TRAVEL & TOURISM

INTERNATIONAL TRAVEL & TOURISM REPORT 2021

The road back to normality

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FOREWORD

As travel and tourism begin to creep back on to consumer agendas, we uncover where people are planning to travel, what they're looking for and what's stopping those with no plans to pack their bags.

In this report, we share the views of approximately 185,000 survey respondents from 25 markets globally. This representative sample shines a light on the travel plans, considerations and motivations of over 2.5 billion consumers.

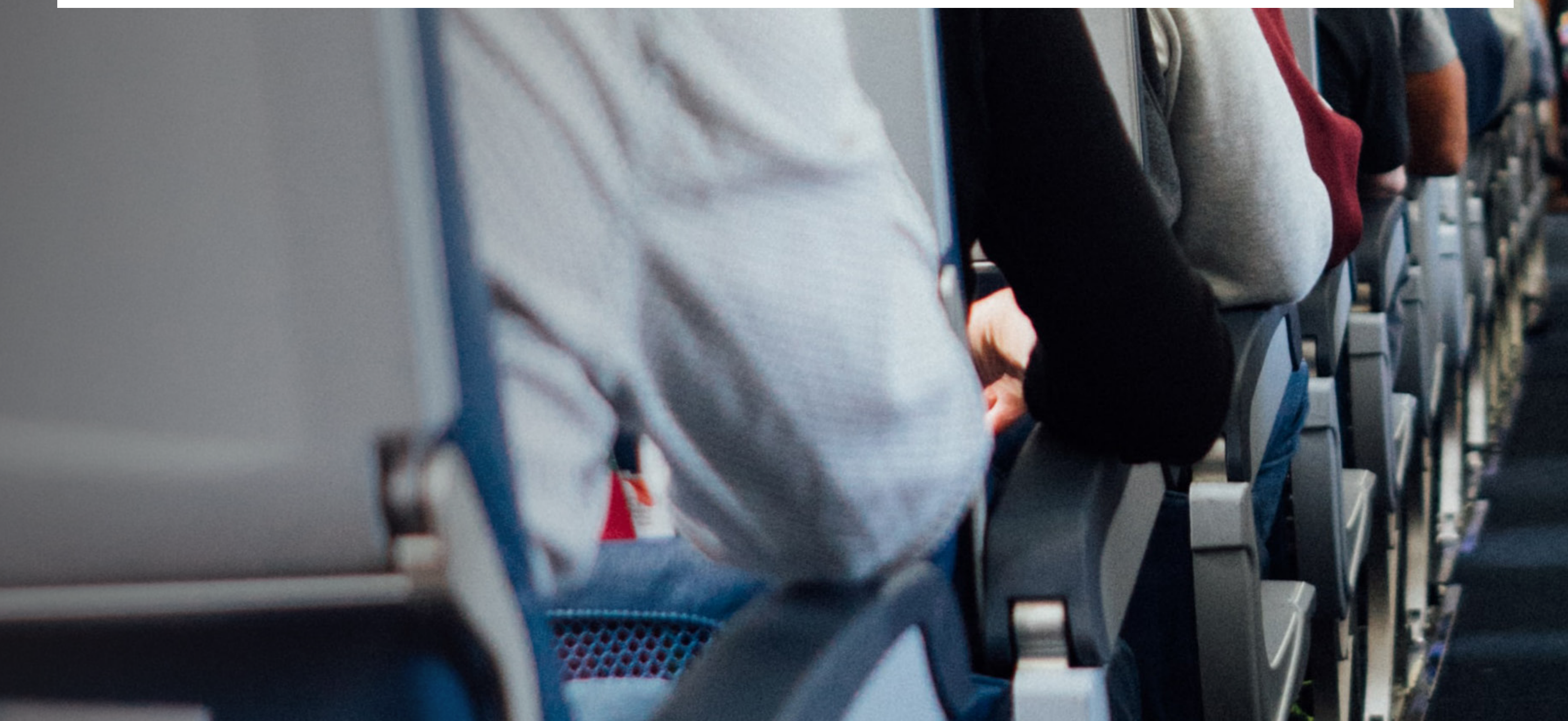
Using YouGov Global Travel Profiles, we look at global travel demand, health and safety concerns, travel restrictions, and rising sensitivities around the price of travel. All are putting downward pressure on travel sentiment–and the choice of destinations too. The data we collect daily from countries worldwide about people's travel plans reveals that most consider familiar destinations closer to home.

YouGov's always-on destination brand tracker, DestinationIndex, helps monitor how consumer perceptions change each day, giving marketers a real sense of how their destinations are faring in these turbulent times. We shared May destination consideration scores by region and in select markets to offer insight into where people are keen to go next.

COVID-19 has made many of us stop and think about climate issues and sustainability. We explore what Responsible Travelers want and how to win them over.

The road back to normality is going to be a bumpy one. Only one in five consumers globally plan to travel internationally in the next 12 months, so competition to attract them will be fierce. YouGov teams are here to help capture the best data and insights about the new travel landscape, brands, and consumers.

Eva Stewart, *Global Sector Head of Travel & Tourism*



CURRENT BARRIERS TO TRAVEL

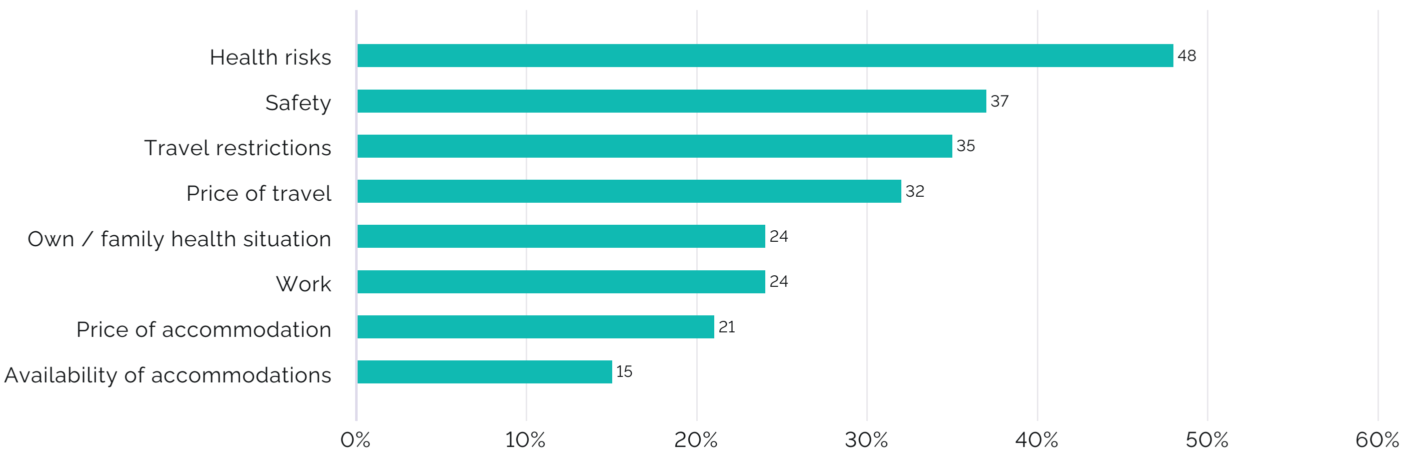
Global appetite for travel remains but recovery depends on softening of restrictions

COVID-19 has put the world on pause and travel has been among the industries most affected. Destinations closed their borders to better control the pandemic which in turn put additional pressure on consumer confidence and willingness to travel domestically or abroad. Even as we start to emerge from the pandemic, variants of concern remain a threat and travel bans are still in place in many countries.

Data from YouGov Global Travel Profiles, a survey which runs daily in 25 countries, shows health risks remain the primary barrier to travel, followed by travel restrictions. Data is pointing to increased sensitivities to price in most countries too.

Encouragingly for travel companies, a gradual fall in the number of people concerned about health risks has been seen across the globe since January 2021, in line with the approvals of vaccines and their widespread rollout. As more herd immunity is reached in various parts of the world, it's reasonable to expect to see health concerns declining, even if they don't disappear completely.

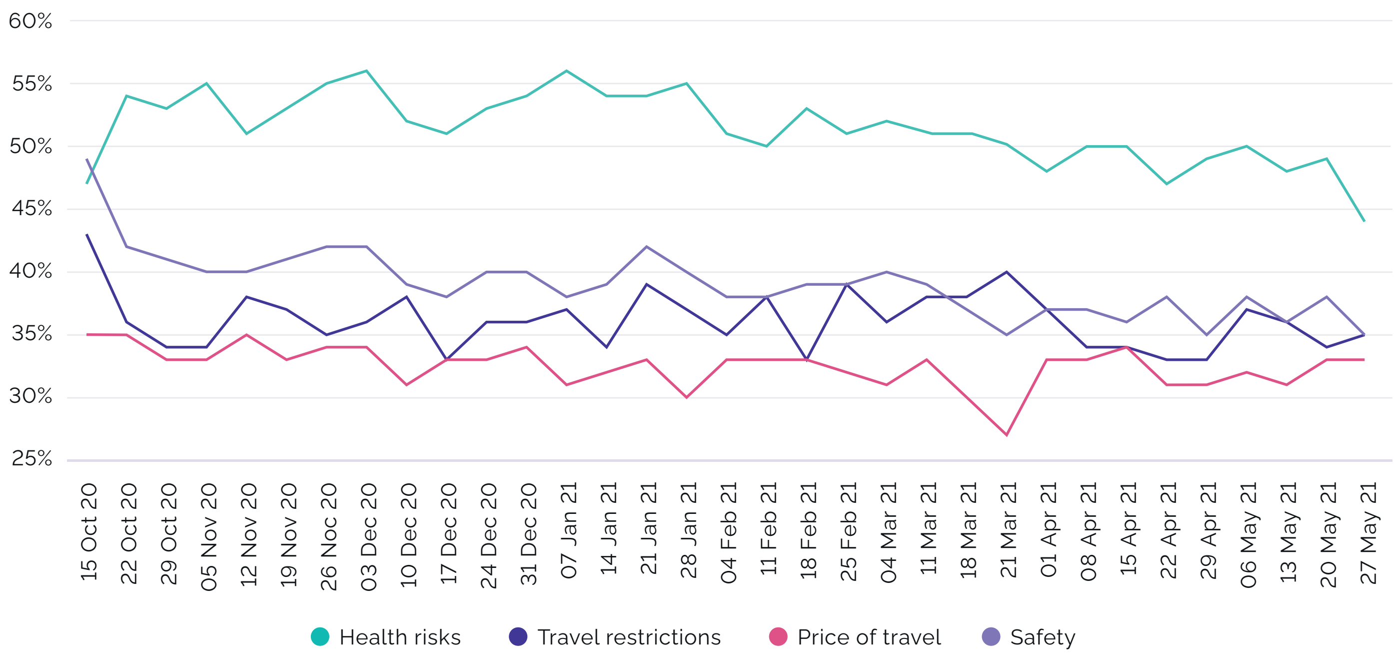
Top barriers to travel globally - May 21 (% of respondents)



Which, if any, of the below factors are currently preventing you from traveling? Please select all that apply

Travel restrictions have proven a more constant barrier. Uncertainty over when local or national lockdowns might be lifted and international travel re-opened will continue to put a downward pressure on a fragile recovery. Globally, around a third of people feel restrictions are preventing them from traveling, but it remains a primary obstacle for consumers in Australia (55% said so in May), Germany (60%), Indonesia (45%), Saudi Arabia (40%), Norway (57%), the UK (62%), and the UAE (45%).

Top barriers to travel globally - Oct 20 to May 21 (% of respondents)



Which, if any, of the below factors are currently preventing you from traveling? Please select all that apply

Consumer concerns around the safety of travel encompass a multitude of facets such as going to airports, traveling by airplanes, accommodation cleanliness standards, and can also extend to destinations too. Those perceived to have managed the pandemic well, with low rates of infection and mortality, or without known variants will be regarded as safer options amongst current and future travelers.

CONSUMERS' TRAVEL INTENT

Global data found that more than seven in ten respondents plan some form of travel in the next 12 months, with more than half (57%) of this group expecting to take two or more trips during that time. This indicates an underlying appetite to travel worldwide, although the one in six travel-planners who said they 'don't know' how much they will be traveling suggests people are still awaiting certainty on restrictions before they commit.

Taken as an average across the 25 countries where Global Travel Profiles is live, about half of people plan to travel for a domestic holiday in the next 12 months, with this figure having peaked in April. Consumers who intend to take domestic trips are more concerned about the price of travel, health risks, safety and travel restrictions compared to those who intend to travel abroad. They typically take beach holidays, as well as trips to visit friends and family, and are frequently looking to combine relaxation with sightseeing or activity holidays.

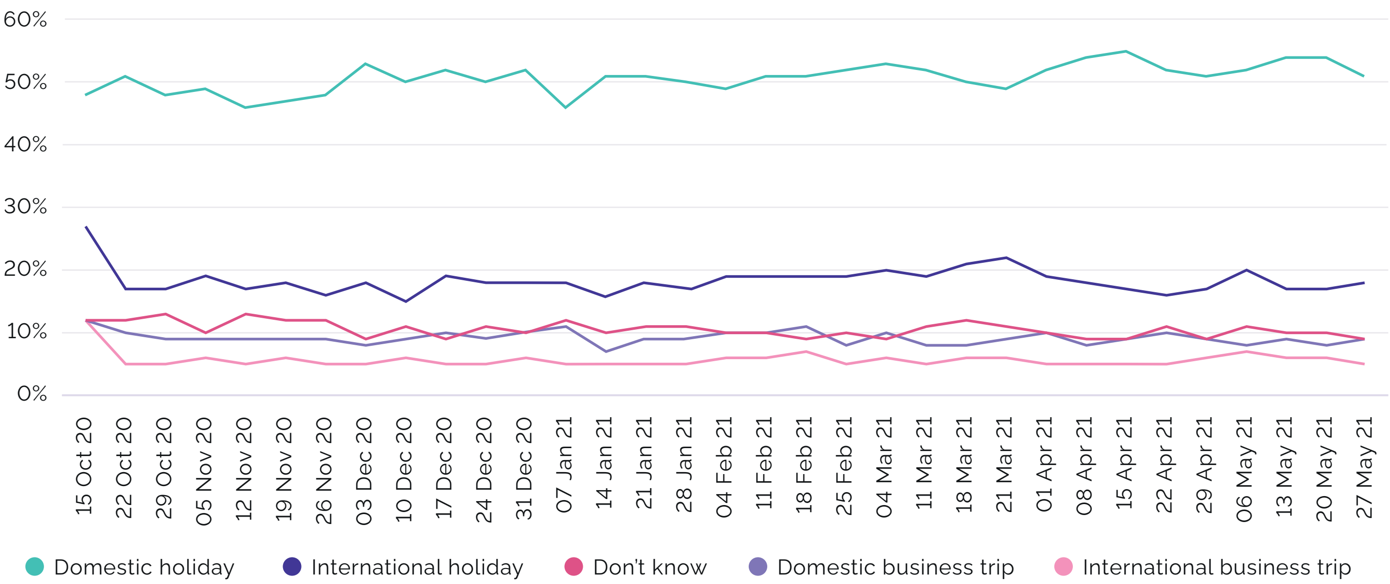
Appetite for international holidays remained consistent month on month, albeit lower than domestic trips. In May, around one in five consumers planned an international vacation. Popular types of trips among those with their sights on destinations abroad are multi-centre vacations staying in two or more destinations in one trip, cruises, tours, safari and wildlife vacations, health spa vacations, and sailing or boating (sea, river, canals). Roughly a quarter of those planning an international trip would typically go on beach vacations, city breaks and visit the great outdoors.

For any travel organisation and destination, it is important not only to understand whether people are ready to book and travel, but also what worries and motivates them. COVID-19 testing for international travel has been a significant barrier to consumers. Part of this is down to cost, but the inconvenience and complexity of the procedures also plays a role. Likewise, the apprehension of visiting a country where travelers are less certain of the handling of the pandemic than at home and having to learn and understand a different country's restrictions are factors.

The lack of clarity and bilateral recognition of safety protocols such as testing procedures and vaccine certification remains a major barrier to international travel. The EU's agreement in May of a Digital COVID-19 Certificate, progress on similar schemes in China and Japan, and the UK's decision to use the NHS (National Health Service) app as proof of vaccination status could go some way to reducing this barrier. The US and Australia may be slightly behind in this area, but the Biden administration has said it is taking "a very close look" at this kind of certification, while Australia is talking to the International Air Transport Association (IATA) about introducing such a scheme.

If international standards on travel protocols are agreed, this could pave the way to a more fluid and rapid recovery of demand.

Plans to travel in next 12 months globally (% of respondents)

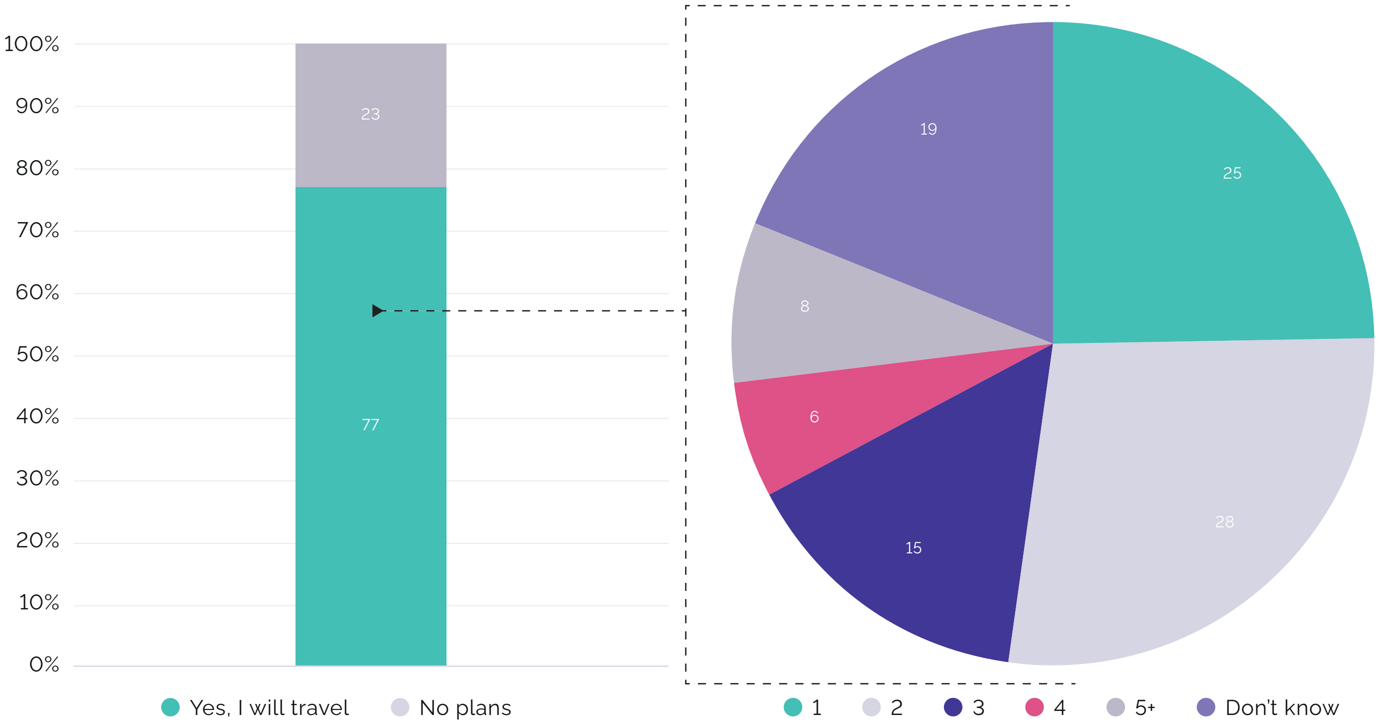


Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

Latest YouGov polling shows broad support across the world for the introduction of 'vaccine passports'. Across 17 major markets, more than half of adult respondents in April were in favor. There was even stronger support in Asian countries such as Indonesia, India and Singapore, as well as Mexico. A closer look finds more support for certification among older age groups across the US, the UK and Australia.

Plans to travel next 12 months globally - May 21 (% of respondents)

Planned # of trips next 12 months globally - May 21 (% of respondents)



Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

How many trips, if any, are you planning to take for leisure, business or personal reasons in the next 12 months?

While the recovery of leisure travel may be gradual, there is an opportunity for the tourism industry to capitalise on the added flexibility being offered in many workplaces by pivoting to offering 'workations' – trips for people who want to work while traveling and who have more freedom to work away from the office than before the pandemic. Barbados was among the early movers here, creating a visa for working travelers in June 2020, followed by Anguilla, the Maldives and some European countries including Croatia, Georgia and Estonia. The Portuguese island of Madeira created a digital nomad village. Backing up this trend, vacation rental giant Airbnb has reported a spike in date-flexible searches, having recently added a 'Flexible Dates' tool to its app.

Business travel intent

Business travel recovery may take longer but there are opportunities in certain markets

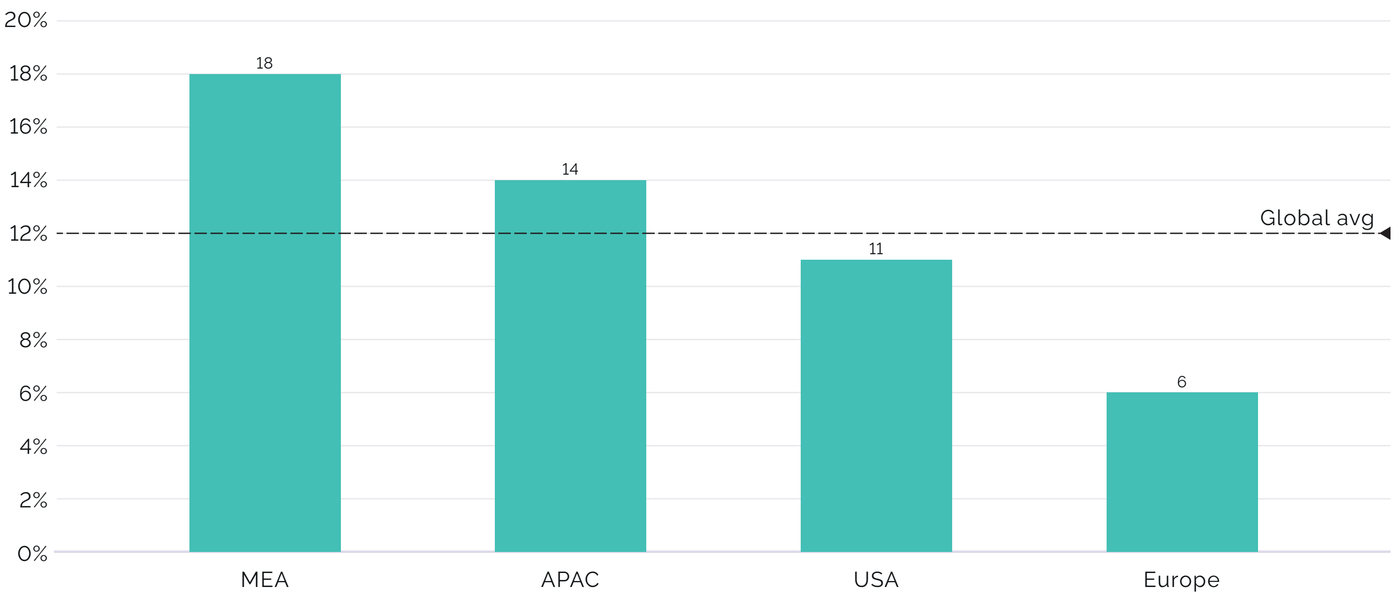
There are varying views about the pace of recovery of business travel. The International Air Transport Association (IATA) has developed a digital travel pass it hopes will become the international standard and help address the concerns around the risks of quarantine - the main barrier to business travel. But the pandemic is still acting as a brake on mobility.

Some corporates are taking clear steps to reduce their business travel footprint, such as Deloitte – which aims to reduce the carbon footprint of its business travel by 50% by 2030 – and PwC, which aims to reduce emissions from business trips by 33% by 2022. Microsoft founder Bill Gates predicted in November 2020 that business travel will drop by 50% compared to before the pandemic.

Expense management firm SAP Concur, however, predict business travel will return - just differently. It anticipates that 'Zoom fatigue' will increase and suggests firms may be willing to spend more per trip for their employees to travel more sustainably.

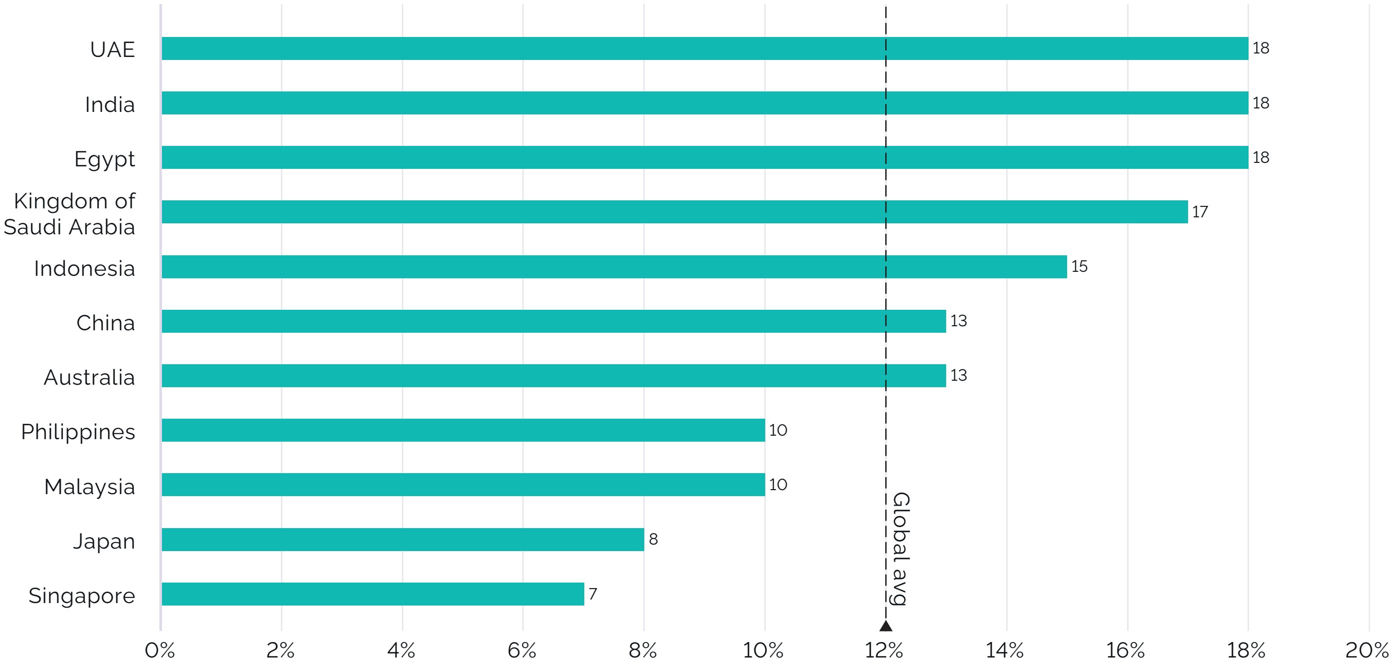
Consumer sentiment data points to a slow demand for business travel compared to leisure travel. Respondents in the APAC and MEA regions are more likely to travel for business, both domestically and internationally, than those in Europe and North America. Those in the Middle East particularly are more likely to travel internationally for business, meaning this could be a favorable target market for airlines and hotels, particularly those brands offering more premium products.

% Intending to travel for business in next 12 months - May 21 (% of respondents)



Which, if any, of the following trips are you planning to take in the next 12 months? Those selecting any business trip

% Intending to travel for business in next 12 months - May 21 (% of respondents)



Which, if any, of the following trips are you planning to take in the next 12 months? Those selecting any business trip

Regional and market-by-market travel sentiment

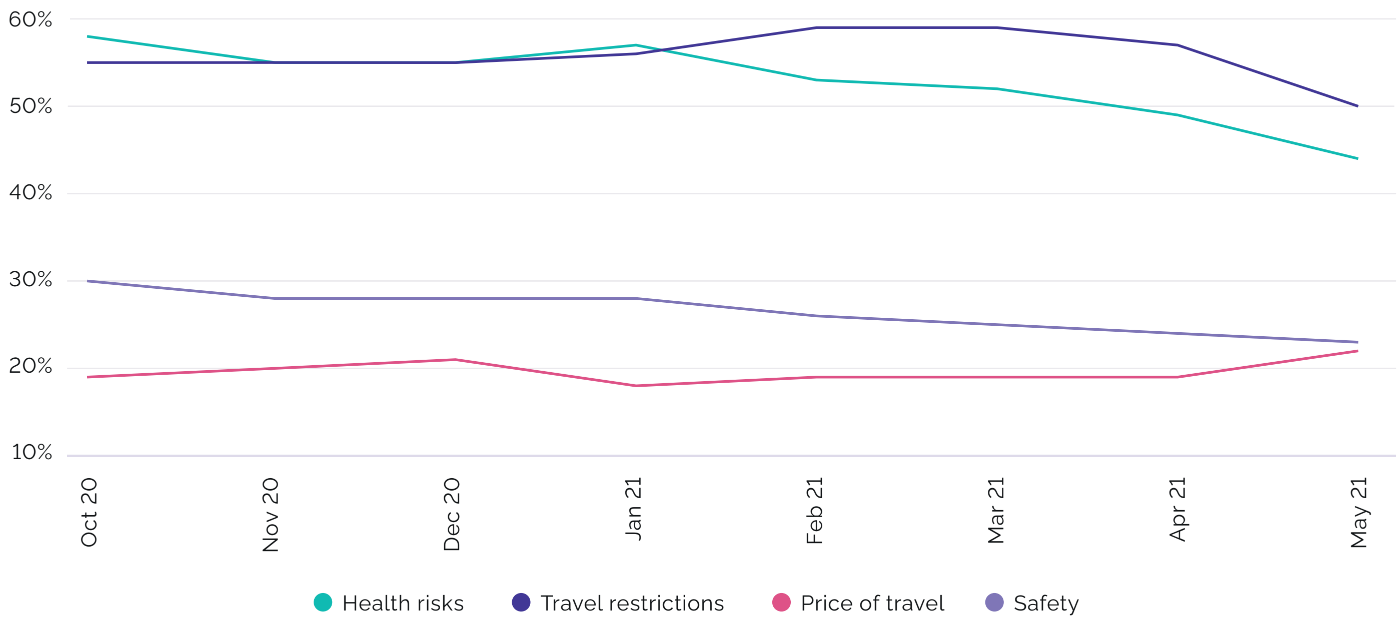
Analysis by market has uncovered noticeable differences in how consumers feel about travel, both domestically and internationally, what is holding them back, and how that has changed over time.

A constant across all the European markets we examined was that health risks are generally becoming less of a barrier, reflecting the progression of vaccine programmes across the continent and ultimately proving the underlying demand for travel once the virus is under control.

It was only in Europe where travel restrictions surpassed health risks as a greater obstacle to travel. This could be down to Europe's spike in COVID-19 infections in the early part of 2021, and most countries' strict stance on travel as a result. The barrier caused by restrictions dropped slightly in Europe in April, just as case numbers in some countries began to decline.

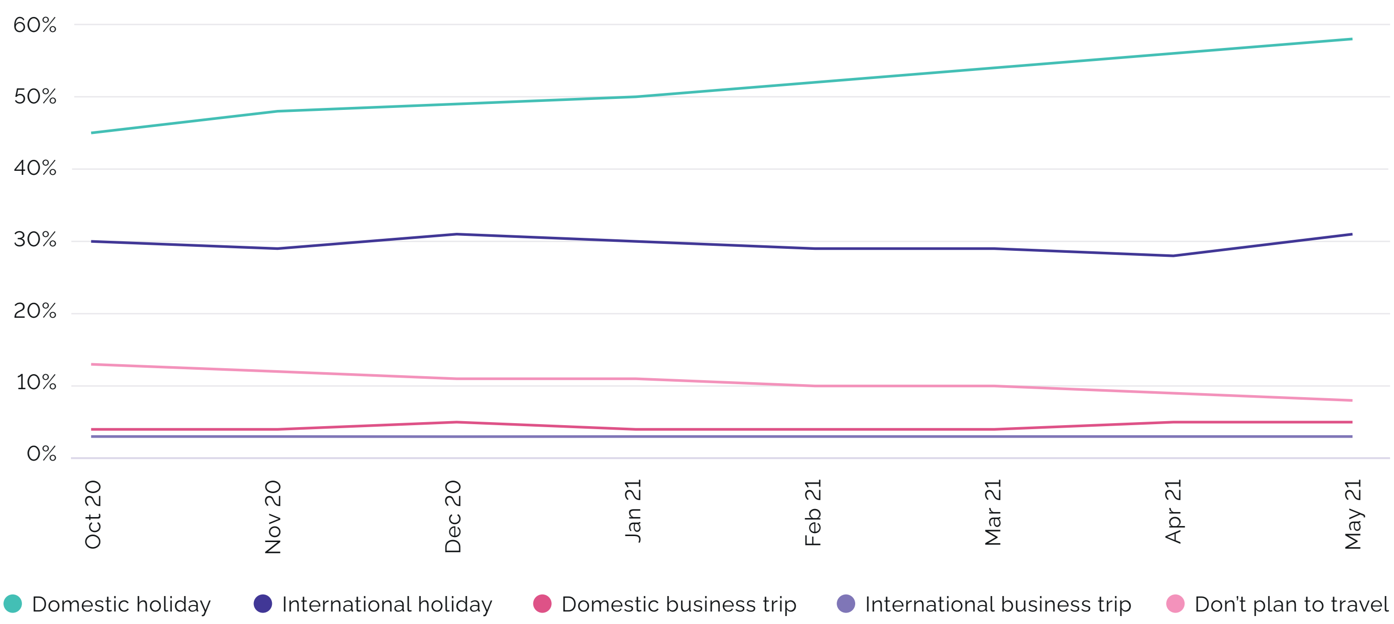
The steeper drop in May follows both continued vaccine successes and lowering infection rates, as well as agreement on the EU's Digital COVID-19 Certification, which records vaccine and testing status as well as whether a traveler has recovered from a COVID-19 infection. It began to be rolled out from June 1.

Barriers to travel - Europe (% of respondents)



Which, if any, of the below factors are currently preventing you from traveling? Please select all that apply

Plans to travel next 12 months - Europe (% of respondents)

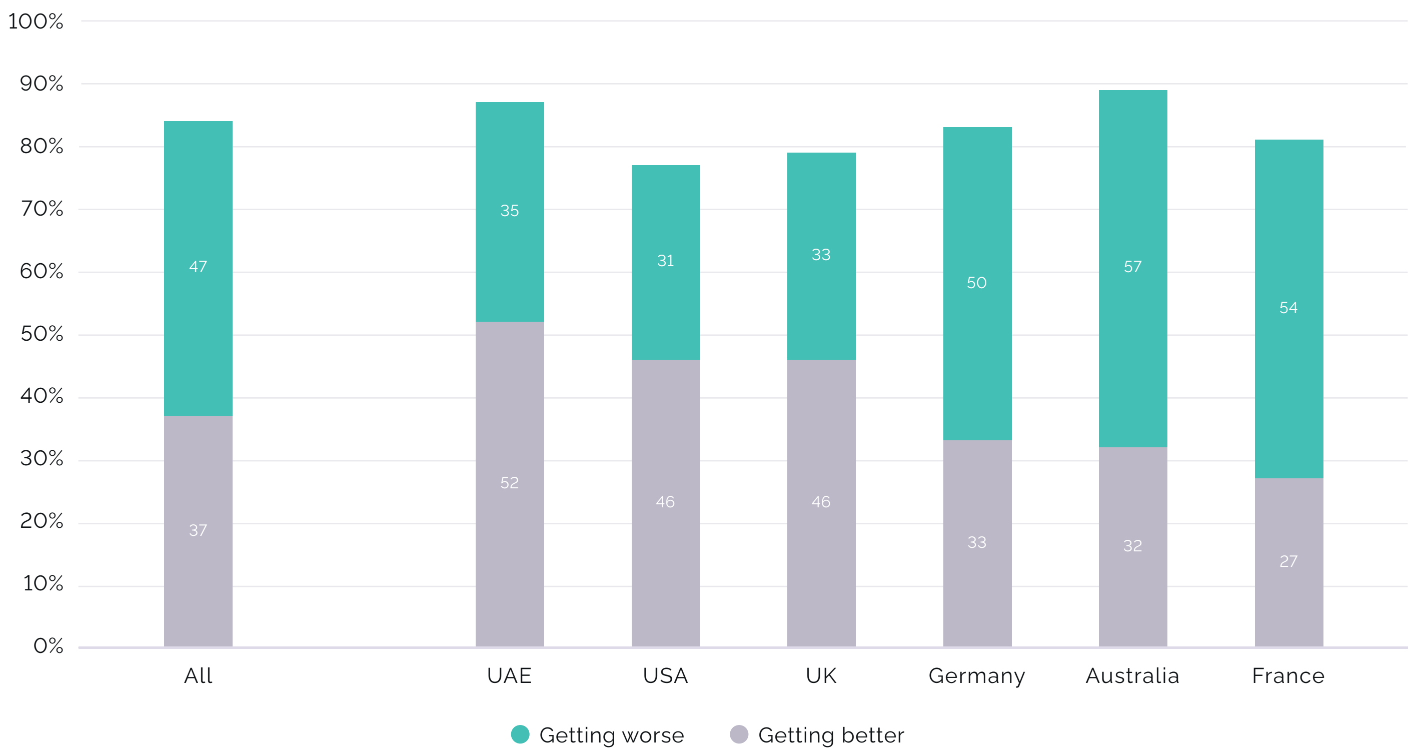


Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

Local success at managing COVID-19 infection rates, through lockdowns or vaccine rollouts, looks to be linked to attitudes towards COVID-19 in individual countries, according to the data. In May, the research showed more people in the US, UK and UAE – where vaccine rollouts were ahead of elsewhere in the world – believed the situation was getting better globally than they did in Germany, France and Australia.

The United Arab Emirates stands out in terms of international travel sentiment, with respondents planning to travel substantially more than consumers in other countries. Both domestic and regional tourism is expected to be vibrant. Consideration for major destinations in the Middle East such as Abu Dhabi, Saudi Arabia, Dubai, Egypt, and Qatar has been trending upward since November 2020. Regional carriers have brighter skies ahead with higher local appetite for business travel whether to destinations regionally, in Europe or APAC.

Attitudes towards COVID-19 situation globally - May 21 (% of respondents)

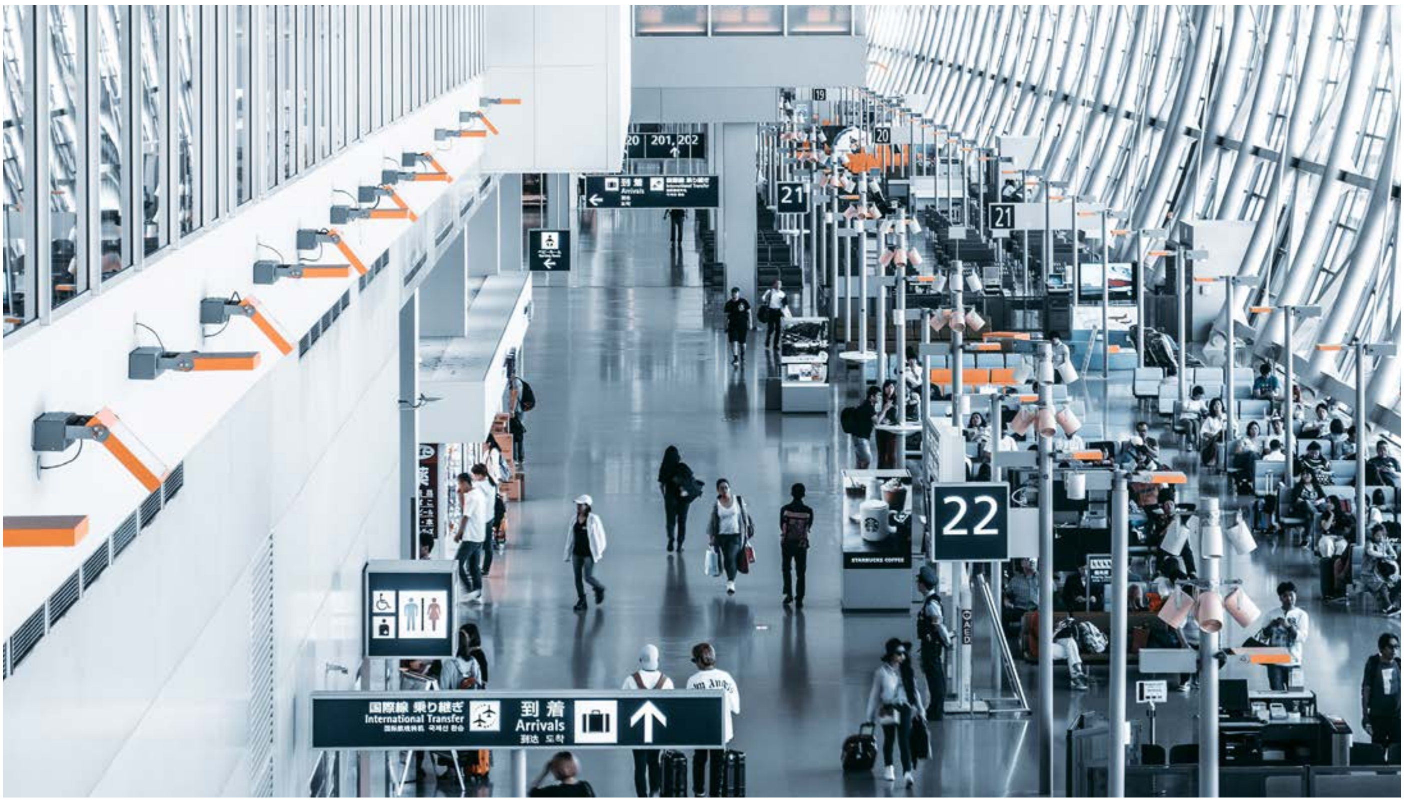


Do you think the COVID-19 (Coronavirus) situation globally is currently...

Countries which imposed stricter rules on travel domestically and internationally - such as Australia, Norway, the UK and Singapore - see restrictions as a bigger barrier to travel than those in countries that took a more relaxed approach, such as Brazil, Mexico and Sweden.

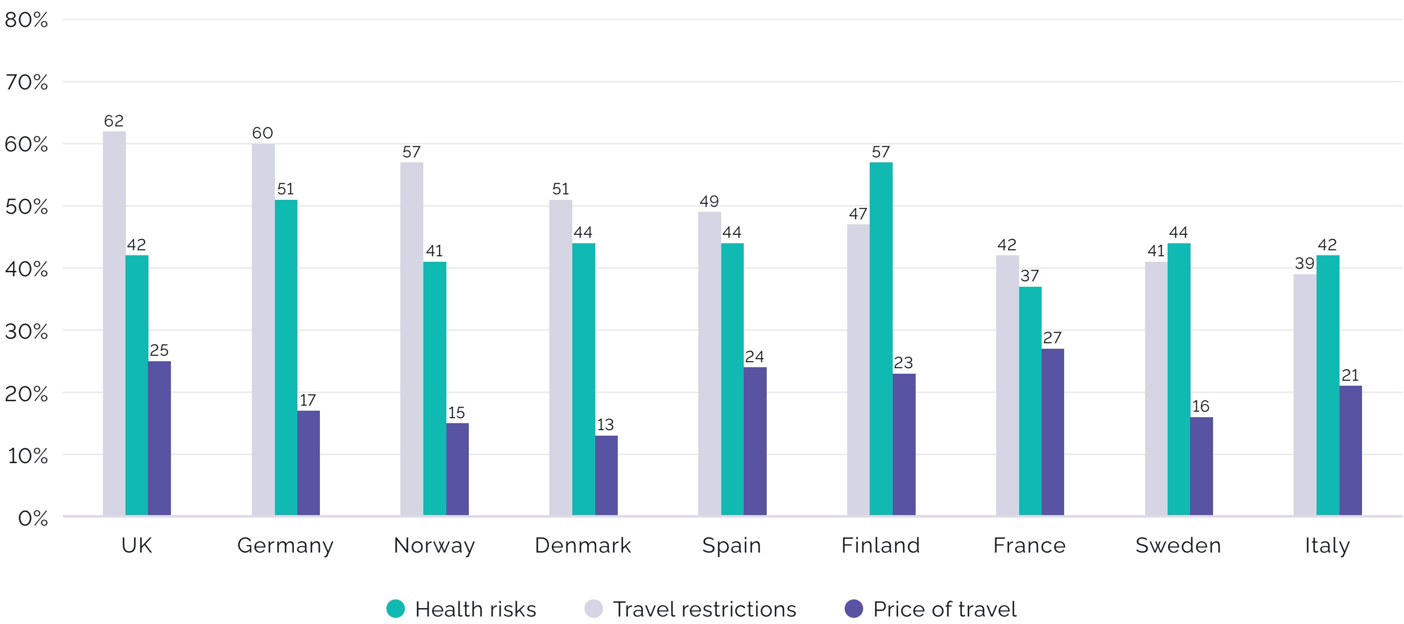
Top barriers to travel - May 21 (% of respondents)

Which, if any, of the below factors are currently preventing you from traveling? Please select all that apply



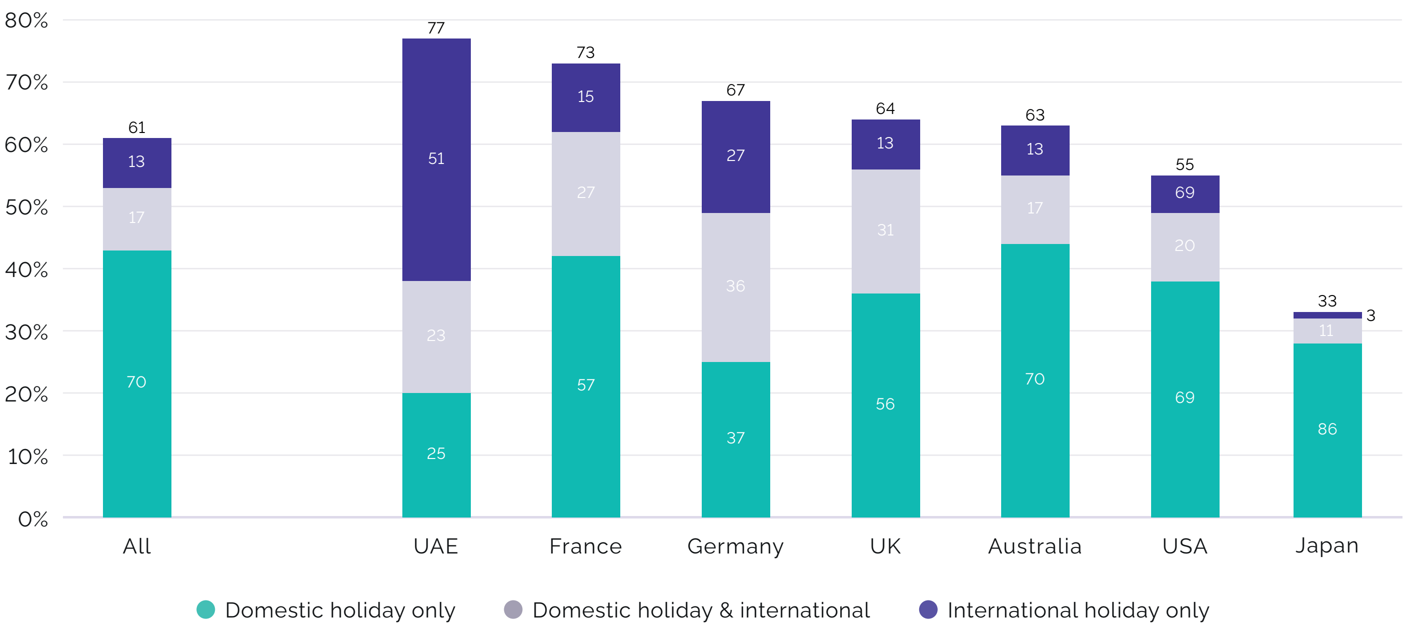
Looking at specific countries within Europe, northern Europeans are more concerned about travel restrictions than those in the south of the continent - except in Sweden, where they took a herd immunity approach to the pandemic. While the EU has worked towards a common framework for the resumption of international travel, member nations are still able to take unilateral decisions.

Top barriers to travel - May 21 (% of respondents)



Which, if any, of the below factors are currently preventing you from traveling? Please select all that apply

Plans to travel for leisure next 12 months - May 21 (% of respondents)



Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

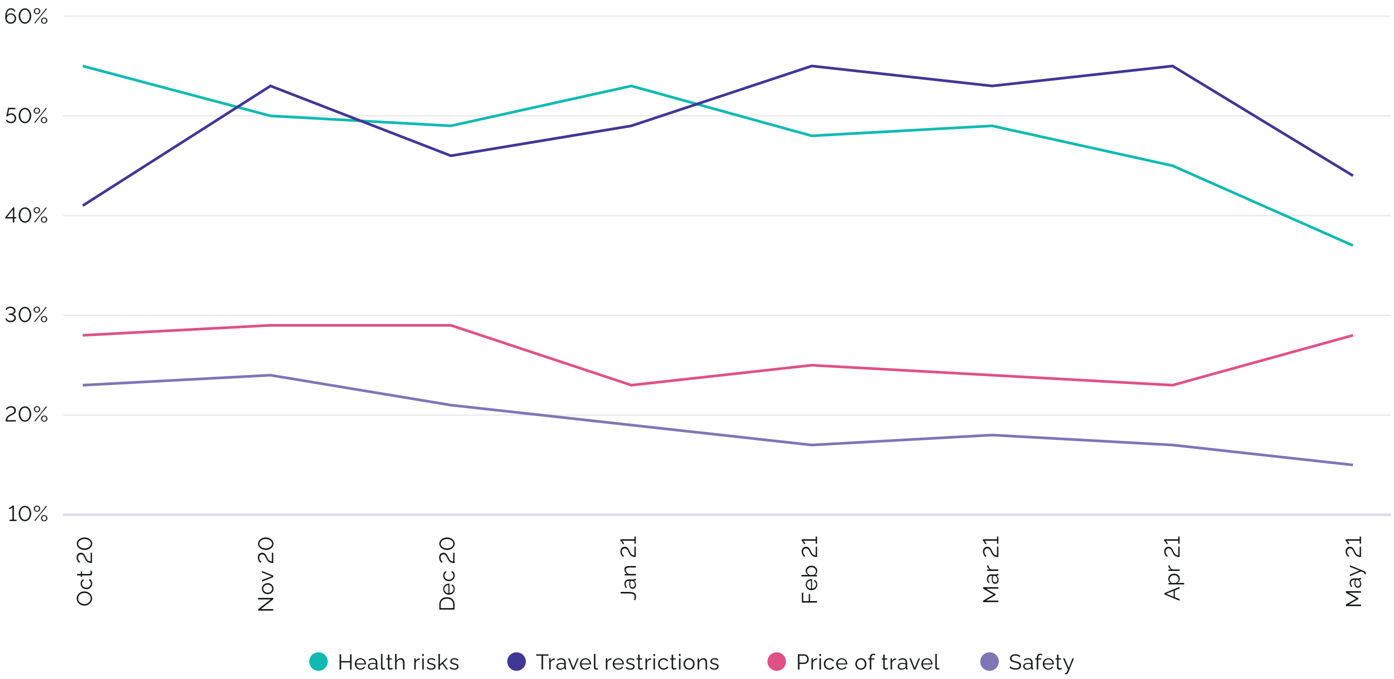
France focus

French travelers happy to take advantage of domestic offering

France has seen consistent levels of intent for travel over time. The country traditionally has a stronger domestic market than its European neighbors in the UK and Germany. We'll further explore the opportunities in the French domestic market later in this report.

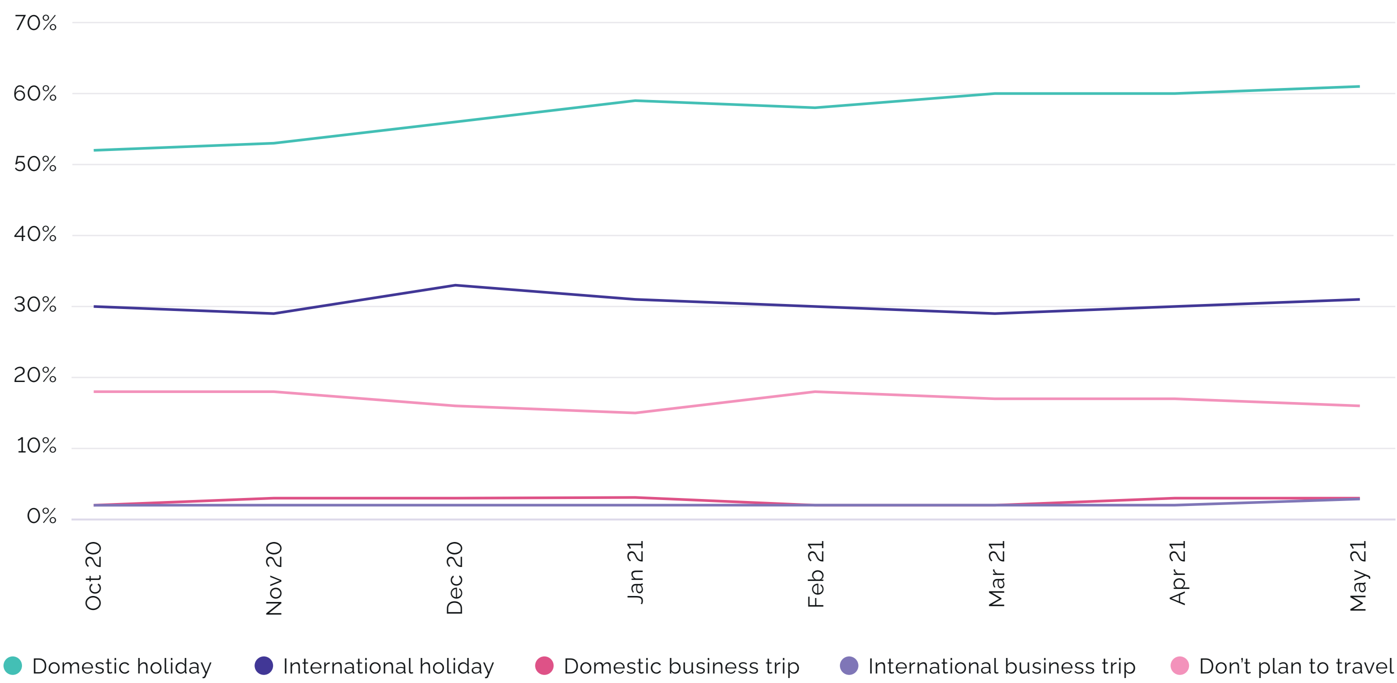
The February spike in perceptions of travel restrictions as a barrier clearly coincides with the implementation of the EU's testing and quarantine policies. While only a small reduction was seen at the announcement in March of plans for a common path to reopening for all EU countries, the significant drop in May also coincides with political agreement on the EU's Digital COVID-19 Certificate. A relatively stable intent to travel internationally is seen in the data from French respondents, with one in three consumers looking to enjoy a vacation abroad.

Barriers to travel - France (% of respondents)



Which, if any, of the below factors are currently preventing you from traveling? Please select all that apply

Plans to travel next 12 months - France (% of respondents)



Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

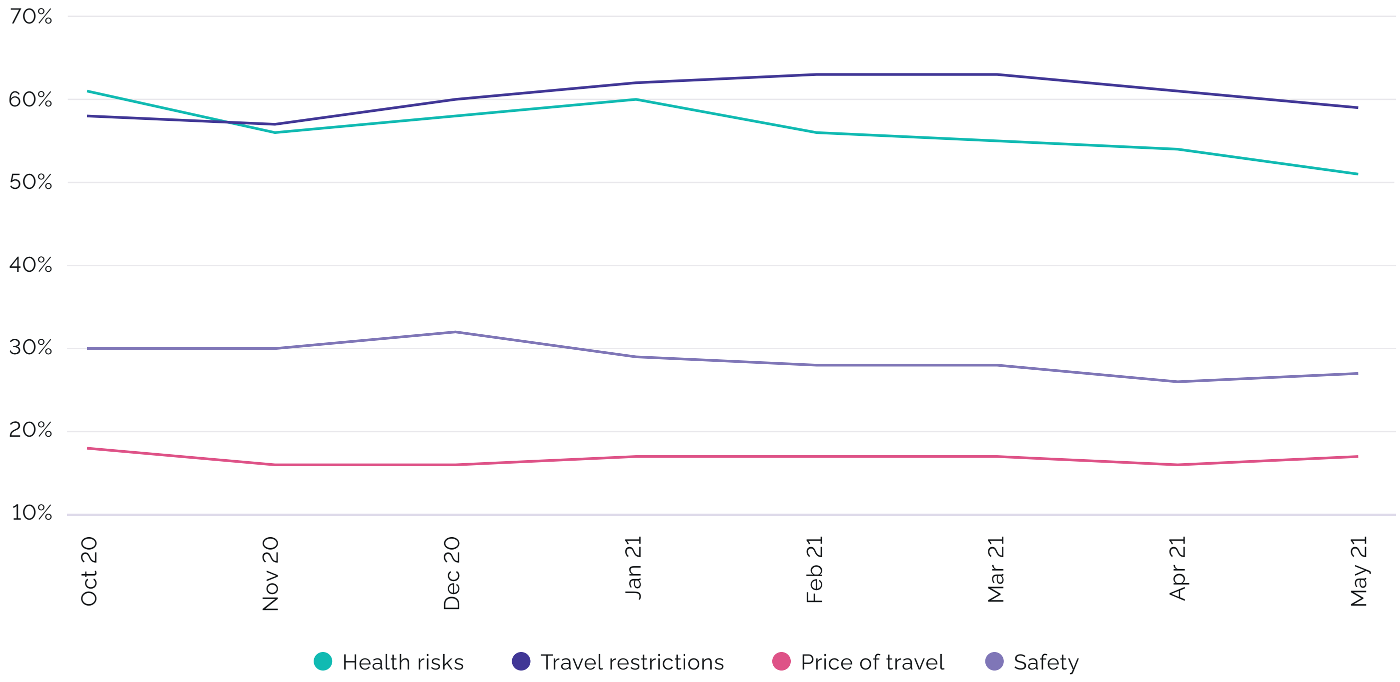
Germany focus

Germans keen to stick to international travel, but not for business

In Germany, Europe's largest outbound travel market, intent to travel overseas is higher than in EU neighbors France and the UK. Despite COVID-19 waves and various local or international restrictions, sentiment has not dropped below 30% and at the end of May recorded a new high of 41%. Encouragingly, data collected in May showed a noticeable drop in the number of people who said they do not plan to travel.

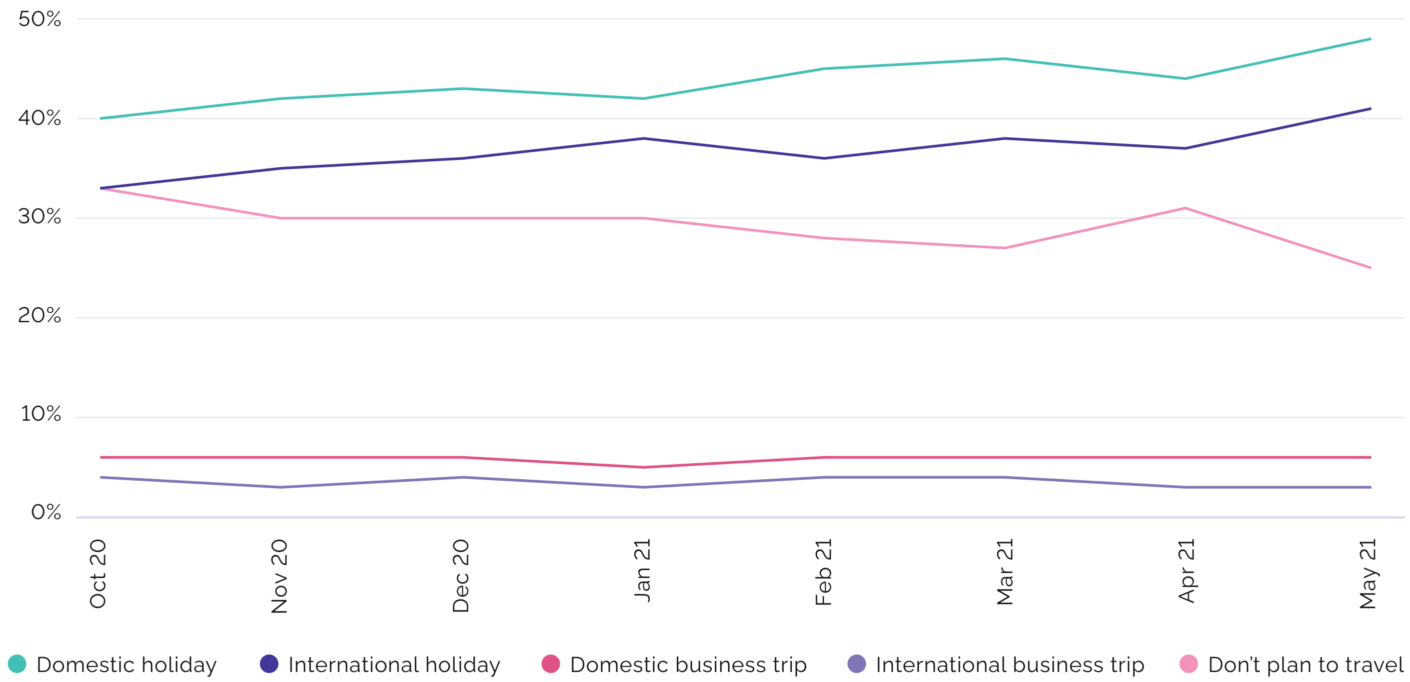
But business travel, both domestically and internationally, is trending surprisingly low for a country whose economy is heavily reliant on international trade and exports. Even with travel conditions slowly improving locally and across the continent, there has been no uptick in plans to travel for business. Airlines and other travel businesses that have traditionally focused on business customers will need to adapt to this trend until business travel returns to pre-pandemic levels or similar. YouGov's data points to international travel demand being most prevalent among the luxury and adventurous travelers in Germany – two consumer groups which could offer an opportunity for growth if their interests and tastes are met. Adjusting the offering and operating models to target new audience segments could help some of the struggling travel businesses recover sooner.

Barriers to travel - Germany (% of respondents)



Which, if any, of the below factors are currently preventing you from traveling? Please select all that apply

Plans to travel next 12 months - Germany (% of respondents)



Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

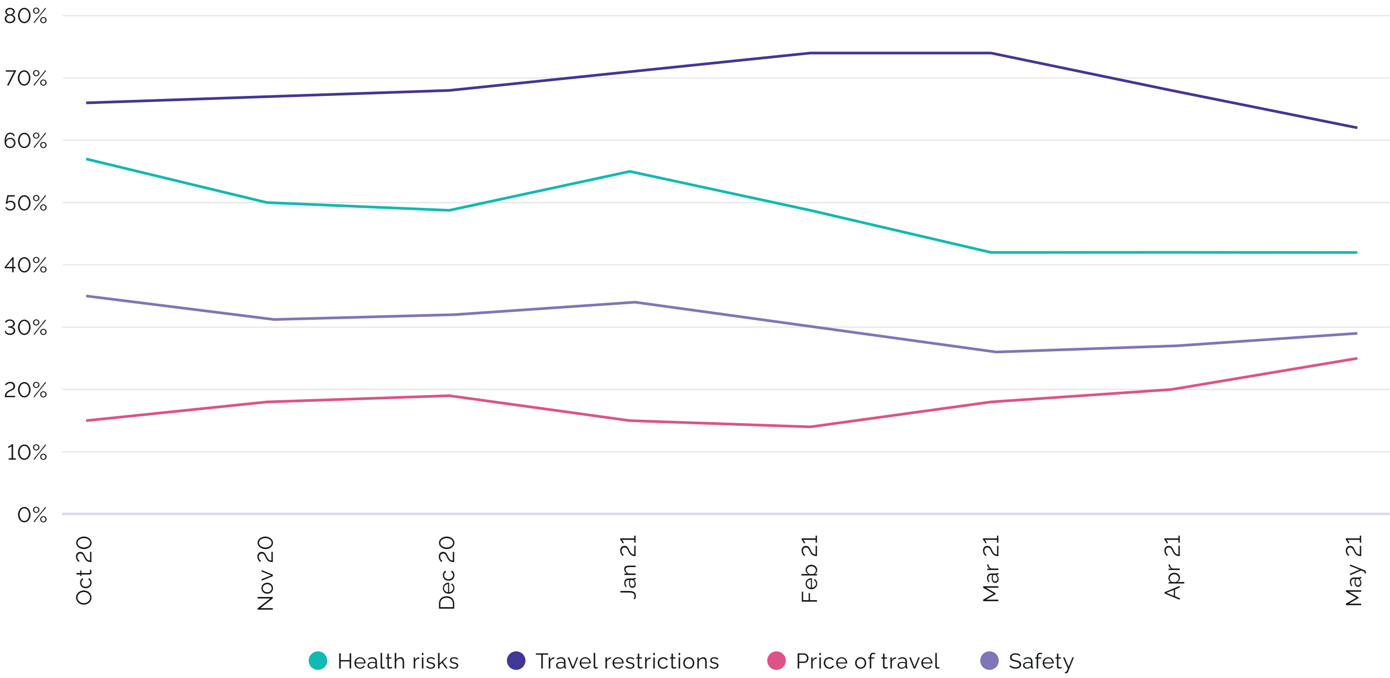
UK focus

Costly and confusing restrictions are the biggest barrier to international travel in UK

The UK – which officially left the EU in January – has separate restrictions to the bloc. The country saw a drop in intent to travel internationally up until April, when its government published its framework for a restart of travel – indicating that the framework gave consumers some added clarity on what protocols may be in place. A very modest rise in May coincides with the country's unveiling of its first 'green list' of destinations from which tourists would no longer be required to observe quarantine measures. Only one major tourism destination, Portugal, was included before it was removed four weeks later.

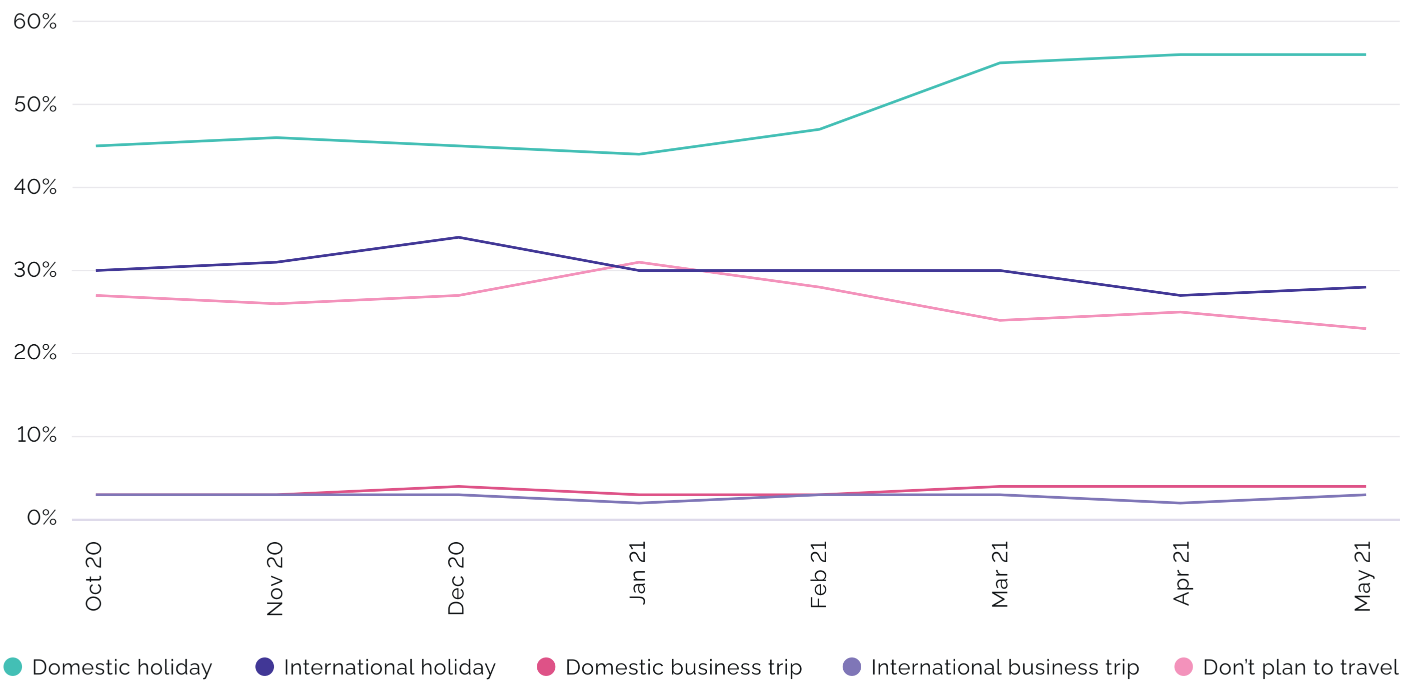
Intentions to travel domestically rose sharply in the early months of 2021, when lockdowns were at their strictest, and the local variant was peaking. The UK's early success with its vaccine rollout may also be playing a role in driving this confidence in domestic travel. But its relatively new status as a third country from the EU means its restrictions are out of step with the majority of the rest of the continent, which could very well put off more Brits from traveling overseas, or encourage them to opt for domestic travel as an alternative.

Barriers to travel - UK (% of respondents)



Which, if any, of the below factors are currently preventing you from traveling? Please select all that apply

Plans to travel next 12 months - UK (% of respondents)



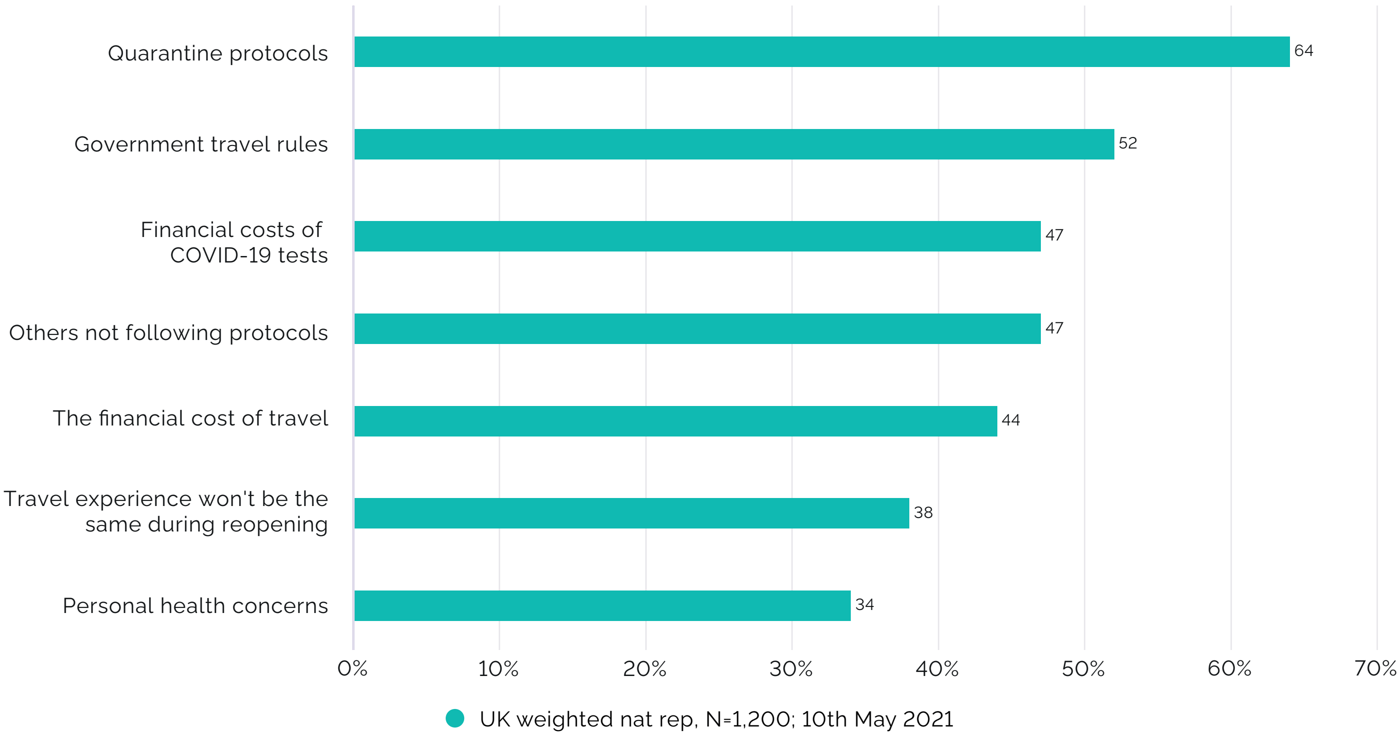
Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

The fear of quarantine is the major barrier to international travel in the UK, according to country-specific data gathered on May 10. The UK introduced mandatory self-isolation at government-approved hotels in February, before following up in April with a traffic light system where hotel quarantine is required for countries on its 'red list'. Self-isolation at home, rather than in a hotel, is required for arrivals from 'amber list' destinations.

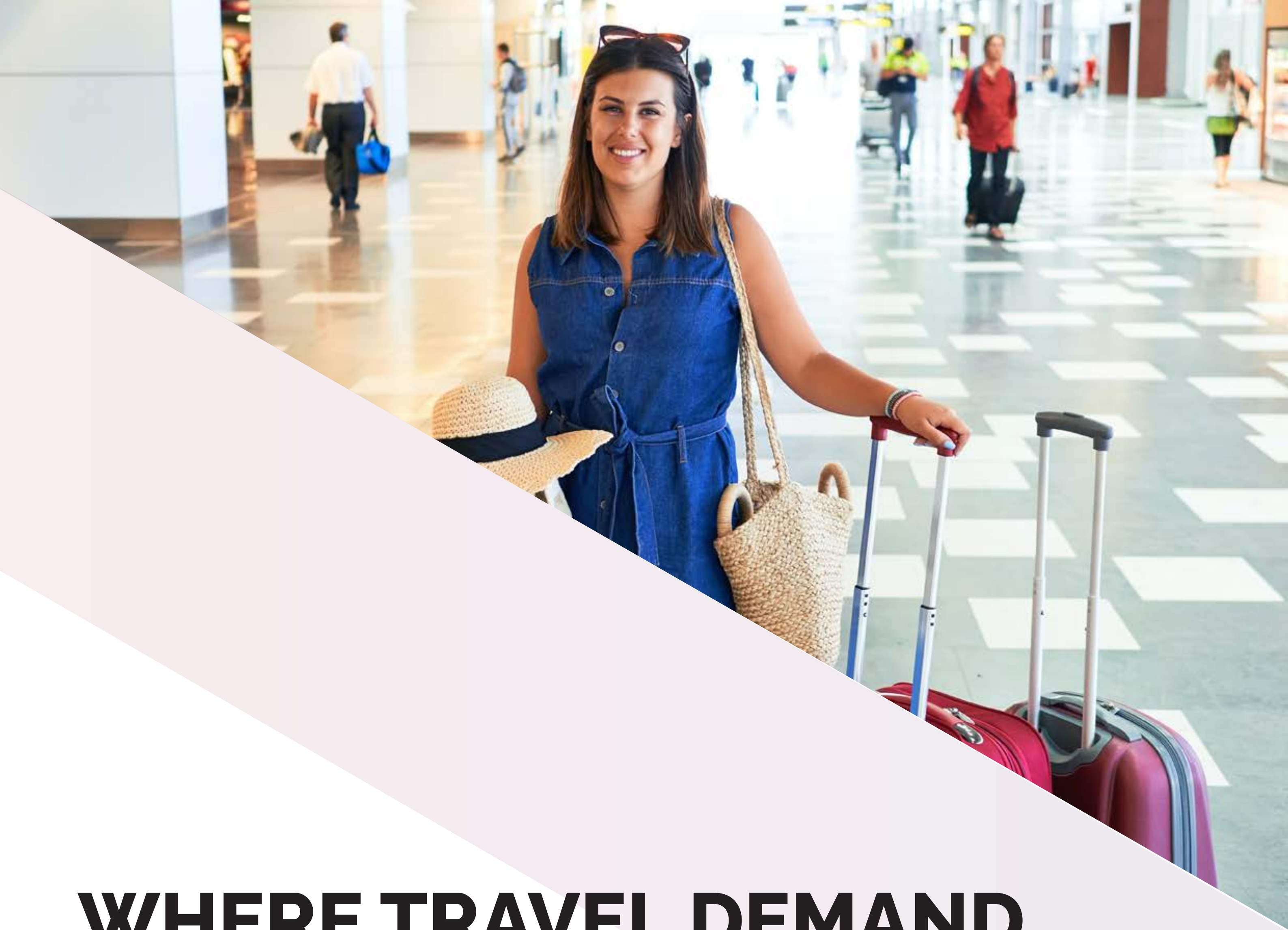
Government travel rules are considered the second highest barrier to international travel. This could incorporate the traffic light system as well as testing, which is required for not just arrivals from red and amber destinations but those from 'green list' countries too. The cost of testing on its own is also deemed a major barrier, jointly third alongside concern over others not following the protocols. While the price of testing has come down, there is clearly still concern about the effectiveness and complexity of the process. Added testing costs, which were not required pre-COVID-19 travel, may be contributing to the 44% of Britons who say the cost of travel is a barrier.

UK – Barriers to travel

Barriers to travel internationally - UK - May 10th 21 (% of respondents)



Which of the following, if any would you consider as a barrier to international travel this year? Please select all that may apply



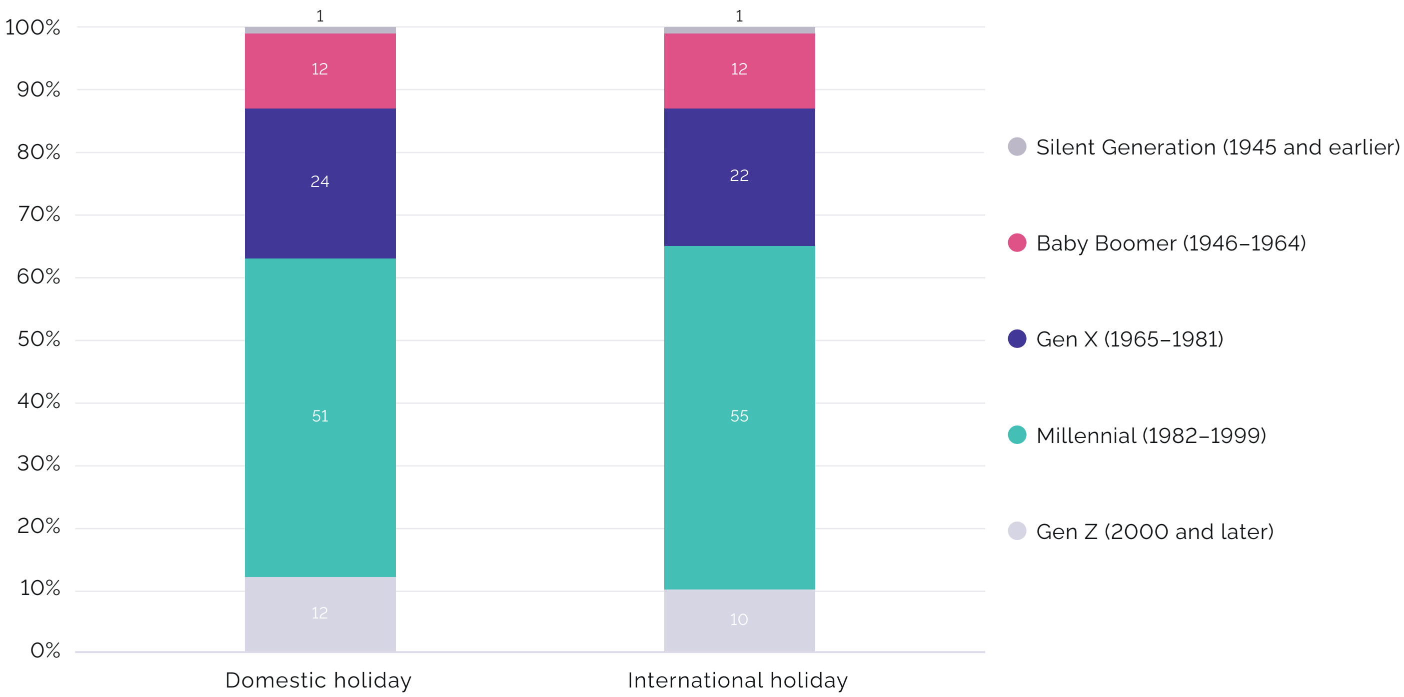
WHERE TRAVEL DEMAND IS COMING FROM FIRST

Millennials and Gen X are main source of demand in next 12 months

With competition intensifying to attract consumers who are ready to travel, it will be of increased importance for travel organisations to understand their audiences.

This data suggests that demand will mainly come from Millennials during the next 12 months. They make up more than half of the total population planning to travel for a holiday, and an even higher proportion for international travel. The sentiment among this group has trended consistently higher in many major tourism markets throughout the pandemic. Gen X is the next most likely to travel in the next 12 months, ahead of both the Silent Generation and Gen Z.

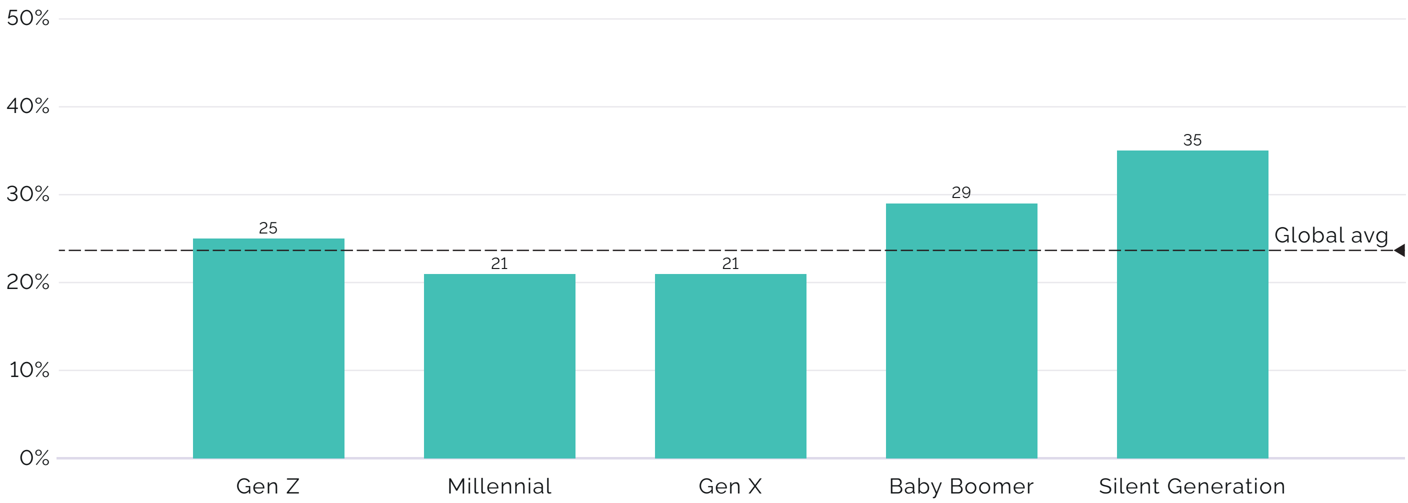
Plans to travel next 12 months - May 21 (% of respondents)



Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

Gen Z is less likely not to travel than both the Boomers and the Silent Generation. Despite being the last in line for vaccinations, they are clearly eager to explore the world and make up for the opportunities lost due to the pandemic.

Do not plan to travel in next 12 months (% of respondents)

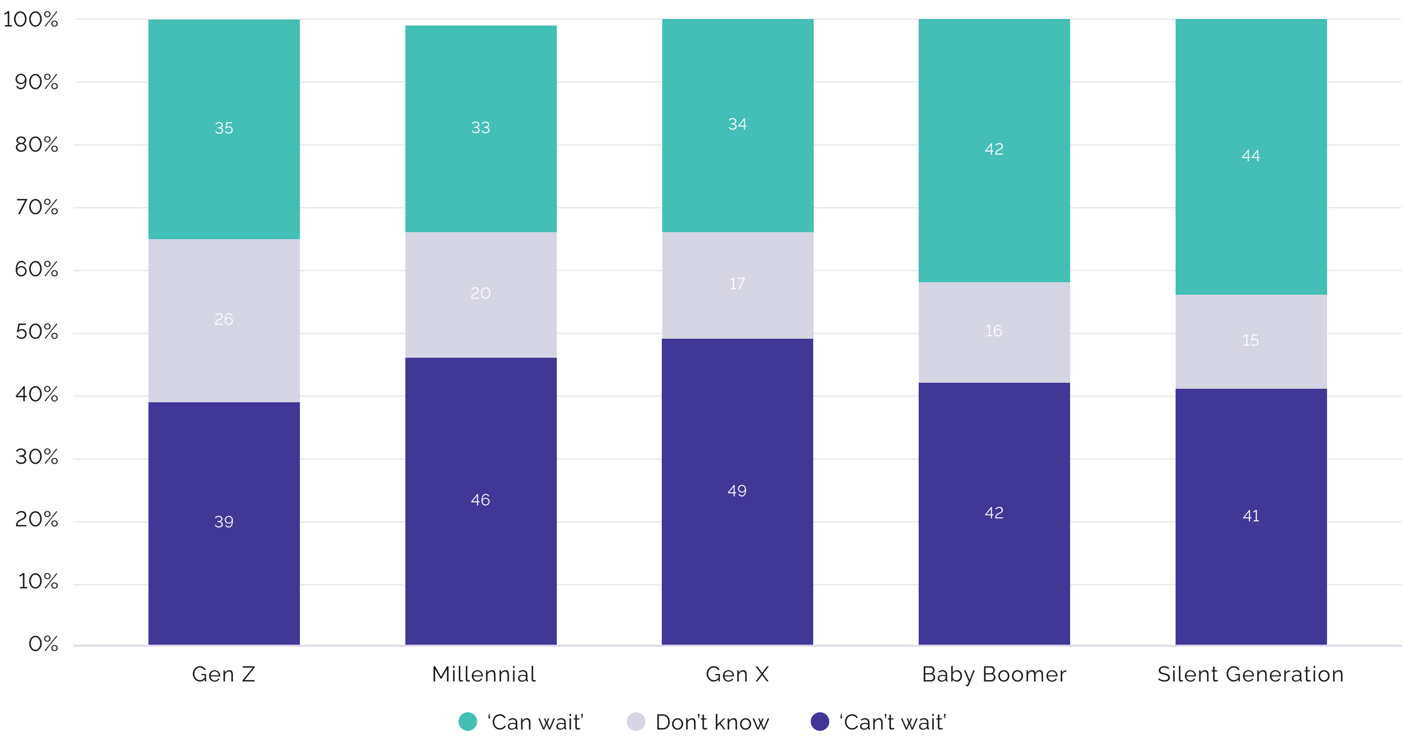


Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

May data does not show increased sentiment to travel among the older generations, who are more likely to be inoculated, with the rate of respondents who 'can't wait' to travel decreasing for the Boomer and Silent Generation groups.

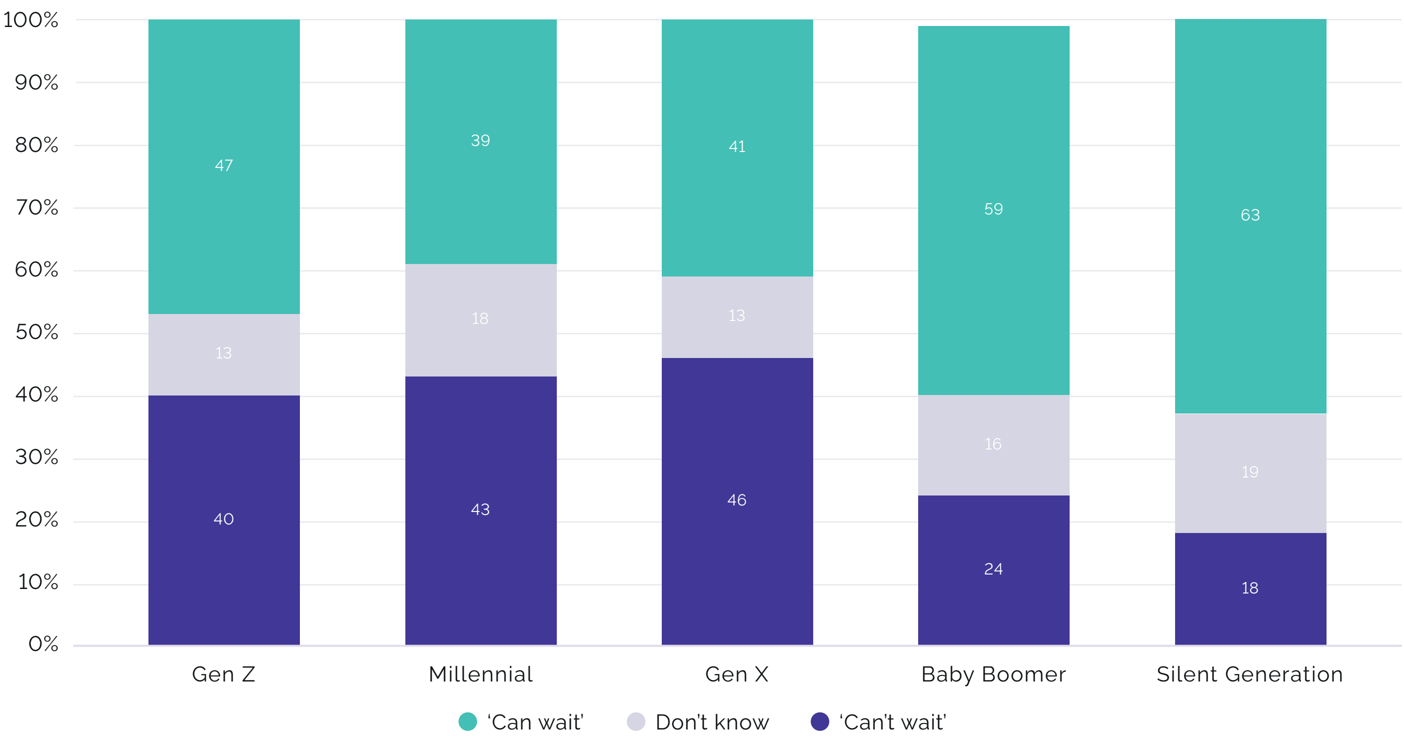
Industry commentators have noted that younger generations are often early adopters and, on the whole, older generations may want more reassurance before traveling with new restrictions in place.

Attitudes to holiday travel in my own country - May 21 (% of respondents)



Which, if any, of the following statements apply to you about traveling in your own country?

Attitudes to holiday travel overseas - May 21 (% of respondents)



Which, if any, of the following statements apply to you about traveling overseas?

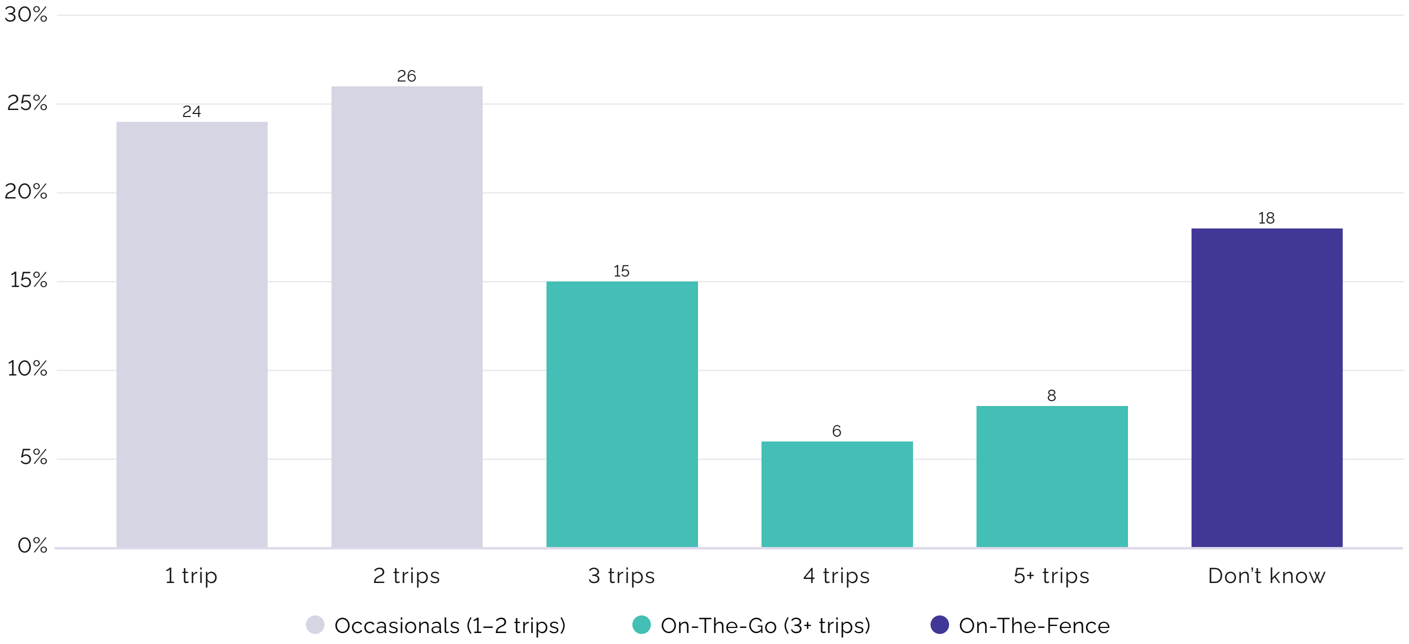
Travel frequency intentions

Target 'On-The-Go' travelers while 'Occasionals' build up confidence

In addition to segmenting the travel audience based on demographics, we can also use attitudinal data to look at consumer preferences and intentions based on travelers' willingness to travel. Using YouGov's Global Travel Profiles, we segmented travelers into three groups based on their intentions to travel in the next 12 months: Occasionals (planning to travel 1-2 times), On-The-Go (taking three or more trips), and On-The-Fence (those planning to travel but who do not know how much).

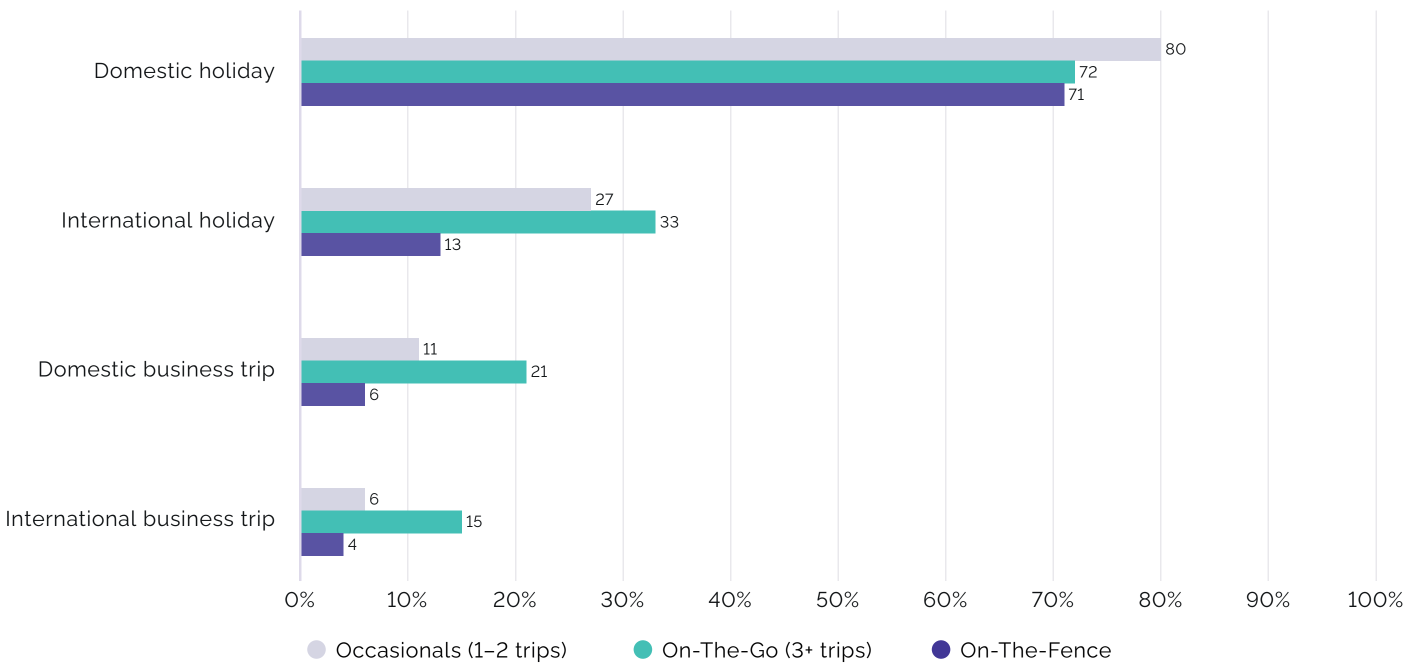
Half of travelers fall under the Occasionals segment – and Occasionals are most likely to be planning a domestic holiday. On-The-Go travelers are a substantially smaller group (29%), but given they will be taking more trips, and are more inclined to travel on an international holiday or for business, they are the clear segment for travel companies to target.

Planned # of trips next 12 months - May 21 (% of respondents)



How many trips, if any, are you planning to take for leisure, business or personal reasons in the next 12 months?

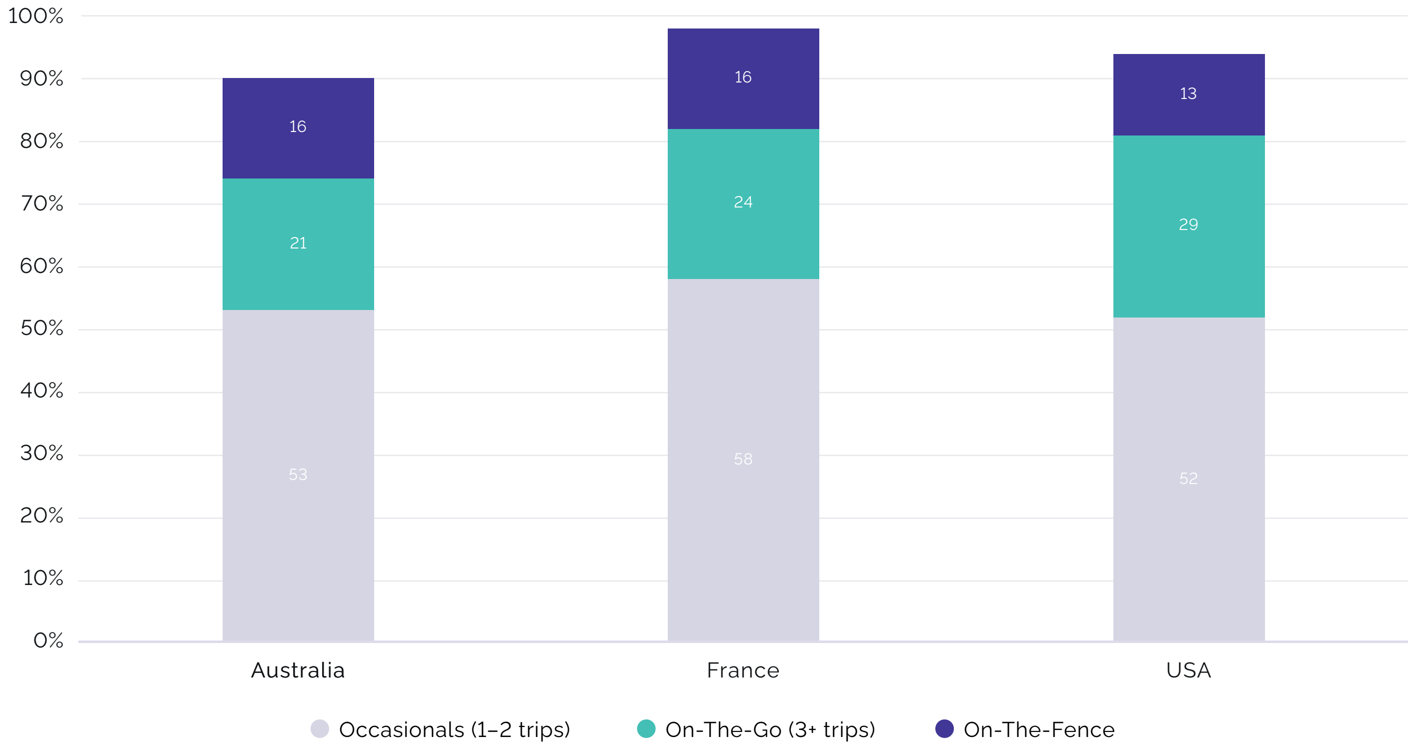
Trip type distribution by segment - May 21 (% of respondents)



Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

Looking at these segments across three major markets, Americans are more likely to be On-The-Go travelers than those in France and Australia. Australians being less likely to be On-The-Go travelers makes sense given the country only recently opened a travel bubble with New Zealand and is unlikely to resume other international travel until early next year. France's high level of Occasionals may be related to its higher levels of intent for domestic holidays, in that if a majority of respondents only feel comfortable traveling domestically then it may reduce the number of trips they plan to take.

Traveling frequency segments by country - May 21 (% of respondents)



How many trips, if any, are you planning to take for leisure, business or personal reasons in the next 12 months? Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

Globally, the On-The-Go segment makes up nearly 30% of planned travelers, and likely offers the highest revenue opportunity per traveler due to their initial confidence. Travel among this group is highest among all forms of travel tracked: while domestic holiday travel is most popular, this segment is far more likely to be traveling for business or international holidays.

A greater proportion of On-The-Go travelers are Millennials, supporting the idea that Millennials are the best market for travel organisations to target during the recovery. There is also a larger percentage of On-The-Go travelers in the higher income bracket, again supporting the theory that those with more disposable income are more likely to travel in the near-term as we emerge from the pandemic.

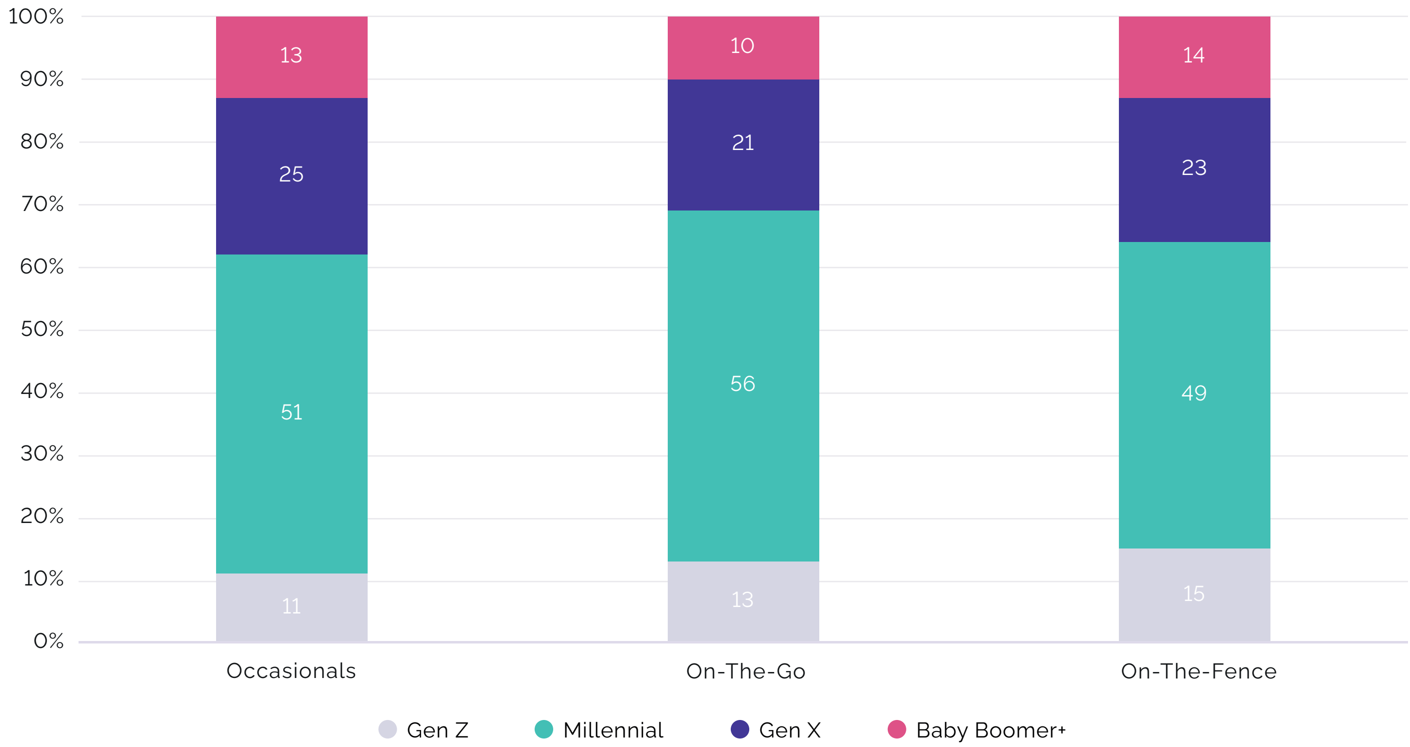
A higher proportion of On-The-Fence travelers are in the Gen Z age group, and more On-The-Fence travelers are in the lower income bracket. These two trends make sense, because we have seen already that Gen Z is less likely to travel than Millennials and Gen X, and they support the idea that the youngest adult generation has suffered economically more than others during COVID-19. A lack of disposable income may be a major contributing factor in why this segment identifies as On-The-Fence rather than On-The-Go, as they simply have less money to spend on travel.

Occasionals are more evenly split across both age and income but appear more comfortable taking leisure trips and traveling domestically. This suggests they need a bit more hand-holding from travel firms or want to see more confident travelers go on international holidays first before they dip their toes. It may require a long-term strategy to reach this segment, but messages from travel companies to help reassure Occasionals may, over time, mean a greater percentage of this segment become On-The-Go travelers.

Income distribution by segment - May 21 (% of respondents)

How many trips, if any, are you planning to take for leisure, business or personal reasons in the next 12 months?

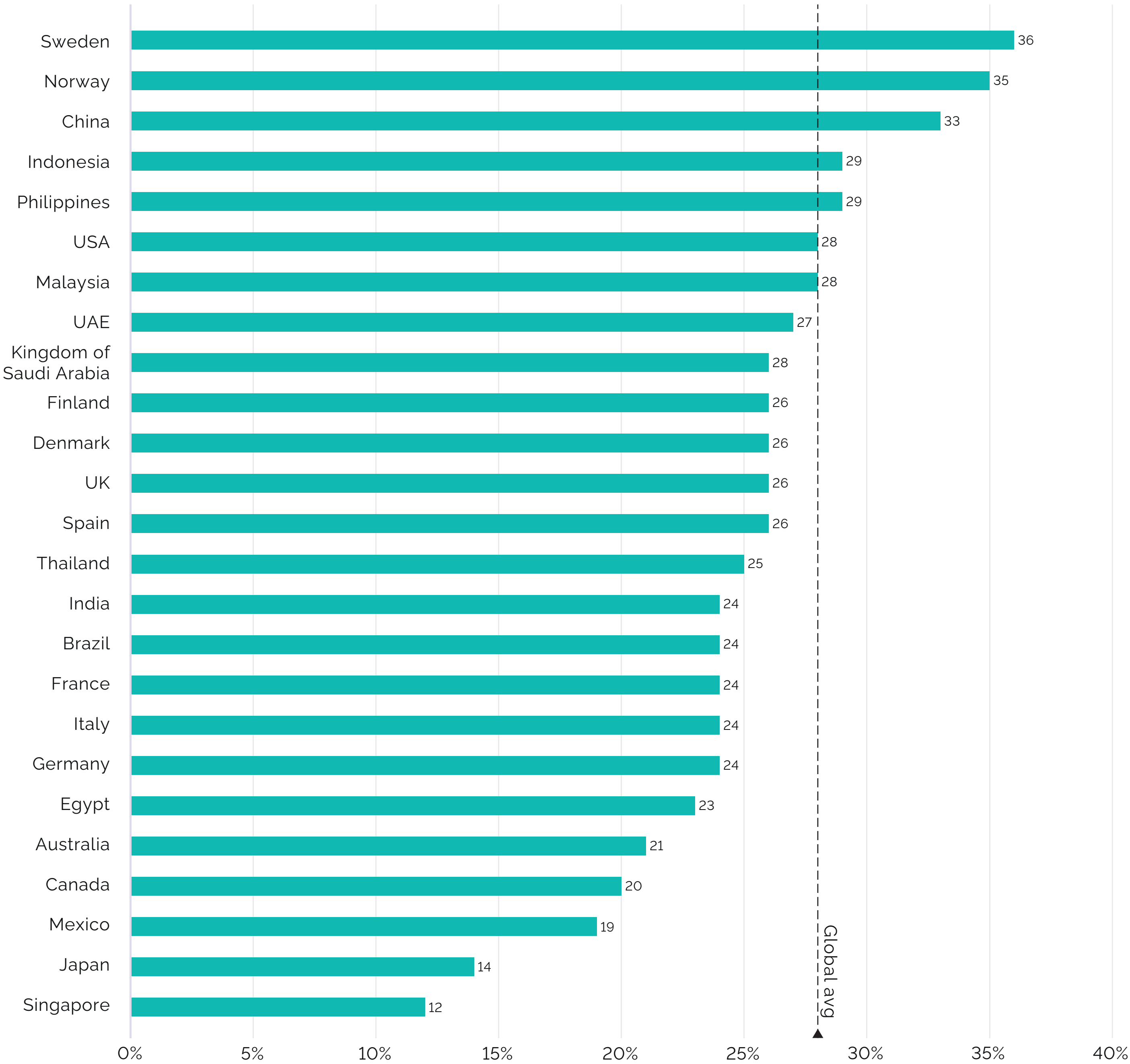
Generation distribution by segment - May 21 (% of respondents)



How many trips, if any, are you planning to take for leisure, business or personal reasons in the next 12 months?

The percentage of travelers identifying as On-The-Go varies by market. Globally, 28% of those planning to travel expect to do so three or more times in the next year. The Philippines, Indonesia, and China top the list with 32% of travelers expecting three or more trips. Some wealthy Scandinavian countries such as Norway, Sweden and Finland are above average – as is Saudi Arabia - while some European countries, as well as Canada, Japan, and Singapore, are on the lower end of the scale. That's not surprising given the higher perceived barriers to travel in these markets.

Percentage of On-The-Go travelers by market (% of respondents)



How many trips, if any, are you planning to take for leisure, business or personal reasons in the next 12 months?

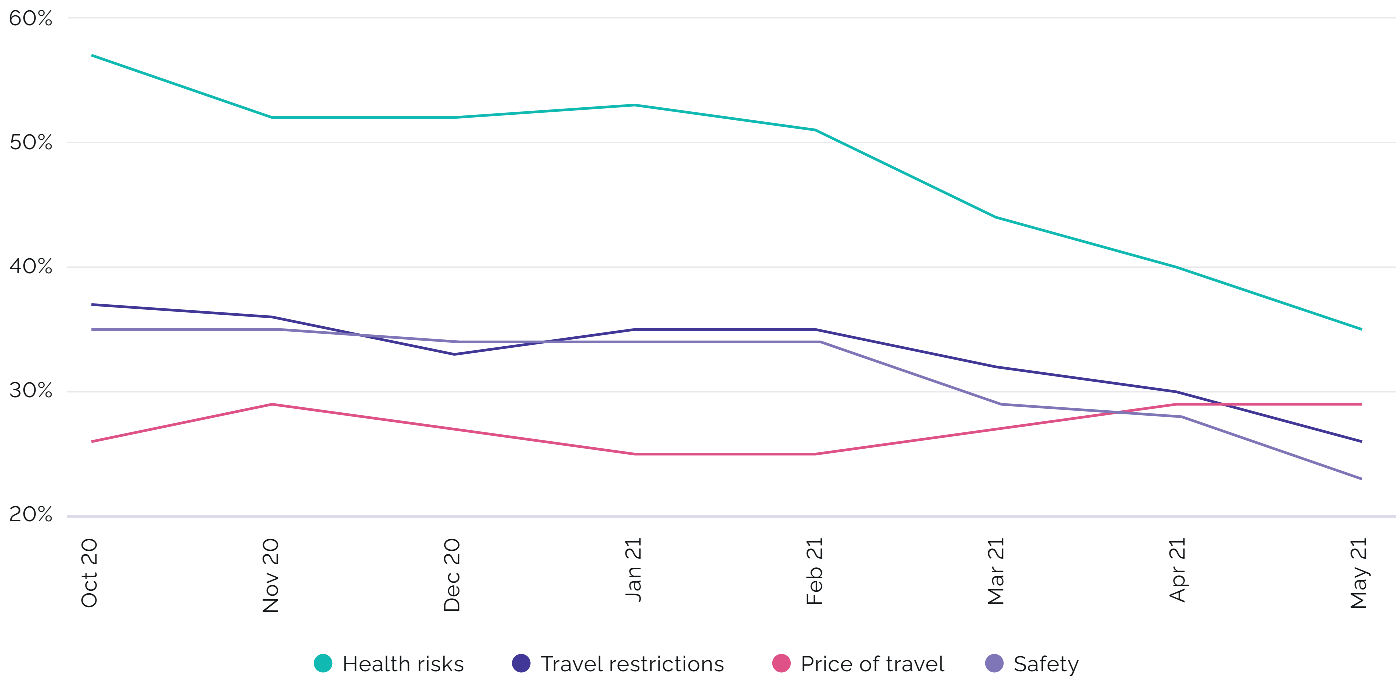
America focus

More than half of Americans intend to travel

In the US, the overall story is more positive compared to the global average. Domestic travel sentiment reached its highest point in nine months in May, jumping from 30% lows in December and January to 49%, meaning that almost half of Americans are eager to take a vacation at home. In May, an additional 8% of Americans were looking to take a business trip, adding to the local demand. There is good news for outbound travel as well. The number of people who plan to travel internationally, for both holidays and business, has been at its highest level in recent months, indicating that Americans are getting ready to make the most out of their summers.

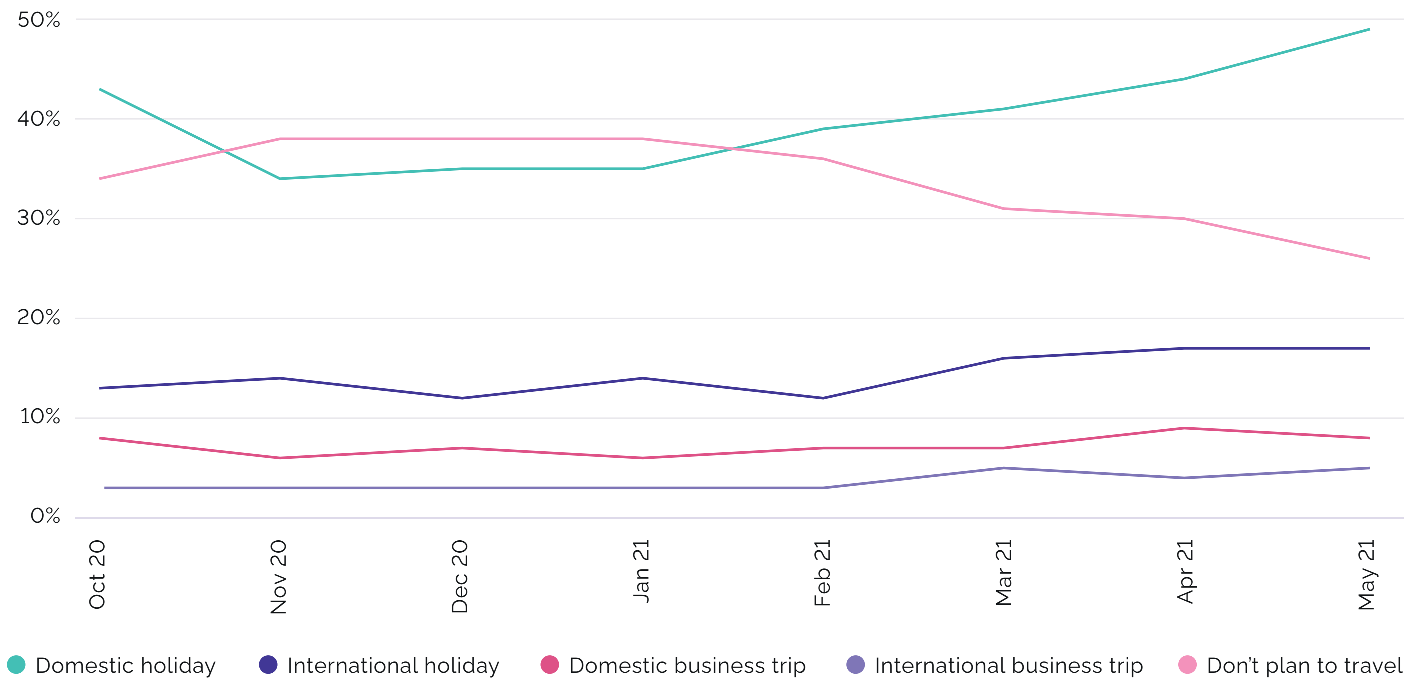
Americans are vastly less put off by travel restrictions than consumers in other regions, perhaps because their domestic restrictions have been less confining than those in Europe or APAC over the course of the pandemic. However, the price of travel is a concern to Americans with 28% identifying this as an obstacle to travel in May.

Barriers to travel - USA (% of respondents)



Which, if any, of the below factors are currently preventing you from traveling? Please select all that apply

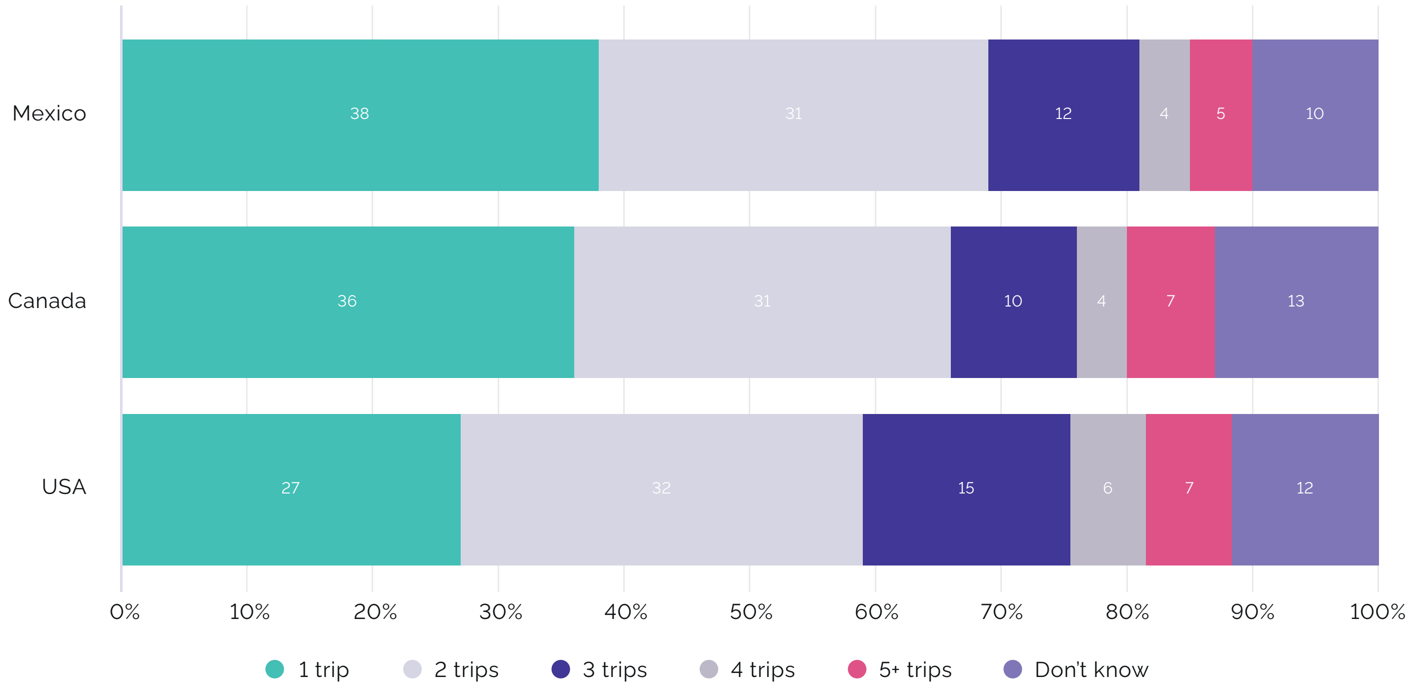
Plans to travel next 12 months - USA (% of respondents)



Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

The US leads the Americas region on the expected number of trips compared to its neighbors Canada and Mexico. Most Americans (59%) would fall into the Occasional traveler group, with around 28% of travel enthusiasts intending to make the most of reopened domestic and international destinations.

Planned # of trips next 12 months - May 21 (% of respondents)



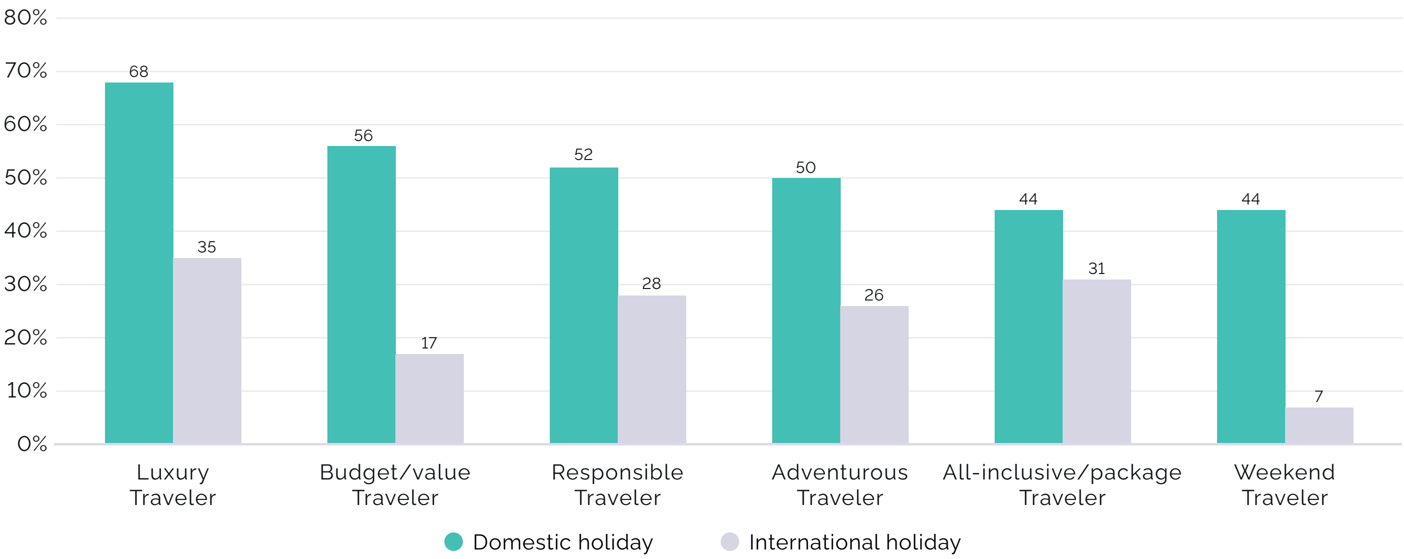
How many trips, if any, are you planning to take for leisure, business or personal reasons in the next 12 months?

Profile: The US Luxury International Traveler

To better understand various travelers, YouGov asks panelists to self-identify as one of the types that best matches their profile. Based on this we are able to track distinct groups of consumers, namely Luxury, Budget/Value, Responsible, Adventurous, All-inclusive/Package and Weekend Travelers to learn about their travel plans, preferences and concerns.

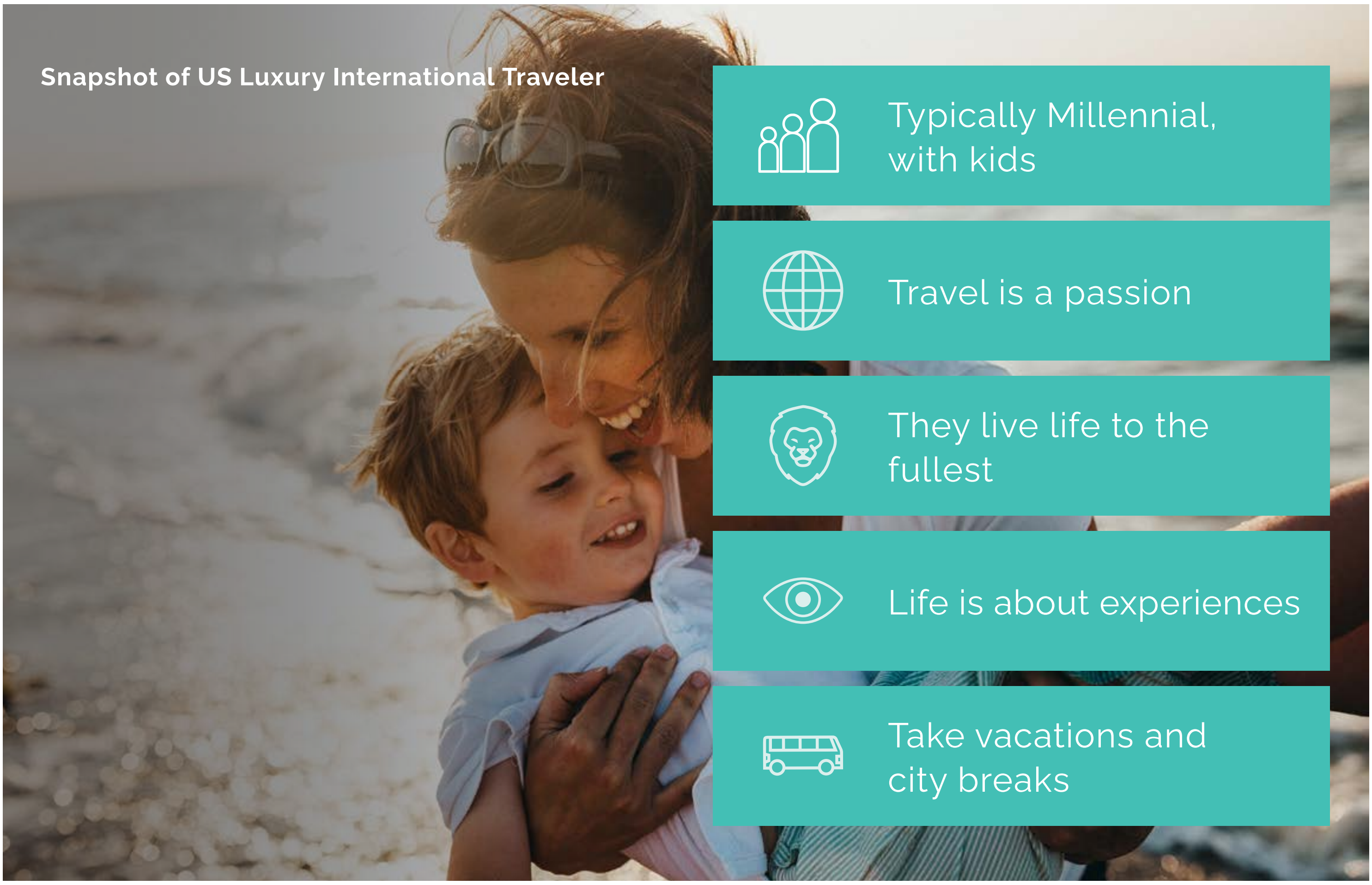
The US Luxury Traveler has the highest appetite for domestic and international leisure travel. Almost seven in ten luxury travel consumers in America plan to take a vacation at home and 35% intend to go abroad. This is higher than all other groups of travelers in the US, and national averages (40% for domestic holidays and 15% for international).

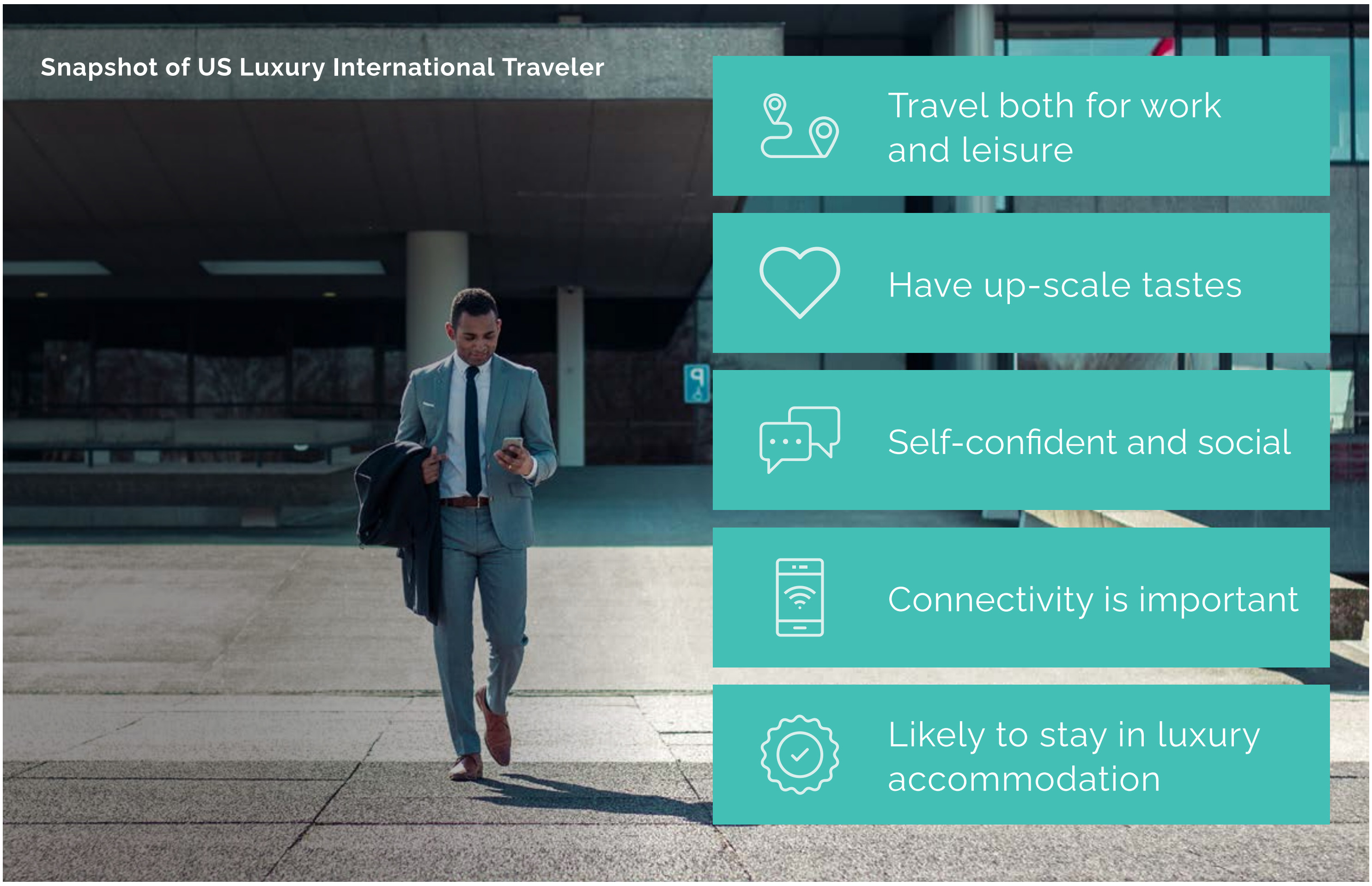
Intentions to travel in next 12 months by US traveler type (% of respondents)



Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

The US luxury international traveler is more likely to be a mid- to-high-earner, and far more likely to say they are planning to travel and looking to return to public places. COVID-19 restrictions may have impacted their lifestyle more than most, but they are more positive and eager than the general population to resume their 'normal' activities. They could be a key target market for travel companies in the aftermath of the pandemic.


Snapshot of US Luxury International Traveler
Typically Millennial, with kids
Travel is a passion
They live life to the fullest
Life is about experiences
Take vacations and city breaks

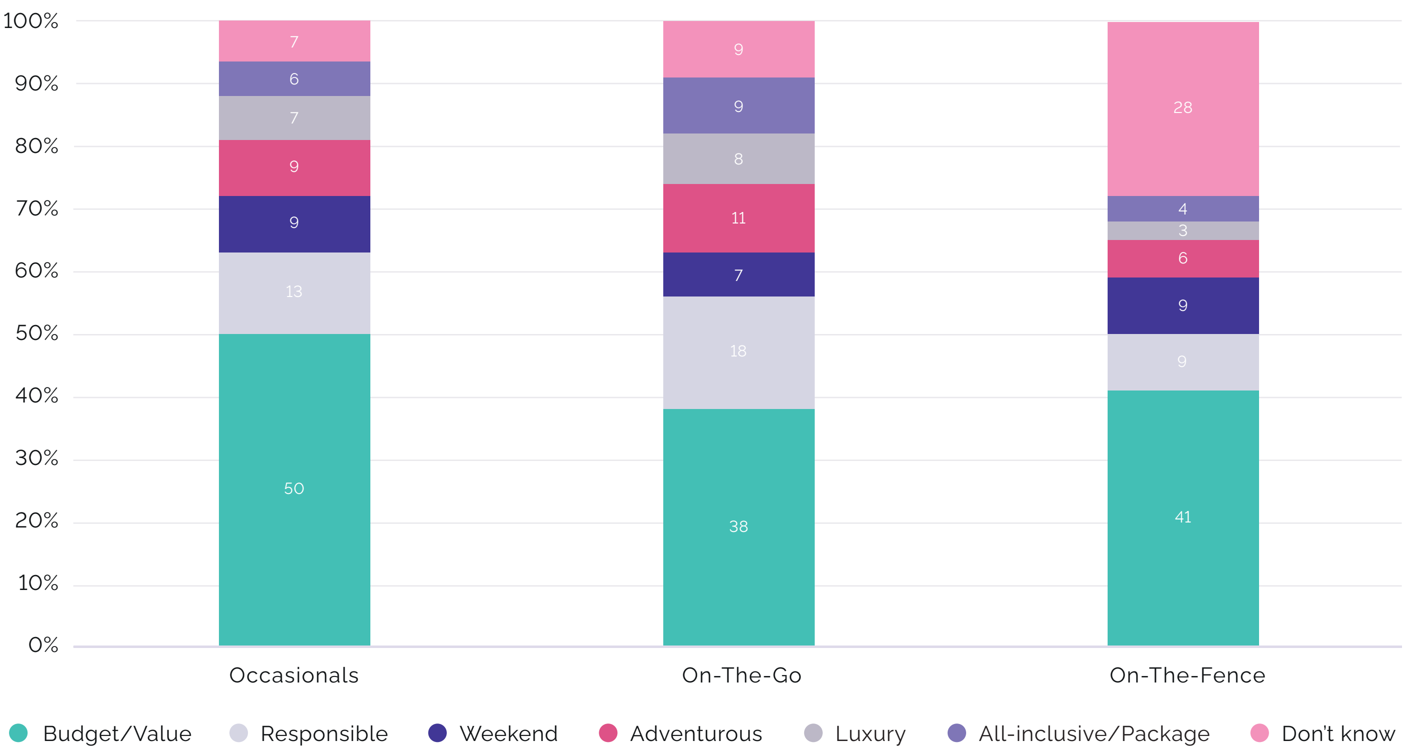

Snapshot of US Luxury International Traveler
Travel both for work and leisure
Have up-scale tastes
Self-confident and social
Connectivity is important
Likely to stay in luxury accommodation

THE RISE OF THE RESPONSIBLE TRAVELER

A Green New Deal, or Build Back Better, are political slogans used to inspire more responsible economies in a post-COVID-19 world. The travel industry is a very visual example of carbon emissions, with aircraft and cruise ships often used to depict coverage of the climate crisis despite high-profile initiatives from tourist groups . While the world may be some way off carbon neutral international travel, some airlines are moving to Sustainable Aviation Fuels (SAFs) and offsetting carbon, while cruise lines are looking to liquefied natural gas (LNG) to limit their impact.

The Budget/Value focused group is the largest segment of traveler type, but data shows that Responsible Travelers are second – and are of a higher proportion in the On-The-Go category, members of which are more likely to travel in the next 12 months as highlighted in the previous section.

% of traveler types by frequency segments - May 21 (% of respondents)



Which of the following, if any, BEST describes the type of traveler you are?

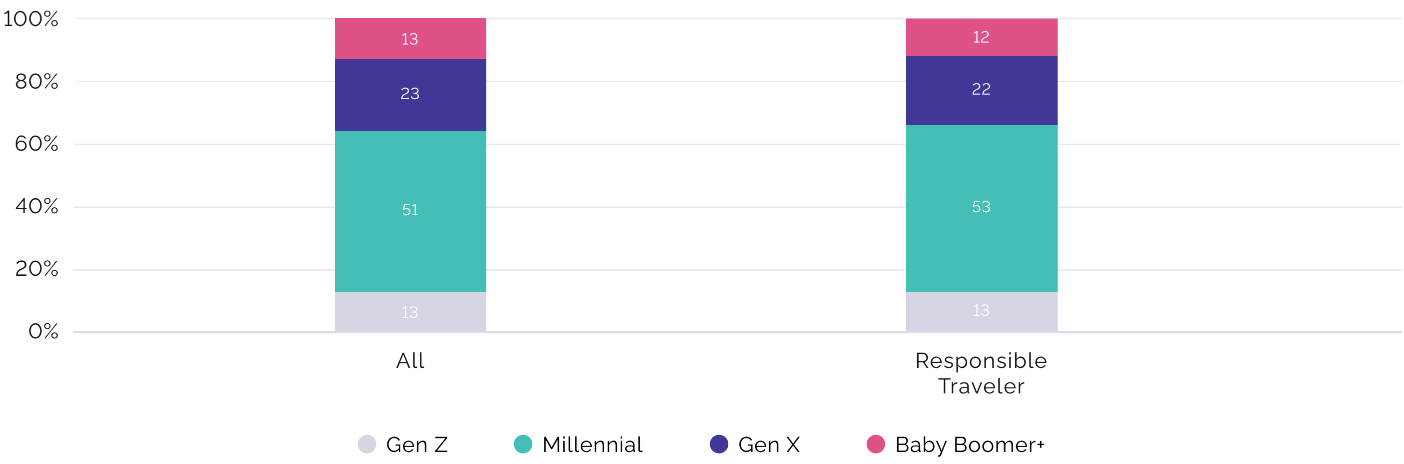
This emphasises a rise in environmental consciousness and an appetite for travelers to do more to offset their impact on the environment, nature, and communities. Responsible travel takes in not just how a traveler gets somewhere, but how they act and where they spend their money once they've arrived. The UNWTO, for example, encourages tourism organisations to respect the socio-cultural authenticity of host communities and conserve their heritage and values.

Another focus of responsible tourism is sustainable growth, consumption, and use of resources such as the ocean, which all feature in a recent handbook developed by the European Tourism Commission which offers a seven-step framework for destinations to act sustainably. A recent example of such an initiative is Spain's Balearic Islands, which have secured €16 million of EU funding to develop a circular economy for the waste created by its tourism industry.

Some travel companies have been working on their own private efforts towards sustainability. Hotels and resorts are supporting local ecosystems and boosting local economies, identifying how excursions fund small local businesses, and promoting strong wage policies for workers in destinations in the developing world. This will resonate with Responsible Travelers, who tend to have strong views about environmental policies and the social corporate responsibility efforts of their favorite brands.

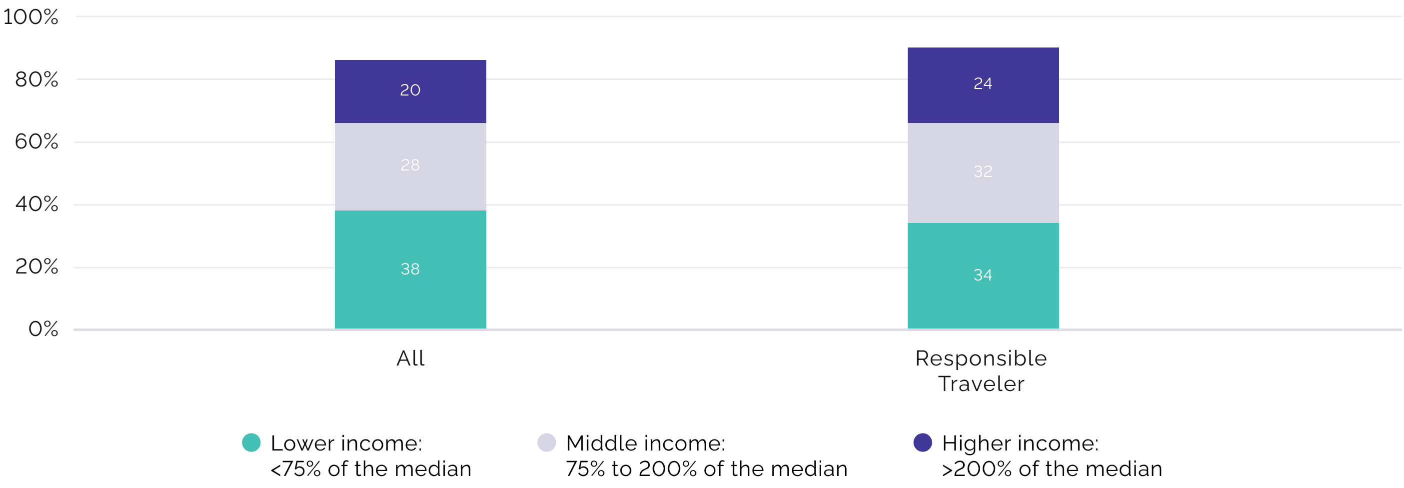
The research makes clear that the demographics most focused on responsible travel are Millennials and Gen X – who typically have more disposable income than Gen Z. Breaking the data down by income also reveals the point that Responsible Travelers have more to spend, with a larger proportion of higher and middle-income earners identifying as part of this group.

Generation distribution - all travelers vs. Responsible Travelers - May 21 (% of respondents)



Which of the following, if any, BEST describes the type of traveler you are?

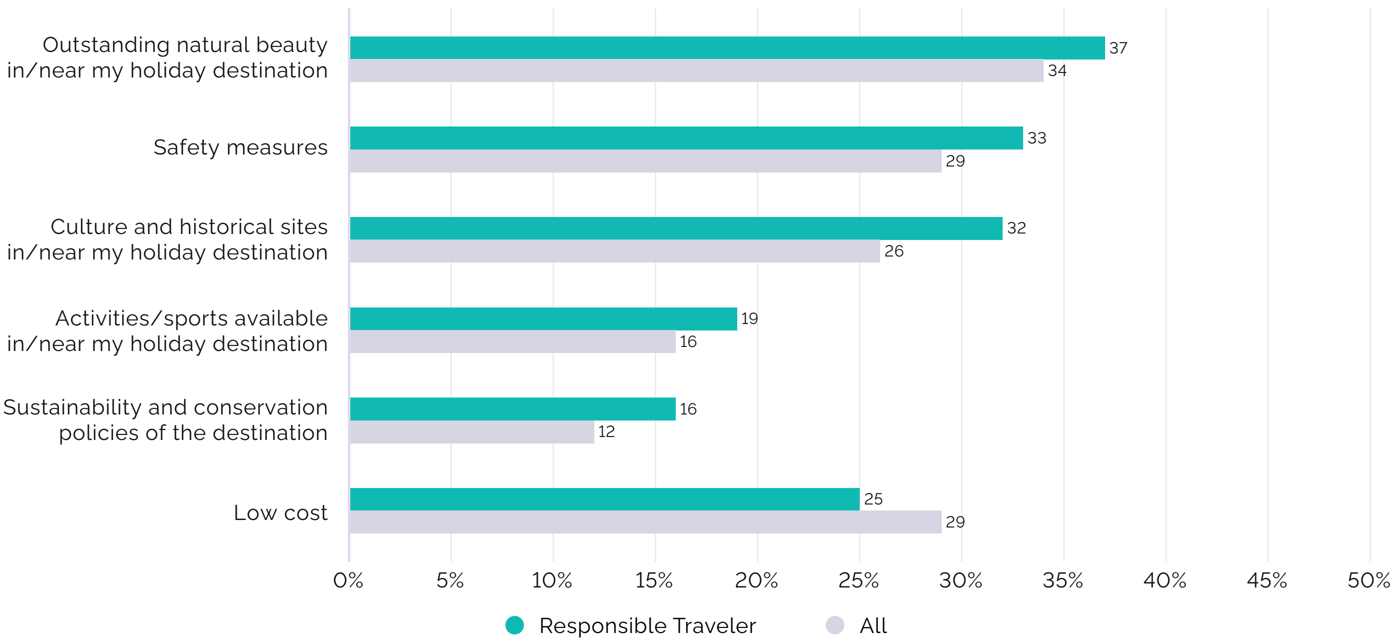
Income distribution - all travelers vs. Responsible Travelers - May 21 (% of respondents)



Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply

When thinking about how to market to this segment, data shows that Responsible Travelers are influenced more by certain factors than the average global traveler, including cultural and historical sites (+6 points vs. all travelers), sustainability and conservation policies (+5), outstanding natural beauty (+3), and safety measures (+3).

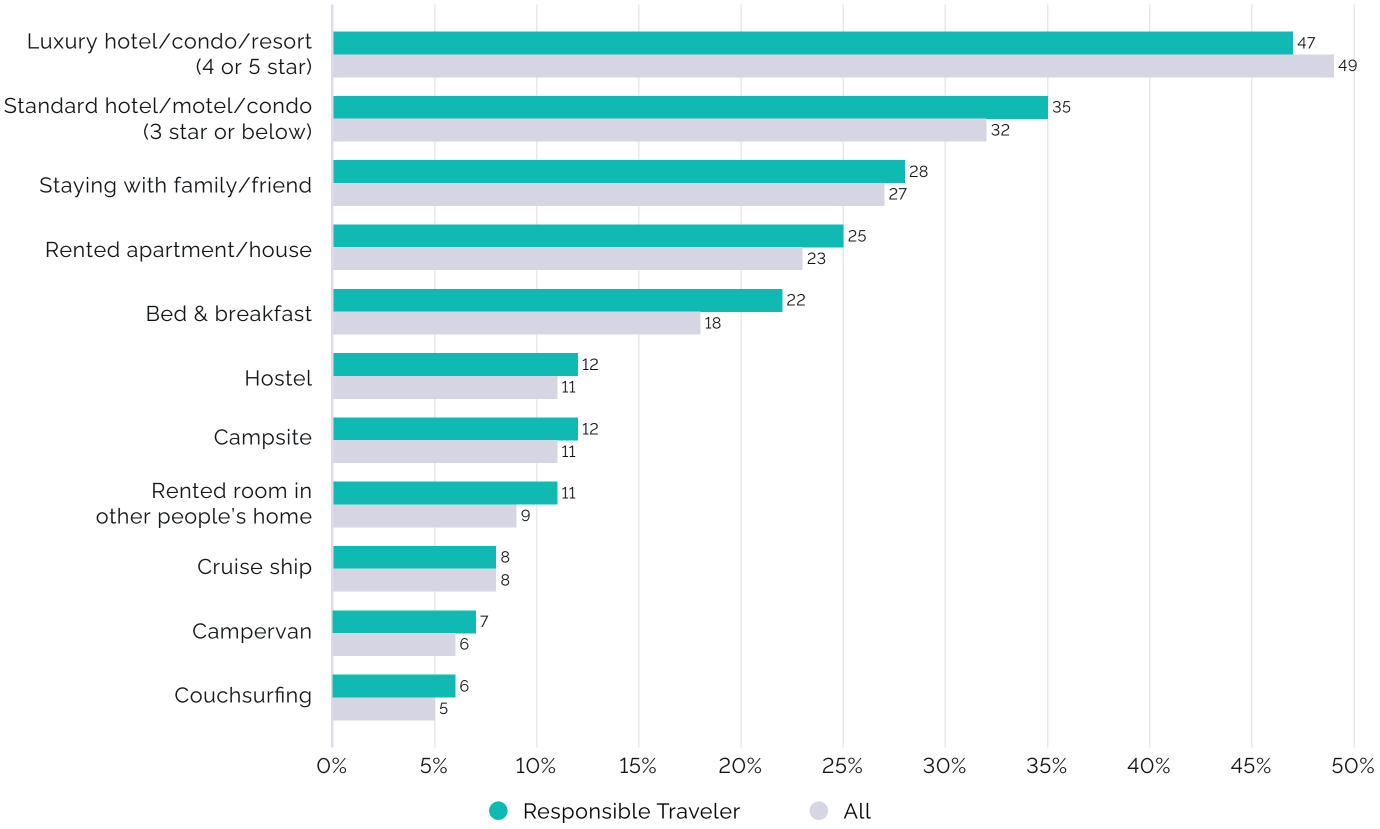
Factors impacting travel choices - all travelers vs. Responsible Travelers (% of global respondents)



Thinking of your most recent holiday, which if any, of the following influenced your choice of holiday/holiday destination? Please choose all that apply

Travel companies have an opportunity to meet the needs of Responsible Travelers by ensuring accommodation is as sustainable as possible. While the data shows that this segment are happy to stay in standard accommodation on the whole, they are more interested in staying in other types of accommodation than travelers across all segments.

Type of accommodations used - all travelers vs. Responsible Travelers (% of responents)



Which, if any, of the following types of accommodation do you typically stay in when you are on holiday? Please select all that apply

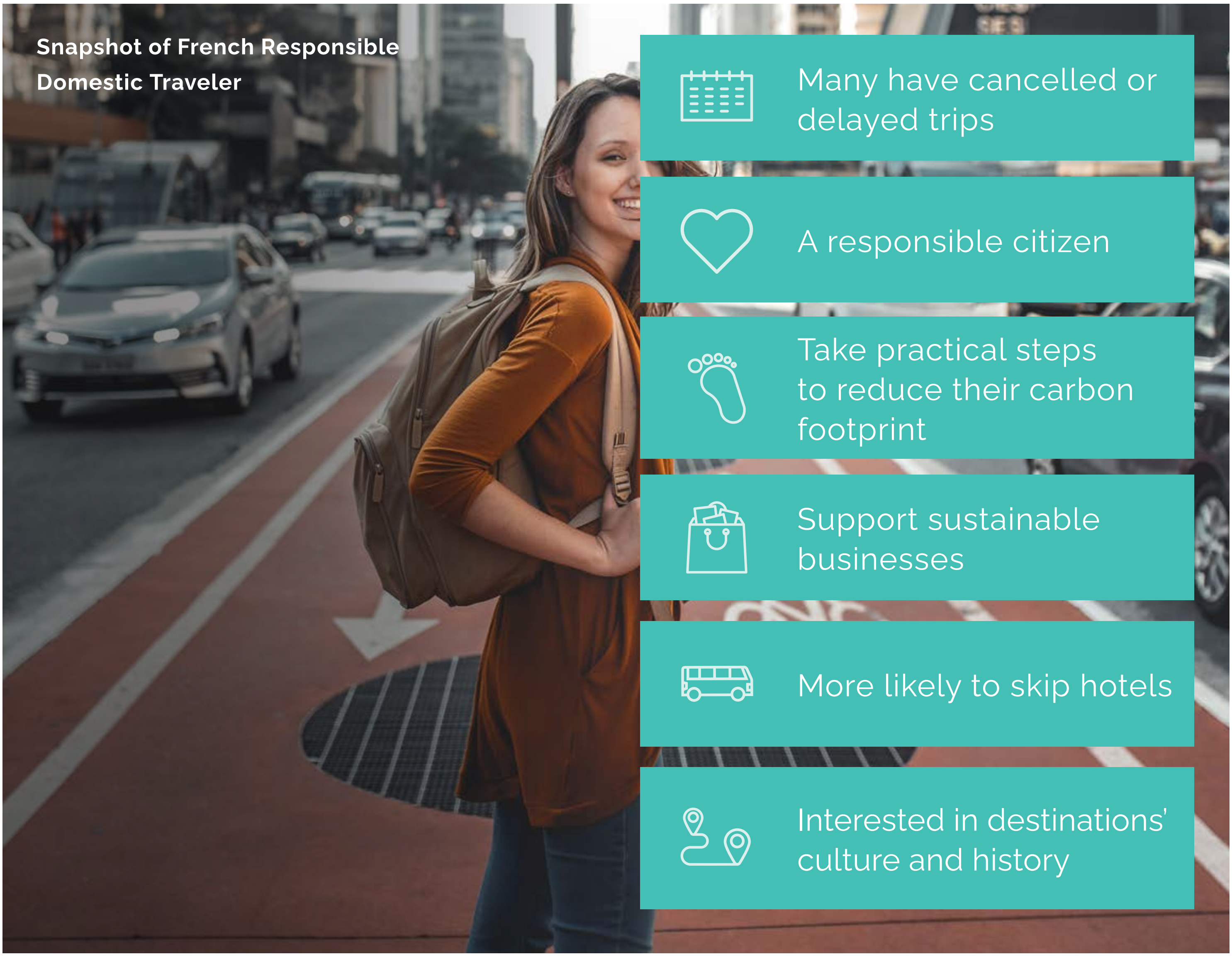
As the industry recovers from the crisis, research shows the resumption of travel can be a prime opportunity to do things differently, with a greater focus on responsible travel and sustainability. Our data tells us that the growing number of people who identify as Responsible Travelers are also more likely to think there will be permanent changes to life as a result of COVID-19. This shows there is scope for change and that by tapping into the opportunities to sell to thought-leaders in the Responsible Traveler segment, firms could help create the new, more responsible and sustainable, normal by capitalising on the malleability of the market as travel returns.

Profile: The French Domestic Responsible Traveler

The French Domestic Responsible Traveler believes in fairness and ethics, has strong convictions and those beliefs extend to their consumer habits. Generally secure and satisfied with their lives and finances, they are not frivolous or flashy spenders, but value quality and premium goods and services, so will gladly spend on something that is of importance to them. Their interest in culture, history and art means they will still be keen to travel but want to do so in a way that causes as little impact on the planet as possible.

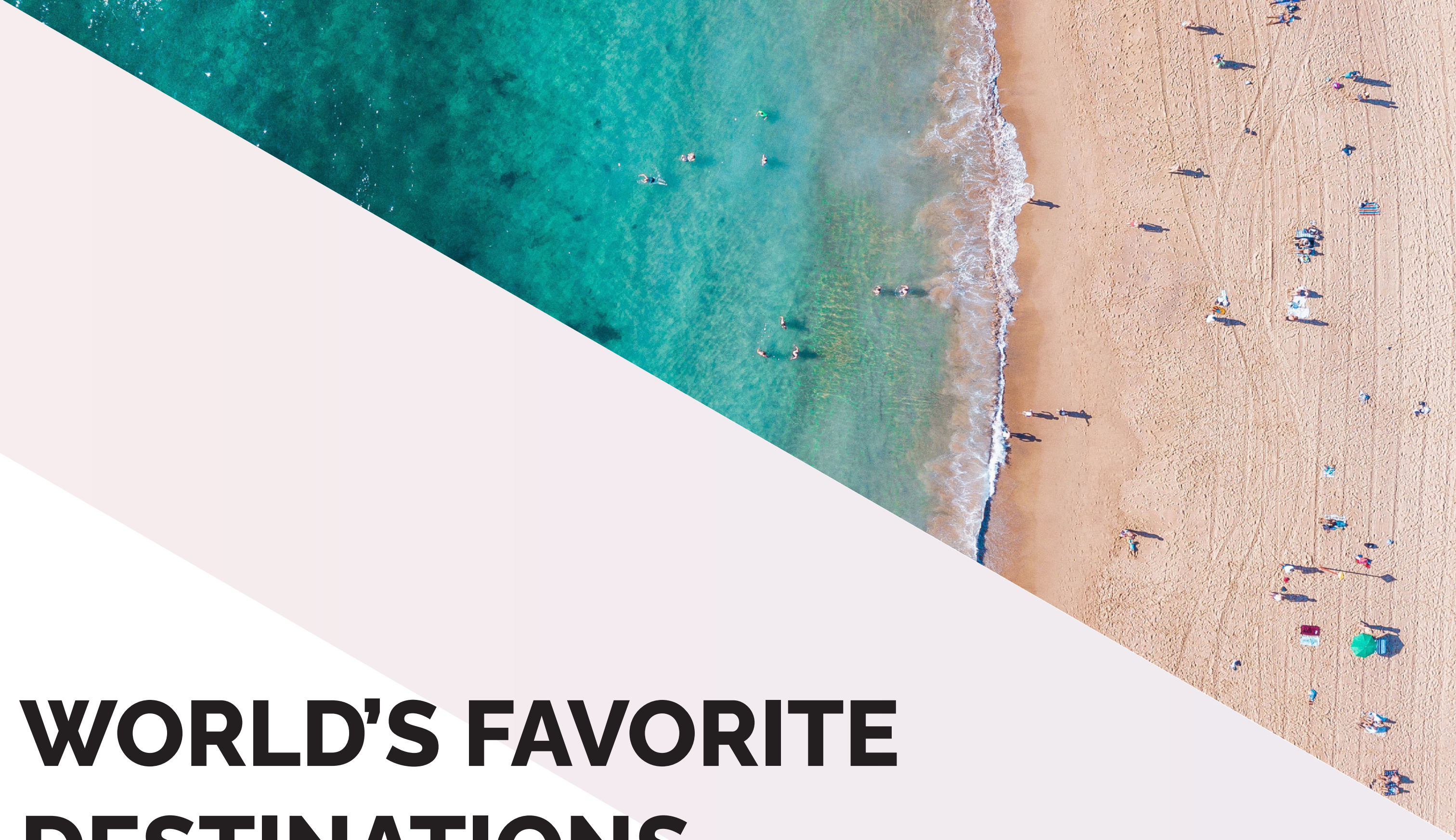
Snapshot of French Responsible Domestic Traveler

- Care deeply about sustainability
- Research and plan trips in advance
- More likely to support charities
- Twice as likely to travel



Snapshot of French Responsible Domestic Traveler

- Many have cancelled or delayed trips
- A responsible citizen
- Take practical steps to reduce their carbon footprint
- Support sustainable businesses
- More likely to skip hotels
- Interested in destinations' culture and history



WORLD'S FAVORITE DESTINATIONS POST-PANDEMIC

Familiarity is key for the gradual return of international travel

Last autumn, we published a report titled Where the world wants to go on its holidays. As a shorter update to that, we looked at new data on popular international destinations in May. Destination scores represent the percentage of the May average of the total sample asked about where they are most likely to visit when they are next to plan a vacation.

Consumers in the Middle East (the UAE and Saudi Arabia) have their sights on local or regional destinations when considering the next trip. The Maldives feature prominently at the helm of the international destinations list in all three countries. One in five consumers said they'd be looking to travel to Canada, Switzerland, and the UK for their next vacation by air. With most APAC markets still closed to international travel, destinations in that continent see lower consideration scores. Around 16% in the UAE would be keen to travel to Japan, and 15% would opt-in for Singapore, Thailand, the Philippines and Malaysia. Saudi consumers favor Morocco, and Indonesia followed by various destinations in Europe.

Travelers from the Nordics are planning trips in the Scandi region and to Germany. However, those seeking a respite in sunny locales will be heading to Southern European beach destinations such as Spain, Greece, Italy and Portugal. All feature highly in the top ten destinations to visit amongst Finns, Norwegians, Danes and Swedes.

Brits appear not to have given up hope to see Spain, Italy, Greece, or Portugal on the 'green list' of countries soon. Many are eager to travel there without the need to quarantine on return. YouGov's omnibus survey in May captured the UK's attitude that 76% are not interested in going to the current 'green' destinations. In contrast, Spain continued to trend as the number one favorite international destination nine months in a row. Over 20% of UK consumers are also keen to hop onto a transatlantic flight to the US or Canada, and over 13% are eager to head to Australia and Japan.

Americans will be looking for mild and warm climates, whilst natural beauty of destinations and having friends or family nearby are highly important too. Over 27% of Americans like to go back to places they've been to and liked, whilst one in five will prefer to go somewhere where it's not crowded, and safety measures on cleanliness and overcrowding are in place. In May, over 20% of Americans said they were keen to visit Great Britain and other European destinations, namely Italy (19%), France (16%), Spain (15%), and Sweden (15%). Italy's situation at the start of the pandemic generated very high levels of negative Buzz for the European country among Americans looking to travel, but the positive sentiment has surpassed the negative, and Italy has been enjoying relatively stable positive noise which will surely help ahead of the summer when Europe welcomes back vaccinated American travelers.

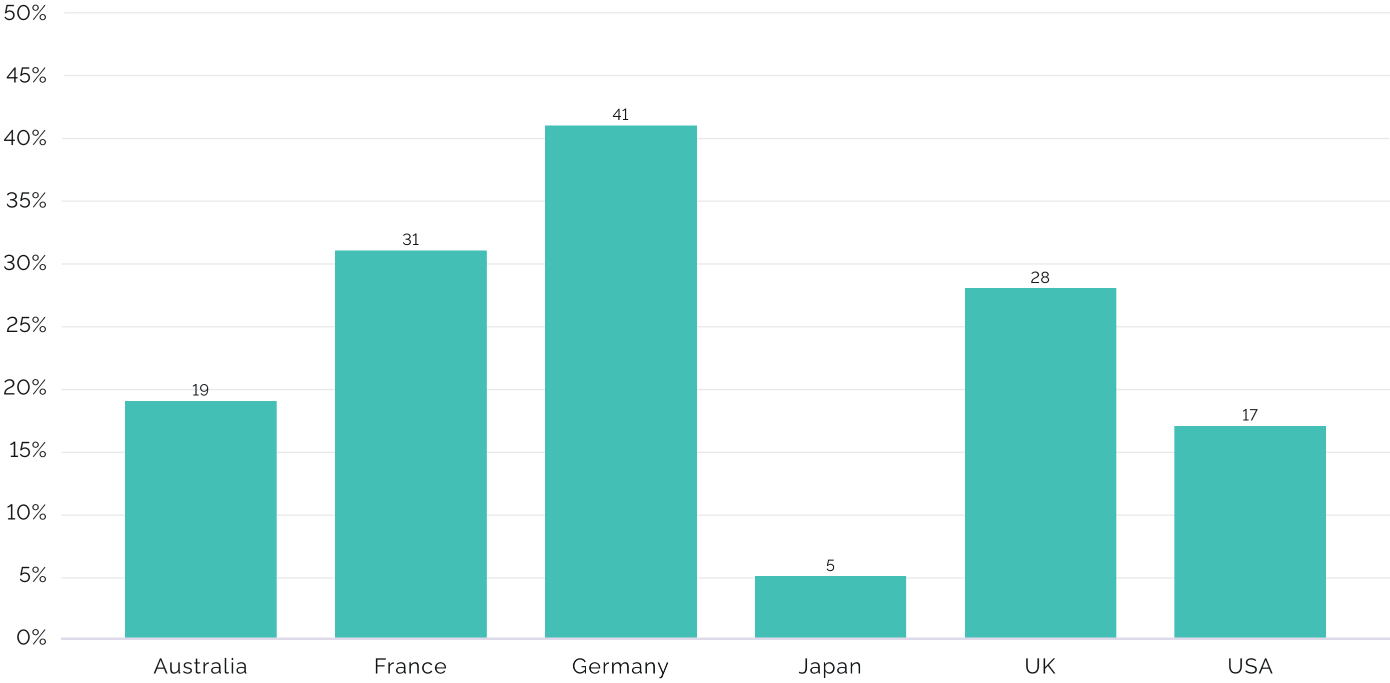
The highest consideration scores for neighboring Canada were in late autumn 2020, when over a third of Americans were planning a vacation there. Still, the sentiment has gradually declined, with a new low of 19% in mid-May. Mexico saw a somewhat opposite trendline with consideration scores increasing towards December and again in March (16%) but declining in April back to levels where it was last August, hovering around 12%.

In Germany, the top 15 destinations considered for the next vacation are all in Europe. In May, Austria was the first international destination considered (27%), followed by Italy (26%), Spain (25%), Greece (23%), and the Netherlands (20%). Just over 11% of Germans would prioritise the long-haul markets like the US, Canada and New Zealand. Interestingly, Turkey, a trendy destination amongst Germans, appears to be in direct competition with the Maldives, both at 8%.

Although close in geographical proximity to Germany, France has a very different outlook on international destinations, with only a few commonalities. Aside from the popular summer destinations of Spain, Greece, Portugal, and Italy, French consumers are keen to travel to Canada, various Caribbean islands, and the Nordics. Interestingly, the United States is considered above the neighboring United Kingdom (13% vs 10%). The sentiment towards traveling to the States has yo-yoed since last summer, peaking in December at 20%, then again in February (17%), and mid-April (18%) but still remains considerably high.

Although Australians are not able to travel abroad, many are gearing up to travel the world as soon as they can. Around 20% of consumers down under set sights on Japan, and just slightly less do so on Canada and the UK.

Planning international holiday travel in next 12 months (% of respondents)



Which, if any, of the following trips are you planning to take in the next 12 months? Please select all that apply
Which destination are you considering to travel to in the next 12 months?

Highest ranking destinations considered by country's travelers - May 21 (% of respondents)

Australia		France		Germany		Japan		UK		USA	
New Zealand	37	Spain	29	Austria	27	Taiwan	14	Spain	36	Canada	23
Tasmania	29	Greece	28	Italy	26	Italy	11	Italy	31	State of Hawaii	21
Japan	20	Portugal	28	Spain	25	Australia	11	Greece	30	UK	20
Canada	17	Italy	26	Greece	23	State of Hawaii	10	Portugal	29	Italy	19
United Kingdom	17	Canada	21	Netherlands	20	Spain	8	France	24	Australia	18
Singapore	16	Ireland	19	France	19	Canada	7	Ireland	20	Paris (France)	16
Italy	15	Croatia	17	Croatia	17	South Korea	7	USA	20	Iceland	16
New York (USA)	15	Guadeloupe	16	Norway	17	Paris (France)	7	Germany	18	Barcelona (Spain)	15
Maldives	13	Martinique	15	Portugal	16	Germany	7	Canada	17	Sweden	15
Paris (France)	12	Norway	15	Denmark	16	Guam (US territory)	7	Iceland	17	Vancouver (Canada)	14

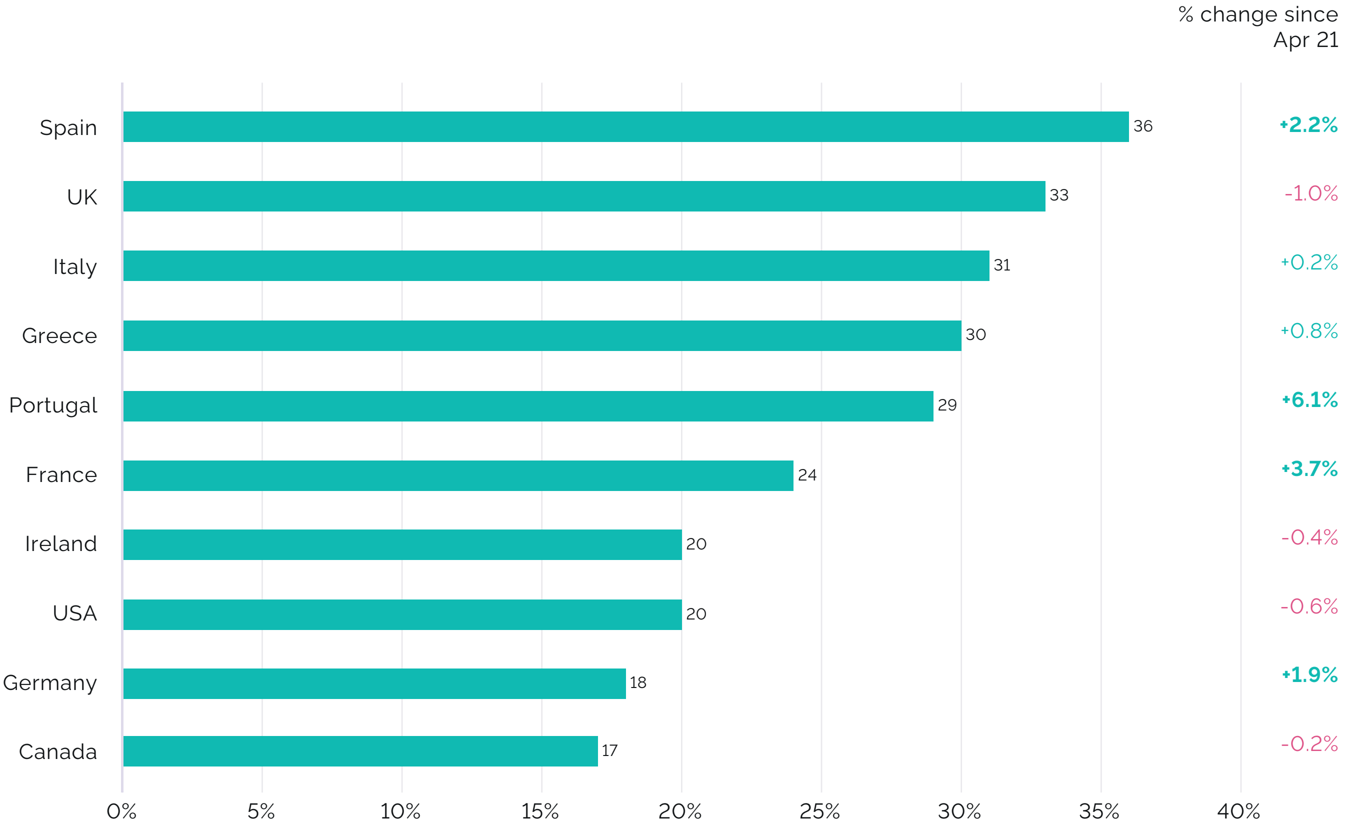
Short haul (3 hrs) Medium haul (3–6 hrs) Long haul (6+ hrs)

Thinking about your next vacation by air alone or with friends, family, a partner or a spouse, which of the following destinations would you consider?

As travel attitudes and restrictions shift rapidly, so to do travelers' interest in particular destinations. The changes we see in travelers' consideration of different destinations appears linked to both seasonal relevancy of the destination, as well as the restrictions that are currently in place to travel to or from the locale. Looking at destination interest in the US and the UK, travelers similarly are showing more interest in international holiday destinations, albeit to different markets.

In the UK we see the greatest jump in travel consideration for some of the UK's most beloved summer destinations, Portugal (+6 pts), France (+4), Spain (+2), and Germany (+2). In fact, Spain overtook domestic travel in the UK as the number one travel destination in May. This up-tick in interest is occurring while all these nations still find themselves on the UK's 'amber' list, meaning the UK government is advising against travel to these countries, (although it is no longer illegal to do so). Expect excitement for these destinations to continue to rise, especially if any of them move to 'green' status, where UK travelers can holiday freely.

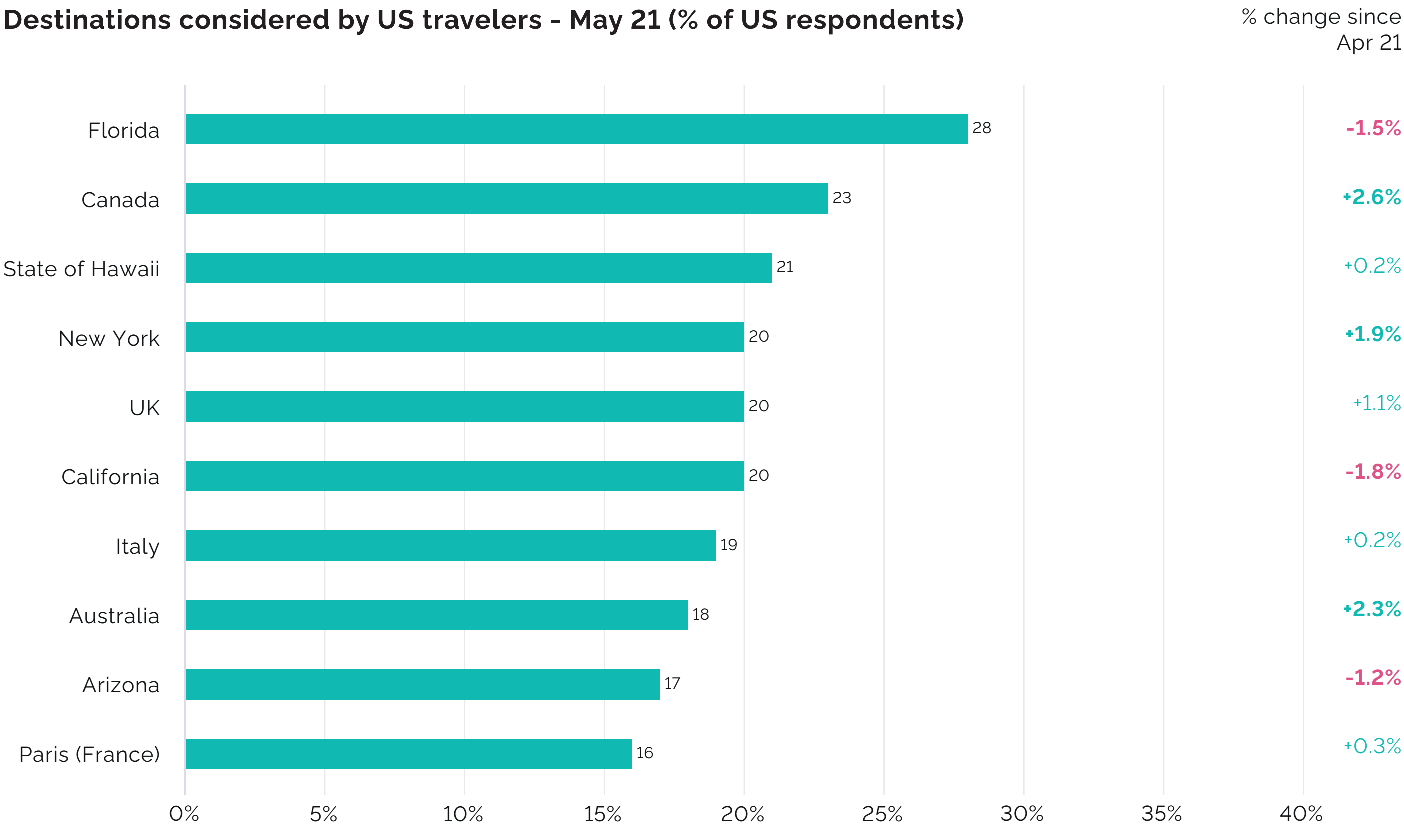
Destinations considered by UK travelers - May 21 (% of UK respondents)



Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

Meanwhile in the United States, while overall destination consideration levels are lower, we recorded similar increases in travel interest in international destinations in the month of May. Notable gainers include Canada (+3 pts), Australia (+2) and the United Kingdom. These upticks occurred while interest in warm weather domestic locations, such as Florida (-2), California (-2), and Arizona (-1), all dipped. Canada will be one market to keep an eye on, as interest is rising in this popular summertime travel destination, while heavy border restrictions and quarantining policies are still in place.

Destinations considered by US travelers - May 21 (% of US respondents)



Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

Top 10 international destinations - May 21 (% of respondents)

UAE		Australia		Denmark		Sweden		Norway	
Maldives	24	New Zealand	37	Italy	32	Spain	30	Spain	34
Canada	19	Japan	20	Spain	28	Italy	23	Denmark	31
Switzerland	19	Canada	17	Germany	27	Greece	22	Sweden	29
United Kingdom (UK)	16	United Kingdom (UK)	17	Greece	26	Denmark	19	Greece	28
Japan	16	Singapore	16	Sweden	22	United Kingdom (UK)	17	Italy	27
United States of America (USA)	15	Italy	15	France	22	Germany	16	Germany	19
Singapore	15	Maldives	13	Norway	18	Norway	16	United Kingdom (UK)	18
Thailand	15	Thailand	12	United Kingdom (UK)	18	Portugal	15	France	17
Philippines	15	Vietnam	12	Portugal	15	United States of America (USA)	14	Iceland	14
Italy	12	Germany	12	Iceland	14	Iceland	14	Netherlands	12

Finland		UK		USA		Germany		France	
Spain	29	Spain	36	Canada	23	Austria	27	Spain	29
Greece	26	Italy	31	United Kingdom	20	Italy	26	Greece	28
Italy	24	Greece	30	Italy	19	Spain	25	Portugal	28
Sweden	22	Portugal	29	Australia	18	Greece	23	Italy	26
Germany	22	France	24	France	16	Netherlands	20	Canada	21
Portugal	22	Ireland	20	Iceland	16	France	19	Ireland	19
Norway	21	United States of America (USA)	20	Spain	15	Croatia	17	Croatia	17
Denmark	18	Germany	18	Sweden	15	Norway	17	Guadeloupe	16
Iceland	18	Canada	17	Germany	14	Portugal	16	Martinique	15
France	17	Iceland	17	Puerto Rico	13	Denmark	16	Norway	15

KEY TAKEAWAYS

The data for this report was gathered amid a landscape of ever-changing rules and restrictions, from lockdowns and travel bans to governments across the world thrashing out certifications and protocols as they map the safe but gradual return of travel. But look closely and you can see some interesting macro trends emerging. Our key findings include:

The resumption of travel will start at home

Vaccination programmes may be in full swing in much of the developed world, but until inoculation against COVID-19 is universal, international travel is likely to be restrained. The first vital steps to a resumption of travel will start close to home as a majority of consumers are planning on taking vacations within their own countries in the short term. A strong return of the domestic sector could provide the springboard to a rebuilding of international travel and give companies opportunities to tap into local markets in the meantime.

Travel sentiment will be affected by government restrictions

Respondents from countries which have had the highest levels of restrictions in place report some of the biggest barriers to travel. It will be up to governments to put the structures in place to allow a travel industry devastated by the pandemic to bounce back. Initiatives such as the standardisation of vaccination certification and testing protocols can only remove friction. Once restrictions are gradually removed, international travel demand will come back and, with it, many benefits of the travel and tourism industry.

Leisure travel will bounce back quicker than business

Video conferencing is here to stay, but there are also many instances where it's essential for a meeting to be conducted in person. As the global economy continues to grapple with its version of long-COVID-19, online will be the safety net and the reason given by those who are more cautious about traveling not to get back on an aircraft.

This may lead to a change in tack from holiday companies who might be wise to target higher-income travelers with disposable funds, gathered by spending more than a year locked down, with first class tickets and luxury accommodation to fill the short-term corporate void.

Millennials and Gen X have the confidence and the means

The youngest generation, Gen Z, has been the hardest hit economically but while they have less concern over health risks, a lack of disposable income is holding them back in terms of their ability to travel freely. The oldest generation is on the other side of the coin – with savings due to having spent less in the last year bu more concerns around travel.

Somewhere in the middle is the audience travel companies are looking for. Millennials and Gen X on average have the combination of a confidence to travel, lack of immediate health risks and the finances to fund what could be multiple trips in the coming months and years.

Opportunities to restart travel responsibly can be lucrative

While we see a light at the end of the tunnel in terms of the COVID-19 crisis, people are increasingly aware of the climate crisis on the horizon. But, travel is inherently a force for good; a means by which to share ideas, cultures, and spread the wealth of the world. People have had the time to become more attuned to their individual impact on the planet and appear more likely to want to change their behaviours and challenge others to do the same. This does not mean turning their backs on travel, but continuing to visit destinations, perhaps in a way that is more impactful to local communities and less damaging to nature than before. The data shows that the sentiment for responsible travel is rising, and especially so among people with the financial clout to make a difference and drive change within companies.

METHODOLOGY

For this study we connected research from our syndicated solutions YouGov DestinationIndex and YouGov Global Travel Profiles whilst also leveraging a small amount of custom research.

Global Travel Profiles tracks global consumer demand, attitudes about travel, brands and destinations, daily in 25 countries. It helps identify who is ready to travel when, where they are looking to go and what kind of travel they are planning. At the time of report writing we had collected a sample of 184,254 survey responses across all tracked markets.

YouGov DestinationIndex is an always-on destination brand tracker, which collects data about people's perceptions of the world's most popular hotspots daily, across 16 different measures. We currently track 130+ tourist destinations across 25 markets and growing. Providing you with key data and analytics, YouGov DestinationIndex allows you to inform your strategy, ultimately giving you the power to influence travelers' perception of your destination in real time, and benchmark your success against your goals, your competitors and your entire market. The survey collects 100+ daily responses in each market, totaling over 32,000 responses per market per year.

The data from YouGov Global Travel Profiles used in this study is based on the interviews of 184,254 adults aged 18 and over across 25 countries. All interviews were conducted online between October 22nd 2020 and 31st May 2021 and the results are nationally representative. The countries in the poll include Australia, France, Germany, India, the UK, the US, China, Sweden, Indonesia, Canada, Spain, United Arab Emirates, Denmark, Italy, Singapore, Thailand, Japan, Malaysia, Norway, Kingdom of Saudi Arabia, Finland, Brazil, Egypt, Mexico, and the Philippines.

The data from YouGov DestinationIndex is based on the interviews of 25,019 adults in April and 26,201 adults in May, aged 18 and over across the same 25 markets. Interviews were carried out online on a daily basis from April 1st 2021 until 31st May 2021 and results have been weighted to be nationally representative.

Data on 'Barriers to international travel in the UK' perceptions are based on the interviews of 1,200 UK adults aged 18 and over. All interviews were conducted online through custom research on the 10th of May and results have been weighted to be nationally representative.

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ABOUT YOUGOV

YouGov is an international research data and analytics group headquartered in London. Our data-led offering supports and improves a wide spectrum of marketing activities for our customer base that includes media owners, brands and media agencies. We work with some of the world's most recognised brands.

Our line of products and services include YouGov BrandIndex, YouGov Profiles, YouGov RealTime, YouGov Custom Research, YouGov Crunch and YouGov Direct.

With 15 million panellists in more than 55 countries, YouGov's market research covers in GB, the Americas, Mainland Europe, the Middle East, and Asia-Pacific. Our panellists come from all ages, socio-economic groups, and other demographic types – allowing us to create representative samples of whole populations and different sections of society.

For more information, visit **yougov.com/business**