

Travel Plans 2021 – March update

Research carried out on the Insiders panel

- *Conducted over 9th – 12th March 2021 | 1,976 Insiders panel responses*
- *Results split out where possible by Insiders panel sub-groups*
- *(xx) denotes differences versus wave 1, which was carried out in Oct/Nov 2020*

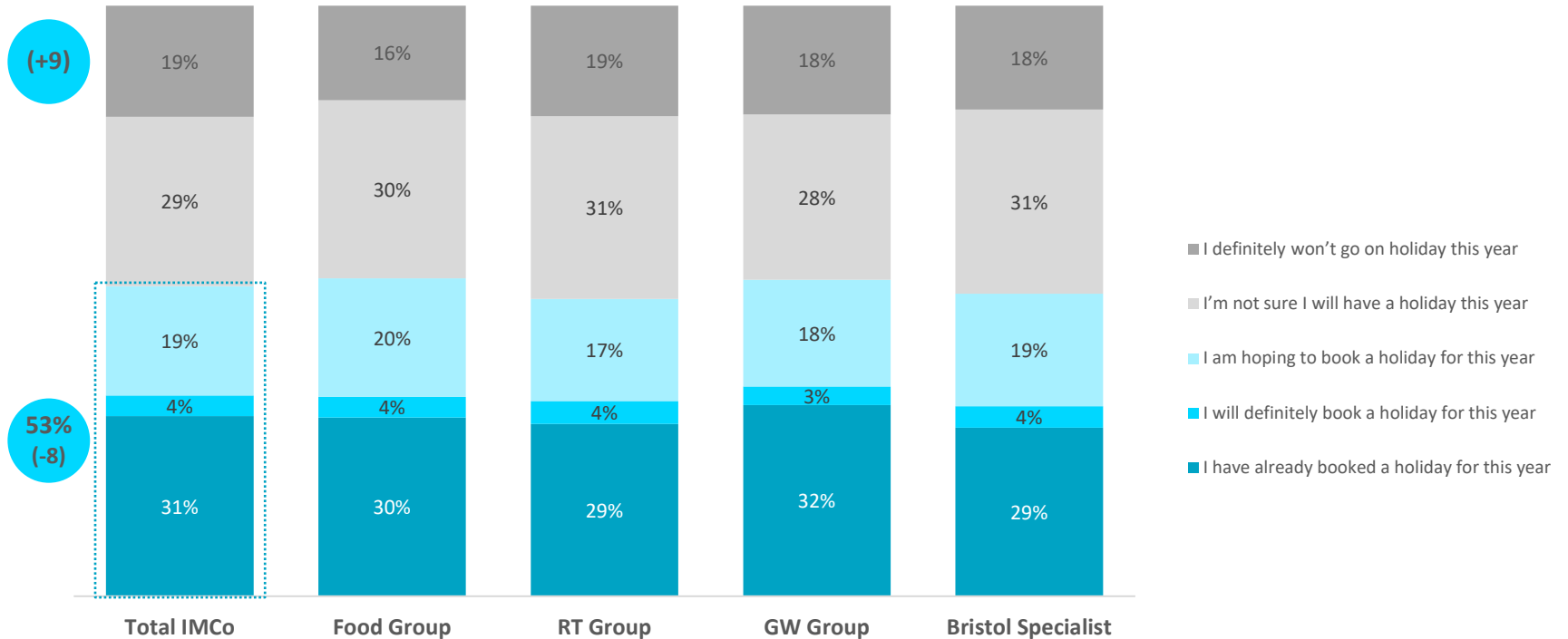
Insight team

Summary

- ✓ Just under a **third of our IM audience** have booked holidays for 2021, with an additional **19% hoping to go away**. Conversely, 19% are definitely not going away this year (an increase of +9% on the last wave of research)
- ✓ **Almost half** of our IM audience continue to say it will be '**very important**' to go on holiday once it is safe to do so, with overall importance remaining stable wave on wave
- ✓ **Relaxing, visiting natural attractions** and **spending time with loved ones** are the top three elements of holidays our audience are most looking forward to most this year, though there is also evidence to suggest that some factors have lessened in importance recently
- ✓ **Almost a third** will make the arrangements **now** for holidays this year and **16%** continue to be willing to wait until the **last minute**
- ✓ Despite the uncertainty, **over half** of our audience (**54%**) are likely to **spend the same amount** on their holiday this year - though this is down on the last wave of research (perhaps as our audience are more likely to holiday in the UK)
- ✓ **Around half** of our IM audience are planning to take at least one **7+ night holiday** or **short break** (2-6 nights long) this year
- ✓ The **vast majority** of our IM audience is likely to **holiday in the UK next year**, with **just over a third** planning to travel to one of the **European countries** (however this is significantly down on the last wave of research)
 - ✓ Within Europe, **Spain, France and Italy** are the top three destinations, though **Greece** is very close behind
 - ✓ Those planning to go to the Americas in this year opted mainly for the **USA** but, interestingly, **Canada** has seen an increase in consideration

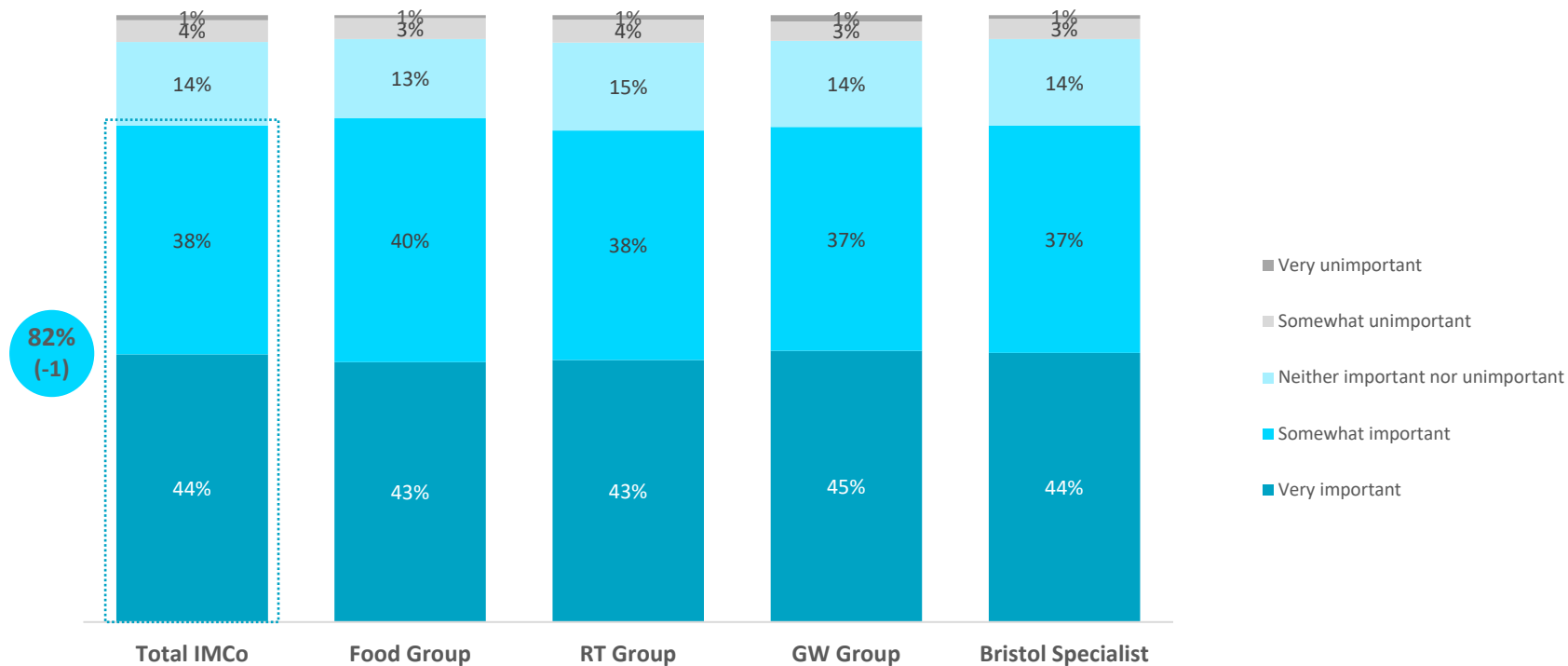
Travel Plans for 2021

Just under a **third of our IM audience** have already booked holidays for this year, however we see an **increase in the proportion definitely not going away** this year versus when we asked this same question late last year



Importance of having a holiday once it is safe to travel again

Almost half of our IM audience said it will be 'very important' to go on holiday once it is safe to do so, rising to 82% who said it is 'important' overall (on par with the previous research)



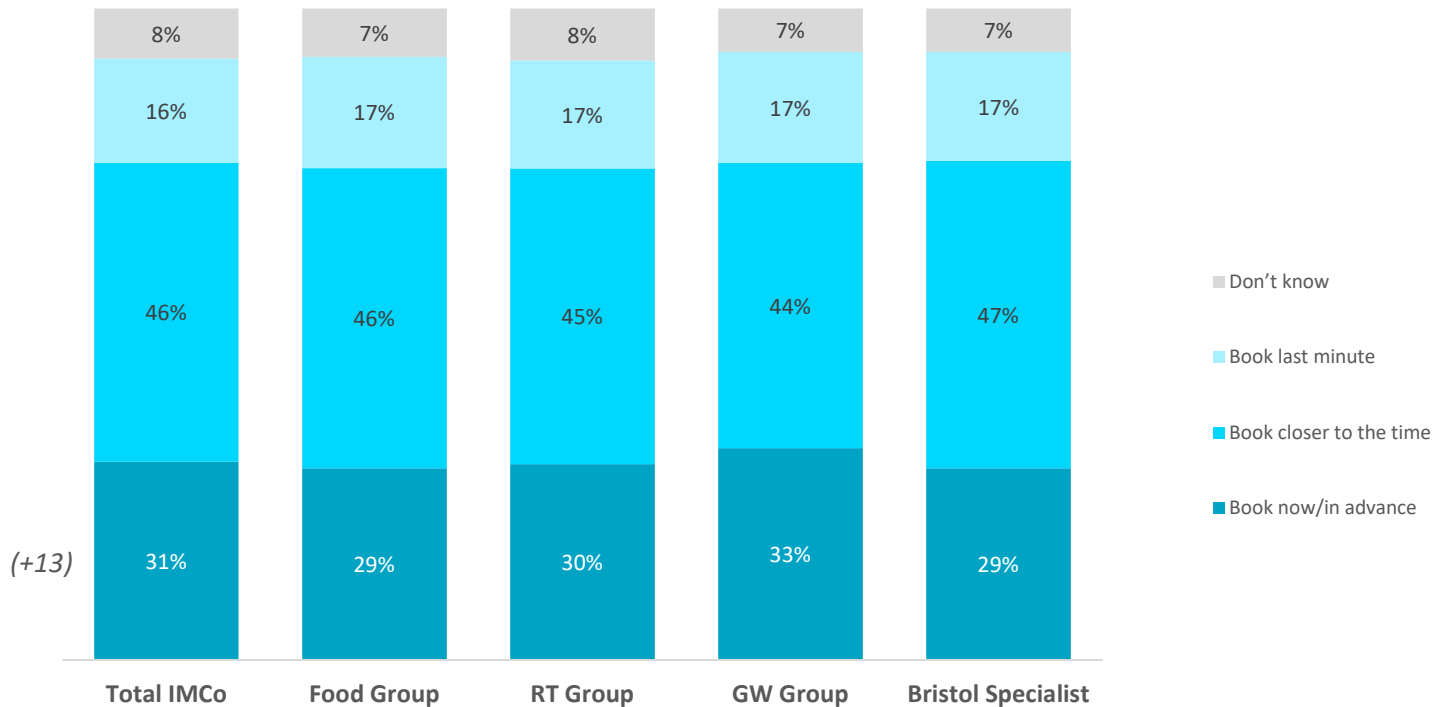
Most looking forward to from holidays in 2021

Relaxing, visiting natural attractions and **spending time with loved ones** continue to be the top three elements our audience is most looking forward to this year, in relation to holidays. Particular increases on the last piece of research include **wanting to relax, to see nature and wildlife** and to carry out **outdoor activities**. Visiting attractions, discovering new destinations and trying local cuisine have lessened in importance

	Total IM	Food Group	RT Group	GW Group	Bristol Specialist
Relaxing	69% (+3)	70%	67%	71%	68%
Visiting natural attractions (e.g. national parks, waterfalls, gardens)	63% (-1)	63%	62%	70%	65%
Spending time together with loved ones	58% (+1)	62%	58%	59%	58%
Seeing nature and wildlife	55% (+3)	56%	55%	64%	59%
Escaping everyday life	54% (+1)	58%	53%	57%	54%
Visiting attractions (e.g. museums and monuments)	50% (-4)	48%	52%	49%	50%
Eating well	45% (-1)	51%	46%	45%	43%
Outdoor activities (e.g. walking/hiking/cycling)	45% (+3)	46%	42%	50%	47%
Visiting beaches	37% (+1)	39%	36%	41%	38%
Discovering new destinations	35% (-4)	35%	34%	37%	34%
Trying local cuisine	32% (-5)	36%	32%	32%	30%
Wellness/mental wellbeing	31% (-1)	32%	29%	31%	32%
Sampling local drinks	19% (-2)	20%	17%	19%	17%
Adventure	9% (-2)	10%	7%	9%	10%
Enjoying nightlife	3% (0)	3%	4%	2%	3%

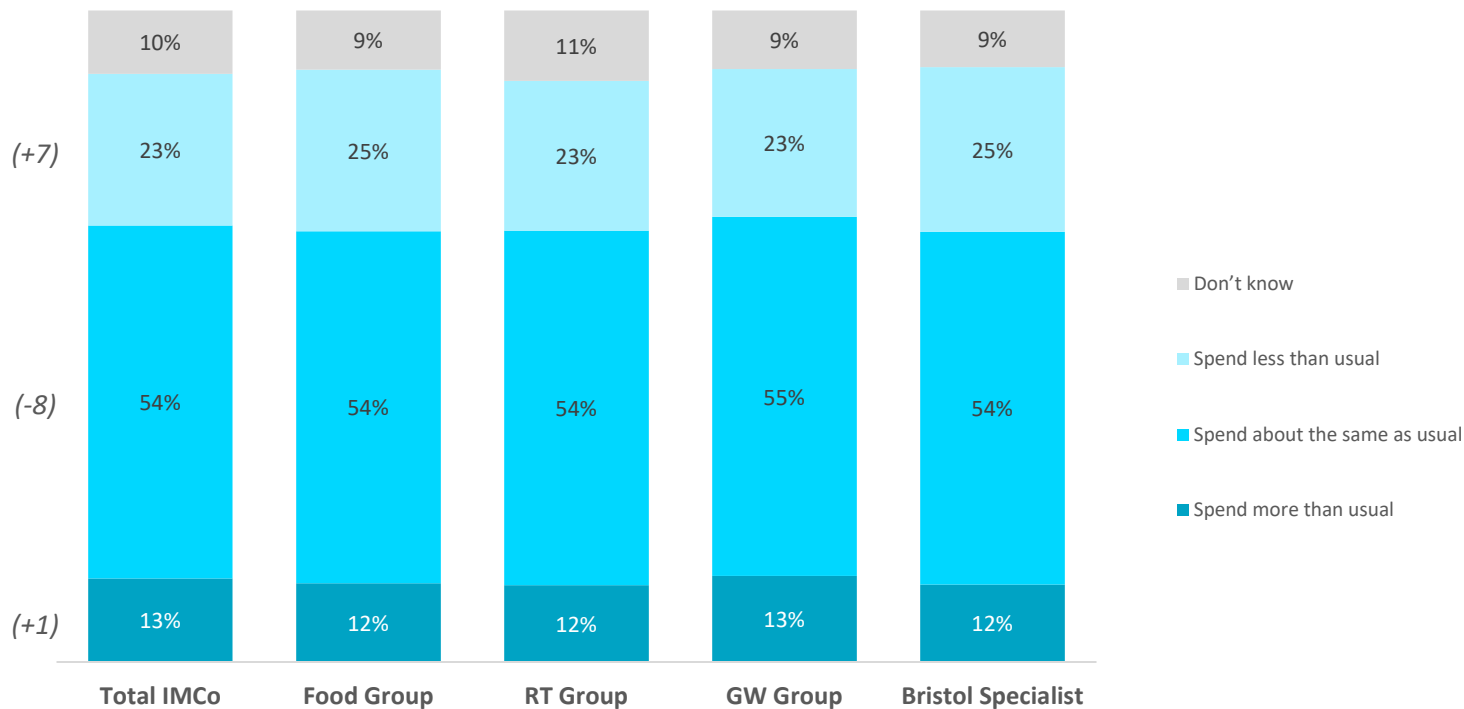
Booking for 2021 holidays

As this wave of research took place in 2021, versus the last wave which was carried out late in 2020, it does make sense that we see an **increase** in the proportion that **will book now**. The proportion that say they will **book last minute** has remained stable



Spend for 2021 holidays

Whilst **over half** of our audience say they will be **likely to spend the same** as usual on holidays this year, it's worth noting that the proportion who say they will **spend less has increased** versus the last research

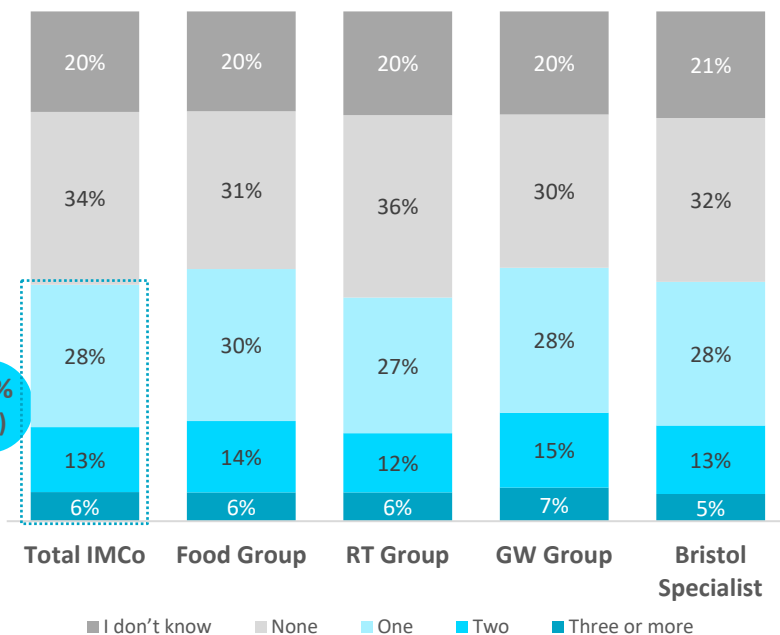


Holidays & Short Break Plans for 2021

Almost half of our IM audience are planning to take **7+ night holidays** in 2021 and **53%** plan to take at least one **short break** (2-6 nights long), though these are both down versus the last wave of research

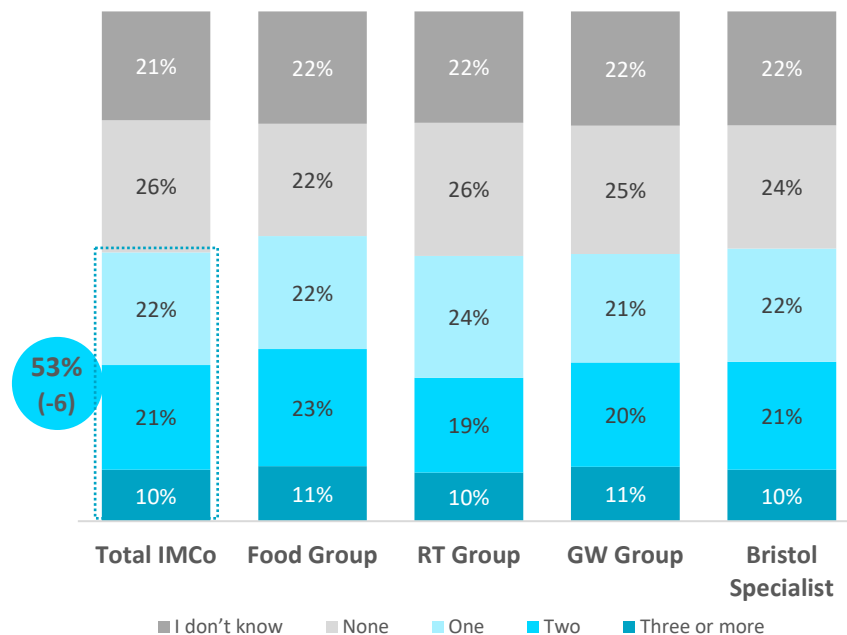
Holidays in 2021

(7 nights or more)



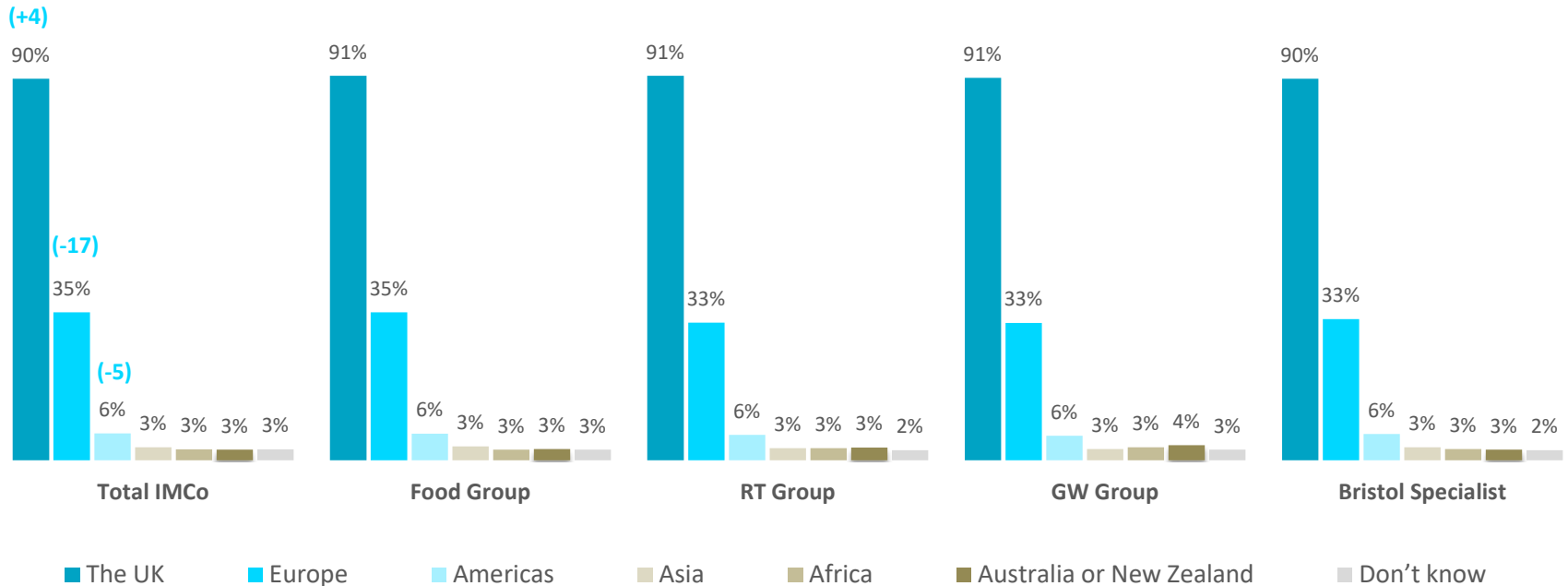
Short breaks in 2021

(2-6 nights)



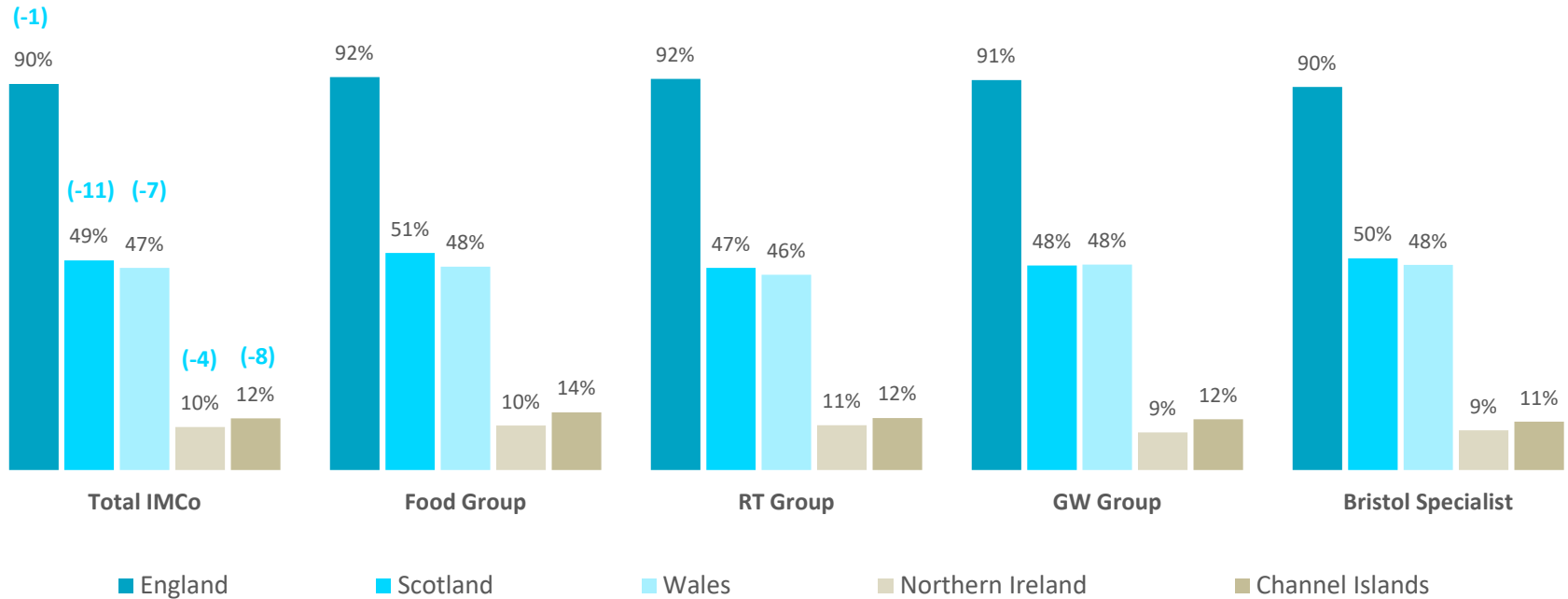
Holiday Destinations for 2021 – Top Level

The **vast majority** of our IM audience remain likely to holiday **in the UK this year** (even seeing a slight increase), with **a third** planning to travel to one of the **European countries** (though this is significantly down versus the last research)



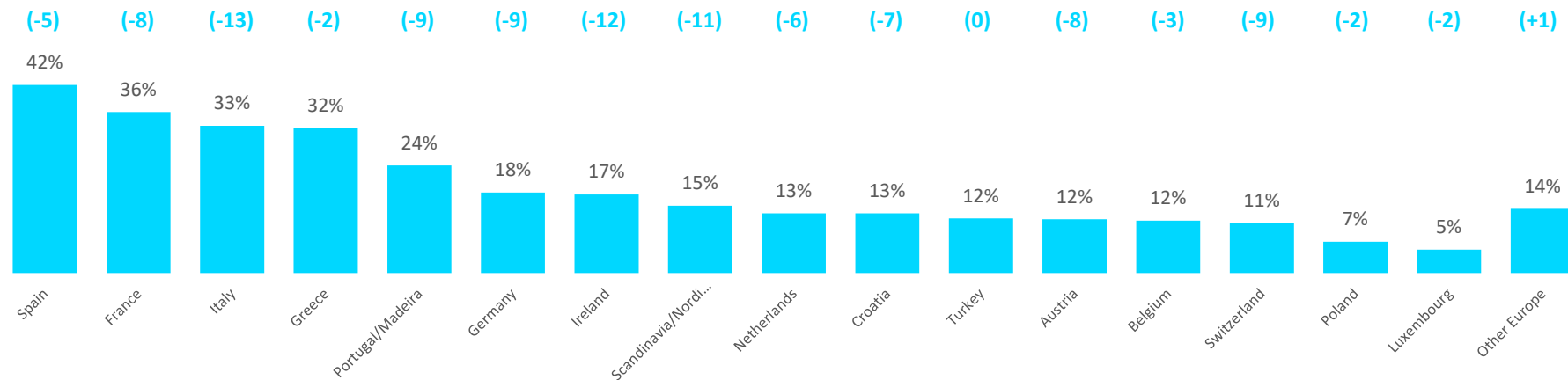
Holiday Destinations for 2021 – UK

Within the UK, the IM audience is likely to holiday in **England**, with almost half also opting for **Scotland** or **Wales** (though these are down versus last time)



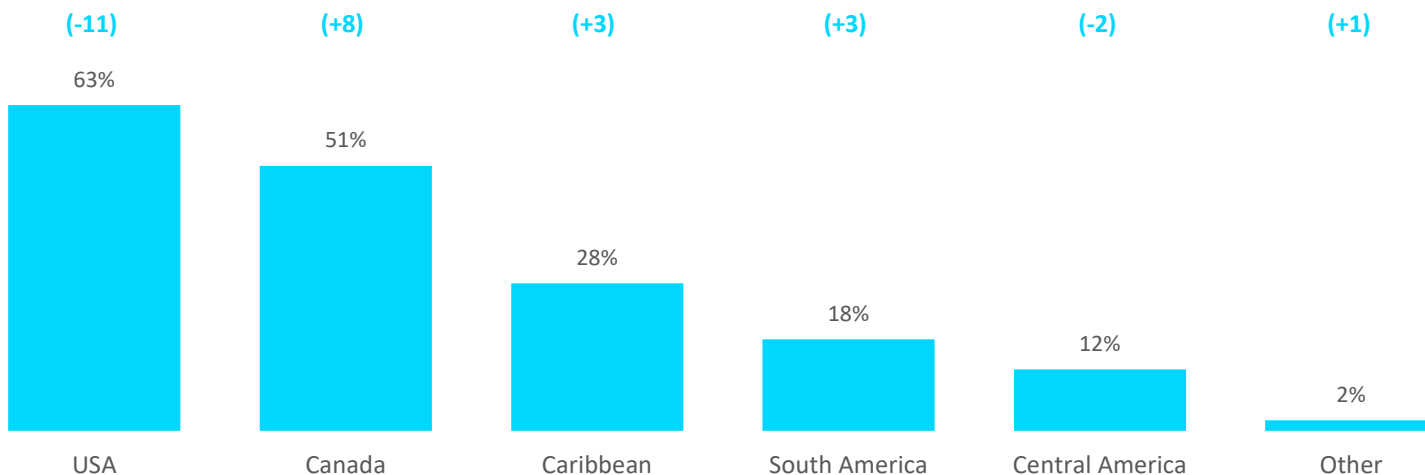
Holiday Destinations for 2021 – Europe

Within Europe, **Spain, France and Italy** are the top three destinations. However, as Italy has seen declines versus the last wave of research, **Greece is now almost in the top three**. As the reality of the pandemic over 2021 becomes more clear, most European destinations have seen declines in consideration



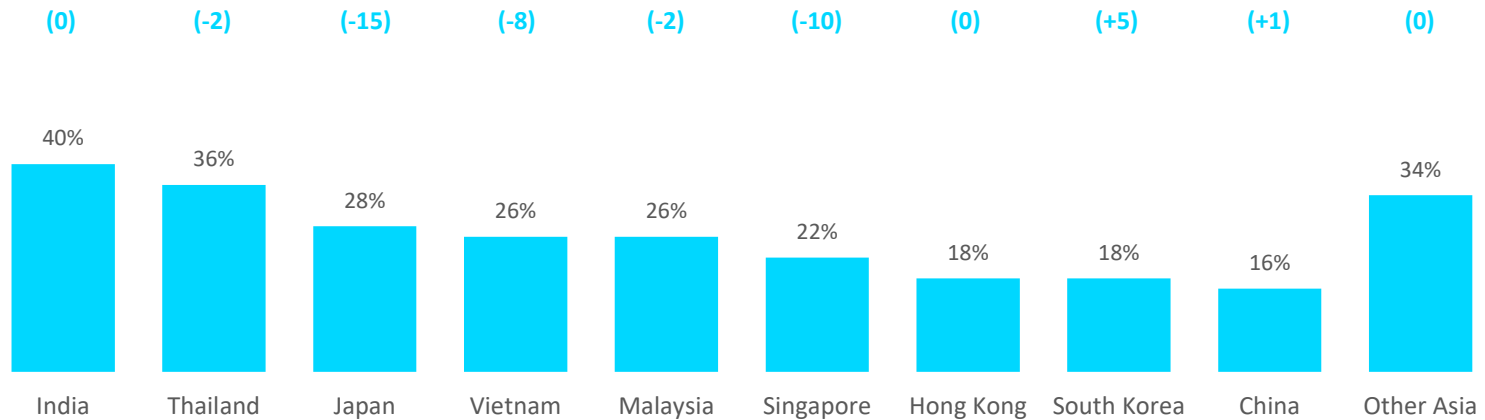
Holiday Destinations for 2021 – Americas

Those planning to go to the Americas in 2021 opted mainly for the **USA**, with **Canada** and the **Caribbean** in second and third place. It's interesting to note that **Canada** in particular has seen an **increase in popularity** amongst those that would consider travelling to the Americas



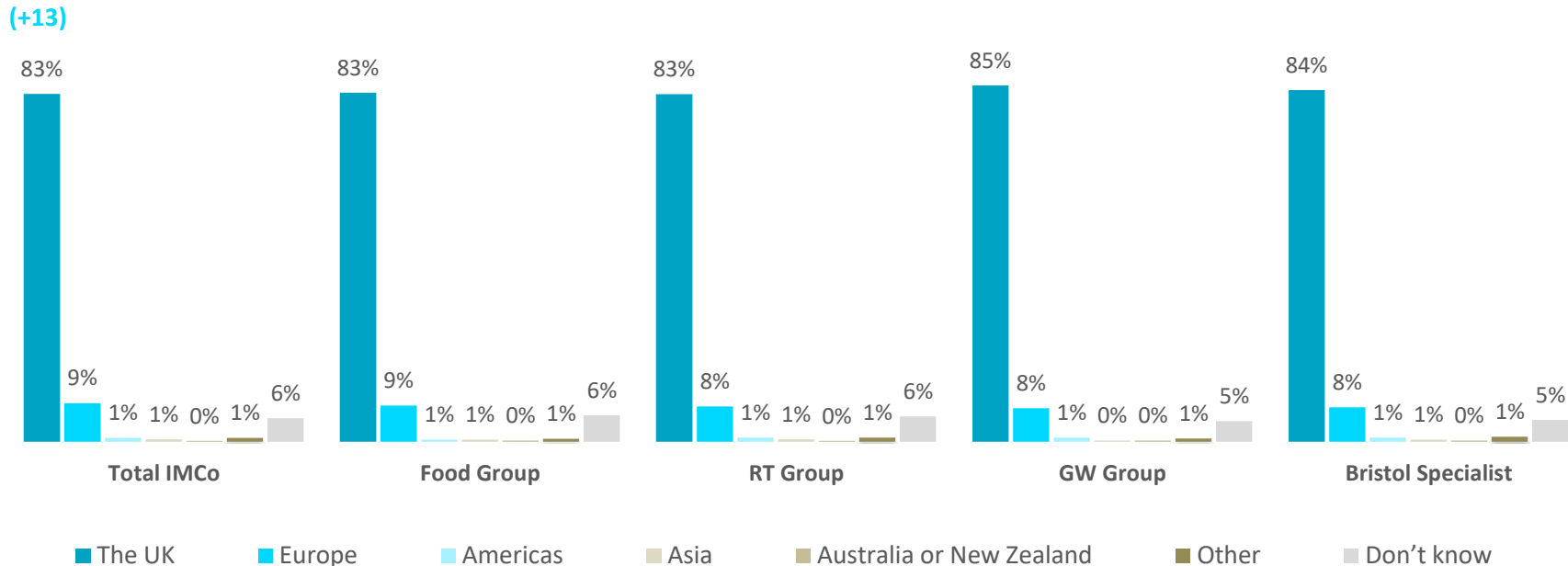
Holiday Destinations for 2021 – Asia

Of the small proportion of those planning to go to Asia, **India, Thailand and Japan** are the top three destinations (as they were in the last research), though Vietnam and Malaysia are not far behind Japan



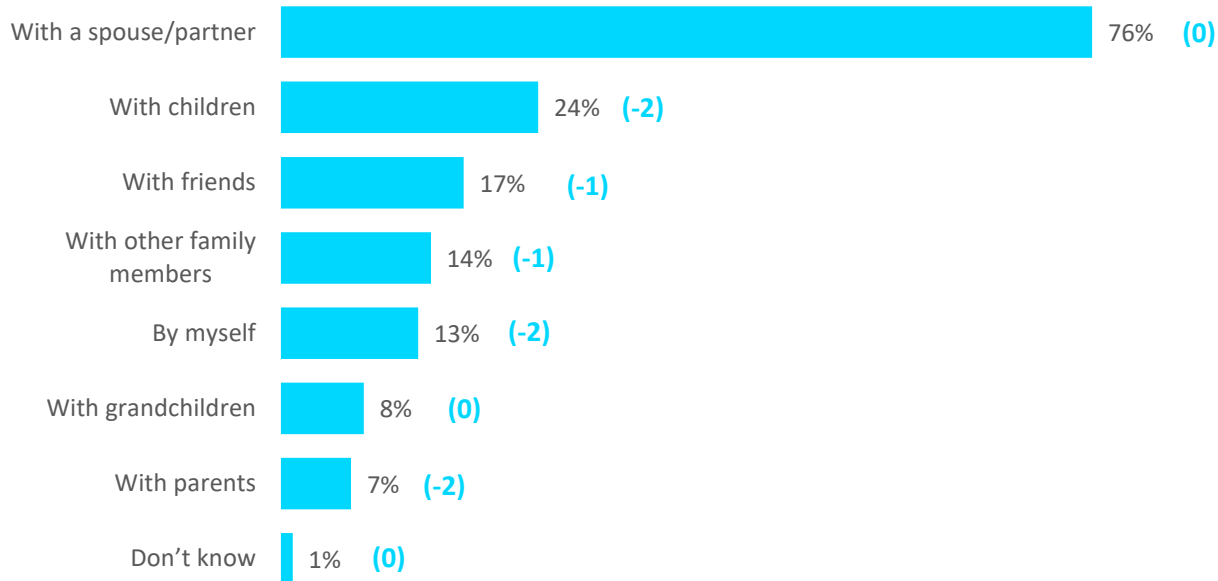
Holiday Destinations for 2021 – most likely *(select one only)*

Given the current pandemic, the IM audience is **most likely to holiday within the UK this year**, rising by +13% since the last research (which likely explains why the amount our audience will spend has decreased)



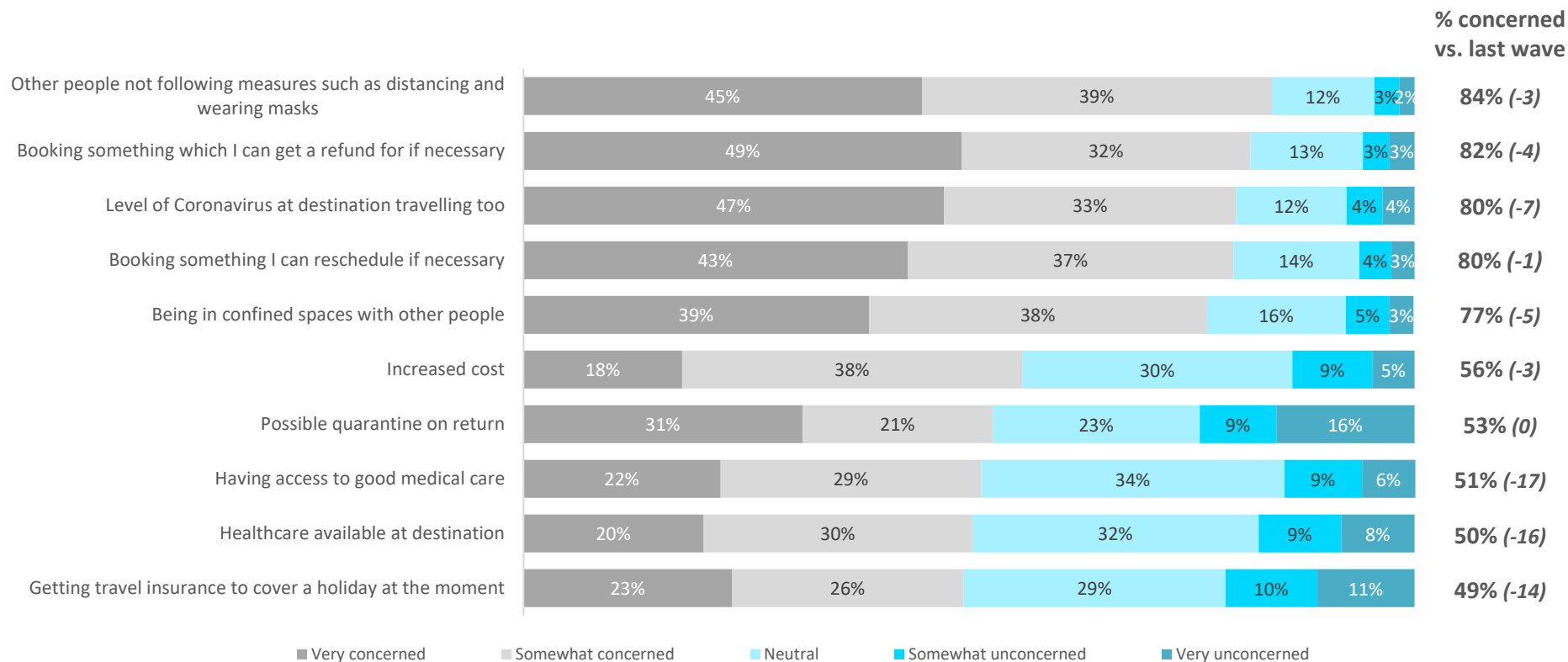
Holiday companions

Most will go on holiday with their **partner** and just over a quarter will go with **their children** (on par with the last research)



Concerns for 2021 holidays

There is still a **great level of concern** with regards to going on holiday this year, though concerns that relate to **travelling abroad** (such as healthcare available at destination and getting travel insurance) **have lessened**, which is perhaps because **fewer people are planning on going abroad** this year



Thoughts and feelings around taking holidays in 2021

Staying safe is my main priority followed by spending my money in the UK to help UK businesses and local economies

Appreciate holidays more after not being able to get away. Concerned by large increase in prices being charged

I do not intend travelling by plane/using airports for at least 1 more year. Mass transport hubs should be avoided. UK only this year

Really want to travel long haul but concerned to book in advance in case other countries don't open their borders in time. Think a vaccination passport is important.

Need to book early as folks will have carried over bookings from last year and booked more UK hols rather than abroad this year

We generally holiday in Scotland so this is nothing different to normal. The only difference is that we will not do short European city breaks this year

We haven't booked anything yet and will not do so until it is safe to travel. Our first holiday will be to see our son in Australia who we haven't seen for nearly 2 years

I don't think people should go on holiday outside of the UK until all the countries in the world have had the majority of their population vaccinated against CV19

I will approach it very differently from usual. I would take a train or a ferry, but not a bus or an aeroplane because of the enclosed space and lack of ventilation

Reasons for not going away

Still too early in pandemic to make these plans, especially as I am clinically vulnerable...and holidays are/will be more expensive and I'm on a limited budget

The Covid situation is not resolved and there are no clear facts regarding immunity going into the future. It would be irresponsible to venture out to places, particularly foreign, that are not covid secure

Too much uncertainty re travel restrictions and restrictions abroad, any of which could change quickly. UK likely to be too costly due to extra demand

I'm not prepared to use any form of public transport until the covid situation is more stable & a lot less than it is now

I'm just not sure it's safe to go on holidays yet and won't be for quite awhile yet. The pandemic is no way near over yet!

no one should be going anywhere this year. not due to covid as a frontline NHS employee this is going to cause chaos and may lead to a 4th lockdown

I am quite happy just having a more normal summer in my local area this summer and reduce the chance of transporting the virus across borders

Don't want to worry about social distancing, other people, cancelling plans again - want to enjoy it!!

Because I think everywhere will be packed probably more hectic than usual and, even though I am vaccinated I want to see how covid works out