Inbound COVID-19 Sentiment Tracker

Market Snapshot – India

Read the full report for Wave 3 here (PDF, 7.6MB)
India Market Summary

Travel intentions

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

Journey purpose:
- Holiday: 83%
- Visit friends or relatives: 55%
- Other leisure purposes: 54%

Planning stage:
- Trip booked: 17% Wave 1, 11% Wave 2, 15% Wave 3
- Destination chosen: 36% Wave 1, 38% Wave 2, 37% Wave 3
- Trip planned: 33% Wave 1, 37% Wave 2, 31% Wave 3
- Intend to travel: 14% Wave 1, 14% Wave 2, 18% Wave 3

Among leisure trip intenders:
- 50% consider Europe
- 18% consider Britain

Among Britain intenders:
- 79% consider England
- 52% consider Scotland
- 31% consider Wales
- 22% consider London

Travel preferences

Top activities:
- Outdoor nature activities: 70%
- Iconic tourist attractions: 69%
- History and heritage: 68%
- Shopping: 68%
- Dining out: 66%

Top Travel Companions:
- With your spouse/partner: 71%
- With children (under 18): 45%
- With adult family members: 29%
- With friends: 27%
- Alone: 19%
- As part of a tour group: 5%

Top Accommodation:
- Hotel chain: 52%
- Private rental: 42%
- Holiday village/centre: 41%
- Bed and breakfast: 41%
- Self catered property: 38%

Destination types:
- Large city: 62%
- Mountains or hills: 63%
- Coastline: 48%
- Small/mid-sized city/town: 42%
- Country/village: 47%

Top modes of transport within Britain:
- Domestic flight: 57%
- Rented car/vehicle: 51%
- Public transport - Train: 46%
- Public transport - Tube/subway: 41%
- Uber/other sharing app: 40%
- Taxi: 37%
- Private coach/minibus: 36%
- Public transport - Bus: 35%
- Own car vehicle: 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
All data is from Wave 3, unless stated.
## India Market Summary

### Top travel drivers

<table>
<thead>
<tr>
<th>Driver</th>
<th>Wave 1 (%)</th>
<th>Wave 2 (%)</th>
<th>Wave 3 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hygiene &amp; safety protocols in place at destination</td>
<td>40%</td>
<td>38%</td>
<td>31%</td>
</tr>
<tr>
<td>Receiving a Covid-19 vaccination</td>
<td>30%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Decrease in coronavirus cases at destination</td>
<td>31%</td>
<td>30%</td>
<td>28%</td>
</tr>
<tr>
<td>Insurance for COVID-19 related travel/regulations changes</td>
<td>30%</td>
<td>30%</td>
<td>28%</td>
</tr>
<tr>
<td>An attractive offer e.g. discounts on flights or accommodation</td>
<td>29%</td>
<td>29%</td>
<td>30%</td>
</tr>
</tbody>
</table>

### Travel concerns – for travel to Britain*

<table>
<thead>
<tr>
<th>Concern</th>
<th>Wave 1 (%)</th>
<th>Wave 2 (%)</th>
<th>Wave 3 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to healthcare if I contract COVID-19 abroad</td>
<td>44%</td>
<td>30%</td>
<td>34%</td>
</tr>
<tr>
<td>Contracting COVID-19 during my journey/trip</td>
<td>93%</td>
<td>92%</td>
<td>91%</td>
</tr>
<tr>
<td>Other people not following COVID-19 policies/procedures</td>
<td>92%</td>
<td>91%</td>
<td>90%</td>
</tr>
<tr>
<td>Change in quarantine requirements on my return home</td>
<td>91%</td>
<td>89%</td>
<td>89%</td>
</tr>
<tr>
<td>Affordability of robust travel insurance</td>
<td>90%</td>
<td>89%</td>
<td>87%</td>
</tr>
<tr>
<td>Limited / restricted experiences at destination</td>
<td>89%</td>
<td>87%</td>
<td>87%</td>
</tr>
<tr>
<td>Extra admin involved with new policy/rules during the trip</td>
<td>89%</td>
<td>87%</td>
<td>87%</td>
</tr>
<tr>
<td>Accessibility of affordable air fares</td>
<td>87%</td>
<td>87%</td>
<td>87%</td>
</tr>
<tr>
<td>Locals’ attitude towards international tourists</td>
<td>83%</td>
<td>75%</td>
<td>75%</td>
</tr>
<tr>
<td>Costs of mandatory COVID-19 tests</td>
<td>83%</td>
<td>75%</td>
<td>72%</td>
</tr>
</tbody>
</table>

*% very & somewhat concerned

**% completely & somewhat agree

### Travel attitudes**

<table>
<thead>
<tr>
<th>Attitude</th>
<th>Agree (%)</th>
<th>No opinion (%)</th>
<th>Disagree (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I will think more about sustainability when planning future holidays</td>
<td>95%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>I would be happy to take a pre-trip covid-19 test should that be required</td>
<td>92%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>I will look for less crowded places, even if I miss attractions</td>
<td>91%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>I will be intending to take fewer but longer holidays</td>
<td>89%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Booking through a travel agent is a safer option at the moment</td>
<td>88%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>I will travel internationally as soon as I can after I get the vaccine</td>
<td>88%</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Due to covid-restrictions, I will have more annual leave to use</td>
<td>81%</td>
<td>8%</td>
<td>15%</td>
</tr>
<tr>
<td>I would be comfortable using public transport within the destination</td>
<td>79%</td>
<td>1%</td>
<td>20%</td>
</tr>
<tr>
<td>I will favor destinations I have been before rather than new places</td>
<td>75%</td>
<td>3%</td>
<td>22%</td>
</tr>
<tr>
<td>I will favour local destinations instead of traveling internationally</td>
<td>75%</td>
<td>3%</td>
<td>22%</td>
</tr>
<tr>
<td>I will leave booking until later/last minute</td>
<td>72%</td>
<td>2%</td>
<td>26%</td>
</tr>
</tbody>
</table>

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