</td>
<td>54%</td>
<td>46%</td>
</tr>
<tr>
<td>North West (e.g. Manchester, Liverpool, Lake District)</td>
<td>33%</td>
<td>28%</td>
<td>20%</td>
<td>23%</td>
<td>34%</td>
<td>24%</td>
<td>31%</td>
<td>23%</td>
<td>33%</td>
<td>36%</td>
<td>34%</td>
</tr>
<tr>
<td>East of England (e.g. Cambridge, Norfolk Broads, Norwich)</td>
<td>30%</td>
<td>21%</td>
<td>14%</td>
<td>22%</td>
<td>18%</td>
<td>17%</td>
<td>28%</td>
<td>20%</td>
<td>16%</td>
<td>23%</td>
<td>31%</td>
</tr>
<tr>
<td>South East (e.g. Brighton, Oxford, Kent, Windsor)</td>
<td>29%</td>
<td>28%</td>
<td>24%</td>
<td>30%</td>
<td>28%</td>
<td>20%</td>
<td>40%</td>
<td>22%</td>
<td>25%</td>
<td>27%</td>
<td>32%</td>
</tr>
<tr>
<td>East Midlands (e.g. Leicester, Derby, Peak District)</td>
<td>20%</td>
<td>15%</td>
<td>11%</td>
<td>15%</td>
<td>8%</td>
<td>14%</td>
<td>21%</td>
<td>17%</td>
<td>13%</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>South West (e.g. Bristol, Bath, Devon, Cornwall)</td>
<td>20%</td>
<td>18%</td>
<td>12%</td>
<td>17%</td>
<td>26%</td>
<td>12%</td>
<td>27%</td>
<td>15%</td>
<td>14%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>West Midlands (e.g. Birmingham, Stratford Upon Avon, Coventry)</td>
<td>18%</td>
<td>13%</td>
<td>9%</td>
<td>12%</td>
<td>12%</td>
<td>11%</td>
<td>19%</td>
<td>13%</td>
<td>11%</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>Yorkshire &amp; the Humber (e.g. Leeds, York, Yorkshire Dales)</td>
<td>16%</td>
<td>12%</td>
<td>7%</td>
<td>13%</td>
<td>13%</td>
<td>10%</td>
<td>15%</td>
<td>15%</td>
<td>9%</td>
<td>15%</td>
<td>12%</td>
</tr>
<tr>
<td>North East (e.g. Newcastle, Durham)</td>
<td>14%</td>
<td>10%</td>
<td>6%</td>
<td>11%</td>
<td>12%</td>
<td>4%</td>
<td>13%</td>
<td>13%</td>
<td>8%</td>
<td>9%</td>
<td>10%</td>
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<tr>
<td>I don't know yet</td>
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<td>9%</td>
<td>13%</td>
<td>14%</td>
<td>6%</td>
<td>7%</td>
<td>5%</td>
<td>13%</td>
<td>12%</td>
<td>9%</td>
<td>5%</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 = 10,954)

Q12: Which destination(s) in England? (Multiple Answers)
Base: Respondents who have chosen England in Q11a (n = 6,246)
Destinations in Britain considered for a leisure trip (LH)

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

Q11a: If you were to go to Britain in the next 12 months, which destination would you go to? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)

<table>
<thead>
<tr>
<th>England</th>
<th>Total</th>
<th>LH</th>
<th>Australia</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>India</th>
<th>Japan</th>
<th>Saudi Arabia</th>
<th>South Korea</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>36%</td>
<td>36%</td>
<td>33%</td>
<td>34%</td>
<td>36%</td>
<td>47%</td>
<td>44%</td>
<td>37%</td>
<td>16%</td>
<td>34%</td>
<td>30%</td>
<td>37%</td>
</tr>
<tr>
<td>Wales</td>
<td>18%</td>
<td>22%</td>
<td>22%</td>
<td>18%</td>
<td>16%</td>
<td>33%</td>
<td>25%</td>
<td>20%</td>
<td>16%</td>
<td>13%</td>
<td>21%</td>
<td>22%</td>
</tr>
<tr>
<td>I wouldn’t consider a trip to Britain</td>
<td>12%</td>
<td>11%</td>
<td>17%</td>
<td>4%</td>
<td>16%</td>
<td>5%</td>
<td>4%</td>
<td>23%</td>
<td>15%</td>
<td>18%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>I don’t know yet</td>
<td>8%</td>
<td>9%</td>
<td>10%</td>
<td>3%</td>
<td>8%</td>
<td>9%</td>
<td>2%</td>
<td>11%</td>
<td>18%</td>
<td>10%</td>
<td>8%</td>
<td>8%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>London</th>
<th>Total</th>
<th>LH</th>
<th>Australia</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>India</th>
<th>Japan</th>
<th>Saudi Arabia</th>
<th>South Korea</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>North West (e.g. Manchester, Liverpool, Lake District)</td>
<td>41%</td>
<td>37%</td>
<td>38%</td>
<td>46%</td>
<td>47%</td>
<td>41%</td>
<td>32%</td>
<td>45%</td>
<td>24%</td>
<td>32%</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>East of England (e.g. Cambridge, Norfolk Broads, Norwich)</td>
<td>33%</td>
<td>36%</td>
<td>35%</td>
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<td>32%</td>
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<td>44%</td>
<td>45%</td>
<td>28%</td>
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<tr>
<td>South East (e.g. Brighton, Oxford, Kent, Windsor)</td>
<td>30%</td>
<td>36%</td>
<td>30%</td>
<td>37%</td>
<td>19%</td>
<td>54%</td>
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<td>43%</td>
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<td>37%</td>
<td>32%</td>
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</tr>
<tr>
<td>East Midlands (e.g. Leicester, Derby, Peak District)</td>
<td>29%</td>
<td>31%</td>
<td>35%</td>
<td>35%</td>
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<td>24%</td>
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<tr>
<td>South West (e.g. Bristol, Bath, Devon, Cornwall)</td>
<td>20%</td>
<td>23%</td>
<td>23%</td>
<td>18%</td>
<td>14%</td>
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<td>26%</td>
<td>16%</td>
</tr>
<tr>
<td>West Midlands (e.g. Birmingham, Stratford Upon Avon, Coventry)</td>
<td>20%</td>
<td>21%</td>
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</tr>
<tr>
<td>Yorkshire &amp; the Humber (e.g. Leeds, York, Yorkshire Dales)</td>
<td>18%</td>
<td>21%</td>
<td>23%</td>
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<td>22%</td>
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<td>15%</td>
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<tr>
<td>North East (e.g. Newcastle, Durham)</td>
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<td>18%</td>
<td>24%</td>
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</table>

Q11a: If you were to go to Britain in the next 12 months, which destination would you go to? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)

Q12: Which destination(s) in England? (Multiple Answers)
Base: Respondents who have chosen England in Q11a (n = 6,246)
Cities in Britain considered for a leisure trip (SH)

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

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

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

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

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<tr>
<th>City</th>
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<th>Germany</th>
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<tbody>
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<tr>
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</table>
Cities in Britain considered for a leisure trip (LH)

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

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<th>Brazil</th>
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<th>India</th>
<th>Japan</th>
<th>Saudi Arabia</th>
<th>South Korea</th>
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<tbody>
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England

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Scotland

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Wales

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<th>Total</th>
<th>LH</th>
<th>Australia</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>India</th>
<th>Japan</th>
<th>Saudi Arabia</th>
<th>South Korea</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardiff</td>
<td>76%</td>
<td>75%</td>
<td>77%</td>
<td>77%</td>
<td>86%</td>
<td>74%</td>
<td>84%</td>
<td>71%</td>
<td>72%</td>
<td>78%</td>
<td>68%</td>
</tr>
<tr>
<td>Swansea</td>
<td>60%</td>
<td>65%</td>
<td>66%</td>
<td>69%</td>
<td>58%</td>
<td>77%</td>
<td>66%</td>
<td>49%</td>
<td>55%</td>
<td>66%</td>
<td>56%</td>
</tr>
<tr>
<td>None of these</td>
<td>7%</td>
<td>6%</td>
<td>8%</td>
<td>5%</td>
<td>4%</td>
<td>2%</td>
<td>2%</td>
<td>19%</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

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

Q12d. More specifically, which cities in Wales would you be interested in visiting? (Multiple Answers)
Base: Respondents who have chosen Wales in Q11a (n = 1,917)
Comfort levels with transport to get to Britain (SH)

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

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

Q13: If you were to travel to Britain in the next 12 months, how comfortable would you feel using the following to get to Britain? (Multiple Answers)

Base: Respondents choosing either England, Scotland or Wales in Q11a (n = 8,671)
## Comfort levels with transport to get to Britain (LH)

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

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

Q13: If you were to travel to Britain in the next 12 months, how comfortable would you feel using the following to get to Britain? (Multiple Answers)
Base: Respondents choosing either England, Scotland or Wales in Q11a (n = 8,671)
The increased level of trust in public and collective transportation means is favorable for exploring rural and urban environments and planning multiple destinations within Britain, be that travelling on their own or via transportation means at their disposal. The preference for using their own car is still high in Ireland, the Netherlands, France and Germany. The positive sentiment in considering trains for journeys within Britain resonates well with the search for sustainable transports.

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

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

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

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

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

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

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)
The role of expert intermediaries is higher in LH markets (online and at a storefront in China and India). Direct booking with airlines and accommodation providers remain key in North America, while the large share of VFR travel intentions gives friends and relatives a significant role, notably for visitors from India, China and the Gulf markets. Brazil, Japan and South Korea rely a lot on comparison websites. In Australia, a wide array of channels are considered addressing needs of both independent travellers and consumers looking for intermediaries.

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)
Planned booking channels for a trip to Britain

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

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

<table>
<thead>
<tr>
<th>Channel</th>
<th>Total</th>
<th>SH</th>
<th>LH</th>
</tr>
</thead>
<tbody>
<tr>
<td>A travel comparison website</td>
<td>45%</td>
<td>42%</td>
<td>46%</td>
</tr>
<tr>
<td>Through a travel agent/tour operator online</td>
<td>43%</td>
<td>33%</td>
<td>49%</td>
</tr>
<tr>
<td>Direct with airline/train/ferry operator</td>
<td>40%</td>
<td>45%</td>
<td>37%</td>
</tr>
<tr>
<td>Direct from the official website of the destination</td>
<td>38%</td>
<td>29%</td>
<td>43%</td>
</tr>
<tr>
<td>Direct with accommodation provider</td>
<td>33%</td>
<td>36%</td>
<td>31%</td>
</tr>
<tr>
<td>Through a travel agent/tour operator at a storefront</td>
<td>28%</td>
<td>20%</td>
<td>32%</td>
</tr>
<tr>
<td>Through friends and family in the destination country</td>
<td>19%</td>
<td>15%</td>
<td>21%</td>
</tr>
</tbody>
</table>
Planned booking channels for a trip to Britain by age

Travel comparison websites and official destinations’ websites are again the most popular options among young people intending to travel to Britain, while the older generation are more likely to book directly through transport operators. The online TOs/OTAs channel is confirmed to be a top choice among younger generations in LH markets.

### SH markets

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

### LH markets

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

Q19: How would you envisage booking your trip? (Multiple Answers)
Base: Respondents who plan on taking a leisure trip in Britain in 2021 (n = 1,403)
COVID-19 safety perception (1)

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

<table>
<thead>
<tr>
<th>Destination</th>
<th>Safe</th>
<th>Don't know</th>
<th>Unsafe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>64%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Scotland</td>
<td>61%</td>
<td>16%</td>
<td>22%</td>
</tr>
<tr>
<td>Wales</td>
<td>61%</td>
<td>16%</td>
<td>24%</td>
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<tr>
<td>England</td>
<td>59%</td>
<td>10%</td>
<td>31%</td>
</tr>
<tr>
<td>Germany</td>
<td>53%</td>
<td>18%</td>
<td>30%</td>
</tr>
<tr>
<td>France</td>
<td>49%</td>
<td>16%</td>
<td>35%</td>
</tr>
<tr>
<td>Italy</td>
<td>46%</td>
<td>17%</td>
<td>37%</td>
</tr>
<tr>
<td>Spain</td>
<td>46%</td>
<td>19%</td>
<td>35%</td>
</tr>
<tr>
<td>Canada</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scotland</td>
<td>72%</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>England</td>
<td>71%</td>
<td>11%</td>
<td>18%</td>
</tr>
<tr>
<td>Ireland</td>
<td>70%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Wales</td>
<td>70%</td>
<td>15%</td>
<td>16%</td>
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<tr>
<td>Germany</td>
<td>66%</td>
<td>15%</td>
<td>19%</td>
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<tr>
<td>France</td>
<td>66%</td>
<td>14%</td>
<td>20%</td>
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<tr>
<td>Italy</td>
<td>62%</td>
<td>14%</td>
<td>25%</td>
</tr>
<tr>
<td>Spain</td>
<td>63%</td>
<td>15%</td>
<td>22%</td>
</tr>
<tr>
<td>USA</td>
<td></td>
<td></td>
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<tr>
<td>England</td>
<td>80%</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>Scotland</td>
<td>80%</td>
<td>10%</td>
<td>0%</td>
</tr>
<tr>
<td>Wales</td>
<td>76%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Ireland</td>
<td>76%</td>
<td>12%</td>
<td>13%</td>
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<tr>
<td>Germany</td>
<td>75%</td>
<td>11%</td>
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<tr>
<td>France</td>
<td>75%</td>
<td>11%</td>
<td>15%</td>
</tr>
<tr>
<td>Italy</td>
<td>73%</td>
<td>11%</td>
<td>16%</td>
</tr>
<tr>
<td>Spain</td>
<td>70%</td>
<td>13%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All respondents (n = 11,057)
COVID-19 safety perception (2)

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

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All respondents (n = 11,057)
COVID-19 safety perception (3)

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

<table>
<thead>
<tr>
<th></th>
<th>Saudis</th>
<th>UAE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>73%</td>
<td>84%</td>
</tr>
<tr>
<td>England</td>
<td>72%</td>
<td>81%</td>
</tr>
<tr>
<td>Germany</td>
<td>70%</td>
<td>79%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>69%</td>
<td>79%</td>
</tr>
<tr>
<td>Scotland</td>
<td>67%</td>
<td>79%</td>
</tr>
<tr>
<td>Wales</td>
<td>66%</td>
<td>78%</td>
</tr>
<tr>
<td>Spain</td>
<td>66%</td>
<td>77%</td>
</tr>
<tr>
<td>Turkey</td>
<td>66%</td>
<td>71%</td>
</tr>
<tr>
<td>Ireland</td>
<td>66%</td>
<td>70%</td>
</tr>
<tr>
<td>Italy</td>
<td>60%</td>
<td>69%</td>
</tr>
<tr>
<td>France</td>
<td>58%</td>
<td>69%</td>
</tr>
</tbody>
</table>

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?
Base: All respondents (n = 11,057)
Britain’s image in Brazil and India in relation to the COVID-19 safety is positive and competitive vs other large European destinations usually visited from those markets. Switzerland is again receiving the best rating in this aspect.

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus?  
Base: All respondents (n = 11,057)
COVID-19 safety perception (5)

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

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus? Base: All respondents (n = 11,057)
Perceptions in the Republic of Ireland, Italy and Spain are still positive but other destinations such as Switzerland, Austria, Germany and Ireland are also seen as safer than England today.

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

**Base:** All respondents (n = 11,057)
The image of British destinations (notably England) has widely improved in Norway and Sweden, even if neighboring Nordic countries generate the best levels of trust today.

<table>
<thead>
<tr>
<th>Norway</th>
<th>Safe</th>
<th>Don't know</th>
<th>Unsafe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>78%</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Sweden</td>
<td>75%</td>
<td>9%</td>
<td>15%</td>
</tr>
<tr>
<td>Scotland</td>
<td>70%</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>Wales</td>
<td>69%</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>Germany</td>
<td>68%</td>
<td>13%</td>
<td>19%</td>
</tr>
<tr>
<td>England</td>
<td>66%</td>
<td>13%</td>
<td>21%</td>
</tr>
<tr>
<td>Ireland</td>
<td>65%</td>
<td>19%</td>
<td>16%</td>
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<tr>
<td>France</td>
<td>64%</td>
<td>13%</td>
<td>23%</td>
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<tr>
<td>Spain</td>
<td>62%</td>
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<tr>
<td>Austria</td>
<td>61%</td>
<td>17%</td>
<td>22%</td>
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<tr>
<td>Italy</td>
<td>60%</td>
<td>15%</td>
<td>25%</td>
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<tr>
<td>Portugal</td>
<td>59%</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>Greece</td>
<td>58%</td>
<td>18%</td>
<td>24%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sweden</th>
<th>Safe</th>
<th>Don't know</th>
<th>Unsafe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norway</td>
<td>70%</td>
<td>10%</td>
<td>20%</td>
</tr>
<tr>
<td>Denmark</td>
<td>67%</td>
<td>11%</td>
<td>22%</td>
</tr>
<tr>
<td>Scotland</td>
<td>61%</td>
<td>15%</td>
<td>24%</td>
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<tr>
<td>Germany</td>
<td>60%</td>
<td>12%</td>
<td>29%</td>
</tr>
<tr>
<td>England</td>
<td>59%</td>
<td>12%</td>
<td>29%</td>
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<tr>
<td>Ireland</td>
<td>55%</td>
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<td>France</td>
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<tr>
<td>Netherlands</td>
<td>54%</td>
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<tr>
<td>Wales</td>
<td>53%</td>
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<tr>
<td>Portugal</td>
<td>53%</td>
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<td>32%</td>
</tr>
<tr>
<td>Austria</td>
<td>53%</td>
<td>15%</td>
<td>32%</td>
</tr>
<tr>
<td>Italy</td>
<td>50%</td>
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<td>37%</td>
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<tr>
<td>Greece</td>
<td>48%</td>
<td>14%</td>
<td>38%</td>
</tr>
<tr>
<td>Poland</td>
<td>38%</td>
<td>17%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Q21: If you were to travel internationally within the next 12 months, how safe would you consider the following destinations to be, in the context of the coronavirus? Base: All respondents (n = 11,057)
In Russia, the gap between England and the other British destinations is more marked, while perceptions in Denmark match the Nordic trend.

<table>
<thead>
<tr>
<th>Country</th>
<th>Safe</th>
<th>Don't know</th>
<th>Unsafe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norway</td>
<td>73%</td>
<td>11%</td>
<td>16%</td>
</tr>
<tr>
<td>Sweden</td>
<td>69%</td>
<td>12%</td>
<td>19%</td>
</tr>
<tr>
<td>Germany</td>
<td>69%</td>
<td>11%</td>
<td>21%</td>
</tr>
<tr>
<td>Spain</td>
<td>62%</td>
<td>12%</td>
<td>26%</td>
</tr>
<tr>
<td>Denmark</td>
<td>61%</td>
<td>18%</td>
<td>21%</td>
</tr>
<tr>
<td>Finland</td>
<td>67%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>Swiss</td>
<td>67%</td>
<td>16%</td>
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</tr>
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<td>Austria</td>
<td>60%</td>
<td>16%</td>
<td>23%</td>
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<tr>
<td>Scotland</td>
<td>59%</td>
<td>17%</td>
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<td>Wales</td>
<td>55%</td>
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<tr>
<td>Greece</td>
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<td>France</td>
<td>43%</td>
<td>15%</td>
<td>42%</td>
</tr>
<tr>
<td>Sweden</td>
<td>69%</td>
<td>12%</td>
<td>19%</td>
</tr>
<tr>
<td>Germany</td>
<td>69%</td>
<td>11%</td>
<td>21%</td>
</tr>
<tr>
<td>Spain</td>
<td>62%</td>
<td>12%</td>
<td>26%</td>
</tr>
<tr>
<td>Denmark</td>
<td>61%</td>
<td>18%</td>
<td>21%</td>
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<tr>
<td>Finland</td>
<td>67%</td>
<td>17%</td>
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<tr>
<td>Switzerland</td>
<td>67%</td>
<td>16%</td>
<td>17%</td>
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<tr>
<td>Austria</td>
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<td>16%</td>
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<tr>
<td>Scotland</td>
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<tr>
<td>Wales</td>
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<tr>
<td>Greece</td>
<td>54%</td>
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<tr>
<td>Germany</td>
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<td>14%</td>
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<tr>
<td>Spain</td>
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<td>14%</td>
<td>37%</td>
</tr>
<tr>
<td>Italy</td>
<td>49%</td>
<td>13%</td>
<td>38%</td>
</tr>
<tr>
<td>France</td>
<td>43%</td>
<td>15%</td>
<td>42%</td>
</tr>
</tbody>
</table>
Travel preferences: summary

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

- Visiting large cities and coastal areas are still top of mind in SH markets, while roaming around is also very well considered. Given the strong position of Britain in the mind of LH markets looking for roaming around, opportunities of promoting multiple Britain destinations / tours are confirmed.

- The progressive return to many pre-pandemic behaviours now makes travellers envisage all types of activities including those considered at risk COVID-wise in a recent past (large shows, events, immersive socialising activities, highly frequented attractions, dining and nightlife…). Dining out has returned to being a dominant activity envisaged, growing strongly in interest.

- An even greater range of experiences is mentioned by most LH markets who still consider visiting iconic tourist attractions in priority.

- Potential visitors to Britain express higher interest than average in engaging in lively cultural and sportive events during their journey.

- While travel confidence grows, fewer travellers look for being hosted by friends and families and like the idea of connecting again to locals via Bed & Breakfast, while hotel chains remain a preferred choice overall.

- Britain intenders would look for a large variety of options including hotel chains and boutique properties, but also B&Bs, historic houses and private rentals. London intenders are again particularly drawn to (boutique) hotels. Potential visitors to Scotland and Wales confirm high levels of interest for lodging in historic houses/castles.

- Couples (with or without children) still dominate in travel cells envisaged, however solo and travel with friends generate further interest in many markets. Tour groups continue to be low in consideration across markets.
Data trends

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

Main types of destinations envisaged

- Large city 45%
- Coastline 38%
- Small/mid-sized city/town 25%
- Mountains or hills 21%
- Countryside or village 20%

I will roam around, visiting many types of places 33%

December 20 March 21 August 21 February 22

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

- Attending sport events: 2.0%
- Visiting cultural attractions: 1.5%
- Visiting famous/iconic tourist attractions: 1.4%
- Attending cultural events: 1.3%
- Dining in restaurants/bars/cafes/pubs: 1.2%
- Experiencing destination’s nightlife: 1.2%
- Experiencing local lifestyle: 1.0%
- Playing sports: 1.0%
- Guided tours/day-excursions: 0.9%
- Exploring history and heritage: 0.7%
- Shopping: 0.4%
- Culinary activities: 0.4%
- Outdoor activities (hiking, cycling, etc): 0.2%
- Learning new skills: 0.2%
- Spa/wellness activities: 0.2%
- Outdoor nature activities: 0.2%
- Self-driving tours: -0.5%

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

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

Q15: Which of the following best describes the main types of destination where you are likely to stay during your next international leisure trip?  (Multiple Answers)

Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)
Main destination types for an international leisure trip (LH)

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

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

Q15: Which of the following best describes the main types of destination where you are likely to stay during your next international leisure trip? (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)
Main destination types for a leisure trip in Britain

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

<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>52%</td>
<td>68%</td>
<td>62%</td>
<td>52%</td>
<td>56%</td>
<td>71%</td>
</tr>
<tr>
<td>I will roam around, visiting many types of places</td>
<td>41%</td>
<td>50%</td>
<td>43%</td>
<td>50%</td>
<td>55%</td>
<td>44%</td>
</tr>
<tr>
<td>Coastline</td>
<td>38%</td>
<td>40%</td>
<td>36%</td>
<td>43%</td>
<td>49%</td>
<td>37%</td>
</tr>
<tr>
<td>Small/mid-sized city/town</td>
<td>31%</td>
<td>41%</td>
<td>32%</td>
<td>39%</td>
<td>44%</td>
<td>30%</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>27%</td>
<td>37%</td>
<td>28%</td>
<td>37%</td>
<td>44%</td>
<td>25%</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>26%</td>
<td>32%</td>
<td>27%</td>
<td>37%</td>
<td>44%</td>
<td>25%</td>
</tr>
<tr>
<td>I’m not sure</td>
<td>4%</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Q15: Which of the following best describes the main types of destination where you are likely to stay during your next international leisure trip? (Multiple Answers)

Base: Europe Int. (n = 6,411) – Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588)
Data trends

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

**Travel party**
- With your spouse/partner: 70% (71% in August 21, 70% in February 22)
- Alone: 18% (19% in August 21, 19% in February 22)
- With friends: 21% (23% in August 21, 22% in February 22)
- With children (under 18): 28% (26% in August 21, 28% in February 22)
- With adult family members: 20% (20% in August 21, 19% in February 22)
- As part of a tour group: 3% (3% in August 21, 3% in February 22)

**Accommodation (W4/W3 Evol. - gap of %)**
- Bed and breakfast: 0.9%
- Hostel/university/school: 0.9%
- Cruise: 0.7%
- Self catered property: 0.4%
- Campsite: 0.1%
- Boutique hotel: 0.0%
- Caravan/motorhome: -0.1%
- Private rental: -0.1%
- Friend’s/family house as a paying guest: -0.3%
- Holiday village/centre (e.g. Center Parcs): -0.3%
- Hotel chain: -1.0%
- Historic house/castle: -1.1%
- Own second home/timeshare: -1.7%
- Friend’s/family house as a free guest: -1.8%

Trend calculated at constant perimeter (13 markets consolidated)
Couples (with or without children) still dominate while tour groups remain very low in consideration across markets. Travelling with friends or solo is more envisaged in Nordic markets. Sweden and Norway seem quite enthusiastic in planning several trips with diverse travel companions.

### Q18: Would you envisage traveling… (Multiple Answers)

Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)

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

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

Q18: Would you envisage traveling... (Multiple Answers)
Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)
## Travel party for a leisure trip in Britain

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

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

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

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

Q17: For your next international leisure trip, would you be comfortable staying in a … (Multiple Answers)

Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)
Accommodation types for an international leisure trip (LH)

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

<table>
<thead>
<tr>
<th>Type</th>
<th>Total</th>
<th>LH</th>
<th>Australia</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>India</th>
<th>Japan</th>
<th>Saudi Arabia</th>
<th>South Korea</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel chain</td>
<td>62%</td>
<td>59%</td>
<td>61%</td>
<td>77%</td>
<td>68%</td>
<td>40%</td>
<td>53%</td>
<td>86%</td>
<td>46%</td>
<td>67%</td>
<td>44%</td>
<td>62%</td>
</tr>
<tr>
<td>Bed and breakfast</td>
<td>35%</td>
<td>31%</td>
<td>47%</td>
<td>16%</td>
<td>39%</td>
<td>27%</td>
<td>33%</td>
<td>13%</td>
<td>19%</td>
<td>40%</td>
<td>31%</td>
<td>37%</td>
</tr>
<tr>
<td>Boutique hotel</td>
<td>32%</td>
<td>36%</td>
<td>44%</td>
<td>37%</td>
<td>37%</td>
<td>45%</td>
<td>32%</td>
<td>32%</td>
<td>23%</td>
<td>38%</td>
<td>26%</td>
<td>36%</td>
</tr>
<tr>
<td>Self catered property (rented house, cottage, chalet, apartment)</td>
<td>31%</td>
<td>26%</td>
<td>38%</td>
<td>43%</td>
<td>26%</td>
<td>30%</td>
<td>27%</td>
<td>16%</td>
<td>23%</td>
<td>18%</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>Private rental such as Airbnb, Couchsurfing, FlipKey</td>
<td>26%</td>
<td>25%</td>
<td>28%</td>
<td>47%</td>
<td>31%</td>
<td>19%</td>
<td>35%</td>
<td>10%</td>
<td>10%</td>
<td>17%</td>
<td>21%</td>
<td>29%</td>
</tr>
<tr>
<td>Historic house/castle</td>
<td>25%</td>
<td>25%</td>
<td>33%</td>
<td>30%</td>
<td>25%</td>
<td>33%</td>
<td>24%</td>
<td>19%</td>
<td>14%</td>
<td>15%</td>
<td>19%</td>
<td>29%</td>
</tr>
<tr>
<td>Friend’s/family house as a free guest</td>
<td>25%</td>
<td>24%</td>
<td>31%</td>
<td>32%</td>
<td>28%</td>
<td>13%</td>
<td>38%</td>
<td>12%</td>
<td>19%</td>
<td>14%</td>
<td>14%</td>
<td>30%</td>
</tr>
<tr>
<td>Holiday village/centre (e.g. Center Parcs)</td>
<td>22%</td>
<td>22%</td>
<td>22%</td>
<td>19%</td>
<td>15%</td>
<td>41%</td>
<td>37%</td>
<td>6%</td>
<td>16%</td>
<td>11%</td>
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<td>16%</td>
</tr>
<tr>
<td>Cruise</td>
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<td>23%</td>
<td>23%</td>
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<td>9%</td>
<td>29%</td>
<td>21%</td>
<td>27%</td>
<td>8%</td>
<td>22%</td>
<td>27%</td>
</tr>
<tr>
<td>Friend’s/family house as a paying guest</td>
<td>16%</td>
<td>16%</td>
<td>20%</td>
<td>23%</td>
<td>13%</td>
<td>11%</td>
<td>30%</td>
<td>5%</td>
<td>15%</td>
<td>8%</td>
<td>24%</td>
<td>15%</td>
</tr>
<tr>
<td>Hostel/university/school</td>
<td>14%</td>
<td>15%</td>
<td>9%</td>
<td>18%</td>
<td>12%</td>
<td>17%</td>
<td>20%</td>
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<td>21%</td>
<td>12%</td>
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<td>12%</td>
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<tr>
<td>Campsite</td>
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<td>12%</td>
<td>13%</td>
<td>13%</td>
<td>9%</td>
<td>13%</td>
<td>15%</td>
<td>5%</td>
<td>14%</td>
<td>7%</td>
<td>18%</td>
<td>11%</td>
</tr>
<tr>
<td>Own second home/timeshare</td>
<td>12%</td>
<td>12%</td>
<td>11%</td>
<td>14%</td>
<td>9%</td>
<td>15%</td>
<td>15%</td>
<td>6%</td>
<td>9%</td>
<td>7%</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>Caravan/motorhome</td>
<td>11%</td>
<td>10%</td>
<td>14%</td>
<td>13%</td>
<td>7%</td>
<td>13%</td>
<td>16%</td>
<td>5%</td>
<td>9%</td>
<td>5%</td>
<td>13%</td>
<td>7%</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 = 10,954)
Those wishing to visit Britain consider a large range of accommodation experiences, including hotel chains and boutique properties, but also B&Bs, historic houses and private rentals. London intenders are again particularly drawn to (boutique) hotels. Potential visitors to Scotland and Wales confirm high levels of interest in lodging in historic houses/castles.

Q17: For your next international leisure trip, would you be comfortable staying in a … (Multiple Answers)

<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>63%</td>
<td>63%</td>
<td>64%</td>
<td>61%</td>
<td>71%</td>
<td>68%</td>
</tr>
<tr>
<td>Bed &amp; breakfast</td>
<td>38%</td>
<td>39%</td>
<td>37%</td>
<td>44%</td>
<td>44%</td>
<td>39%</td>
<td>37%</td>
</tr>
<tr>
<td>Self catered property (rented house, cottage, chalet, apartment)</td>
<td>35%</td>
<td>38%</td>
<td>31%</td>
<td>38%</td>
<td>38%</td>
<td>34%</td>
<td>31%</td>
</tr>
<tr>
<td>Boutique hotel</td>
<td>33%</td>
<td>45%</td>
<td>36%</td>
<td>40%</td>
<td>43%</td>
<td>40%</td>
<td>39%</td>
</tr>
<tr>
<td>Private rental such as Airbnb, Couchsurfing, FlipKey</td>
<td>29%</td>
<td>35%</td>
<td>30%</td>
<td>34%</td>
<td>35%</td>
<td>35%</td>
<td>30%</td>
</tr>
<tr>
<td>Historic house/castle</td>
<td>28%</td>
<td>35%</td>
<td>27%</td>
<td>36%</td>
<td>38%</td>
<td>29%</td>
<td>27%</td>
</tr>
<tr>
<td>Friend's/family house as a free guest</td>
<td>25%</td>
<td>29%</td>
<td>26%</td>
<td>26%</td>
<td>28%</td>
<td>27%</td>
<td>26%</td>
</tr>
<tr>
<td>Holiday village/centre (e.g. Center Parcs)</td>
<td>24%</td>
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<td>24%</td>
<td>29%</td>
<td>32%</td>
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<td>Cruise</td>
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<td>23%</td>
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<td>20%</td>
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<tr>
<td>Friend's/family house as a paying guest</td>
<td>17%</td>
<td>20%</td>
<td>18%</td>
<td>19%</td>
<td>22%</td>
<td>18%</td>
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<tr>
<td>Campsite</td>
<td>14%</td>
<td>17%</td>
<td>13%</td>
<td>18%</td>
<td>20%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Hostel/university/school</td>
<td>14%</td>
<td>20%</td>
<td>16%</td>
<td>18%</td>
<td>22%</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>Own second home/timeshare</td>
<td>13%</td>
<td>15%</td>
<td>13%</td>
<td>16%</td>
<td>18%</td>
<td>13%</td>
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<tr>
<td>Caravan/motorhome</td>
<td>13%</td>
<td>16%</td>
<td>12%</td>
<td>16%</td>
<td>18%</td>
<td>11%</td>
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</tbody>
</table>
The progressive return to many pre-pandemic behaviours now make travellers envisage all types of activities including those considered at risk COVID-wise in a recent past (large shows, events, immersive socialising activities, highly frequented attractions, dining and nightlife…). Outdoor activities remain popular for Germans, French, Italians and Dutch, while a strong appetite for culture is seen in France, Italy and Spain.

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

Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total</th>
<th>SH</th>
<th>Denmark</th>
<th>France</th>
<th>Germany</th>
<th>Rep. of Ireland</th>
<th>Italy</th>
<th>Neths.</th>
<th>Norway</th>
<th>Russia</th>
<th>Spain</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dining in restaurants/bars, cafes or pubs</td>
<td>52%</td>
<td>51%</td>
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<td>50%</td>
<td>55%</td>
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<td>54%</td>
<td>55%</td>
<td>29%</td>
<td>49%</td>
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<tr>
<td>Visiting famous/iconic tourist attractions</td>
<td>50%</td>
<td>44%</td>
<td></td>
<td>38%</td>
<td>52%</td>
<td>41%</td>
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<td>58%</td>
<td>43%</td>
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<td>49%</td>
<td>47%</td>
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<tr>
<td>Exploring history and heritage</td>
<td>49%</td>
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<tr>
<td>Outdoor nature activities</td>
<td>47%</td>
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<td>38%</td>
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<tr>
<td>Visiting cultural attractions</td>
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<tr>
<td>Experiencing local lifestyle, socialising with locals</td>
<td>41%</td>
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<tr>
<td>Shopping</td>
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<tr>
<td>Outdoor activ. (hiking, cycling..)</td>
<td>38%</td>
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<tr>
<td>Guided tours/day-excursions</td>
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<td>Self-driving tours</td>
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<tr>
<td>Attending cultural events</td>
<td>31%</td>
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<tr>
<td>Culinary activities</td>
<td>31%</td>
<td>26%</td>
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<td>29%</td>
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<tr>
<td>Spa/wellness activities</td>
<td>29%</td>
<td>25%</td>
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<td>17%</td>
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<td>26%</td>
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<td>21%</td>
<td>30%</td>
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<tr>
<td>Experiencing destination’s nightlife</td>
<td>28%</td>
<td>22%</td>
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<td>15%</td>
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<td>22%</td>
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<td>32%</td>
<td>21%</td>
<td>18%</td>
<td>15%</td>
<td>27%</td>
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<tr>
<td>Attending sport events</td>
<td>26%</td>
<td>20%</td>
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<td>21%</td>
<td>21%</td>
<td>15%</td>
<td>23%</td>
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<tr>
<td>Learning new skills</td>
<td>25%</td>
<td>18%</td>
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<td>19%</td>
<td>11%</td>
<td>16%</td>
<td>28%</td>
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<tr>
<td>Playing sports</td>
<td>22%</td>
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<td>11%</td>
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<td>22%</td>
<td>18%</td>
<td>8%</td>
<td>16%</td>
</tr>
</tbody>
</table>
An even greater range of experiences are mentioned by most long-haul markets who still consider visiting iconic tourist attractions in priority. Shopping is still high on the bucket list in Brazil, India and Gulf markets. Gulf markets would envisage outdoor activities and Brazilians show affinities with nightlife. Asian markets will enjoy cultural, iconic attractions. Dining out has returned to being a dominant activity envisaged, growing strongly in interest.

### Level of interest in activities (LH)

**Base:** Respondents who plan on taking an international leisure trip in the next 12 months (n = 10,954)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Total (%)</th>
<th>LH (%)</th>
<th>Australia (%)</th>
<th>Brazil (%)</th>
<th>Canada (%)</th>
<th>China (%)</th>
<th>India (%)</th>
<th>Japan (%)</th>
<th>Saudi Arabia (%)</th>
<th>South Korea (%)</th>
<th>UAE (%)</th>
<th>USA (%)</th>
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<tbody>
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<td>Dining in restaurants/bars, cafes or pubs</td>
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<td>53%</td>
<td>39%</td>
<td>67%</td>
<td>50%</td>
<td>41%</td>
<td>62%</td>
<td>51%</td>
<td>61%</td>
<td>47%</td>
<td>61%</td>
<td>58%</td>
</tr>
<tr>
<td>Visiting famous/iconic tourist attractions</td>
<td>50%</td>
<td>55%</td>
<td>45%</td>
<td>69%</td>
<td>49%</td>
<td>47%</td>
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<td>44%</td>
<td>66%</td>
<td>50%</td>
<td>59%</td>
<td>56%</td>
</tr>
<tr>
<td>Exploring history and heritage</td>
<td>49%</td>
<td>53%</td>
<td>44%</td>
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<tr>
<td>Outdoor nature activities</td>
<td>47%</td>
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<td>37%</td>
<td>62%</td>
<td>46%</td>
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<tr>
<td>Visiting cultural attractions</td>
<td>46%</td>
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<td>54%</td>
<td>45%</td>
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<tr>
<td>Experiencing local lifestyle, socialising with locals</td>
<td>41%</td>
<td>43%</td>
<td>36%</td>
<td>49%</td>
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<td>44%</td>
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<td>47%</td>
<td>32%</td>
<td>51%</td>
<td>46%</td>
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<tr>
<td>Shopping</td>
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<td>57%</td>
<td>33%</td>
<td>54%</td>
<td>43%</td>
</tr>
<tr>
<td>Outdoor activ. (hiking, cycling,..)</td>
<td>38%</td>
<td>40%</td>
<td>28%</td>
<td>46%</td>
<td>36%</td>
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<td>57%</td>
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<tr>
<td>Guided tours/day-excursions</td>
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<tr>
<td>Self-driving tours</td>
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<tr>
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<td>37%</td>
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<td>41%</td>
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<td>42%</td>
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<tr>
<td>Culinary activities</td>
<td>31%</td>
<td>36%</td>
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<tr>
<td>Spa/wellness activities</td>
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<td>37%</td>
<td>22%</td>
<td>38%</td>
<td>34%</td>
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<tr>
<td>Experiencing destination’s nightlife</td>
<td>28%</td>
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<td>22%</td>
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<td>N/A</td>
<td>19%</td>
<td>N/A</td>
<td>35%</td>
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<tr>
<td>Attending sport events</td>
<td>26%</td>
<td>32%</td>
<td>21%</td>
<td>35%</td>
<td>24%</td>
<td>35%</td>
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<td>17%</td>
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<td>23%</td>
<td>42%</td>
<td>33%</td>
</tr>
<tr>
<td>Learning new skills</td>
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<td>31%</td>
<td>16%</td>
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<td>36%</td>
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<td>13%</td>
<td>42%</td>
<td>16%</td>
<td>41%</td>
<td>31%</td>
</tr>
<tr>
<td>Playing sports</td>
<td>22%</td>
<td>29%</td>
<td>15%</td>
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<td>37%</td>
<td>19%</td>
<td>38%</td>
<td>29%</td>
</tr>
</tbody>
</table>
**Level of interest in activities in Britain**

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

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

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

Base: Europe Int. (n = 6,411) – Britain Int. (n = 1,403) – England pot. visitors (n = 6,246) – Scotland pot. visitors (n = 3,984) – Wales pot. visitors (n = 1,917) – London pot. visitors (n = 2,588) – Large City Int. (n = 5,398)
Key Takeaways

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

1. Desire to travel internationally has increased further, reaching the highest level recorded since 2020. More than 5 in 10 respondents certainly intend to travel internationally in the coming 12 months, while the vaccination and spending power continue to fuel confidence in travel.

2. If travel plans are getting more concrete, destination choice remains still very open in consumers’ minds.

3. The 2022 summer season is the next not-to-be-missed window for an international trip for nearly 4 in 10 travellers.

4. The vaccination continues to be a trigger for travel notably for LH markets but the gap of intention between vaccinated and non-vaccinated consumers is lower while a vaccine boost accelerates travel plans.

5. The younger generation still shows the highest propensity to travel internationally across most markets.

6. The money-centric factor (money-back guarantee, deals..) equally matters vs health/COVID-19 factors in the decisions to take an international trip. This “money factor” is an important trigger of travel intentions to Britain as affordability is a common obstacle to visit.

7. Travellers’ intentions show established expectations for living the full destination experience, including growing interest in events and social activities.

8. While attitudes towards a more responsible and sustainable travel remain, travel-related attitudes confirm the shift to a careful back to pre-pandemic expectations including high record level of trust in public transports and less last-minute booking dictated by the changing context.

9. While socialising is expected as an integral part of the experience at the next destination, 6 in 10 travellers express concerns about locals’ attitudes towards international tourists.

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

11. Consumers need reassurance that the experiences are available and not restricted.
Key Takeaways – perceptions of destinations/Britain

1. Europe confirms and even reinforces its status as the favourite region in most markets.

2. Britain has gained 1.5 points of intention in 6 months, rivaling France and Spain in travel intentions.

3. The positive trend is notably fuelled by a continuous improvement of its COVID-19 sanitary image.

4. Providing pre-COVID-19 volumes of visits, intention levels and competitive positions and evolutions, the COVID-19 image, the competitive position of Britain is summarised as follows:
   - 4 markets in a highly favourable competitive position: China, Australia, UAE and the Saudi Arabia
   - 6 markets in favourable competitive positions: Italy, Spain, Norway, South Korea, Japan and the Republic of Ireland
   - 8 markets in average competitive positions: France, the US, Canada, India, Germany, Brazil, Denmark and Sweden
   - 2 markets in a challenging competitive position: the Netherlands, Russia

5. Among the 13 markets surveyed in August 2021:
   - 4 markets have improved their competitive positions: the US, France, German and Spain
   - 6 markets have kept a favourable competitive position: Italy, the Republic of Ireland, Norway, China, India and Australia
   - 1 market remain competitive but has lost its place in the ranking: Sweden
   - 2 markets have become or remain challenged: the Netherlands and Russia
Key Takeaways – Potential targets

Confirmed prioritised motivations and experiences to promote Britain

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

**Confirmed planning, booking and influencing channels**

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

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

**Travel intentions**

Among leisure trip intenders:
- 74% **consider Europe**
- 10% **consider Britain**

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

**Journey purpose**
- Holiday: 81%
- Visit friends or relatives: 31%
- Other leisure purposes: 24%

**Intending to travel abroad for leisure**

Wave 2: 72%
Wave 4: 85%

**Planning stage**

- Trip booked: 7%
- Destination chosen: 34%
- Trip planned: 32%
- Intend to travel: 27%

Wave 2: 15%
Wave 4: 33%

**Among leisure trip intenders:**

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

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

**Among Britain intenders:**

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

**Top modes of transport within Britain**
- Public transport - Train: 49%
- Public transport - Tube/subway: 44%
- Public transport - Bus: 41%

**Top modes of transport to Britain**
- Plane – via nonstop flight: 92%
- Plane – via connecting flight: 75%
- Own/rented vehicle – via Ferry: 48%

**Top accommodation**
- Hotel chain: 65%
- Bed and breakfast: 41%
- Self-catered property: 37%
- Private rental: 29%
- Boutique hotel: 28%

*(% definitely & probably) in the next 12 months*
## Short-Haul Markets Summary

### Top travel drivers

| Non-Travel Concerns \n---|---|---|
| **...for any international trip** | **...for a trip to Britain** |
| I will be intending to take fewer but longer holidays | 41% |
| I will favor destinations I have been before rather than new places | 33% |
| I will favour local destinations instead of traveling internationally | 32% |
| I will leave booking until later/last minute | 25% |
| Insurance for COVID-19 related travel/regulations changes | 25% |

<table>
<thead>
<tr>
<th>Travel Concerns – for travel to Britain*</th>
<th>Percentages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to healthcare if I contract COVID-19 abroad</td>
<td>65%</td>
</tr>
<tr>
<td>Other people not following COVID-19 policies/procedures</td>
<td>64%</td>
</tr>
<tr>
<td>Extra admin involved with new policy/rules during the trip</td>
<td>63%</td>
</tr>
<tr>
<td>Change in quarantine requirements on my return home</td>
<td>61%</td>
</tr>
<tr>
<td>Limited / restricted experiences at destination</td>
<td>61%</td>
</tr>
<tr>
<td>Contracting COVID-19 during my journey/trip</td>
<td>61%</td>
</tr>
<tr>
<td>Costs of mandatory COVID-19 tests</td>
<td>58%</td>
</tr>
<tr>
<td>Affordability of robust travel insurance</td>
<td>56%</td>
</tr>
<tr>
<td>Accessibility of affordable air fares</td>
<td>55%</td>
</tr>
<tr>
<td>Locals’ attitude towards international tourists</td>
<td>46%</td>
</tr>
</tbody>
</table>

**% very & somewhat concerned

**% completely & somewhat agree

### Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 73% Agree, 4% Disagree, 23% No opinion
- I would be comfortable using public transport within the destination: 64% Agree, 5% Disagree, 31% No opinion
- I will look for less crowded places, even if I miss attractions: 59% Agree, 6% Disagree, 36% No opinion
- Booking through a travel agent is a safer option at the moment: 57% Agree, 10% Disagree, 33% No opinion
- I will favor international destinations closer to my home country: 56% Agree, 8% Disagree, 36% No opinion
- I will think more about sustainability when planning future holidays: 54% Agree, 9% Disagree, 36% No opinion
- I will delay my next international trip until Omicron is under control: 53% Agree, 6% Disagree, 41% No opinion
- I will leave booking until later/last minute: 51% Agree, 7% Disagree, 42% No opinion
- I will favour local destinations instead of traveling internationally: 46% Agree, 7% Disagree, 47% No opinion
- I will favor destinations I have been before rather than new places: 43% Agree, 7% Disagree, 50% No opinion
- I will be intending to take fewer but longer holidays: 42% Agree, 12% Disagree, 46% No opinion

---

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

Travel intentions

Intending to travel abroad for leisure*

<table>
<thead>
<tr>
<th>Wave 2</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>73%</td>
<td>76%</td>
</tr>
</tbody>
</table>

Travel preferences

Journey purpose

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Wave 2</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>45%</td>
<td>80%</td>
</tr>
<tr>
<td>Visit friends or relatives</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Other leisure purposes</td>
<td>33%</td>
<td></td>
</tr>
</tbody>
</table>

Planning stage

<table>
<thead>
<tr>
<th>Wave 2</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>31%</td>
<td>32%</td>
</tr>
<tr>
<td>39%</td>
<td>35%</td>
</tr>
<tr>
<td>24%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Among leisure trip intenders:

45% consider Europe
15% consider Britain

Among Britain intenders:

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

Travel Companions

<table>
<thead>
<tr>
<th>Companions</th>
<th>Wave 2</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>With your spouse/partner</td>
<td>45%</td>
<td>69%</td>
</tr>
<tr>
<td>With children (under 18)</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>With friends</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>With adult family members</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Alone</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>As part of a tour group</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

Top Activitys

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

Top Accommodation

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

Top Travel Companions

- With your spouse/partner: 45%
- With children (under 18): 31%
- With friends: 19%
- With adult family members: 19%
- Alone: 18%
- As part of a tour group: 3%

Top modes of transport within Britain

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

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

Wave 1: 2nd-16th Dec 2020
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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>An attractive offer e.g. discounts on flights or accommodation</td>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td>Hygiene &amp; safety protocols in place at destination</td>
</tr>
<tr>
<td>Hygiene &amp; safety protocols in place at destination</td>
<td>Removal of quarantine policies in destination country</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>
</tbody>
</table>

**Travel concerns – for travel to Britain**

- Other people not following COVID-19 policies/procedures: 81%
- Access to healthcare if I contract COVID-19 abroad: 80%
- Contracting COVID-19 during my journey/trip: 79%
- Change in quarantine requirements on my return home: 78%
- Limited / restricted experiences at destination: 76%
- Affordability of robust travel insurance: 74%
- Extra admin involved with new policy/rules during the trip: 74%
- Costs of mandatory COVID-19 tests: 72%
- Locals’ attitude towards international tourists: 70%
- Accessibility of affordable air fares: 70%

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

Travel intentions

Intending to travel abroad for leisure*

- Among leisure trip intenders:
  - 32% consider Europe
  - 12% consider Britain

Journey purpose

- Among Britain intenders:
  - 59% consider England
  - 33% consider Scotland
  - 23% consider London
  - 22% consider Wales

Planning stage

- Wave 1: 2nd-16th Dec 2020
- Wave 2: 24th Mar – 6th Apr 2021
- Wave 4: 10th-23rd Feb 2022

All data is from Wave 4, unless stated

Travel preferences

Top activities

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

Destination types

- 43% Will roam around
- 34% Coastline
- 27% Mountains or hills
- 25% Small/mid-sized city/town

Top Travel Companions

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

Top Accommodation

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

Top modes of transport within Britain

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

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

**Top travel drivers**

...for any international trip

- Money-back guarantee should I wish to cancel my trip: 40%
- Insurance for COVID-19 related travel/regulations changes: 37%
- Removal of quarantine policies in destination country: 32%
- Decrease in coronavirus cases at destination: 28%
- Removal of quarantine policies in home country: 26%

...for a trip to Britain

- Money-back guarantee should I wish to cancel my trip: 33%
- Insurance for COVID-19 related travel/regulations changes: 27%
- Removal of quarantine policies in destination country: 26%
- Removal of quarantine policies in home country: 24%
- Decrease in coronavirus cases at destination: 23%

**Travel attitudes**

- I would be happy to take a pre-trip COVID-19 test should that be required: Agree 79%, No opinion 8%, Disagree 3%
- I will delay my next international trip until Omicron is under control: Agree 72%, No opinion 9%, Disagree 19%
- I will favour local destinations instead of traveling internationally: Agree 66%, No opinion 11%, Disagree 24%
- I will look for less crowded places, even if I miss attractions: Agree 65%, No opinion 11%, Disagree 25%
- Booking through a travel agent is a safer option at the moment: Agree 62%, No opinion 13%, Disagree 25%
- I would be comfortable using public transport within the destination: Agree 61%, No opinion 9%, Disagree 30%
- I will be intending to take fewer but longer holidays: Agree 57%, No opinion 15%, Disagree 28%
- I will favour international destinations closer to my home country: Agree 54%, No opinion 17%, Disagree 29%
- I will be intending to take fewer but longer holidays: Agree 53%, No opinion 10%, Disagree 37%
- I will think more about sustainability when planning future holidays: Agree 52%, No opinion 15%, Disagree 33%
- I will favour destinations I have been before rather than new places: Agree 51%, No opinion 14%, Disagree 35%

**Travel Concerns – for travel to Britain**

- Affordability of robust travel insurance: 84%
- Access to healthcare if I contract COVID-19 abroad: 81%
- Change in quarantine requirements on my return home: 80%
- Other people not following COVID-19 policies/procedures: 79%
- Accessibility of affordable air fares: 78%
- Contracting COVID-19 during my journey/trip: 76%
- Limited / restricted experiences at destination: 74%
- Costs of mandatory COVID-19 tests: 73%
- Extra admin involved with new policy/rules during the trip: 70%
- Locals’ attitude towards international tourists: 53%

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

Wave 1: 2nd-16th Dec 2020
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Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated
Brazil Market Summary

**Travel intentions**

- **Intending to travel abroad for leisure***
  - Wave 2: 82%
  - Wave 4: 91%

- **Journey purpose**
  - Holiday: 85%
  - Other leisure purposes: 38%
  - Visit friends or relatives: 35%

- **Planning stage**
  - Trip booked: 47%
  - Destination chosen: 48%
  - Trip planned: 31%
  - Intend to travel: 12%
  - **62% consider Europe**
  - **11% consider Britain**

- **Among leisure trip intenders:**
  - 79% consider England
  - 36% consider London
  - 34% consider Scotland
  - 18% consider Wales

- **Among Britain intenders:**
  - 60% consider England
  - 36% consider London
  - 34% consider Scotland
  - 18% consider Wales

**Travel preferences**

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

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

- **Top Travel Companions**
  - With your spouse/partner: 76%
  - With adult family members: 28%
  - With friends: 25%
  - Alone: 23%
  - As part of a tour group: 4%

- **Top modes of transport within Britain**
  - Rented car/vehicle: 56%
  - Uber/other sharing app: 52%
  - Public transport - Tube/subway: 51%
  - Domestic flight: 50%
  - Public transport - Train: 50%
  - Taxi: 37%
  - Public transport - Bus: 35%
  - Own car vehicle: 35%
  - Private coach/minibus: 26%

- **Top Accommodation**
  - Hotel chain: 77%
  - Private rental: 47%
  - Self catered property: 43%
  - Boutique hotel: 37%
  - Friend’s/family house: 32%

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

**Top travel drivers**

<table>
<thead>
<tr>
<th>Travel drivers</th>
<th>For any international trip</th>
<th>For a trip to Britain</th>
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</thead>
<tbody>
<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
<td>44%</td>
<td>40%</td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>39%</td>
<td>32%</td>
</tr>
<tr>
<td>Money-back guarantee should I wish to cancel my trip</td>
<td>38%</td>
<td>32%</td>
</tr>
<tr>
<td>Insurance for COVID-19 related travel/regulations changes</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>Hygiene &amp; safety protocols in place at destination</td>
<td>33%</td>
<td>27%</td>
</tr>
</tbody>
</table>

**Travel Concerns – for travel to Britain**

- Other people not following COVID-19 policies/procedures: 83%
- Access to healthcare if I contract COVID-19 abroad: 83%
- Contracting COVID-19 during my journey/trip: 82%
- Affordability of robust travel insurance: 77%
- Change in quarantine requirements on my return home: 76%
- Limited / restricted experiences at destination: 76%
- Extra admin involved with new policy/rules during the trip: 73%
- Accessibility of affordable air fares: 73%
- Locals’ attitude towards international tourists: 68%
- Costs of mandatory COVID-19 tests: 66%

**Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 87% Agree, 11% Disagree
- Booking through a travel agent is a safer option at the moment: 72% Agree, 2% Disagree, 25% No opinion
- I will think more about sustainability when planning future holidays: 69% Agree, 4% Disagree, 27% No opinion
- I would be comfortable using public transport within the destination: 63% Agree, 2% Disagree, 35% No opinion
- I will delay my next international trip until Omicron is under control: 62% Agree, 2% Disagree, 36% No opinion
- I will look for less crowded places, even if I miss attractions: 59% Agree, 2% Disagree, 39% No opinion
- I will be intending to take fewer but longer holidays: 52% Agree, 4% Disagree, 44% No opinion
- I will favour international destinations closer to my home country: 47% Agree, 2% Disagree, 51% No opinion
- I will favour local destinations instead of traveling internationally: 44% Agree, 2% Disagree, 54% No opinion
- I will favour destinations I have been before rather than new places: 43% Agree, 2% Disagree, 55% No opinion
- I will leave booking until later/last minute: 37% Agree, 2% Disagree, 62% No opinion

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
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All data is from Wave 4, unless stated
Canada Market Summary

Travel intentions

Intending to travel abroad for leisure*

Among leisure trip intenders:

- 45% consider Europe
- Among Britain intenders:
  - 57% consider England
  - 36% consider Scotland
  - 27% consider London
  - 16% consider Wales

Planning stage

Wave 1 Wave 2 Wave 3 Wave 4

- 7% Trip booked
- 28% Destination chosen
- 29% Trip planned
- 37% Intend to travel

Journey purpose

- 37% Visit friends or relatives
- 20% Other leisure purposes
- Holiday: 87%

Travel preferences

Top activities

- History and heritage: 51%
- Dining out: 50%
- Iconic tourist attractions: 49%
- Outdoor nature activities: 46%
- Visiting cultural attractions: 43%

Among Britain intenders:

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

Top Travel Companions

- With your spouse/partner: 65%
- Alone: 23%
- With children (under 18): 18%
- With friends: 17%
- With adult family members: 15%
- As part of a tour group: 2%

Top Accommodation

- Hotel chain: 68%
- Bed and breakfast: 39%
- Boutique hotel: 37%
- Private rental: 31%
- Friend’s/family house: 28%

Top modes of transport within Britain

- Public transport - Train: 54%
- Public transport - Tube/subway: 51%
- Domestic flight: 49%
- Public transport - Bus: 47%
- Taxi: 41%
- Private coach/minibus: 39%
- Uber/other sharing app: 30%
- Rented car/vehicle: 26%
- Own car vehicle: 24%

*(% 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
Wave 4: 10th-23rd Feb 2022

All data is from Wave 4, unless stated.
Canada Market Summary

**Top travel drivers**

For any international trip:
- Money-back guarantee should I wish to cancel my trip: 47%
- Insurance for COVID-19 related travel/regulations changes: 37%
- Removal of quarantine policies in destination country: 35%
- Decrease in coronavirus cases at destination: 31%
- High proportion of destination population being vaccinated: 29%

For a trip to Britain:
- Money-back guarantee should I wish to cancel my trip: 36%
- Insurance for COVID-19 related travel/regulations changes: 30%
- Removal of quarantine policies in destination country: 28%
- Decrease in coronavirus cases at destination: 28%
- An attractive offer e.g. discounts on flights or accommodation: 26%

**Travel Concerns – for travel to Britain**

- Access to healthcare if I contract COVID-19 abroad: 78%
- Other people not following COVID-19 policies/procedures: 77%
- Change in quarantine requirements on my return home: 77%
- Costs of mandatory COVID-19 tests: 76%
- Extra admin involved with new policy/rules during the trip: 73%
- Accessibility of affordable air fares: 73%
- Affordability of robust travel insurance: 73%
- Limited / restricted experiences at destination: 72%
- Contracting COVID-19 during my journey/trip: 71%
- Locals’ attitude towards international tourists: 58%

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

**Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 72% Agree, 5% No opinion, 23% Disagree
- I will delay my next international trip until Omicron is under control: 69% Agree, 4% No opinion, 27% Disagree
- I would be comfortable using public transport within the destination: 62% Agree, 7% No opinion, 32% Disagree
- Booking through a travel agent is a safer option at the moment: 60% Agree, 10% No opinion, 30% Disagree
- I will look for less crowded places, even if I miss attractions: 59% Agree, 7% No opinion, 34% Disagree
- I will leave booking until later/last minute: 54% Agree, 4% No opinion, 42% Disagree
- I will favour local destinations instead of traveling internationally: 54% Agree, 8% No opinion, 38% Disagree
- I will be intending to take fewer but longer holidays: 53% Agree, 14% No opinion, 34% Disagree
- I will favour international destinations closer to my home country: 52% Agree, 11% No opinion, 37% Disagree
- I will think more about sustainability when planning future holidays: 51% Agree, 13% No opinion, 35% Disagree
- I will favour destinations I have been before rather than new places: 45% Agree, 8% No opinion, 47% Disagree

Wave 1: 2nd-16th Dec 2020
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Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022

All data is from Wave 4, unless stated.
China Market Summary

**Travel intentions**

Intending to travel abroad for leisure*:

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

**Journey purpose**

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

Among leisure trip intenders:

- 58% consider Europe
- 35% consider Britain

**Planning stage**

- Trip booked: 35%
- Destination chosen: 55%
- Trip planned: 46%
- Intend to travel: 38%

Among Britain intenders:

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

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

**Travel preferences**

**Destination types**

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

**Top activities**

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

**Top Travel Companions**

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

**Top Accommodation**

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

**Top modes of transport within Britain**

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

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

Top travel drivers

...for any international trip

- Hygiene & safety protocols in place at destination: 28%
- Stable political environment in destination country: 28%
- Official national hygiene label in destination: 27%
- Receiving a booster COVID-19 vaccination: 24%
- Decrease in coronavirus cases at destination: 24%

...for a trip to Britain

- Hygiene & safety protocols in place at destination: 28%
- Decrease in coronavirus cases at destination: 26%
- Welcoming locals in destination country: 26%
- Stable political environment in destination country: 26%
- Official national hygiene label in destination: 24%

Travel concerns – for travel to Britain*

- Other people not following COVID-19 policies/procedures: 90%
- Access to healthcare if I contract COVID-19 abroad: 90%
- Extra admin involved with new policy/rules during the trip: 89%
- Contracting COVID-19 during my journey/trip: 89%
- Limited / restricted experiences at destination: 89%
- Change in quarantine requirements on my return home: 88%
- Affordability of robust travel insurance: 88%
- Locals’ attitude towards international tourists: 88%
- Costs of mandatory COVID-19 tests: 82%
- Accessibility of affordable air fares: 82%

Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 85%, 51%
- I will think more about sustainability when planning future holidays: 82%, 7%, 1%
- Booking through a travel agent is a safer option at the moment: 82%, 6%, 2%
- I will look for less crowded places, even if I miss attractions: 80%, 6%, 4%
- I will be intending to take fewer but longer holidays: 80%, 7%, 3%
- I would be comfortable using public transport within the destination: 78%, 6%, 16%
- I will delay my next international trip until Omicron is under control: 77%, 7%, 16%
- I will favour international destinations closer to my home country: 72%, 8%, 20%
- I will leave booking until later/last minute: 71%, 6%, 23%
- I will favour local destinations instead of traveling internationally: 67%, 8%, 25%
- I will favour destinations I have been before rather than new places: 63%, 8%, 29%

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

**Travel intentions**

- Among leisure trip intenders: 82% consider Europe, 8% consider Britain

- Intending to travel abroad for leisure:
  - Wave 2: 72%, Wave 4: 79%

**Journey purpose**

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

**Planning stage**

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

**Travel preferences**

**Top activities**

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

**Destination types**

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

**Top Travel Companions**

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

**Top Accommodation**

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

**Top modes of transport within Britain**

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

**Top modes of transport to Britain**

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

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

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

**Travel Drivers**

**...for any international trip**
- Money-back guarantee should I wish to cancel my trip: 43%
- Removal of quarantine policies in destination country: 37%
- An attractive offer e.g. discounts on flights or accommodation: 32%
- Insurance for COVID-19 related travel/regulations changes: 28%
- Decrease in coronavirus cases at destination: 21%

**...for a trip to Britain**
- Money-back guarantee should I wish to cancel my trip: 30%
- An attractive offer e.g. discounts on flights or accommodation: 27%
- Removal of quarantine policies in destination country: 25%
- Insurance for COVID-19 related travel/regulations changes: 22%
- Decrease in coronavirus cases at destination: 17%

**Travel Concerns – for travel to Britain**
- Other people not following COVID-19 policies/procedures: 59%
- Access to healthcare if I contract COVID-19 abroad: 57%
- Contracting COVID-19 during my journey/trip: 53%
- Change in quarantine requirements on my return home: 52%
- Extra admin involved with new policy/rules during the trip: 51%
- Limited / restricted experiences at destination: 50%
- Costs of mandatory COVID-19 tests: 47%
- Affordability of robust travel insurance: 44%
- Accessibility of affordable airfares: 41%
- Locals’ attitude towards international tourists: 37%

**Travel Attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 84%
- I would be comfortable using public transport within the destination: 62%
- Booking through a travel agent is a safer option at the moment: 60%
- I will look for less crowded places, even if I miss attractions: 56%
- I will leave booking until later/last minute: 53%
- I will delay my next international trip until Omicron is under control: 51%
- I will favour international destinations closer to my home country: 49%
- I will think more about sustainability when planning future holidays: 44%
- I will be intending to take fewer but longer holidays: 39%
- I will favour destinations I have been before rather than new places: 39%
- I will favour local destinations instead of traveling internationally: 38%

*% 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
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated.
France Market Summary

**Travel intentions**

- Intending to travel abroad for leisure:
  - Wave 1: 79%
  - Wave 2: 80%
  - Wave 3: 87%
  - Wave 4: 90%

- Journey purpose:
  - Holiday: 90%
  - Visit friends or relatives: 30%
  - Other leisure purposes: 20%

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

- Among leisure trip intenders:
  - 66% consider Europe
  - 8% consider Britain

- Among Britain intenders:
  - 49% consider England
  - 44% consider Scotland
  - 23% consider London
  - 14% consider Wales

**Travel preferences**

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

- Destination types:
  - coastline: 33%
  - Large city: 43%
  - Small/mid-sized city/town: 24%
  - Mountains or hills: 14%
  - Country/village: 20%

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

- Top modes of transport to Britain:
  - Plane – via nonstop flight: 91%
  - Plane – via connecting flight: 75%
  - On foot – via Eurostar/Train: 62%

- Top modes of transport within Britain:
  - Public transport - Train: 51%
  - Public transport - Tube/subway: 49%
  - Public transport - Bus: 46%

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

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

**Top travel drivers**

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**...for any international trip**
- Money-back guarantee should I wish to cancel my trip: 40%
- An attractive offer e.g. discounts on flights or accommodation: 29%
- Stable political environment in destination country: 28%
- Insurance for COVID-19 related travel/regulations changes: 28%
- Welcoming locals in destination country: 28%

**...for a trip to Britain**
- Money-back guarantee should I wish to cancel my trip: 33%
- An attractive offer e.g. discounts on flights or accommodation: 28%
- Removal of quarantine policies in destination country: 23%
- Welcoming locals in destination country: 21%
- Insurance for COVID-19 related travel/regulations changes: 19%

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**Travel Concerns – for travel to Britain**

- Access to healthcare if I contract COVID-19 abroad: 70%
- Extra admin involved with new policy/rules during the trip: 69%
- Change in quarantine requirements on my return home: 67%
- Limited / restricted experiences at destination: 65%
- Accessibility of affordable air fares: 65%
- Other people not following COVID-19 policies/procedures: 64%
- Contracting COVID-19 during my journey/trip: 64%
- Costs of mandatory COVID-19 tests: 62%
- Affordability of robust travel insurance: 61%
- Locals’ attitude towards international tourists: 50%

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**Travel attitudes**

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I would be happy to take a pre-trip covid-19 test should that be required: 73% Agree, 5% No opinion, 22% Disagree
I would be comfortable using public transport within the destination: 70% Agree, 4% No opinion, 26% Disagree
I will favour international destinations closer to my home country: 66% Agree, 6% No opinion, 29% Disagree
I will think more about sustainability when planning future holidays: 59% Agree, 6% No opinion, 35% Disagree
Booking through a travel agent is a safer option at the moment: 57% Agree, 5% No opinion, 38% Disagree
I will look for less crowded places, even if I miss attractions: 54% Agree, 5% No opinion, 41% Disagree
I will leave booking until later/last minute: 53% Agree, 5% No opinion, 42% Disagree
I will favour local destinations instead of traveling internationally: 51% Agree, 6% No opinion, 43% Disagree
I will delay my next international trip until Omicron is under control: 44% Agree, 7% No opinion, 49% Disagree
I will be intending to take fewer but longer holidays: 43% Agree, 10% No opinion, 47% Disagree
I will favour destinations I have been before rather than new places: 42% Agree, 5% No opinion, 53% Disagree

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All data is from Wave 4, unless stated.

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
Germany Market Summary

**Travel intentions**

- Intending to travel abroad for leisure:
  - Wave 1: 65%
  - Wave 2: 67%
  - Wave 3: 81%
  - Wave 4: 87%

**Journey purpose**

- Holiday: 91%
- Visit friends or relatives: 32%
- Other leisure purposes: 16%

**Planning stage**

- Trip booked: Wave 1: 8%, Wave 2: 9%, Wave 3: 19%, Wave 4: 22%
- Destination chosen: Wave 1: 26%, Wave 2: 27%, Wave 3: 29%, Wave 4: 33%
- Trip planned: Wave 1: 33%, Wave 2: 37%, Wave 3: 31%, Wave 4: 32%
- Intend to travel: Wave 1: 33%, Wave 2: 27%, Wave 3: 23%, Wave 4: 18%

**Among leisure trip intenders:**

- 76% consider Europe
- 7% consider Britain

**Among Britain intenders:**

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

**Travel preferences**

**Top activities**

- Dining out: 50%
- Outdoor nature activities: 44%
- Outdoor activities: 43%
- History and heritage: 42%
- Iconic tourist attractions: 41%

**Destination types**

- Large city: 30%
- Coastline: 52%
- Mountains or hills: 22%
- Will roam around: 30%
- Small/mid-sized city/town: 23%
- Country/village: 19%

**Top Travel Companions**

- With your spouse/partner: 70%
- With friends: 23%
- With children (under 18): 22%
- Alone: 19%
- With adult family members: 14%
- As part of a tour group: 1%

**Top modes of transport within Britain**

- Own car vehicle: 41%
- Public transport - Train: 38%
- Public transport - Tube/subway: 36%

**Top modes of transport to Britain**

- Plane – via nonstop flight: 86%
- Plane – via connecting flight: 68%
- Own/rented vehicle – via Channel Tunnel: 60%

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

**Top travel drivers**

- **For any international trip**
  - Money-back guarantee should I wish to cancel my trip: 39%
  - Removal of quarantine policies in destination country: 34%
  - Stable political environment in destination country: 30%
  - Removal of quarantine policies in home country: 26%
  - Decrease in coronavirus cases at destination: 26%

- **For a trip to Britain**
  - Money-back guarantee should I wish to cancel my trip: 30%
  - Removal of quarantine policies in destination country: 25%
  - Assurance that there will be a range of enough things to do: 22%
  - Decrease in coronavirus cases at destination: 20%
  - An attractive offer e.g. discounts on flights or accommodation: 19%

**Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 81%
- I will look for less crowded places, even if I miss attractions: 66%
- I will favour international destinations closer to my home country: 61%
- Booking through a travel agent is a safer option at the moment: 60%
- I would be comfortable using public transport within the destination: 56%
- I will think more about sustainability when planning future holidays: 56%
- I will leave booking until later/last minute: 55%
- I will delay my next international trip until Omicron is under control: 46%
- I will favour destinations I have been before rather than new places: 46%
- I will favour destinations I have been before rather than new places: 46%
- I will look for less crowded places, even if I miss attractions: 40%
- I would be happy to take a pre-trip covid-19 test should that be required: 39%

**Travel Concerns – for travel to Britain**

- Change in quarantine requirements on my return home: 48%
- Limited / restricted experiences at destination: 46%
- Other people not following COVID-19 policies/procedures: 46%
- Access to healthcare if I contract COVID-19 abroad: 44%
- Contracting COVID-19 during my journey/trip: 40%
- Accessibility of affordable air fares: 39%
- Affordability of robust travel insurance: 36%
- Costs of mandatory COVID-19 tests: 35%
- Extra admin involved with new policy/rules during the trip: 34%
- Locals’ attitude towards international tourists: 25%

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All data is from Wave 4, unless stated.
India 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>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>92%</td>
<td>90%</td>
<td>94%</td>
<td>91%</td>
</tr>
</tbody>
</table>

Journey purpose

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

Planning stage

- Trip booked: 17%, 11%, 15%, 6%
- Destination chosen: 36%, 38%, 37%, 40%
- Trip planned: 33%, 37%, 31%, 40%
- Intend to travel: 14%, 14%, 18%, 17%

Among leisure trip intenders:

- Europe: 40%
- Britain: 13%

Among Britain intenders:

- England: 74%
- Scotland: 44%
- Wales: 25%
- London: 23%

Travel preferences

Top activities

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

Top Travel Companions

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

Destination types

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

Top modes of transport within Britain

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

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

Wave 1: 2nd-16th Dec 2020
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All data is from Wave 4, unless stated
India Market Summary

**Top travel drivers**

**...for any international trip**
- Hygiene & safety protocols in place at destination: 42%
- Decrease in coronavirus cases at destination: 29%
- Receiving a booster COVID-19 vaccination: 28%
- Relaxation of visa requirements: 28%
- Insurance for COVID-19 related travel/regulations changes: 28%

**...for a trip to Britain**
- Hygiene & safety protocols in place at destination: 37%
- Removal of quarantine policies in destination country: 29%
- Relaxation of visa requirements: 28%
- An attractive offer e.g. discounts on flights or accommodation: 28%
- Receiving a booster COVID-19 vaccination: 26%

**Travel Concerns – for travel to Britain**
- Access to healthcare if I contract COVID-19 abroad: 91%
- Contracting COVID-19 during my journey/trip: 89%
- Other people not following COVID-19 policies/procedures: 88%
- Change in quarantine requirements on my return home: 88%
- Affordability of robust travel insurance: 87%
- Accessibility of affordable air fares: 87%
- Extra admin involved with new policy/rules during the trip: 86%
- Limited / restricted experiences at destination: 86%
- Locals’ attitude towards international tourists: 86%
- Costs of mandatory COVID-19 tests: 83%

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

**Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 88% Agree, 22% Disagree
- I will think more about sustainability when planning future holidays: 87% Agree, 23% Disagree
- Booking through a travel agent is a safer option at the moment: 86% Agree, 14% Disagree
- I will be intending to take fewer but longer holidays: 85% Agree, 15% Disagree
- I will look for less crowded places, even if I miss attractions: 85% Agree, 15% Disagree
- I will delay my next international trip until Omicron is under control: 82% Agree, 18% Disagree
- I would be comfortable using public transport within the destination: 82% Agree, 18% Disagree
- I will favour international destinations closer to my home country: 80% Agree, 20% Disagree
- I will favour destinations I have been before rather than new places: 70% Agree, 30% Disagree
- I will favour local destinations instead of traveling internationally: 69% Agree, 31% Disagree
- I will leave booking until later/last minute: 65% Agree, 4% Disagree
- I would be intending to take fewer but longer holidays: 85% Agree, 15% Disagree
- I will look for less crowded places, even if I miss attractions: 85% Agree, 15% Disagree
- I will delay my next international trip until Omicron is under control: 82% Agree, 18% Disagree
- I would be comfortable using public transport within the destination: 82% Agree, 18% Disagree
- I will favour international destinations closer to my home country: 80% Agree, 20% Disagree
- I will favour destinations I have been before rather than new places: 70% Agree, 30% Disagree
- I will favour local destinations instead of traveling internationally: 69% Agree, 31% Disagree
- I will leave booking until later/last minute: 65% Agree, 4% Disagree

*% very & somewhat concerned
**% completely & somewhat agree
Irish Republic Market Summary

### Travel intentions

**Intending to travel abroad for leisure***

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

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

### Journey purpose

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

### Planning stage

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

### Among leisure trip intenders:

- 77% consider Europe
- 13% consider Britain

### Among Britain intenders:

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

### Travel preferences

#### Top activities

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

#### Destination types

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

#### Top Travel Companions

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

#### Top modes of transport to Britain

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

#### Top modes of transport to Britain

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

#### Top Accommodation

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

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

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Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022

All data is from Wave 4, unless stated.
# Irish 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>42%</td>
</tr>
<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
<td>37%</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td>29%</td>
</tr>
<tr>
<td>Hygiene &amp; safety protocols in place at destination</td>
<td>27%</td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>26%</td>
</tr>
</tbody>
</table>

## Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 75% Agree, 3% No opinion, 22% Disagree
- I would be comfortable using public transport within the destination: 69% Agree, 5% No opinion, 27% Disagree
- I will look for less crowded places, even if I miss attractions: 68% Agree, 5% No opinion, 28% Disagree
- I will favour international destinations closer to my home country: 63% Agree, 9% No opinion, 28% Disagree
- Booking through a travel agent is a safer option at the moment: 54% Agree, 11% No opinion, 35% Disagree
- I will think more about sustainability when planning future holidays: 53% Agree, 12% No opinion, 35% Disagree
- I will favour destinations I have been before rather than new places: 53% Agree, 7% No opinion, 40% Disagree
- I will delay my next international trip until Omicron is under control: 52% Agree, 7% No opinion, 41% Disagree
- I will leave booking until later/last minute: 51% Agree, 4% No opinion, 45% Disagree
- I will favour local destinations instead of traveling internationally: 48% Agree, 8% No opinion, 43% Disagree
- I will be intending to take fewer but longer holidays: 48% Agree, 13% No opinion, 39% Disagree

## Travel Concerns – for travel to Britain*

- Other people not following COVID-19 policies/procedures: 77% Agree, 74% No opinion, 7% Disagree
- Acces to healthcare if I contract COVID-19 abroad: 74% Agree, 74% No opinion, 2% Disagree
- Accessibility of affordable air fares: 74% Agree, 74% No opinion, 2% Disagree
- Contracting COVID-19 during my journey/trip: 71% Agree, 71% No opinion, 2% Disagree
- Change in quarantine requirements on my return home: 71% Agree, 71% No opinion, 2% Disagree
- Costs of mandatory COVID-19 tests: 70% Agree, 70% No opinion, 2% Disagree
- Affordability of robust travel insurance: 69% Agree, 69% No opinion, 2% Disagree
- Limited / restricted experiences at destination: 69% Agree, 69% No opinion, 2% Disagree
- Extra admin involved with new policy/rules during the trip: 69% Agree, 69% No opinion, 2% Disagree
- Locals’ attitude towards international tourists: 65% Agree, 69% No opinion, 6% Disagree

*% very & somewhat concerned

**% completely & somewhat agree

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

### Travel Intentions

- **Intending to travel abroad for leisure**:%
  - Wave 1: 77%
  - Wave 2: 81%
  - Wave 3: 87%
  - Wave 4: 90%

- **Journey purpose**
  - Holiday: 91%
  - Visit friends or relatives: 31%
  - Other leisure purposes: 25%

### Among leisure trip intenders:

- **78%** consider Europe
- **14%** consider Britain

### Among Britain intenders:

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

### Planning stage

- **3%** Trip booked
- **34%** Destination chosen
- **41%** Trip planned
- **10%** Intend to travel

### Travel Preferences

#### Top activities

- Iconic tourist attractions: 58%
- History and heritage: 58%
- Visiting cultural attractions: 57%
- Dining out: 52%
- Outdoor nature activities: 50%

#### Top Travel Companions

- With your spouse/partner: 70%
- With friends: 27%
- With children (under 18): 21%
- With adult family members: 15%
- Alone: 14%
- As part of a tour group: 2%

#### Top Accommodation

- Hotel chain: 64%
- Bed and breakfast: 59%
- Private rental: 37%
- Self catered property: 36%
- Holiday village/centre: 26%

#### Top modes of transport within Britain

- Public transport - Tube/subway: 55%
- Public transport - Train: 52%
- Public transport - Bus: 52%

#### Top modes of transport to Britain

- Plane – via nonstop flight: 93%
- Plane – via connecting flight: 86%
- Own/rented vehicle – via Ferry: 59%

### Destination types

- 53% Will roam around
- 63% Large city
- 32% Coastline
- 24% Mountains or hills
- 20% 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
Wave 4: 10th-23rd Feb 2022

All data is from Wave 4, unless stated.
Italy 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>An attractive offer e.g. discounts on flights or accommodation</td>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>Decrease in coronavirus cases at destination</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>Insurance for COVID-19 related travel/regulations changes</td>
<td>Removal of quarantine policies in destination country</td>
</tr>
</tbody>
</table>

Travel attitudes**

I would be happy to take a pre-trip covid-19 test should that be required

<table>
<thead>
<tr>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>80%</td>
<td>4%</td>
<td>16%</td>
</tr>
</tbody>
</table>

I will think more about sustainability when planning future holidays

<table>
<thead>
<tr>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>70%</td>
<td>9%</td>
<td>21%</td>
</tr>
</tbody>
</table>

I would be comfortable using public transport within the destination

<table>
<thead>
<tr>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>63%</td>
<td>5%</td>
<td>32%</td>
</tr>
</tbody>
</table>

I will look for less crowded places, even if I miss attractions

<table>
<thead>
<tr>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>62%</td>
<td>6%</td>
<td>32%</td>
</tr>
</tbody>
</table>

I will favour international destinations closer to my home country

<table>
<thead>
<tr>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>59%</td>
<td>8%</td>
<td>33%</td>
</tr>
</tbody>
</table>

I will delay my next international trip until Omicron is under control

<table>
<thead>
<tr>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>58%</td>
<td>6%</td>
<td>36%</td>
</tr>
</tbody>
</table>

Booking through a travel agent is a safer option at the moment

<table>
<thead>
<tr>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>56%</td>
<td>7%</td>
<td>37%</td>
</tr>
</tbody>
</table>

I will leave booking until later/last minute

<table>
<thead>
<tr>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>49%</td>
<td>7%</td>
<td>43%</td>
</tr>
</tbody>
</table>

I will be intending to take fewer but longer holidays

<table>
<thead>
<tr>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>44%</td>
<td>10%</td>
<td>46%</td>
</tr>
</tbody>
</table>

I will favour local destinations instead of traveling internationally

<table>
<thead>
<tr>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>43%</td>
<td>6%</td>
<td>51%</td>
</tr>
</tbody>
</table>

I will favour destinations I have been before rather than new places

<table>
<thead>
<tr>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>32%</td>
<td>8%</td>
<td>60%</td>
</tr>
</tbody>
</table>

Travel Concerns – for travel to Britain*

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to healthcare if I contract COVID-19 abroad</td>
<td>72%</td>
<td>67%</td>
<td>66%</td>
<td>66%</td>
</tr>
<tr>
<td>Other people not following COVID-19 policies/procedures</td>
<td>67%</td>
<td>66%</td>
<td>66%</td>
<td>66%</td>
</tr>
<tr>
<td>Contracting COVID-19 during my journey/trip</td>
<td>66%</td>
<td>66%</td>
<td>66%</td>
<td>66%</td>
</tr>
<tr>
<td>Limited / restricted experiences at destination</td>
<td>63%</td>
<td>63%</td>
<td>63%</td>
<td>63%</td>
</tr>
<tr>
<td>Change in quarantine requirements on my return home</td>
<td>60%</td>
<td>55%</td>
<td>54%</td>
<td>54%</td>
</tr>
<tr>
<td>Extra admin involved with new policy/rules during the trip</td>
<td>52%</td>
<td>52%</td>
<td>52%</td>
<td>52%</td>
</tr>
<tr>
<td>Affordability of robust travel insurance</td>
<td>41%</td>
<td>41%</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>Costs of mandatory COVID-19 tests</td>
<td>41%</td>
<td>41%</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>Accessibility of affordable air fares</td>
<td>41%</td>
<td>41%</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>Locals’ attitude towards international tourists</td>
<td>41%</td>
<td>41%</td>
<td>41%</td>
<td>41%</td>
</tr>
</tbody>
</table>

*% very & somewhat concerned

**% completely & somewhat agree

All data is from Wave 4, unless stated
Travel intentions

Intending to travel abroad for leisure*

<table>
<thead>
<tr>
<th>Wave 2</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>42%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Journey purpose

<table>
<thead>
<tr>
<th>Activity</th>
<th>Wave 2</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>58%</td>
<td></td>
</tr>
<tr>
<td>Other leisure purposes</td>
<td>58%</td>
<td></td>
</tr>
<tr>
<td>Visit friends or relatives</td>
<td>16%</td>
<td></td>
</tr>
</tbody>
</table>

Planning stage

<table>
<thead>
<tr>
<th>Wave 2</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>39%</td>
<td>39%</td>
</tr>
<tr>
<td>38%</td>
<td>33%</td>
</tr>
<tr>
<td>19%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Among leisure trip intenders:

40% consider Europe

13% consider Britain

Among Britain intenders:

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

Travel preferences

Top activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Wave 2</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dining out</td>
<td>51%</td>
<td></td>
</tr>
<tr>
<td>History and heritage</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Visiting cultural attractions</td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>Iconic tourist attractions</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>Shopping</td>
<td>43%</td>
<td></td>
</tr>
</tbody>
</table>

Top Travel Companions

<table>
<thead>
<tr>
<th>Companions</th>
<th>Wave 2</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>With your spouse/partner</td>
<td>65%</td>
<td></td>
</tr>
<tr>
<td>With friends</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Alone</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>With adult family members</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>With children (under 18)</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>As part of a tour group</td>
<td>7%</td>
<td></td>
</tr>
</tbody>
</table>

Destination types

<table>
<thead>
<tr>
<th>Type</th>
<th>Wave 2</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>32% Coastline</td>
<td></td>
<td></td>
</tr>
<tr>
<td>63% Large city</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18% Mountains or hills</td>
<td></td>
<td></td>
</tr>
<tr>
<td>46% Will roam around</td>
<td></td>
<td></td>
</tr>
<tr>
<td>21% Country/village</td>
<td></td>
<td></td>
</tr>
<tr>
<td>45% Small/mid-sized city/town</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Top modes of transport within Britain

<table>
<thead>
<tr>
<th>Mode</th>
<th>Wave 2</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public transport - Train</td>
<td>71%</td>
<td></td>
</tr>
<tr>
<td>Public transport - Tube/subway</td>
<td>58%</td>
<td></td>
</tr>
<tr>
<td>Public transport - Bus</td>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>Taxi</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Rented car/vehicle</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Private coach/minibus</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Uber/other sharing app</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Own car vehicle</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Domestic flight</td>
<td>7%</td>
<td></td>
</tr>
</tbody>
</table>

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

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

Top travel drivers

...for any international trip

- Decrease in coronavirus cases at destination: 53%
- Removal of quarantine policies in home country: 38%
- Removal of quarantine policies in destination country: 36%
- Stable political environment in destination country: 27%
- Money-back guarantee should I wish to cancel my trip: 25%

...for a trip to Britain

- Decrease in coronavirus cases at destination: 42%
- Removal of quarantine policies in home country: 31%
- Removal of quarantine policies in destination country: 30%
- Money-back guarantee should I wish to cancel my trip: 23%
- An attractive offer e.g. discounts on flights or accommodation: 21%

Travel attitudes

Agree | No opinion | Disagree
---|---|---
I will delay my next international trip until Omicron is under control | 84% | 4% | 12%
I would be comfortable using public transport within the destination | 82% | 4% | 14%
I will be intending to take fewer but longer holidays | 80% | 7% | 3%
I would be happy to take a pre-trip covid-19 test should that be required | 80% | 4% | 6%
I will leave booking until later/last minute | 65% | 10% | 25%
Booking through a travel agent is a safer option at the moment | 65% | 11% | 25%
I will think more about sustainability when planning future holidays | 64% | 13% | 23%
I will look for less crowded places, even if I miss attractions | 58% | 9% | 33%
I will favour international destinations closer to my home country | 50% | 14% | 36%
I will favour local destinations instead of traveling internationally | 47% | 17% | 36%
I will favour destinations I have been before rather than new places | 43% | 11% | 46%

Travel Concerns – for travel to Britain*

- Contracting COVID-19 during my journey/trip: 90%
- Access to healthcare if I contract COVID-19 abroad: 89%
- Change in quarantine requirements on my return home: 85%
- Other people not following COVID-19 policies/procedures: 84%
- Limited / restricted experiences at destination: 83%
- Locals’ attitude towards international tourists: 82%
- Costs of mandatory COVID-19 tests: 78%
- Extra admin involved with new policy/rules during the trip: 76%
- Affordability of robust travel insurance: 72%
- Accessibility of affordable air fares: 64%

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

Wave 1: 2nd-16th Dec 2020
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Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated
**Netherlands Market Summary**

### Travel intentions

**Intending to travel abroad for leisure**

- Wave 1: 63%
- Wave 2: 72%
- Wave 3: 83%
- Wave 4: 82%

- Holiday: 91%
- Visit friends or relatives: 34%
- Other leisure purposes: 17%

### Journey purpose

- Holiday: 91%
- Visit friends or relatives: 34%
- Other leisure purposes: 17%

### Planning stage

- 8% Trip booked
- 24% Destination chosen
- 25% Trip planned
- 43% Intend to travel

### Among leisure trip intenders:

- 75% consider Europe
- 10% consider Britain

### Among Britain intenders:

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

### Travel preferences

#### Top activities

- Dining out: 54%
- Outdoor activities: 51%
- Self-driving tours: 48%
- Outdoor nature activities: 45%
- History and heritage: 44%

#### Top Accommodation

- Hotel chain: 60%
- Self catered property: 44%
- Bed and breakfast: 42%
- Holiday village/centre: 33%
- Historic house/castle: 28%

#### Top Travel Companions

- With your spouse/partner: 67%
- With children (under 18): 29%
- Alone: 27%
- With friends: 24%
- With adult family members: 21%
- As part of a tour group: 4%

#### Top modes of transport within Britain

- Own car vehicle: 46%
- Public transport - Train: 45%
- Public transport - Tube/subway: 39%

#### Top modes of transport to Britain

- Plane – via nonstop flight: 87%
- Plane – via connecting flight: 82%
- Own/rented vehicle – via Ferry: 60%

---

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

---

Wave 1: 2nd-16th Dec 2020
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Wave 4: 10th-23rd Feb 2022

All data is from Wave 4, unless stated.
Netherlands Market Summary

**Top travel drivers**

*for any international trip*
- Money-back guarantee should I wish to cancel my trip: 37%
- Removal of quarantine policies in destination country: 29%
- An attractive offer e.g. discounts on flights or accommodation: 24%
- Welcoming locals in destination country: 22%
- Removal of quarantine policies in home country: 21%

*for a trip to Britain*
- Money-back guarantee should I wish to cancel my trip: 26%
- Removal of quarantine policies in destination country: 22%
- An attractive offer e.g. discounts on flights or accommodation: 19%
- Decrease in coronavirus cases at destination: 16%
- Assurance that there will be a range of/enough things to do: 14%

**Travel Concerns – for travel to Britain**

- Extra admin involved with new policy/rules during the trip: 64%
- Other people not following COVID-19 policies/procedures: 61%
- Contracting COVID-19 during my journey/trip: 59%
- Access to healthcare if I contract COVID-19 abroad: 57%
- Change in quarantine requirements on my return home: 56%
- Costs of mandatory COVID-19 tests: 55%
- Limited / restricted experiences at destination: 52%
- Affordability of robust travel insurance: 51%
- Accessibility of affordable air fares: 48%
- Locals’ attitude towards international tourists: 43%

**Travel attitudes**

I would be happy to take a pre-trip covid-19 test should that be required: 63% Agree, 4% No opinion, 33% Disagree
I would be comfortable using public transport within the destination: 61% Agree, 6% No opinion, 33% Disagree
I will look for less crowded places, even if I miss attractions: 61% Agree, 5% No opinion, 34% Disagree
Booking through a travel agent is a safer option at the moment: 60% Agree, 11% No opinion, 28% Disagree
I will leave booking until later/last minute: 58% Agree, 5% No opinion, 37% Disagree
I will delay my next international trip until Omicron is under control: 54% Agree, 5% No opinion, 42% Disagree
I will favour international destinations closer to my home country: 53% Agree, 5% No opinion, 42% Disagree
I will think more about sustainability when planning future holidays: 52% Agree, 7% No opinion, 40% Disagree
I will favour destinations I have been before rather than new places: 48% Agree, 4% No opinion, 48% Disagree
I will favour local destinations instead of traveling internationally: 46% Agree, 6% No opinion, 48% Disagree
I will be intending to take fewer but longer holidays: 41% Agree, 8% No opinion, 50% Disagree

---

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

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

**Travel intentions**

- Intending to travel abroad for leisure*
  - Wave 1: 53%
  - Wave 2: 53%
  - Wave 3: 68%
  - Wave 4: 74%

**Journey purpose**

- Holiday: 84%
- Visit friends or relatives: 30%
- Other leisure purposes: 15%

**Planning stage**

- Trip booked: 5%
- Destination chosen: 33%
- Trip planned: 43%
- Intend to travel: 36%

**Among leisure trip intenders:**

- Europe: 81%
- Britain: 15%

**Among Britain intenders:**

- England: 57%
- Scotland: 32%
- London: 27%
- Wales: 10%

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

**Travel preferences**

**Top activities**

- Dining out: 55%
- History and heritage: 35%
- Iconic tourist attractions: 34%
- Experiencing local lifestyle: 32%
- Visiting cultural attractions: 30%

**Destination types**

- Coastline: 43%
- Large city: 52%
- Small/mid-sized city/town: 33%
- Mountains or hills: 11%
- Country/village: 22%

**Top Travel Companions**

- With your spouse/partner: 66%
- With friends: 39%
- With adult family members: 32%
- With children (under 18): 28%
- Alone: 27%
- As part of a tour group: 5%

**Top modes of transport to Britain**

- Public transport - Train: 59%
- Public transport - Tube/subway: 46%
- Public transport - Bus: 40%

**Top modes of transport to Britain**

- Plane – via nonstop flight: 92%
- Plane – via connecting flight: 64%
- Own/rented vehicle – via Ferry: 34%
Norway 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>40%</td>
</tr>
<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
<td>38%</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td>37%</td>
</tr>
<tr>
<td>Removal of quarantine policies in home country</td>
<td>30%</td>
</tr>
<tr>
<td>Welcoming locals in destination country</td>
<td>29%</td>
</tr>
<tr>
<td>Your Government’s advice on international travel</td>
<td></td>
</tr>
</tbody>
</table>

**Travel Concerns – for travel to Britain**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Extra admin involved with new policy/rules during the trip</td>
<td>59%</td>
<td>57%</td>
<td>53%</td>
<td>52%</td>
</tr>
<tr>
<td>Other people not following COVID-19 policies/procedures</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to healthcare if I contract COVID-19 abroad</td>
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<td>Contracting COVID-19 during my journey/trip</td>
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</tr>
<tr>
<td>Costs of mandatory COVID-19 tests</td>
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<tr>
<td>Change in quarantine requirements on my return home</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Limited / restricted experiences at destination</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Accessibility of affordable air fares</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Locals’ attitude towards international tourists</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Affordability of robust travel insurance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*% very & somewhat concerned

**% completely & somewhat agree

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

**Travel intentions**

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

- **Journey purpose**:
  - Other leisure purposes: 68%
  - Holiday: 28%
  - Visit friends or relatives: 22%

- **Planning stage**:
  - Trip booked:
    - Wave 2: 40%
    - Wave 4: 40%
  - Destination chosen:
    - Wave 2: 11%
    - Wave 4: 13%
  - Trip planned:
    - Wave 2: 46%
    - Wave 4: 46%
  - Intend to travel:
    - Wave 2: 33%
    - Wave 4: 34%

**Among leisure trip intenders**:

- 56% consider Europe
- 1% consider Britain

**Among Britain intenders**:

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

**Travel preferences**

**Top activities**

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

**Destination types**

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

**Top Travel Companions**

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

**Top modes of transport within Britain**

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

**Top modes of transport to Britain**

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

---

*(% 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
Wave 4: 10th-23rd Feb 2022

All data is from Wave 4, unless stated.
## Russia 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>An attractive offer e.g. discounts on flights or accommodation</td>
<td>Relaxation of visa requirements</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td>An attractive offer e.g. discounts on flights or accommodation</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>Relaxation of visa requirements</td>
<td>Removal of quarantine policies in destination country</td>
</tr>
<tr>
<td>Removal of quarantine policies in home country</td>
<td>Removal of quarantine policies in home country</td>
</tr>
</tbody>
</table>

### Travel concerns – for travel to Britain*

- Limited / restricted experiences at destination: 89%
- Extra admin involved with new policy/rules during the trip: 84%
- Access to healthcare if I contract COVID-19 abroad: 83%
- Costs of mandatory COVID-19 tests: 83%
- Affordability of robust travel insurance: 82%
- Change in quarantine requirements on my return home: 78%
- Contracting COVID-19 during my journey/trip: 77%
- Accessibility of affordable air fares: 74%
- Other people not following COVID-19 policies/procedures: 73%
- Locals’ attitude towards international tourists: 70%

### Travel attitudes**

- Booking through a travel agent is a safer option at the moment: Agree 66%, No opinion 8%, Disagree 25%
- I would be happy to take a pre-trip COVID-19 test should that be required: Agree 62%, No opinion 6%, Disagree 32%
- I would be comfortable using public transport within the destination: Agree 60%, No opinion 7%, Disagree 32%
- I will look for less crowded places, even if I miss attractions: Agree 51%, No opinion 6%, Disagree 42%
- I will leave booking until later/last minute: Agree 50%, No opinion 9%, Disagree 41%
- I will delay my next international trip until Omicron is under control: Agree 49%, No opinion 8%, Disagree 43%
- I will think more about sustainability when planning future holidays: Agree 46%, No opinion 13%, Disagree 42%
- I will be intending to take fewer but longer holidays: Agree 45%, No opinion 12%, Disagree 43%
- I will favour international destinations closer to my home country: Agree 42%, No opinion 9%, Disagree 49%
- I will favour local destinations instead of traveling internationally: Agree 33%, No opinion 11%, Disagree 56%
- I will favour destinations I have been before rather than new places: Agree 32%, No opinion 7%, Disagree 61%

---

*% very & somewhat concerned

**% completely & somewhat agree
**Saudi Arabia Market Summary**

### Travel intentions

- Among leisure trip intenders:
  - 27% consider **Europe**
  - 7% consider **Britain**

### Travel preferences

#### Top activities
- Outdoor nature activities: 66%
- Iconic tourist attractions: 66%
- Dining out: 61%
- Outdoor activities: 57%
- Shopping: 57%

#### Destination types
- Small/mid-sized city/town: 22%
- Large city: 39%
- Will roam around: 43%
- Coastline: 40%
- Country/village: 37%
- Mountains or hills: 33%

#### Top Travel Companions
- With your spouse/partner: 68%
- With children (under 18): 37%
- With adult family members: 20%
- Alone: 17%
- With friends: 15%
- As part of a tour group: 2%

#### Top Accommodation
- Hotel chain: 46%
- Cruise: 27%
- Boutique hotel: 23%
- Self catered property: 23%
- Hostel/university/school: 21%

#### Top modes of transport within Britain
- Public transport - Train: 41%
- Public transport - Tube/subway: 38%
- Domestic flight: 38%
- Rented car/vehicle: 31%
- Uber/other sharing app: 30%
- Public transport - Bus: 26%
- Taxi: 23%
- Own car vehicle: 23%
- Private coach/minibus: 14%

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

Top travel drivers

...for any international trip

<table>
<thead>
<tr>
<th>Travel Driver</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
<td>35%</td>
<td>55%</td>
<td>10%</td>
</tr>
<tr>
<td>Relaxation of visa requirements</td>
<td>32%</td>
<td>53%</td>
<td>4%</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td>28%</td>
<td>65%</td>
<td>7%</td>
</tr>
<tr>
<td>Receiving a booster COVID-19 vaccination</td>
<td>26%</td>
<td>62%</td>
<td>12%</td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>24%</td>
<td>67%</td>
<td>6%</td>
</tr>
</tbody>
</table>

...for a trip to Britain

<table>
<thead>
<tr>
<th>Travel Driver</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
<td>31%</td>
<td>64%</td>
<td>5%</td>
</tr>
<tr>
<td>Relaxation of visa requirements</td>
<td>26%</td>
<td>66%</td>
<td>8%</td>
</tr>
<tr>
<td>Receiving a booster COVID-19 vaccination</td>
<td>20%</td>
<td>65%</td>
<td>15%</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td>19%</td>
<td>70%</td>
<td>11%</td>
</tr>
<tr>
<td>Stable political environment in destination country</td>
<td>19%</td>
<td>70%</td>
<td>11%</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 policies/procedures</td>
<td>70%</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Contracting COVID-19 during my journey/trip</td>
<td>67%</td>
<td>28%</td>
<td>5%</td>
</tr>
<tr>
<td>Change in quarantine requirements on my return home</td>
<td>64%</td>
<td>24%</td>
<td>12%</td>
</tr>
<tr>
<td>Access to healthcare if I contract COVID-19 abroad</td>
<td>63%</td>
<td>32%</td>
<td>5%</td>
</tr>
<tr>
<td>Affordability of robust travel insurance</td>
<td>62%</td>
<td>32%</td>
<td>6%</td>
</tr>
<tr>
<td>Costs of mandatory COVID-19 tests</td>
<td>60%</td>
<td>30%</td>
<td>10%</td>
</tr>
<tr>
<td>Limited / restricted experiences at destination</td>
<td>58%</td>
<td>32%</td>
<td>10%</td>
</tr>
<tr>
<td>Extra admin involved with new policy/rules during the trip</td>
<td>56%</td>
<td>41%</td>
<td>3%</td>
</tr>
<tr>
<td>Accessibility of affordable air fares</td>
<td>55%</td>
<td>39%</td>
<td>6%</td>
</tr>
<tr>
<td>Locals’ attitude towards international tourists</td>
<td>53%</td>
<td>41%</td>
<td>6%</td>
</tr>
</tbody>
</table>

I would be happy to take a pre-trip covid-19 test should that be required 86% 3%
I will be intending to take fewer but longer holidays 77% 3% 19%
Booking through a travel agent is a safer option at the moment 77% 2% 21%
I will look for less crowded places, even if I miss attractions 77% 2% 22%
I will favour international destinations closer to my home country 75% 2% 23%
I will think more about sustainability when planning future holidays 74% 4% 22%
I will delay my next international trip until Omicron is under control 72% 3% 27%
I would be comfortable using public transport within the destination 70% 2% 28%
I will favour local destinations instead of traveling internationally 62% 3% 35%
I will favour destinations I have been before rather than new places 59% 2% 39%
I will leave booking until later/last minute 59% 3% 39%

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

Intending to travel abroad for leisure*

- Wave 2: 56%
- Wave 4: 60%

- Consider Europe: 36%
- Consider Britain: 11%

**Planning stage**

- Wave 2:
  - Trip booked: 1%
  - Destination chosen: 28%
  - Trip planned: 45%
  - Intend to travel: 26%

- Wave 4:
  - Trip booked: 2%
  - Destination chosen: 32%
  - Trip planned: 43%
  - Intend to travel: 23%

**Journey purpose**

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

**Among leisure trip intenders:**

- Consider Europe: 36%
- Consider Britain: 11%

**Among Britain intenders:**

- Consider England: 57%
- Consider Scotland: 34%
- Consider London: 18%
- Consider Wales: 13%

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

**Travel preferences**

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

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

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

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

**Destination types**

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

Top travel drivers

...for any international trip

- Decrease in coronavirus cases at destination: 42%
- Hygiene & safety protocols in place at destination: 32%
- Removal of quarantine policies in destination country: 29%
- An attractive offer e.g. discounts on flights or accommodation: 25%
- Insurance for COVID-19 related travel/regulations changes: 24%

...for a trip to Britain

- Decrease in coronavirus cases at destination: 34%
- Hygiene & safety protocols in place at destination: 26%
- Removal of quarantine policies in destination country: 25%
- An attractive offer e.g. discounts on flights or accommodation: 22%
- Insurance for COVID-19 related travel/regulations changes: 22%

Travel Concerns – for travel to Britain*

- Contracting COVID-19 during my journey/trip: 88%
- Access to healthcare if I contract COVID-19 abroad: 87%
- Other people not following COVID-19 policies/procedures: 85%
- Change in quarantine requirements on my return home: 80%
- Extra admin involved with new policy/rules during the trip: 80%
- Locals’ attitude towards international tourists: 76%
- Costs of mandatory COVID-19 tests: 73%
- Limited / restricted experiences at destination: 72%
- Affordability of robust travel insurance: 68%
- Accessibility of affordable air fares: 49%

Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 81%/2%/7%
- I will think more about sustainability when planning future holidays: 74%/5%/21%
- I will look for less crowded places, even if I miss attractions: 70%/3%/27%
- I will delay my next international trip until Omicron is under control: 69%/3%/28%
- Booking through a travel agent is a safer option at the moment: 66%/6%/28%
- I will favour local destinations instead of traveling internationally: 66%/3%/32%
- I will be intending to take fewer but longer holidays: 59%/8%/33%
- I would be comfortable using public transport within the destination: 59%/3%/38%
- I will favour international destinations closer to my home country: 58%/7%/36%
- I will leave booking until later/last minute: 53%/7%/40%
- I will favour destinations I have been before rather than new places: 42%/5%/54%

*% 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%  
- Wave 4: 91%

Journey purpose

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

Planning stage

- Trip booked: 8%  
- Destination chosen: 36%  
- Trip planned: 40%  
- Intend to travel: 40%

Among leisure trip intenders:

- 73% consider Europe  
- 15% consider Britain

Among Britain intenders:

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

Travel preferences

Top activities

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

Destination types

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

Top Travel Companions

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

Top modes of transport to Britain

- Plane – via nonstop flight: 96%  
- Plane – via connecting flight: 81%  
- On foot – via Eurostar/Train: 53%  
- Public transport - Tube/subway: 36%  
- Domestic flight: 40%

Top Accommodation

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

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

**Top travel drivers**

*...for any international trip*

- Money-back guarantee should I wish to cancel my trip: 43%
- An attractive offer e.g. discounts on flights or accommodation: 40%
- Removal of quarantine policies in destination country: 31%
- Decrease in coronavirus cases at destination: 29%
- Stable political environment in destination country: 28%

*...for a trip to Britain*

- An attractive offer e.g. discounts on flights or accommodation: 38%
- Money-back guarantee should I wish to cancel my trip: 33%
- Removal of quarantine policies in destination country: 29%
- Voucher-back guarantee should I wish to cancel my trip: 26%
- Decrease in coronavirus cases at destination: 24%

**Travel Concerns – for travel to Britain**

- Access to healthcare if I contract COVID-19 abroad: 84%
- Extra admin involved with new policy/rules during the trip: 83%
- Change in quarantine requirements on my return home: 82%
- Limited / restricted experiences at destination: 82%
- Accessibility of affordable air fares: 80%
- Costs of mandatory COVID-19 tests: 79%
- Affordability of robust travel insurance: 77%
- Contracting COVID-19 during my journey/trip: 77%
- Other people not following COVID-19 policies/procedures: 76%
- Locals’ attitude towards international tourists: 67%

**Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: 72%
- I would be comfortable using public transport within the destination: 68%
- I will think more about sustainability when planning future holidays: 68%
- I will favour international destinations closer to my home country: 68%
- I will favour local destinations instead of traveling internationally: 66%
- I will look for less crowded places, even if I miss attractions: 65%
- I will leave booking until later/last minute: 62%
- I will think more about sustainability when planning future holidays: 60%
- I would be comfortable using public transport within the destination: 60%
- I will make international destinations closer to my home country: 60%
- I will think more about sustainability when planning future holidays: 52%
- I would be happy to take a pre-trip covid-19 test should that be required: 49%

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

Wave 1: 2nd-16th Dec 2020
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Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated
Sweden Market Summary

**Travel intentions**

- Intending to travel abroad for leisure:
  - Wave 1: 55%
  - Wave 2: 67%
  - Wave 3: 75%
  - Wave 4: 82%

**Journey purpose**

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

**Planning stage**

- Trip booked: 32%
- Destination chosen: 35%
- Trip planned: 32%
- Intend to travel: 36%

**Among leisure trip intenders:**

- 80% consider Europe
- 11% consider Britain

**Among Britain intenders:**

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

**Travel preferences**

**Top activities**

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

**Destination types**

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

**Top Travel Companions**

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

**Top Accommodation**

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

**Top modes of transport within Britain**

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

**Top modes of transport to Britain**

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

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

Wave 1: 2nd-16th Dec 2020
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Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated.
### Sweden Market Summary

#### Top travel drivers

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

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

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

- Extra admin involved with new policy/rules during the trip: 58%
- Access to healthcare if I contract COVID-19 abroad: 52%
- Change in quarantine requirements on my return home: 51%
- Contracting COVID-19 during my journey/trip: 50%
- Limited / restricted experiences at destination: 45%
- Affordability of robust travel insurance: 44%
- Costs of mandatory COVID-19 tests: 44%
- Accessibility of affordable air fares: 38%

#### Travel attitudes**

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

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

---

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

**Travel intentions**

Intending to travel abroad for leisure*:

- Wave 2: 86%
- Wave 4: 86%

**Journey purpose**

- Holiday: 71%
- Visit friends or relatives: 59%
- Other leisure purposes: 37%

**Planning stage**

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

Among leisure trip intenders:

- 41% consider Europe
- 9% consider Britain

Among Britain intenders:

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

**Travel preferences**

**Top activities**

- Dining out: 61%
- Outdoor nature activities: 61%
- Iconic tourist attractions: 59%
- History and heritage: 55%
- Visiting cultural attractions: 54%

**Destination types**

- Coastline: 34%
- Large city: 47%
- Will roam around: 47%
- Mountains or hills: 44%
- Small/mid-sized city/town: 33%
- Country/village: 41%

**Top Travel Companions**

- With your spouse/partner: 68%
- With children (under 18): 44%
- With friends: 19%
- With adult family members: 19%
- Alone: 15%
- As part of a tour group: 2%

**Top modes of transport within Britain**

- Public transport - Tube/subway: 44%
- Public transport - Train: 42%
- Public transport - Bus: 39%
- Domestic flight: 36%
- Rented car/vehicle: 35%
- Uber/other sharing app: 33%
- Own car vehicle: 29%
- Taxi: 26%
- Private coach/minibus: 22%

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

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

### Top travel drivers

#### …for any international trip
- Relaxation of visa requirements: 34%
- An attractive offer e.g. discounts on flights or accommodation: 32%
- Removal of quarantine policies in destination country: 28%
- Decrease in coronavirus cases at destination: 27%
- Hygiene & safety protocols in place at destination: 25%

#### …for a trip to Britain
- Relaxation of visa requirements: 32%
- An attractive offer e.g. discounts on flights or accommodation: 30%
- Removal of quarantine policies in destination country: 23%
- Decrease in coronavirus cases at destination: 22%
- Assurance that there will be a range of/enough things to do: 22%

### Travel Concerns – for travel to Britain*

- Other people not following COVID-19 policies/procedures: 72%
- Access to healthcare if I contract COVID-19 abroad: 68%
- Change in quarantine requirements on my return home: 67%
- Contracting COVID-19 during my journey/trip: 64%
- Affordability of robust travel insurance: 64%
- Limited / restricted experiences at destination: 63%
- Costs of mandatory COVID-19 tests: 60%
- Locals’ attitude towards international tourists: 59%
- Extra admin involved with new policy/rules during the trip: 59%
- Accessibility of affordable air fares: 59%

---

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

---

**Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: $81\%$ $2\%$ $7\%$
- I will be intending to take fewer but longer holidays: $75\%$ $3\%$ $22\%$
- Booking through a travel agent is a safer option at the moment: $75\%$ $4\%$ $21\%$
- I will think more about sustainability when planning future holidays: $74\%$ $3\%$ $23\%$
- I would be comfortable using public transport within the destination: $72\%$ $3\%$ $26\%$
- I will look for less crowded places, even if I miss attractions: $71\%$ $2\%$ $27\%$
- I will favour international destinations closer to my home country: $69\%$ $3\%$ $28\%$
- I will delay my next international trip until Omicron is under control: $63\%$ $4\%$ $33\%$
- I will favour local destinations instead of traveling internationally: $58\%$ $4\%$ $38\%$
- I will leave booking until later/last minute: $57\%$ $4\%$ $39\%$
- I will favour destinations I have been before rather than new places: $56\%$ $3\%$ $40\%$

---

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

Travel intentions

Intending to travel abroad for leisure*:

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

Among leisure trip intenders:

- 53% consider Europe
- 11% consider Britain

Journey purpose:

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

Planning stage:

- Trip booked: 14%
- Destination chosen: 28%
- Trip planned: 33%
- Intend to travel: 16%

Among leisure trip intenders:

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

Among Britain intenders:

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

Travel preferences

Top activities:

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

Destination types:

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

Top Travel Companions:

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

Top Accommodation:

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

Top modes of transport within Britain:

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

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

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022

All data is from Wave 4, unless stated.
### USA Market Summary

#### 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>32%</td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>28%</td>
</tr>
<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
<td>28%</td>
</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td>27%</td>
</tr>
<tr>
<td>Hygiene &amp; safety protocols in place at destination</td>
<td>27%</td>
</tr>
</tbody>
</table>

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

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

*% very & somewhat concerned

**% completely & somewhat agree

#### Travel attitudes**

<table>
<thead>
<tr>
<th>I would be happy to take a pre-trip covid-19 test should that be required</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>83%</td>
<td>24%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I will look for less crowded places, even if I miss attractions</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>71%</td>
<td>3%</td>
<td>26%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I would be comfortable using public transport within the destination</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>69%</td>
<td>4%</td>
<td>27%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Booking through a travel agent is a safer option at the moment</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>68%</td>
<td>7%</td>
<td>25%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I will delay my next international trip until Omicron is under control</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>65%</td>
<td>4%</td>
<td>30%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I will favour local destinations instead of traveling internationally</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>65%</td>
<td>5%</td>
<td>30%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I will think more about sustainability when planning future holidays</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>63%</td>
<td>8%</td>
<td>29%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I will be intending to take fewer but longer holidays</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>61%</td>
<td>9%</td>
<td>31%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I will favour international destinations closer to my home country</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>60%</td>
<td>9%</td>
<td>32%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I will favour destinations I have been before rather than new places</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>55%</td>
<td>5%</td>
<td>40%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>I will leave booking until later/last minute</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>51%</td>
<td>3%</td>
<td>46%</td>
<td></td>
</tr>
</tbody>
</table>

---

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

#### Travel intentions & Profile

<table>
<thead>
<tr>
<th>Total Short Haul</th>
<th>Haul</th>
<th>AU</th>
<th>BR</th>
<th>CA</th>
<th>CN</th>
<th>DK</th>
<th>FR</th>
<th>GE</th>
<th>IN</th>
<th>IR</th>
<th>IT</th>
<th>JP</th>
<th>NL</th>
<th>NO</th>
<th>RU</th>
<th>SA</th>
<th>KR</th>
<th>ES</th>
<th>SE</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>13%</td>
<td>10%</td>
<td>8%</td>
<td>8%</td>
<td>7%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
<td>10%</td>
<td>15%</td>
<td>7%</td>
<td>11%</td>
<td>11%</td>
<td>9%</td>
<td>11%</td>
<td>11%</td>
<td>9%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
<td>8%</td>
<td>5%</td>
</tr>
</tbody>
</table>

#### Channel booking

| Travel comparison website | 45% |
| TAs/TOs - Online          | 43% |
| Airline/train/ferry operator | 40% |
| Destination website direct | 38% |
| Accom. Provider direct    | 33% |
| TAs/TOs - Storefront      | 28% |

#### Travel Party

- Travel with your spouse/partner: 68%
- Travel with children (under 18): 34%
- Travel alone: 25%
- Travel with friends: 25%
- Travel with adult family members: 23%
- Travel as part of a tour group: 4%

#### Age

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

#### Ever visited Britain

- Several times: 40%
- Once: 30%
- No: 30%

#### Britain travel drivers

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

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

- I would be happy to take a pre-trip COVID-19 test if required: 84%
- I would be comfortable using public transport within the destination: 78%
- I will look for less crowded places, even if I miss attractions: 72%
- I will think more about sustainability and the environmental impact: 72%
- Booking through a travel agent is a safer option at the moment: 71%

#### Travel preferences

<table>
<thead>
<tr>
<th>Top activities</th>
<th>History and heritage</th>
<th>Iconic tourist attractions</th>
<th>Visiting cultural attractions</th>
<th>Dining out</th>
<th>Outdoor nature activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>59%</td>
<td>58%</td>
<td>58%</td>
<td>57%</td>
<td>51%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Destination types</th>
<th>Country/ village</th>
<th>Large city</th>
<th>Will roam around</th>
<th>Mountains or hills</th>
<th>Small/mid-sized city/town</th>
<th>Coastline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percentage</td>
<td>37%</td>
<td>68%</td>
<td>50%</td>
<td>32%</td>
<td>41%</td>
<td>40%</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 = 1403)
Britain – Intenders Profile (SH)

Travel intentions & Profile

% intending to visit the UK

<table>
<thead>
<tr>
<th>Channel booking</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airline/train/ferry operator</td>
<td>45%</td>
</tr>
<tr>
<td>Travel comparison website</td>
<td>42%</td>
</tr>
<tr>
<td>Accom. Provider direct</td>
<td>36%</td>
</tr>
<tr>
<td>TAs/TOs - Online</td>
<td>33%</td>
</tr>
<tr>
<td>Destination website direct</td>
<td>29%</td>
</tr>
<tr>
<td>TAs/TOs - Storefront</td>
<td>20%</td>
</tr>
</tbody>
</table>

Travel Party

- With your spouse/partner: 64%
- With friends: 31%
- With children (under 18): 29%
- Alone: 27%
- With adult family members: 27%
- As part of a tour group: 4%

Age

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

Ever visited Britain

- Several times: 44%
- Once: 28%
- No: 27%

Travel preferences

Top activities

- Dining out: 60%
- History and heritage: 55%
- Visiting cultural attractions: 55%
- Iconic tourist attractions: 54%
- Outdoor nature activities: 48%

Destination types

- 27% Country/village
- 67% Large city
- 41% Will roam around
- 23% Mountains or hills
- 35% Small/mid-sized city/town
- 29% Coastline

Travel attitudes (% completely & somewhat agree)

- I would be happy to take a pre-trip COVID-19 test if required: 78%
- I would be comfortable using public transport within the destination: 71%
- I will look for less crowded places, even if I miss attractions: 64%
- I will favor international destinations closer to my home country: 62%
- I will think more about sustainability and the environmental impact: 59%

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

Travel intentions & Profile

- % intending to visit the UK

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

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

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

Ever visited Britain
- Several times: 37%
- Once: 31%
- No: 32%

Travel preferences
- Top activities
  - History and heritage: 61%
  - Iconic tourist attractions: 61%
  - Visiting cultural attractions: 59%
  - Dining out: 56%
  - Outdoor nature activities: 53%

- Destination types
  - Country/village: 42%
  - Large city: 68%
  - Will roam around: 56%
  - Mountains or hills: 37%
  - Small/mid-sized city/town: 44%
  - Coastline: 46%

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

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

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

**Travel intentions & Profile**

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Short Haul</th>
<th>Long Haul</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>AU</td>
<td>13%</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>BR</td>
<td>13%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>CA</td>
<td>13%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>CN</td>
<td>13%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>DK</td>
<td>13%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>FR</td>
<td>13%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>GE</td>
<td>13%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>IN</td>
<td>13%</td>
<td>12%</td>
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<tr>
<td>IR</td>
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<td>IT</td>
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<td>JP</td>
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<td>NL</td>
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<td>RU</td>
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<td>ES</td>
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<tr>
<td>SE</td>
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<td>13%</td>
</tr>
<tr>
<td>UAE</td>
<td>13%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>USA</td>
<td>13%</td>
<td>12%</td>
<td>13%</td>
</tr>
</tbody>
</table>

**Travel Party**

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

**Age**

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

**Ever visited Britain**

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

**Channel booking**

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

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

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

**Britain travel drivers**

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

**Travel preferences**

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

**Destination types**

- 37% Country/village
- 72% Large city
- 49% Will roam around
- 32% Mountains or hills
- 42% 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 = 1,188)
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

Channel booking

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

Travel Party

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

Age

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

Ever visited Britain

- Several times: 49%
- Once: 27%
- No: 25%

Travel preferences

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

- Destination types
  - Country/village: 27%
  - Large city: 73%
  - Will roam around: 36%
  - Mountains or hills: 22%
  - Small/mid-sized city/town: 36%
  - Coastline: 29%

Britain travel drivers

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

Travel attitudes (% completely & somewhat agree)

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

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

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

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

**Ever visited Britain**
- Several times: 39%
- Once: 30%
- No: 31%

**Travel preferences**
- Top activities:
  - History and heritage: 61%
  - Iconic tourist attractions: 60%
  - Visiting cultural attractions: 59%
  - Dining out: 56%
  - Outdoor nature activities: 53%

**Destination types**
- 42% Country/village
- 72% Large city
- 55% Will roam around
- 37% Mountains or hills
- 45% Small/mid-sized city/town
- 46% Coastline

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

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting England in the next 12 months (n = 788)
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**
- Travel comparison website: 50%
- TAs/TOs - Online: 49%
- Destination website direct: 47%
- Airline/train/ferry operator: 43%
- Accom. Provider direct: 37%
- TAs/TOs - Storefront: 35%

**Travel Party**
- With your spouse/partner: 41%
- With children (under 18): 40%
- With friends: 25%
- With adult family members: 24%
- Alone: 23%
- As part of a tour group: 6%

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

**Ever visited Britain**
- Several times: 43%
- Once: 31%
- No: 26%

**Travel preferences**
- Top activities:
  - History and heritage: 63%
  - Iconic tourist attractions: 61%
  - Visiting cultural attractions: 60%
  - Dining out: 57%
  - Outdoor nature activities: 55%

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

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

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Scotland in the next 12 months (n = 696)
Scotland – Potential Visitors Profile (SH)

Travel intentions & Profile

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

Channel booking

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

Travel Party

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

Age

- < 35 y.o.: 46%
- 35-54 y.o.: 31%
- 55+ y.o.: 23%

Ever visited Britain

- Several times: 46%
- Once: 31%
- No: 23%

Travel preferences

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

- Destination types:
  - 38% Country/village
  - 61% Large city
  - 58% Will roam around
  - 36% Mountains or hills
  - 46% Small/mid-sized city/town
  - 39% 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 = 228)
### Scotland – Potential Visitors Profile (LH)

#### Travel intentions & Profile

<table>
<thead>
<tr>
<th>Region</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>Long Haul AU BR CA CN IN JP SA KR UAE USA</td>
<td>15% 8% 12% 6% 11% 11% 13% 13% 7% 9% 7% 11% 9% 11% 8% 6% 16% 5% 9% 4% 9% 11% 6%</td>
<td>35%</td>
</tr>
</tbody>
</table>

#### Channel booking

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

#### Travel Party

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

#### Age

- < 35 y.o.: 41%
- 35-54 y.o.: 44%
- 55+ y.o.: 16%

#### Ever visited Britain

- Several times: 41%
- Once: 31%
- No: 27%

#### Britain travel drivers

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

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

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

#### Travel preferences

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

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

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

Travel Intentions & Profile

- 35% of those intending to visit the UK who would consider visiting Wales
- 13% are already intending to visit the UK

Channel Booking

<table>
<thead>
<tr>
<th>Channel</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAs/TOs - Online</td>
<td>55%</td>
</tr>
<tr>
<td>Travel comparison website</td>
<td>53%</td>
</tr>
<tr>
<td>Destination website direct</td>
<td>53%</td>
</tr>
<tr>
<td>Airline/train/ferry operator</td>
<td>47%</td>
</tr>
<tr>
<td>TAs/TOs - Storefront</td>
<td>44%</td>
</tr>
<tr>
<td>Accom. Provider direct</td>
<td>39%</td>
</tr>
</tbody>
</table>

Travel Party

<table>
<thead>
<tr>
<th>Group</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>With your spouse/partner</td>
<td>79%</td>
</tr>
<tr>
<td>With children (under 18)</td>
<td>47%</td>
</tr>
<tr>
<td>With friends</td>
<td>25%</td>
</tr>
<tr>
<td>Alone</td>
<td>24%</td>
</tr>
<tr>
<td>With adult family members</td>
<td>24%</td>
</tr>
<tr>
<td>As part of a tour group</td>
<td>7%</td>
</tr>
</tbody>
</table>

Travel Party Age

- 47% of respondents are under 35 y.o.
- 12% of respondents are 55+ y.o.

Ever Visited Britain

- 49% have visited Britain several times
- 28% have visited once
- 24% have never visited Britain

Travel Preferences

<table>
<thead>
<tr>
<th>Activity</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>History and heritage</td>
<td>64%</td>
</tr>
<tr>
<td>Visiting cultural attractions</td>
<td>61%</td>
</tr>
<tr>
<td>Dining out</td>
<td>59%</td>
</tr>
<tr>
<td>Iconic tourist attractions</td>
<td>59%</td>
</tr>
<tr>
<td>Outdoor nature activities</td>
<td>55%</td>
</tr>
</tbody>
</table>

Destination Types

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

Britain Travel Drivers

- 32% Money-back guarantee should I wish to cancel my trip
- 29% Attractive offer (e.g. discounts)
- 28% Welcoming locals in destination country
- 27% Decrease in coronavirus cases at destination

Travel Attitudes (% completely & somewhat agree)

- 86% I would be happy to take a pre-trip COVID-19 test if required
- 83% I would be comfortable using public transport within the destination
- 79% I will think more about sustainability and the environmental impact
- 79% Booking through a travel agent is a safer option at the moment
- 76% I will delay my next international trip until Omicron is under control

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Wales in the next 12 months (n = 429)
Wales – Potential Visitors Profile (SH)

Travel intentions & Profile

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

Channel booking

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

Travel Party

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

Age

- Ever visited Britain
- 54% Several times
- 27% Once
- 19% No

Britain travel drivers

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

Travel attitudes (% completely & somewhat agree)

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Wales in the next 12 months (n = 99)
Wales – Potential Visitors Profile (LH)

Travel intentions & Profile

<table>
<thead>
<tr>
<th>Channel booking</th>
<th>TAs/TOs - Online</th>
<th>Destination website direct</th>
<th>Travel comparison website</th>
<th>TAs/TOs - Storefront</th>
<th>Airline/train/ferry operator</th>
<th>Accom. Provider direct</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long Haul</td>
<td>15%</td>
<td>6%</td>
<td>3%</td>
<td>4%</td>
<td>2%</td>
<td>14%</td>
</tr>
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<td>1%</td>
<td>7%</td>
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<tr>
<td>CA</td>
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<td>9%</td>
<td>4%</td>
<td>3%</td>
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<tr>
<td>CN</td>
<td>13%</td>
<td>9%</td>
<td>11%</td>
<td>4%</td>
<td>3%</td>
<td>9%</td>
</tr>
<tr>
<td>IN</td>
<td>11%</td>
<td>9%</td>
<td>9%</td>
<td>3%</td>
<td>3%</td>
<td>11%</td>
</tr>
<tr>
<td>JP</td>
<td>11%</td>
<td>11%</td>
<td>7%</td>
<td>7%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>SA</td>
<td>7%</td>
<td>14%</td>
<td>6%</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
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<tr>
<td>KR</td>
<td>4%</td>
<td>7%</td>
<td>11%</td>
<td>9%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>UAE</td>
<td>4%</td>
<td>7%</td>
<td>13%</td>
<td>11%</td>
<td>13%</td>
<td>6%</td>
</tr>
<tr>
<td>USA</td>
<td>4%</td>
<td>7%</td>
<td>13%</td>
<td>11%</td>
<td>13%</td>
<td>6%</td>
</tr>
</tbody>
</table>

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

Travel Party

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

Age

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

Ever visited Britain

- Several times: 47%
- Once: 28%
- No: 25%

Travel preferences

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

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

Travel attitudes (% completely & somewhat agree)

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting Wales in the next 12 months (n = 330)
London – Potential Visitors Profile

Travel intentions & Profile

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

Total Short Haul 35%
Long Haul 17%

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

Channel booking

Travel Party

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

Age

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

Ever visited Britain

40% 26% 34%

Britain travel drivers

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

Travel attitudes (% completely & somewhat agree)

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

Travel preferences

Top activities

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

Accommodation

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

Britain travel drivers

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

Travel attitudes (% completely & somewhat agree)

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

Travel preferences

Top activities

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

Accommodation

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 551)
London – Potential Visitors Profile

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

<table>
<thead>
<tr>
<th></th>
<th>W2</th>
<th>W3</th>
<th>W4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Short Haul</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Long Haul</td>
<td>8%</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

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

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

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

**Ever visited Britain**
- Several times: 40%
- Once: 26%
- No: 34%

**Travel preferences**

<table>
<thead>
<tr>
<th>Top activities</th>
<th>W2</th>
<th>W3</th>
<th>W4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iconic tourist attractions</td>
<td>65%</td>
<td>63%</td>
<td>59%</td>
</tr>
<tr>
<td>History and heritage</td>
<td>63%</td>
<td>59%</td>
<td>57%</td>
</tr>
<tr>
<td>Visiting cultural attractions</td>
<td>59%</td>
<td>57%</td>
<td>53%</td>
</tr>
<tr>
<td>Dining out</td>
<td>57%</td>
<td>57%</td>
<td>55%</td>
</tr>
<tr>
<td>Outdoor nature activities</td>
<td>49%</td>
<td>49%</td>
<td>47%</td>
</tr>
</tbody>
</table>

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

**Britain travel drivers**

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

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

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 551)
London – Potential Visitors Profile (SH)

### Travel intentions & Profile

- % intending to visit the UK: 10%
- % of those intending to visit the UK who would consider visiting London: 8%

<table>
<thead>
<tr>
<th>Short Haul</th>
<th>DK</th>
<th>FR</th>
<th>GE</th>
<th>IR</th>
<th>IT</th>
<th>NL</th>
<th>NO</th>
<th>RU</th>
<th>ES</th>
<th>SE</th>
<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>10%</td>
<td>4%</td>
<td>8%</td>
<td>3%</td>
<td>8%</td>
<td>3%</td>
<td>7%</td>
<td>13%</td>
<td>3%</td>
<td>14%</td>
<td>10%</td>
<td>7%</td>
<td>15%</td>
</tr>
</tbody>
</table>

### Channel booking

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

### Travel Party

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

### Age

- Under 35 y.o.: 46%
- 35-54 y.o.: 36%
- 55+ y.o.: 20%

### Ever visited Britain

- Several times: 46%
- Once: 26%
- No: 28%

### Britain travel drivers

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

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

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

### Travel preferences

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

### Accommodation

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 179)
London – Potential Visitors Profile (SH)

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

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

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

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

Ever visited Britain
- Several times: 46%
- Once: 26%
- No: 28%

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

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

Travel attitudes (% completely & somewhat agree)

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

Note: TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 179)
London – Potential Visitors Profile (LH)

Travel intentions & Profile

<table>
<thead>
<tr>
<th>Channel booking</th>
<th>% intending to visit the UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel comparison website</td>
<td>50%</td>
</tr>
<tr>
<td>TAs/TOs - Online</td>
<td>49%</td>
</tr>
<tr>
<td>Destination website direct</td>
<td>45%</td>
</tr>
<tr>
<td>Airline/train/ferry operator</td>
<td>36%</td>
</tr>
<tr>
<td>Accom. Provider direct</td>
<td>35%</td>
</tr>
<tr>
<td>TAs/TOs - Storefront</td>
<td>28%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Travel Party</th>
<th>% of those intending to visit the UK who would consider visiting London</th>
</tr>
</thead>
<tbody>
<tr>
<td>With your spouse/partner</td>
<td>65%</td>
</tr>
<tr>
<td>With children (under 18)</td>
<td>38%</td>
</tr>
<tr>
<td>Alone</td>
<td>33%</td>
</tr>
<tr>
<td>With adult family members</td>
<td>22%</td>
</tr>
<tr>
<td>With friends</td>
<td>22%</td>
</tr>
<tr>
<td>As part of a tour group</td>
<td>5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>&lt; 3 y.o.</th>
<th>35-54 y.o.</th>
<th>55+ y.o.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ever visited Britain</td>
<td>38%</td>
<td>26%</td>
<td>36%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ever visited Britain</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>%- completely &amp; somewhat agree</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hygiene &amp; safety protocols in place at destination</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>Removal of quarantine policies in destination</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Official national hygiene label</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Money-back guarantee should I wish to cancel my trip</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>29%</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Travel preferences Top activities</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Iconic tourist attractions</td>
<td>64%</td>
<td></td>
</tr>
<tr>
<td>History and heritage</td>
<td>63%</td>
<td></td>
</tr>
<tr>
<td>Visiting cultural attractions</td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>Dining out</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>Outdoor nature activities</td>
<td>51%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Accommodation</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Boutique hotel</td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>Hotel chain</td>
<td>60%</td>
<td></td>
</tr>
<tr>
<td>Historic house/castle</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>Holiday village/centre</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Private rental</td>
<td>36%</td>
<td></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 = 372)
London – Potential Visitors Profile (LH)

**Travel intentions & Profile**

<table>
<thead>
<tr>
<th>Country</th>
<th>AU</th>
<th>BR</th>
<th>CA</th>
<th>CN</th>
<th>IN</th>
<th>JP</th>
<th>SA</th>
<th>KR</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of those intending to visit London</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **W2**: 4%
- **W3**: 6%
- **W4**: 5%

**Channel booking**

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

**Travel Party**

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

**Age**

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

**Ever visited Britain**

- Several times: 38%
- Once: 26%
- No: 36%

**Travel preferences**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Iconic tourist attractions</th>
<th>History and heritage</th>
<th>Visiting cultural attractions</th>
<th>Dining out</th>
<th>Outdoor nature activities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>64%</td>
<td>63%</td>
<td>61%</td>
<td>53%</td>
<td>51%</td>
</tr>
</tbody>
</table>

**Accommodation**

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

**Britain travel drivers**

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

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

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

**Note:** TA/TO = Travel Agencies/Tour Operators
Base: Respondents intending to visit the UK who would consider visiting London in the next 12 months (n = 372)
Trends: August 2021 vs February 2022

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

What conversion funnels measure

International travel consideration (*)
Europe consideration
Britain consideration

Market: All

<table>
<thead>
<tr>
<th>All Respondants</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>International Leisure Trip Intenders (*)</td>
<td>92%</td>
</tr>
<tr>
<td>European Leisure Trip Intenders</td>
<td>58%</td>
</tr>
<tr>
<td>Britain Leisure Trip Intenders</td>
<td>13%</td>
</tr>
</tbody>
</table>

Market: long-haul

<table>
<thead>
<tr>
<th>All Respondants</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>International Leisure Trip Intenders</td>
<td>89%</td>
</tr>
<tr>
<td>European Leisure Trip Intenders</td>
<td>45%</td>
</tr>
<tr>
<td>Britain Leisure Trip Intenders</td>
<td>15%</td>
</tr>
</tbody>
</table>

Market: short-haul

<table>
<thead>
<tr>
<th>All Respondants</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>International Leisure Trip Intenders</td>
<td>96%</td>
</tr>
<tr>
<td>European Leisure Trip Intenders</td>
<td>74%</td>
</tr>
<tr>
<td>Britain Leisure Trip Intenders</td>
<td>10%</td>
</tr>
</tbody>
</table>
Conversion Funnel summary

Long-haul markets

**Market: Australia**
- All Respondents: 100%
- International Leisure Trip Intenders: 80%
- European Leisure Trip Intenders: 31%
- Britain Leisure Trip Intenders: 12%

**Market: Brazil**
- All Respondents: 100%
- International Leisure Trip Intenders: 98%
- European Leisure Trip Intenders: 62%
- Britain Leisure Trip Intenders: 11%

**Market: Canada**
- All Respondents: 100%
- International Leisure Trip Intenders: 92%
- European Leisure Trip Intenders: 45%
- Britain Leisure Trip Intenders: 11%

**Market: China**
- All Respondents: 100%
- International Leisure Trip Intenders: 96%
- European Leisure Trip Intenders: 57%
- Britain Leisure Trip Intenders: 35%

**Market: India**
- All Respondents: 100%
- International Leisure Trip Intenders: 98%
- European Leisure Trip Intenders: 39%
- Britain Leisure Trip Intenders: 13%

**Market: Japan**
- All Respondents: 100%
- International Leisure Trip Intenders: 52%
- European Leisure Trip Intenders: 39%
- Britain Leisure Trip Intenders: 13%

Q: / Base: All respondents (n = 11,057)
## Conversion Funnel summary

### Long-haul markets

<table>
<thead>
<tr>
<th>Market: Saudi Arabia</th>
<th>Market: South Korea</th>
<th>Market: UAE</th>
<th>Market: USA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All Respondants</strong></td>
<td><strong>All Respondants</strong></td>
<td><strong>All Respondants</strong></td>
<td><strong>All Respondants</strong></td>
</tr>
<tr>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>International Leisure Trip Intenders</td>
<td>International Leisure Trip Intenders</td>
<td>International Leisure Trip Intenders</td>
<td>International Leisure Trip Intenders</td>
</tr>
<tr>
<td>95%</td>
<td>83%</td>
<td>97%</td>
<td>93%</td>
</tr>
<tr>
<td>European Leisure Trip Intenders</td>
<td>European Leisure Trip Intenders</td>
<td>European Leisure Trip Intenders</td>
<td>European Leisure Trip Intenders</td>
</tr>
<tr>
<td>27%</td>
<td>35%</td>
<td>41%</td>
<td>52%</td>
</tr>
<tr>
<td>Britain Leisure Trip Intenders</td>
<td>Britain Leisure Trip Intenders</td>
<td>Britain Leisure Trip Intenders</td>
<td>Britain Leisure Trip Intenders</td>
</tr>
<tr>
<td>7%</td>
<td>11%</td>
<td>9%</td>
<td>11%</td>
</tr>
</tbody>
</table>

**Q:** / **Base:** All respondents (n = 11,057)
Conversion Funnel summary

Short-haul markets

Market: Denmark
- All Respondants: 100%
- International Leisure Trip Intenders: 93%
- European Leisure Trip Intenders: 80%
- Britain Leisure Trip Intenders: 8%

Market: France
- All Respondants: 100%
- International Leisure Trip Intenders: 98%
- European Leisure Trip Intenders: 66%
- Britain Leisure Trip Intenders: 8%

Market: Germany
- All Respondants: 100%
- International Leisure Trip Intenders: 95%
- European Leisure Trip Intenders: 75%
- Britain Leisure Trip Intenders: 7%

Market: Irish Republic
- All Respondants: 100%
- International Leisure Trip Intenders: 97%
- European Leisure Trip Intenders: 76%
- Britain Leisure Trip Intenders: 13%

Market: Italy
- All Respondants: 100%
- International Leisure Trip Intenders: 98%
- European Leisure Trip Intenders: 77%
- Britain Leisure Trip Intenders: 14%

Market: Netherlands
- All Respondants: 100%
- International Leisure Trip Intenders: 94%
- European Leisure Trip Intenders: 74%
- Britain Leisure Trip Intenders: 10%

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

Short-haul markets

Market: Norway

- All Respondants: 100%
- International Leisure Trip Intenders: 92%
- European Leisure Trip Intenders: 80%
- Britain Leisure Trip Intenders: 15%

Market: Russia

- All Respondants: 100%
- International Leisure Trip Intenders: 97%
- European Leisure Trip Intenders: 56%
- Britain Leisure Trip Intenders: 1%

Market: Spain

- All Respondants: 100%
- International Leisure Trip Intenders: 98%
- European Leisure Trip Intenders: 73%
- Britain Leisure Trip Intenders: 15%

Market: Sweden

- All Respondants: 100%
- International Leisure Trip Intenders: 96%
- European Leisure Trip Intenders: 80%
- Britain Leisure Trip Intenders: 11%

Q: / Base: All respondents (n = 11,057)
Britain Intenders – Travel Horizons

<table>
<thead>
<tr>
<th></th>
<th>Short-haul (n = 509)</th>
<th>Long-haul (n = 894)</th>
<th>Total (n = 1403)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apr. 22 - June 22</td>
<td>31%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>July 22 - Aug. 22</td>
<td>24%</td>
<td>20%</td>
<td>21%</td>
</tr>
<tr>
<td>Sept. 22 - Dec. 22</td>
<td>18%</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>January-March 2023</td>
<td>2%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>April-June 2023</td>
<td>1%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>July-September 2023</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>October-December 2023</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>2024/beyond</td>
<td>1%</td>
<td>2%</td>
<td>2%</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 = 10,954)
Travel horizon for next international leisure trip (LH)

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

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

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

<table>
<thead>
<tr>
<th>Base: All respondents (n = 11,057)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
</tr>
<tr>
<td>-----------</td>
</tr>
<tr>
<td><strong>Male</strong></td>
</tr>
<tr>
<td>51%</td>
</tr>
<tr>
<td>49%</td>
</tr>
<tr>
<td><strong>Female</strong></td>
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<tr>
<td>49%</td>
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<td>51%</td>
</tr>
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<td><strong>Total</strong></td>
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<tr>
<td><strong>Total</strong></td>
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<tr>
<td>57%</td>
</tr>
<tr>
<td>35%</td>
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<tr>
<td>8%</td>
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</table>
## Sample description (LH)

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Long-haul</th>
<th>Australia</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>India</th>
<th>Japan</th>
<th>Saudi Arabia</th>
<th>South Korea</th>
<th>UAE</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Male</strong></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Base: All respondents (n = 11,057)</td>
<td></td>
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</tr>
<tr>
<td>Male</td>
<td>51%</td>
<td>52%</td>
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<td>47%</td>
<td>50%</td>
<td>49%</td>
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<tr>
<td>Female</td>
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<td>39%</td>
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<td>49%</td>
</tr>
<tr>
<td><strong>Less than 35</strong></td>
<td></td>
<td></td>
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<tr>
<td>Male</td>
<td>35%</td>
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<td>44%</td>
<td>27%</td>
<td>39%</td>
<td>35%</td>
<td>56%</td>
<td>34%</td>
</tr>
<tr>
<td>Female</td>
<td>38%</td>
<td>39%</td>
<td>34%</td>
<td>38%</td>
<td>36%</td>
<td>41%</td>
<td>40%</td>
<td>33%</td>
<td>52%</td>
<td>48%</td>
<td>42%</td>
<td>32%</td>
</tr>
<tr>
<td><strong>From 35 to 54</strong></td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>26%</td>
<td>24%</td>
<td>40%</td>
<td>19%</td>
<td>35%</td>
<td>19%</td>
<td>16%</td>
<td>40%</td>
<td>9%</td>
<td>17%</td>
<td>2%</td>
<td>34%</td>
</tr>
<tr>
<td>Female</td>
<td>26%</td>
<td>24%</td>
<td>40%</td>
<td>19%</td>
<td>35%</td>
<td>19%</td>
<td>16%</td>
<td>40%</td>
<td>9%</td>
<td>17%</td>
<td>2%</td>
<td>34%</td>
</tr>
<tr>
<td><strong>55 and over</strong></td>
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</tr>
<tr>
<td>Male</td>
<td>13%</td>
<td>11%</td>
<td>9%</td>
<td>2%</td>
<td>1%</td>
<td>0%</td>
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<td>3%</td>
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<td>1%</td>
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<tr>
<td>Female</td>
<td>13%</td>
<td>11%</td>
<td>9%</td>
<td>2%</td>
<td>1%</td>
<td>0%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
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## Segmentation (SH)

### Among international trip Intenders

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

### Among Europe Intenders

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

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

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

#### Among Europe Intenders

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

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Base: Respondents who plan on taking a leisure trip in Britain (n = 1403)
Mixed reactions to the end of VAT-returns on tax-free shopping in the UK

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

Q32: Finally, which of the following best describes your reaction to the fact that you can no longer claim value-added tax refunds on goods purchased in tax-free shopping in the UK?

Base: All respondents concerned (n = 6,553)