Inbound COVID-19 Sentiment Tracker

Market Snapshot – USA

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
USA Market Summary

Travel intentions

Among leisure trip intenders:
- 53% consider Europe
- 11% consider Britain

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

Planning stage

Among leisure trip intenders:
- Trip booked: 14% (Wave 1), 16% (Wave 2), 21% (Wave 3), 17% (Wave 4)
- Destination chosen: 24% (Wave 1), 25% (Wave 2), 23% (Wave 3), 24% (Wave 4)
- Trip planned: 28% (Wave 1), 34% (Wave 2), 32% (Wave 3), 34% (Wave 4)
- Intend to travel: 33% (Wave 1), 26% (Wave 2), 23% (Wave 3), 25% (Wave 4)

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
USA Market Summary

### Top travel drivers

#### ...for any international trip
- Money-back guarantee should I wish to cancel my trip: 32%
- Decrease in coronavirus cases at destination: 28%
- An attractive offer e.g. discounts on flights or accommodation: 28%
- Removal of quarantine policies in destination country: 27%
- Hygiene & safety protocols in place at destination: 27%

#### ...for a trip to Britain
- An attractive offer e.g. discounts on flights or accommodation: 27%
- Decrease in coronavirus cases at destination: 26%
- Money-back guarantee should I wish to cancel my trip: 25%
- High proportion of destination population being vaccinated: 23%
- Removal of quarantine policies in destination country: 23%

### 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%
- Accessibility of affordable air fares: 67%
- Affordability of robust travel insurance: 64%
- Locals’ attitude towards international tourists: 63%
- Costs of mandatory COVID-19 tests: 62%

#### 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>83%</td>
<td>24%</td>
<td>3%</td>
</tr>
<tr>
<td>I will look for less crowded places, even if I miss attractions</td>
<td>71%</td>
<td>3%</td>
<td>26%</td>
</tr>
<tr>
<td>I would be comfortable using public transport within the destination</td>
<td>69%</td>
<td>4%</td>
<td>27%</td>
</tr>
<tr>
<td>Booking through a travel agent is a safer option at the moment</td>
<td>68%</td>
<td>7%</td>
<td>25%</td>
</tr>
<tr>
<td>I will delay my next international trip until Omicron is under control</td>
<td>65%</td>
<td>4%</td>
<td>30%</td>
</tr>
<tr>
<td>I will favour local destinations instead of traveling internationally</td>
<td>65%</td>
<td>5%</td>
<td>30%</td>
</tr>
<tr>
<td>I will think more about sustainability when planning future holidays</td>
<td>63%</td>
<td>8%</td>
<td>29%</td>
</tr>
<tr>
<td>I will be intending to take fewer but longer holidays</td>
<td>61%</td>
<td>9%</td>
<td>31%</td>
</tr>
<tr>
<td>I will favour international destinations closer to my home country</td>
<td>60%</td>
<td>9%</td>
<td>32%</td>
</tr>
<tr>
<td>I will favour destinations I have been before rather than new places</td>
<td>55%</td>
<td>5%</td>
<td>40%</td>
</tr>
<tr>
<td>I will leave booking until later/last minute</td>
<td>51%</td>
<td>3%</td>
<td>46%</td>
</tr>
</tbody>
</table>

*% 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