



VisitBritain

Inbound tourism trends and prospects

Richard Nicholls, January 2022

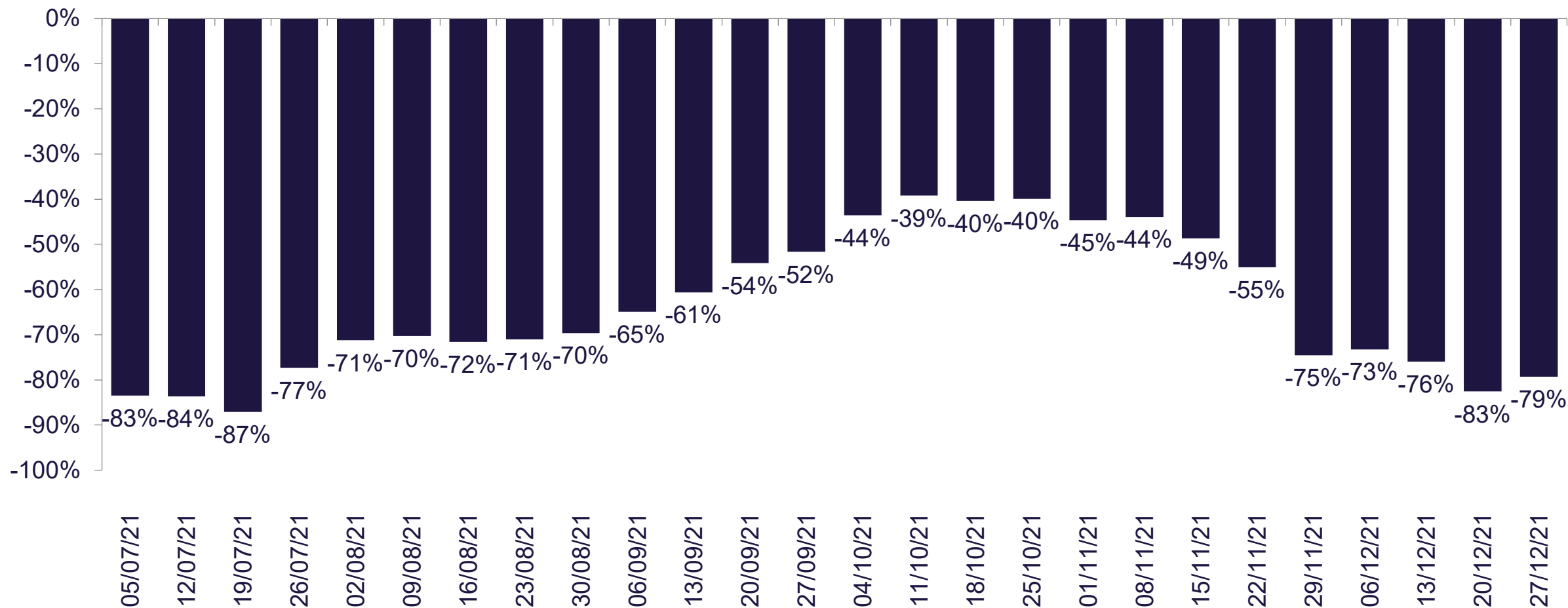
Bristol Balloon Fiesta: Destination Bristol ©Gary Newman



Latest inbound data and outlook

Flight bookings plunged as Omicron hit

Inbound flight bookings to the UK made in each week starting date shown, vs. 2 years before, within the ForwardKeys database



Source: Forward Keys data up to 2nd January. 2-year growth is shown to compare against a normal year baseline.

Flight bookings plunged as Omicron hit

Inbound flight bookings to the UK made in each week starting date shown, vs. 2 years before, within the ForwardKeys database

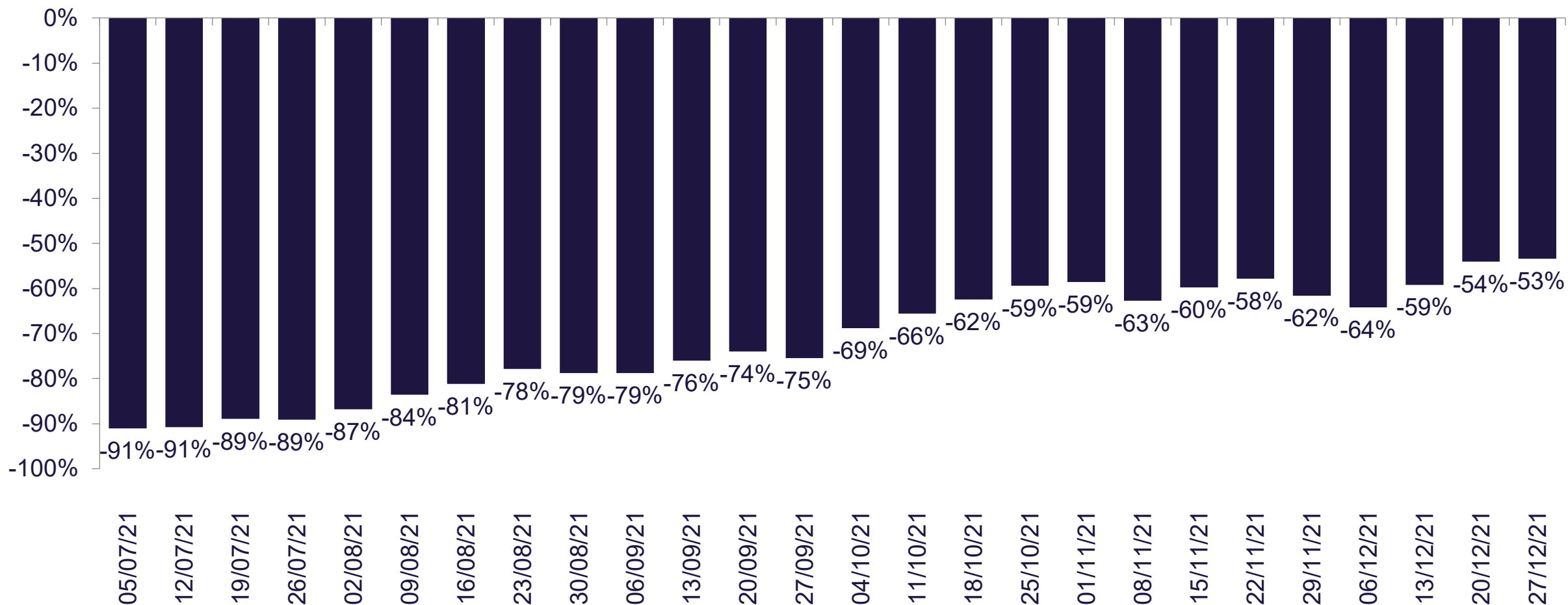
	Total	Eastern Europe	Middle East	North America	NorthEast Asia	Northern Europe	Oceania	South America	South Asia	SouthEast Asia	Southern Europe	Subsah. Africa	Western Europe
Mon, 05-Jul-21	-83%	-85%	-82%	-70%	-98%	-84%	-97%	-93%	-98%	-87%	-85%	-73%	-85%
Mon, 12-Jul-21	-84%	-88%	-80%	-71%	-97%	-85%	-98%	-94%	-98%	-89%	-83%	-72%	-87%
Mon, 19-Jul-21	-87%	-86%	-88%	-81%	-97%	-84%	-98%	-93%	-98%	-90%	-85%	-71%	-88%
Mon, 26-Jul-21	-77%	-82%	-85%	-62%	-96%	-76%	-98%	-91%	-96%	-85%	-78%	-66%	-72%
Mon, 02-Aug-21	-71%	-79%	-56%	-63%	-94%	-71%	-98%	-89%	-77%	-84%	-74%	-65%	-64%
Mon, 09-Aug-21	-70%	-78%	-47%	-66%	-92%	-71%	-98%	-91%	-54%	-84%	-65%	-62%	-66%
Mon, 16-Aug-21	-72%	-77%	-67%	-65%	-93%	-71%	-98%	-91%	-68%	-89%	-68%	-65%	-66%
Mon, 23-Aug-21	-71%	-76%	-71%	-61%	-94%	-69%	-96%	-91%	-76%	-88%	-66%	-67%	-65%
Mon, 30-Aug-21	-70%	-76%	-64%	-61%	-95%	-65%	-94%	-85%	-75%	-91%	-61%	-64%	-67%
Mon, 06-Sep-21	-65%	-75%	-68%	-54%	-95%	-54%	-92%	-89%	-74%	-91%	-59%	-64%	-61%
Mon, 13-Sep-21	-61%	-76%	-47%	-53%	-95%	-44%	-89%	-87%	-63%	-90%	-53%	-58%	-57%
Mon, 20-Sep-21	-54%	-72%	-31%	-44%	-95%	-37%	-88%	-83%	-50%	-88%	-45%	-56%	-52%
Mon, 27-Sep-21	-52%	-74%	-37%	-43%	-92%	-41%	-80%	-80%	-56%	-78%	-40%	-58%	-46%
Mon, 04-Oct-21	-44%	-66%	-17%	-36%	-93%	-40%	-75%	-53%	-44%	-32%	-33%	-14%	-42%
Mon, 11-Oct-21	-39%	-64%	-19%	-31%	-92%	-42%	-67%	-16%	-47%	4%	-26%	5%	-42%
Mon, 18-Oct-21	-40%	-63%	-26%	-25%	-91%	-45%	-62%	-37%	-37%	-29%	-33%	-8%	-42%
Mon, 25-Oct-21	-40%	-59%	-30%	-23%	-91%	-38%	-64%	-5%	-33%	-37%	-34%	-6%	-46%
Mon, 01-Nov-21	-45%	-67%	-29%	-26%	-93%	-46%	-55%	-26%	-50%	-53%	-42%	-22%	-50%
Mon, 08-Nov-21	-44%	-63%	-27%	-26%	-93%	-46%	-51%	0%	-35%	-55%	-42%	-24%	-49%
Mon, 15-Nov-21	-49%	-61%	-33%	-36%	-93%	-54%	-54%	-20%	-30%	-45%	-45%	-30%	-53%
Mon, 22-Nov-21	-55%	-58%	-41%	-41%	-93%	-61%	-61%	-39%	-34%	-54%	-53%	-43%	-62%
Mon, 29-Nov-21	-75%	-74%	-58%	-66%	-96%	-88%	-74%	-48%	-61%	-79%	-77%	-68%	-81%
Mon, 06-Dec-21	-73%	-70%	-49%	-66%	-97%	-86%	-73%	-54%	-59%	-77%	-76%	-91%	-75%
Mon, 13-Dec-21	-76%	-79%	-57%	-71%	-98%	-90%	-74%	-65%	-68%	-78%	-84%	-8%	-82%
Mon, 20-Dec-21	-83%	-75%	-86%	-80%	-98%	-87%	-79%	-45%	-65%	-81%	-86%	-21%	-88%
Mon, 27-Dec-21	-79%	-74%	-78%	-73%	-97%	-85%	-85%	-39%	-67%	-86%	-82%	-47%	-84%

Source: Forward Keys data up to 2nd January. 2-year growth is shown to compare against a normal year baseline. Weekly data can be volatile.



Arrivals held steady but will fall from this level

Arrivals to the UK in each week starting on the date shown, vs. 2 years before, within the ForwardKeys database

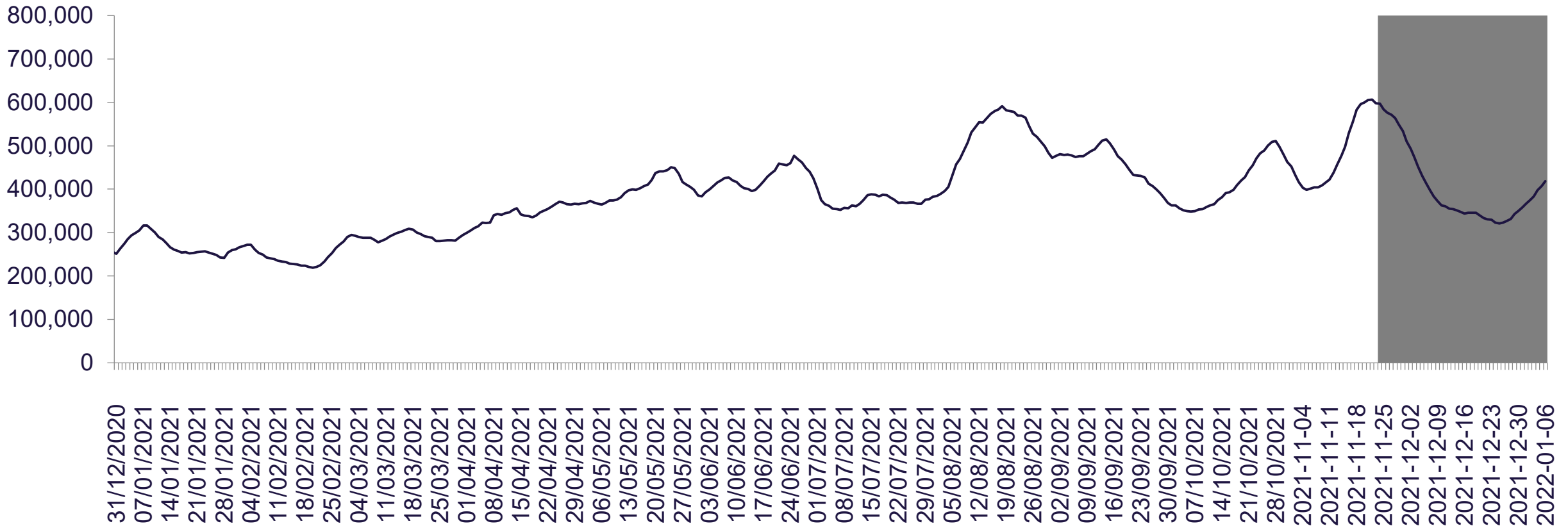


Source: Forward Keys data up to 2nd January. 2-year growth is shown to compare against a normal year baseline.

Flight searches fell as soon as Omicron emerged, but starting to pick back up post Christmas

Flight searches in Travelport. 7 day average shown.

Omicron reported Nov 24th



Flight bookings – outlook for early 2022

Prospects slow for early 2022, picking up from spring

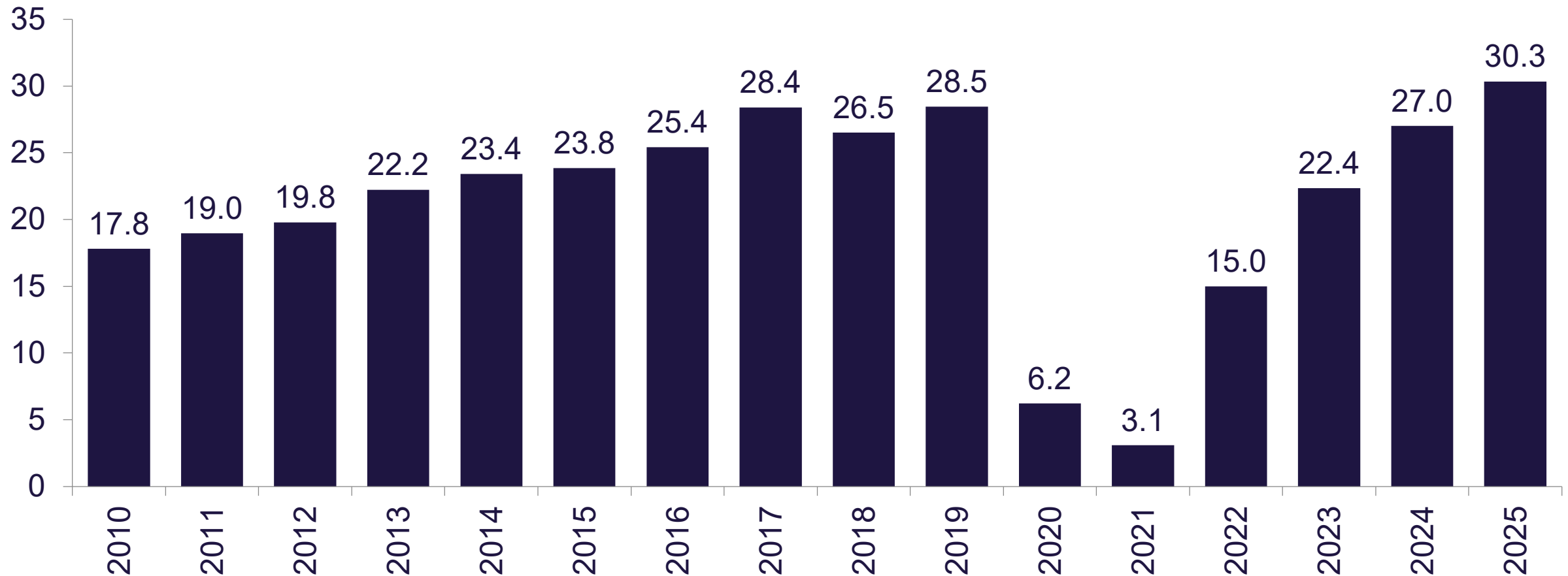
	Future arrivals
	% change vs 2019
	Jan-Mar 2022
Eastern Europe	-77%
Southern Europe	-73%
Western Europe	-79%
Nordics	-68%
Middle East	-60%
North America	-59%
North East Asia	-95%
Oceania	-75%
South America	-56%
South Asia	-58%
South East Asia	-71%
Sub-Saharan Africa	-52%
TOTAL INTERNATIONAL	-71%

Flight bookings for international arrivals to the UK, global total:

	January	February	March	April	May	June
Booking growth, 2022 vs 2019	-74%	-71%	-62%	-59%	-62%	-55%

Long term forecast for value of inbound tourism (pre Omicron!) – back to pre-COVID by 2025

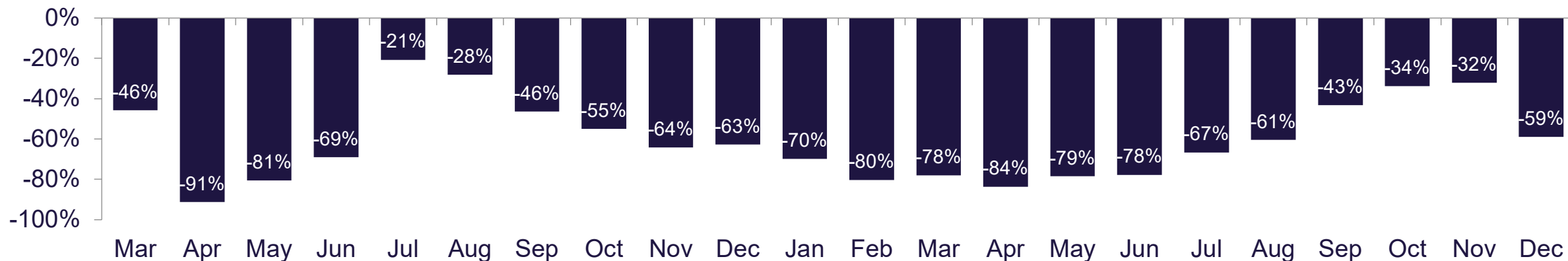
Inbound tourism to the UK – spending (£billions), trend and forecast



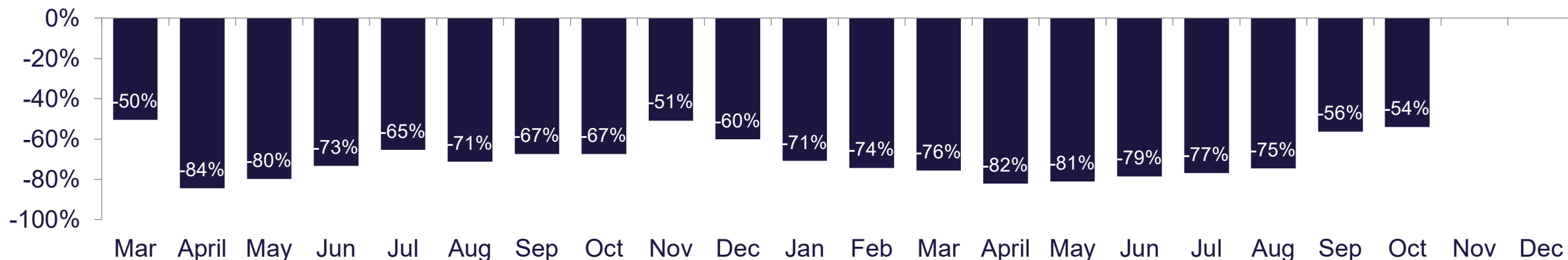
Source: Tourism Economics (forecast run pre-Omicron)

Eurotunnel passenger volumes fall back sharply in Dec after rising to -32%

Eurotunnel passenger vehicles, decline vs same month in 2019 (NB this includes both UK and overseas residents):

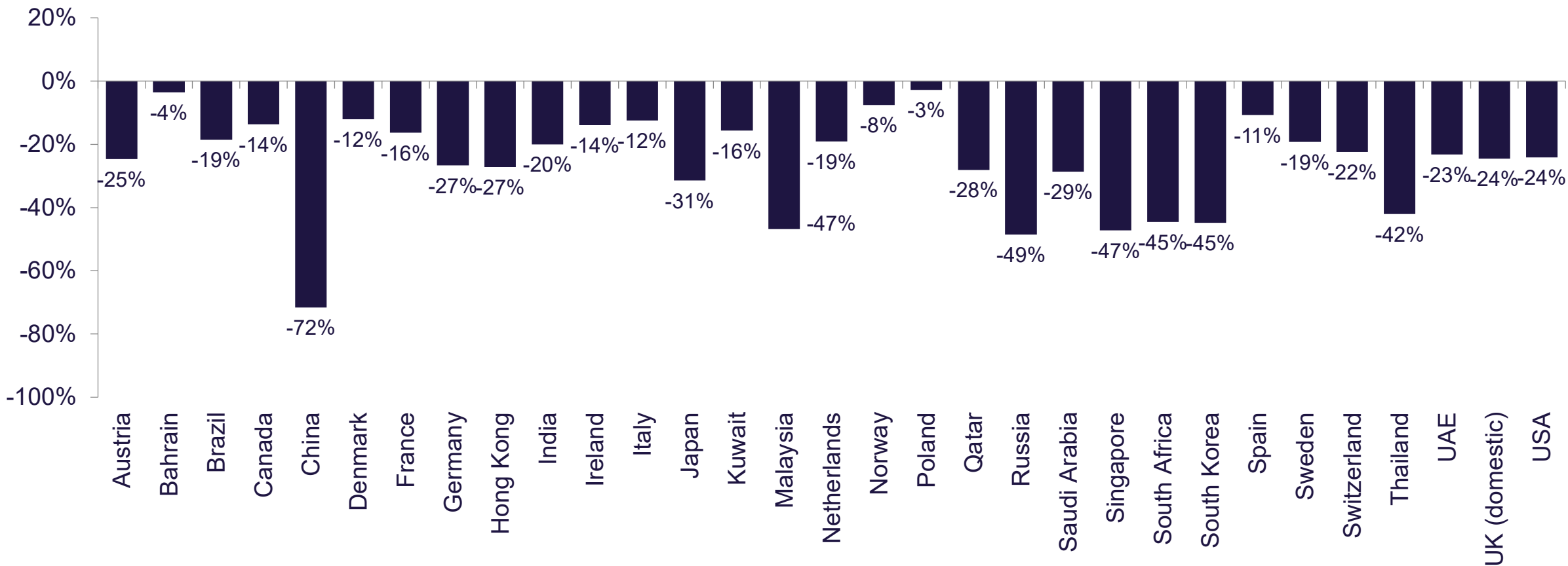


Short-sea ferry pax, decline vs same month in 2019 (NB this includes both UK & overseas residents, & includes lorries):



Air capacity to the UK: Mar-May 2019 to Mar-May 2022

Seats available, Mar-May 2022 vs 2019, by selected country of origin. Overall international capacity down 27%.



Source: Apex. Data run January 10th.



Inbound traveller sentiment

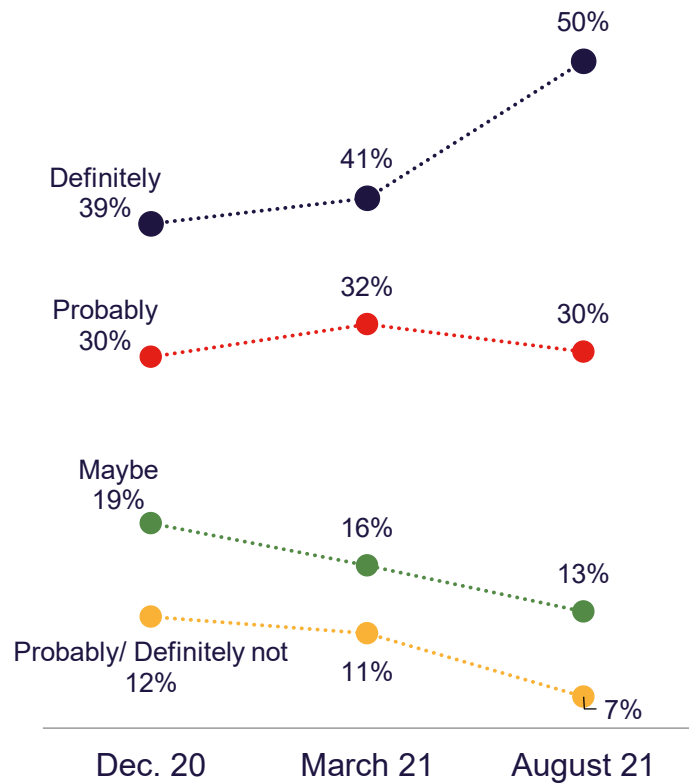
International COVID sentiment research

- VisitBritain have been conducting an international COVID sentiment research tracker, in conjunction with Visit Wales, VisitScotland and London & Partners.
- Wave 3 of the tracker was fielded between 23rd August and 5th September 2021 in 13 markets by TCI Research. Waves 1 and 2 were conducted in December 2020 and March-April 2021.
- The 13 markets were: Australia, Canada, China, France, Germany, India, Irish Republic, Italy, Netherlands, Norway, Spain, Sweden, USA.
- All trended data here is calculated using the 13 markets included in all three waves.
- We have contracted for a fourth wave of this survey, and are looking at running fieldwork in February with an expanded range of markets.
- While Omicron has of course pushed recovery back, the research still gives some valuable guidance as to how travellers were feeling as we emerge from the pandemic.
- The full reports can be found here: <https://www.visitbritain.org/inbound-covid-19-sentiment-tracker>

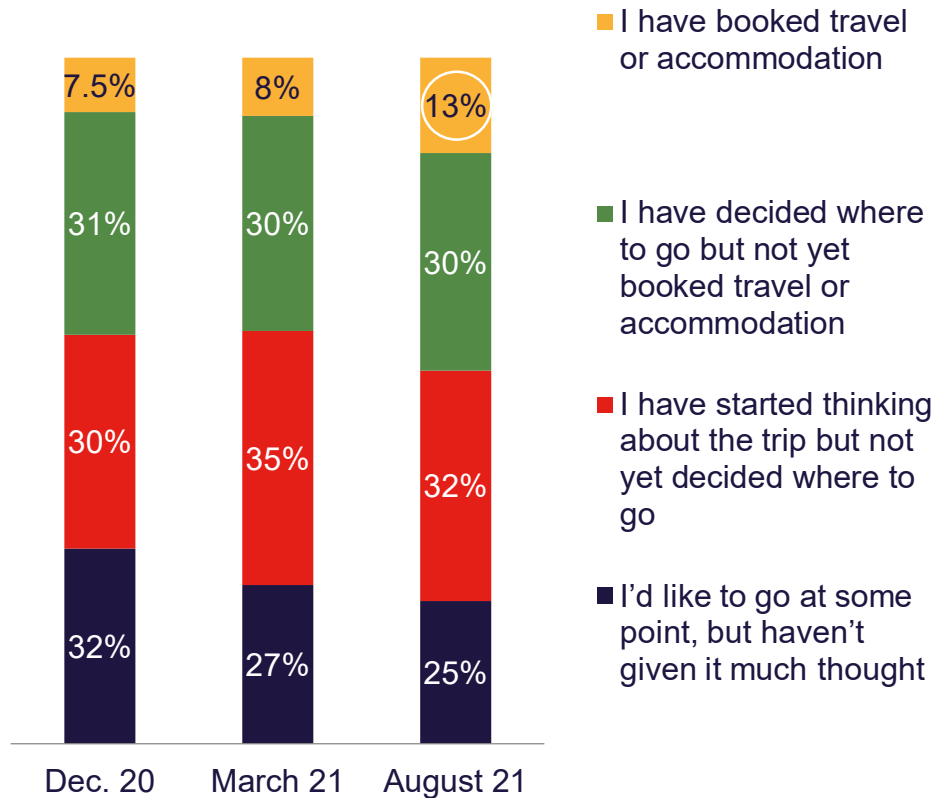
Trends: headline results

“How likely would you consider an international leisure trip for more than one night in the next 12 months?” / “Which of the following best describes where you stand with your plans for your next international leisure trip?” / “Considering your next international leisure trip, for what purpose(s) would you travel?”

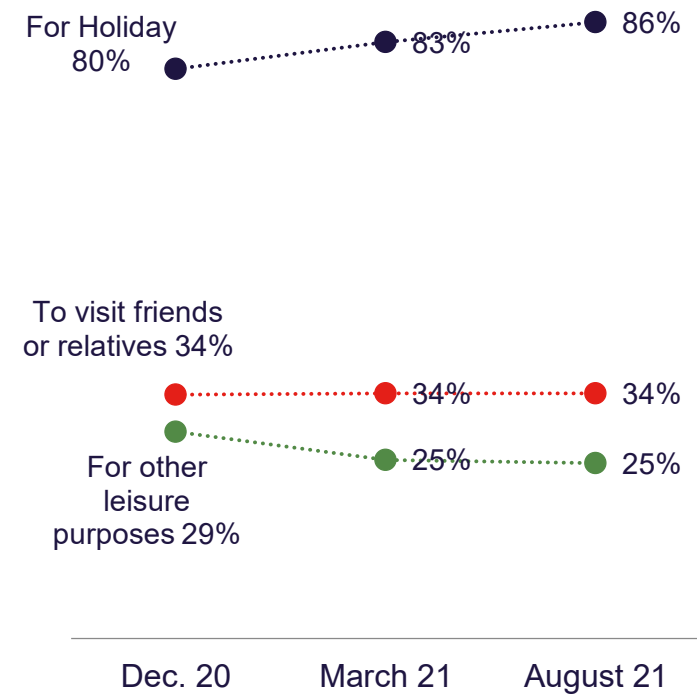
Travel consideration



Trip planning stage



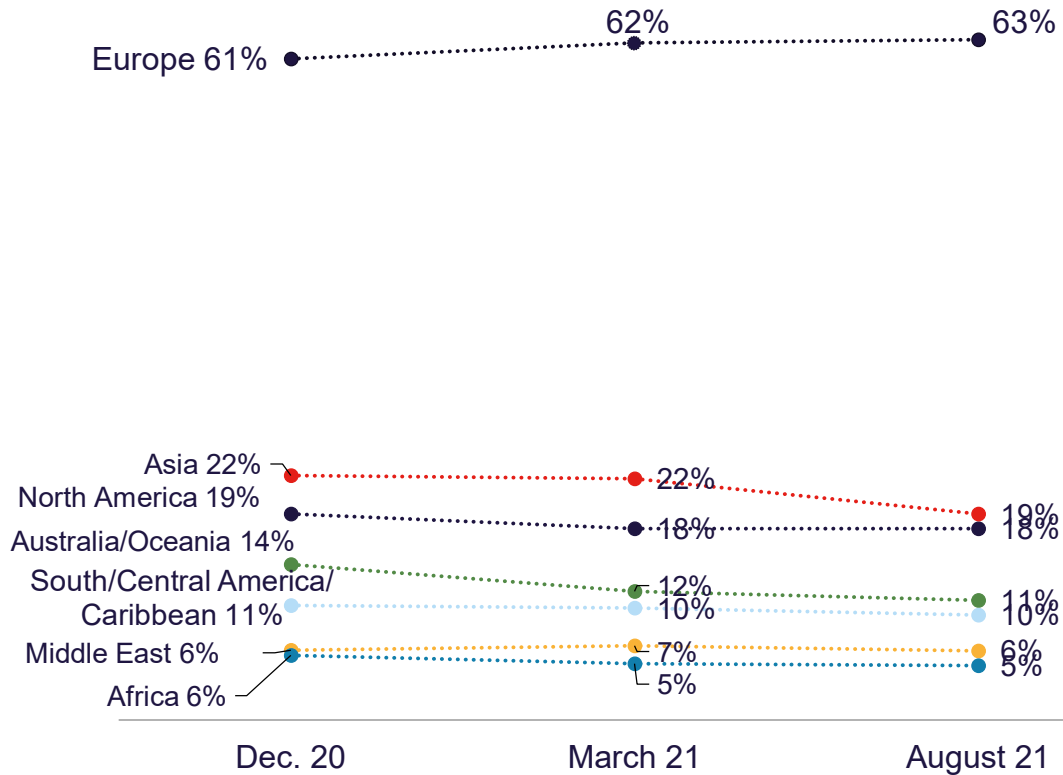
Purpose of leisure travel



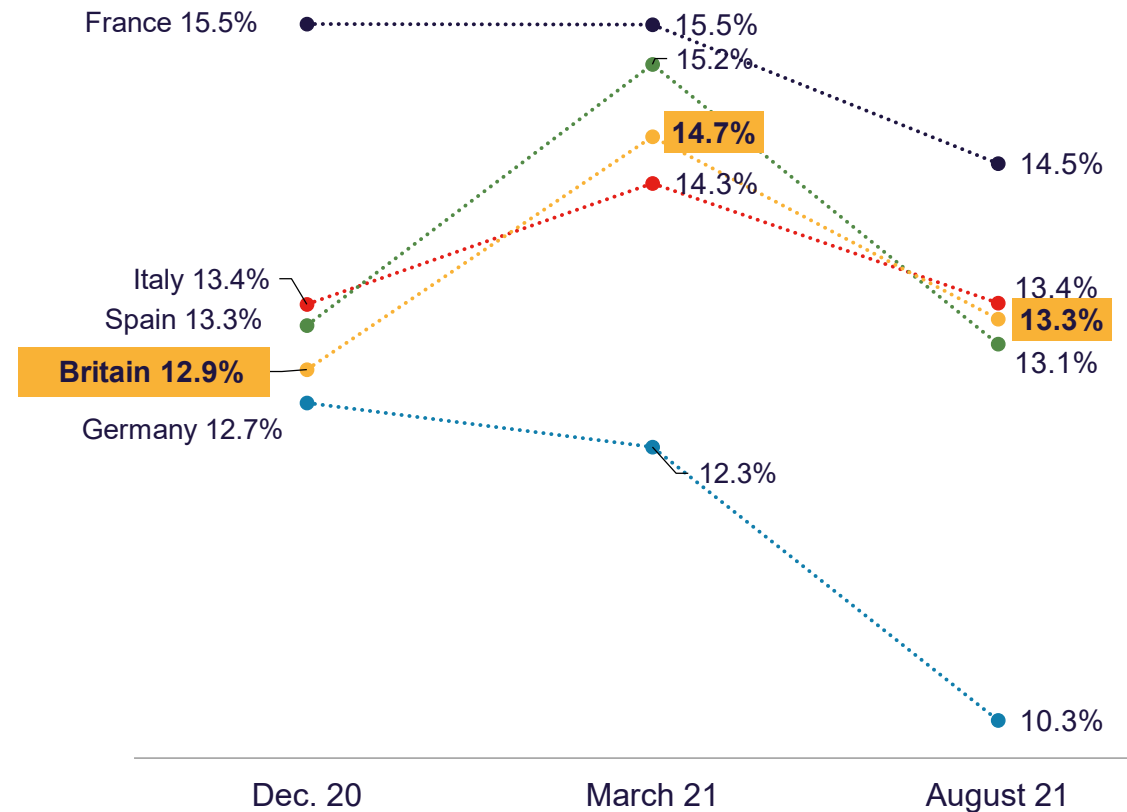
Trend calculated at constant perimeter (13 markets consolidated)

Britain lost market share between waves 2 and 3, though so did some other top European destinations

Destinations envisaged



European destinations envisaged (TOP 5)

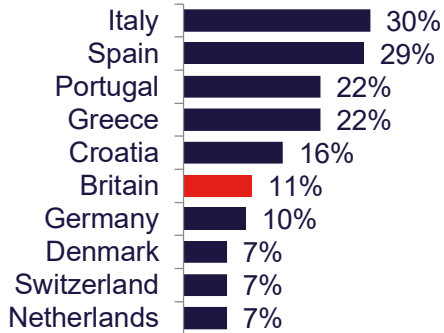


Trend calculated at constant perimeter (13 markets consolidated)

Top European destinations for travelers in short-haul markets

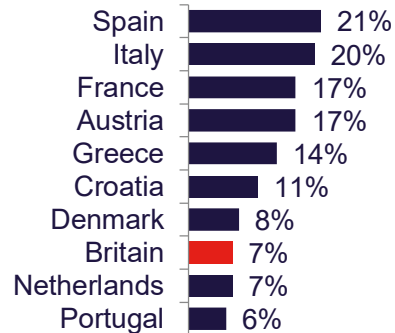
“Where do you plan to travel on your next international leisure trip?”

France



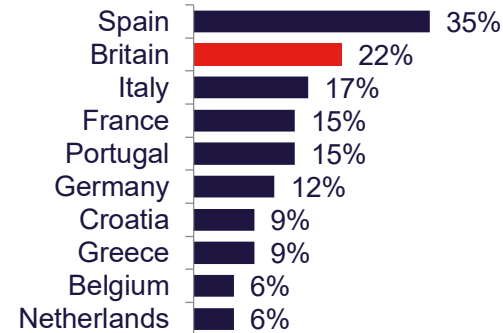
2.6 dest. mentioned on average

Germany



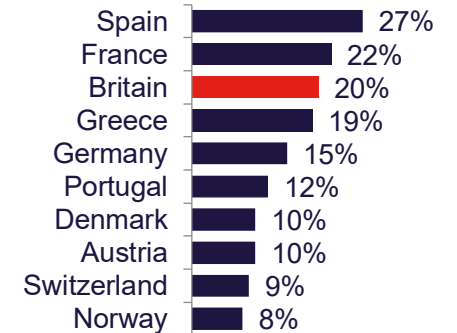
1.9 dest. mentioned on average

Irish Republic



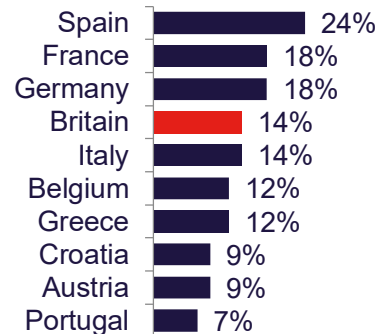
2.2 dest. mentioned on average

Italy



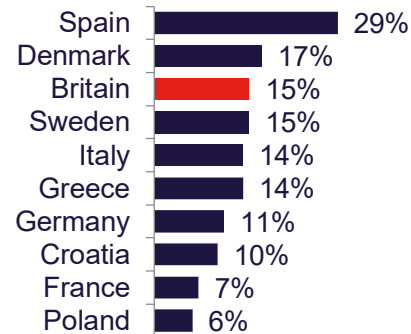
2.5 dest. mentioned on average

Netherlands



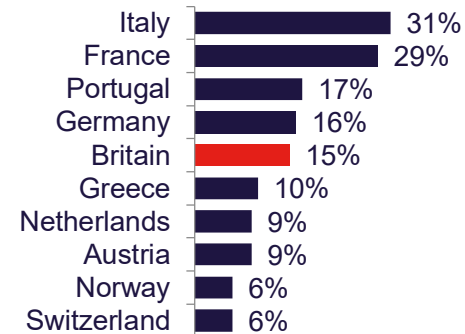
1.9 dest. mentioned on average

Norway



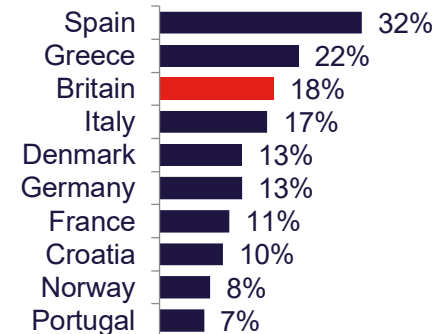
2 dest. mentioned on average

Spain



2.3 dest. mentioned on average

Sweden



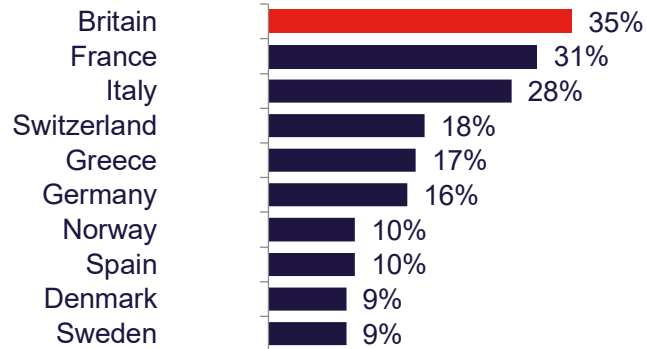
2.2 dest. mentioned on average

To which destination(s) in Europe in particular? (Multiple Answers possible)
Base: Respondents who plan on taking an European leisure trip in 2021 (n=4,664)

Top European destinations for travelers in long-haul markets

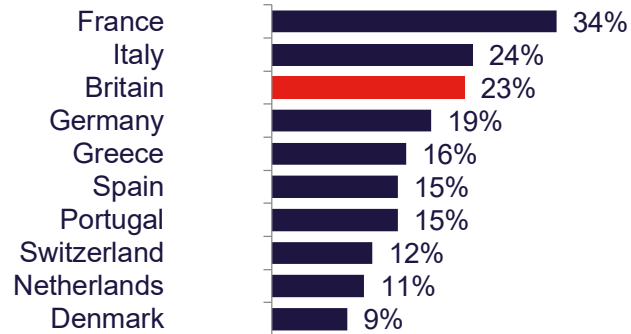
“Where do you plan to travel on your next international leisure trip?”

Australia



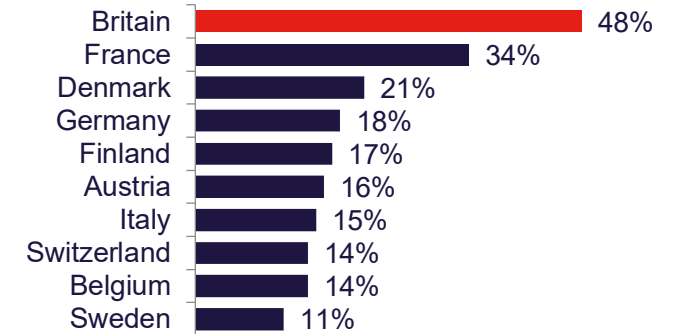
2.8 dest. mentioned on average

Canada



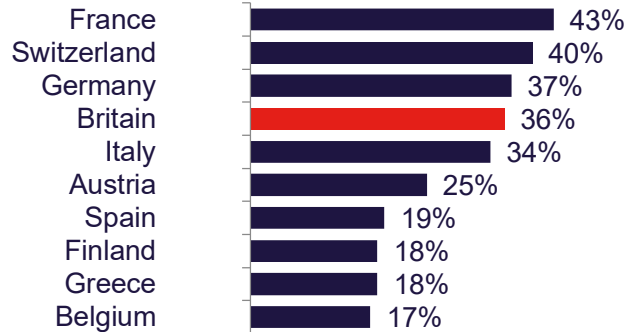
2.7 dest. mentioned on average

China



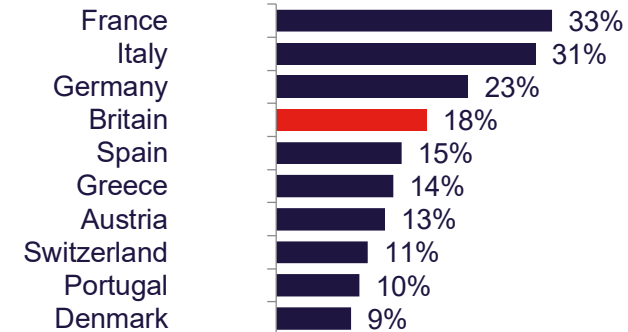
3.5 dest. mentioned on average

India



5.1 dest. mentioned on average

USA



2.9 dest. mentioned on average

To which destination(s) in Europe in particular? (Multiple Answers possible)
Base: Respondents who plan on taking an European leisure trip in 2021 (n=4,664)

Attitudes towards travel plans and preferences

Many will look for less crowded places to visit, even if it means missing must-see attractions

% who completely or somewhat agree	Dec 2021	Mar 2021	Aug 2021
I would be happy to take a pre-trip covid-19 test should that be required before my next international trip		82%	79%
I will look for less crowded places to visit, even if it means “missing” must-see attractions	73%	70%	71%
I will think more about sustainability and the environmental impact when planning future holidays		62%	64%
Booking through a travel agent is a safer option at the moment for limiting uncertainties around trip planning		62%	63%
I will travel internationally as soon as I can after I get the vaccine		64%	62%
I will favour local destinations in my home country instead of traveling	59%	60%	61%
I would be comfortable using public transport within the destination	51%	56%	61%
I will leave booking until later/last minute	64%	61%	58%
I will be intending to take fewer but longer holidays	54%	53%	54%
I will favour destinations I have been before rather than new places	50%	50%	52%

Base: All Respondents (n = 7,500). “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?”

Main destination types for an international leisure trip

The desire to roam around is still high in many long haul markets, offering a great opportunity of promoting multiple Britain destinations on one trip. Visiting large cities and coastal areas are still top of mind in short haul markets, with diverse intentions from one market to another.

	Total	Australia	Canada	China	France	Germany	India	Irish Republic	Italy	Neths.	Norway	Spain	Sweden	USA
Large city	48%	49%	44%	55%	39%	31%	62%	49%	53%	36%	49%	56%	43%	50%
Coastline	38%	35%	34%	49%	40%	46%	48%	36%	29%	35%	38%	29%	34%	32%
I will roam around, visiting many types of places	37%	46%	39%	47%	36%	26%	51%	22%	51%	33%	30%	25%	22%	39%
Small/mid-sized city/town	29%	30%	31%	37%	23%	21%	42%	25%	34%	24%	24%	32%	23%	26%
Countryside or village	25%	40%	27%	29%	21%	17%	47%	22%	21%	22%	15%	11%	21%	29%
Mountains or hills	24%	27%	20%	25%	15%	25%	63%	16%	21%	27%	10%	20%	9%	28%
I'm not sure	7%	10%	11%	6%	6%	6%	1%	6%	4%	5%	7%	7%	13%	8%

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

Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7,450)

Level of interest in activities

All activities saw an increase in intent between waves 2 and 3, suggesting a growing desire to return to a more normal visitor experience if possible

(% very interested)	Total	Australia	Canada	China	France	Germany	India	Irish Rep.	Italy	Neths.	Norway	Spain	Sweden	USA
Dining in restaurants/bars, cafes or pubs	51%	48%	47%	37%	55%	52%	66%	51%	49%	57%	53%	44%	58%	54%
Exploring history and heritage	48%	51%	49%	44%	49%	42%	68%	41%	57%	44%	29%	60%	34%	57%
Visiting famous/iconic tourist attractions	47%	49%	47%	45%	49%	42%	69%	42%	53%	42%	29%	44%	31%	57%
Outdoor nature activities	46%	44%	45%	41%	55%	44%	70%	48%	49%	43%	29%	44%	34%	51%
Visiting cultural attractions	43%	41%	43%	42%	41%	35%	66%	37%	55%	39%	27%	47%	29%	53%
Experiencing local lifestyle, socialising with locals	41%	36%	40%	42%	45%	34%	66%	33%	42%	43%	27%	36%	34%	48%
Outdoor activ. (hiking, cycling..)	38%	31%	34%	37%	39%	39%	60%	36%	44%	50%	25%	29%	23%	46%
Shopping	37%	30%	32%	41%	34%	37%	68%	36%	32%	37%	27%	30%	27%	40%
Guided tours/day-excursions	35%	31%	35%	32%	36%	24%	58%	26%	43%	40%	17%	39%	18%	46%
Self-driving tours	35%	31%	32%	35%	51%	29%	51%	28%	32%	44%	24%	24%	32%	35%
Culinary activities	31%	27%	26%	37%	26%	30%	55%	23%	30%	24%	21%	28%	22%	38%
Attending cultural events	30%	27%	26%	35%	26%	23%	58%	25%	30%	25%	21%	24%	16%	39%
Spa/wellness activities	30%	23%	19%	40%	32%	30%	54%	24%	29%	22%	20%	27%	14%	35%
Experiencing destination's nightlife	28%	22%	22%	37%	24%	22%	59%	25%	28%	19%	16%	25%	14%	35%
Learning new skills	25%	18%	19%	36%	21%	18%	53%	15%	27%	18%	10%	22%	8%	33%
Attending sport events	24%	19%	19%	32%	21%	16%	52%	22%	22%	17%	16%	16%	12%	32%
Playing sports	22%	14%	14%	32%	16%	17%	50%	17%	19%	16%	16%	14%	9%	29%

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

Base: Respondents who plan on taking an international leisure trip in the next 12 months (n = 7,450)

A wide range of traveller concerns contributing to traveller caution

“How concerned are you about the following when thinking about your next international trip?”

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

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