Inbound COVID-19 Sentiment Tracker

Market Snapshot – France

Read the full report for Wave 4 here (PDF, 8MB)

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

Bristol Balloon Fiesta: Destination Bristol ©Gary Newman
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: 7%
- Destination chosen: 28%
- Trip planned: 36%
- Intend to travel: 36%

Among leisure trip intenders:

- 66% consider Europe
- 8% consider Britain

**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 within Britain

- Public transport - Train: 51%
- Public transport - Tube/subway: 49%
- Public transport - Bus: 46%

Top modes of transport to Britain

- Plane – via nonstop flight: 91%
- Plane – via connecting flight: 75%
- On foot – via Eurostar/Train: 62%

**Among Britain intenders:**

- 49% consider England
- 44% consider Scotland
- 23% consider London
- 14% consider Wales

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

Top travel drivers

...for any international trip

<table>
<thead>
<tr>
<th>Travel Driver</th>
<th>Wave 4 %</th>
<th>Wave 3 %</th>
<th>Wave 2 %</th>
<th>Wave 1 %</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Money-back guarantee should I wish to cancel my trip</td>
<td>40%</td>
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</tr>
<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
<td>29%</td>
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</tr>
<tr>
<td>Stable political environment in destination country</td>
<td>28%</td>
<td>28%</td>
<td>28%</td>
<td>28%</td>
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</tr>
<tr>
<td>Insurance for COVID-19 related travel/regulations changes</td>
<td>28%</td>
<td>28%</td>
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<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td>Welcoming locals in destination country</td>
<td>28%</td>
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...for a trip to Britain

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</tr>
<tr>
<td>Removal of quarantine policies in destination country</td>
<td>23%</td>
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<td>23%</td>
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</tr>
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Travel attitudes**

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<th>Wave 1</th>
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</thead>
<tbody>
<tr>
<td>I would be happy to take a pre-trip covid-19 test should that be required</td>
<td>73%</td>
<td>70%</td>
<td>66%</td>
<td>51%</td>
</tr>
<tr>
<td>I would be comfortable using public transport within the destination</td>
<td>70%</td>
<td>67%</td>
<td>66%</td>
<td>59%</td>
</tr>
<tr>
<td>I will favour international destinations closer to my home country</td>
<td>66%</td>
<td>66%</td>
<td>63%</td>
<td>59%</td>
</tr>
<tr>
<td>I will think more about sustainability when planning future holidays</td>
<td>59%</td>
<td>59%</td>
<td>57%</td>
<td>53%</td>
</tr>
<tr>
<td>Booking through a travel agent is a safer option at the moment</td>
<td>57%</td>
<td>57%</td>
<td>55%</td>
<td>54%</td>
</tr>
<tr>
<td>I will look for less crowded places, even if I miss attractions</td>
<td>54%</td>
<td>54%</td>
<td>52%</td>
<td>51%</td>
</tr>
<tr>
<td>I will leave booking until later/last minute</td>
<td>53%</td>
<td>53%</td>
<td>51%</td>
<td>50%</td>
</tr>
<tr>
<td>I will favour local destinations instead of traveling internationally</td>
<td>51%</td>
<td>51%</td>
<td>49%</td>
<td>47%</td>
</tr>
<tr>
<td>I will delay my next international trip until Omicron is under control</td>
<td>44%</td>
<td>44%</td>
<td>43%</td>
<td>42%</td>
</tr>
<tr>
<td>I will be intending to take fewer but longer holidays</td>
<td>43%</td>
<td>43%</td>
<td>41%</td>
<td>40%</td>
</tr>
<tr>
<td>I will favour destinations I have been before rather than new places</td>
<td>42%</td>
<td>42%</td>
<td>41%</td>
<td>40%</td>
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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%

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