
Who Will Go Where? The Changed World of Travel and Tourism After COVID-19

Public polling data from a six-country survey

March 2021



The world of travel and tourism may never look the same again. In the short and medium term, vaccines, quarantine periods and varying infection rates mean that countries, carriers, and companies will need to be nimble to adapt to changing circumstances and expectations. Even when normality does return, new research from Kekst CNC, the leading global strategic communications firm, suggests that patterns and behavior of travellers will be changed substantially by the events of the last year.

And while many countries, regions, airlines and hotel groups have already started advertising and promotional campaigns to attract the post-pandemic traveller, we have taken a first look at what consumers are actually looking for and the factors that will define their choice of destination.

These first findings, from research among more than 6,000 respondents from six countries around the world are summarized below. The research is an introduction to a new Kekst CNC **research offering, the Global Traveller Index**, to sit alongside its existing expertise in tourism-related issues and campaigns. Through surveying key tourist groups most relevant to clients, and the application of a sophisticated indexing method, we will be able to present you with **how travellers in target countries plan to approach their vacations in the future and how carriers, countries or companies can be in front of and ready for the post-pandemic traveller.**

In Summary

The joint most important enabling factor for travel is that **travellers themselves have had the vaccine** – potentially unlocking many more travellers later this year - and suggesting support for **vaccine passports**.

The perception of their destination matters too, especially for younger audiences. Whether the place they were travelling to has **falling case numbers** mattered more than quarantine restrictions or the extent of vaccine rollout in that country.

A requirement to have a **test before or after travelling was rarely cited as a barrier to travelling**, suggesting an increasing level of public tolerance for testing as a gateway for travel.

The Numbers

In March of 2021, Kekst CNC polled 6,000 members of the public in the UK, the United States, Germany, Sweden, France and Japan on what their most important factors would be when it came to deciding to go on vacation in 2021 after a vaccine was available.

% of respondents in each country who put a factor in their top 3 considerations:							
	UK	USA	DE	SE	JP	FR	GLOBAL
THAT I HAVE HAD THE VACCINE	42%	36%	38%	46%	38%	30%	38%
FALLING CASE NUMBERS GLOBALLY	25%	27%	31%	29%	38%	31%	30%
FALLING CASE NUMBERS IN THE COUNTRY I AM TRAVELLING TO	22%	24%	30%	29%	38%	32%	29%
THAT THERE IS NO NEED TO QUARANTINE WHEN IN THE COUNTRY	35%	24%	35%	24%	16%	32%	28%
THAT THERE IS NO NEED TO QUARANTINE WHEN RETURNING TO MY COUNTRY	32%	21%	35%	20%	16%	27%	25%
THAT ONLY PEOPLE WHO HAVE HAD A VACCINE CAN ENTER	23%	22%	20%	27%	25%	19%	23%
NONE OF THE ABOVE	24%	25%	18%	23%	23%	20%	22%
THAT THE COUNTRY MAKES MASK-WEARING COMPULSORY IN PUBLIC SPACES	11%	26%	17%	12%	27%	30%	21%
THAT THE LOCAL POPULATION HAVE ACCESS TO A VACCINE	18%	20%	17%	21%	19%	16%	19%
NOT HAVING TO HAVE A TEST BEFORE OR ON ARRIVAL	9%	15%	14%	14%	9%	15%	13%
THAT I HAVE BEEN TO THE COUNTRY BEFORE	5%	9%	11%	9%	4%	9%	8%

Source: Kekst CNC COVID-19 Opinion Tracker – Wave 7, March 2021

The Details

The results are important for the travel and tourism industry:

- **Personal vaccination** is the most important factor that people say would make them likely to travel globally. This is especially the case for tourists originating from the UK (where 42% cite this as their top factor) and Sweden (46%). French tourists are the exception to this – a country with low vaccination uptake, only three in ten say it is one of the most important factors for their own travel.
 - **Men** are more likely to say they want to have the vaccine before travelling than women, by a margin of 40% to 29%.
 - **Older tourists** are much more insistent they have a vaccine before travel; as high as 47% globally amongst over-65s, as are people in **higher income groups**.
 - The importance of having personally had a vaccine has **increased** compared to the same survey in December of last year, from 34% placing it in their top three then to 38% now.
- After personal vaccination, the next important factor is a **perception that case numbers are falling globally**, followed by **falling case numbers in the country I am travelling to**. These perception-led considerations dominated in most countries more than more practical obstacles like testing, vaccine rollout or quarantine measures.
 - The perception that case numbers are falling globally was most important for **younger tourists**, even more so than being personally vaccinated.
- Nonetheless, **there being no need to quarantine when in the country or when returning** is still prominent, especially so in the German market where this is the second top concern behind having had the vaccine. But it is lower down in other countries such as Japan and the United States. And, **marginally, tourists are more likely to contemplate quarantining upon return than in a destination country itself**.
 - **Higher income earners** are more likely to prioritize not having to quarantine – either in the country, or when returning, than lower or middle-income groups.
- Countries placing restrictions on who can enter the country based on whether they have had the vaccine **do not make a major difference to a tourist's likelihood to travel**. Only around one in five people place this in their top three considerations. And, in good news for destination countries where vaccine rollout will take some time but have low caseloads, the **level of access local populations have to the vaccine do not feature highly in people's considerations**.
- **Mandatory mask-wearing** is more important for American, Japanese and French tourists, but less important a consideration for British, German and Swedish tourists.
- **Having to have a test** seems to have been accepted by tourists and does not seem to be presenting a major barrier to travel. It may actually provide **peace of mind** to many and be accepted as a new normal.
- Finally, there is **no sense that 'new countries' are being ruled out by tourists**, or that people are defaulting to places they know well – only 8% said that having been to a country before was an important consideration for their 2021 travel. This is good news for off-beat countries, or countries that rely on new travellers rather than repeat visits.

The Kekst CNC research team is run by expert, former Downing Street pollsters, and uses the best research methods in the market to uncover insight for our clients. The team can repeat these questions, and delve deeper, in relation to your country, industry or target tourist type (e.g. younger, high net worth).

The Kekst CNC Global Traveller Index

Our **Global Traveller Index**, alongside the insight similar to that set out above, allows you to see how your key target travellers' attitudes and approaches to travelling have changed, what their main priorities are for travelling, and how your country, carrier or company is performing against these metrics.

With integrated message and narrative testing, the Index gives you a clear, evidence-based understanding of how to attract and retain travellers and tourists in the future – allowing you to **refine, re-calibrate and improve your organization's promotional strategy**.

Able to run in all major countries, with all tourist types, it answers a range of questions about your target audiences (e.g. high-net-worth tourists, tourists from the UK), including:

- How positively do people feel towards your country, carrier or company?
- What are the drivers behind this? What are the things boosting tourists' views of you that you should promote, and what are the negative drivers that you should look to mitigate?
- Which aspects of your audience are most likely or least likely to use your services or travel to your country in the future?
- What are the key things your target tourists are looking for from a holiday? (e.g. culture, wildlife, restaurants, history, levels of service)
- How does your country or carrier perform against these demands? And how does your country or carrier perform compared to competitors?
- By cross-referencing what people want and how you perform on these metrics, how should your organization communicate with your potential tourist base?
- Which messages and narratives land best with your target audience? How should you vary your message dependent on different audiences and sub-sections of your target audience?
- Which factors and decisions will make tourists more or less likely to travel to your country or use your carrier?
- How do your target audience plan to adapt and change their travel habits in the event of further variants of coronavirus, so you can plan ahead?
- Which information sources do tourists most or least trust when it comes to information about your country or carrier?

Using our expert data analysis, and visualization tools, you and senior stakeholders will be able to clearly see how your target tourists feel.



For more information, please contact our research team at polling@kekstcnc.com

www.kekstcnc.com



Kekst CNC is a leading global strategic communication consultancy. The team of over 250 experienced professionals serve clients from 14 locations in New York, Dallas, London, Munich, Berlin, Frankfurt, Paris, Brussels, Tokyo, Seoul, Hong Kong, Dubai, Abu Dhabi, and Stockholm. As trusted advisors, the firm contributes its expertise on such high-stake matters as: M&A, shareholder activism and governance, crisis communications, restructurings, regulatory investigations, litigation support, investor relations, IPO communications, issues and reputation management, change management and employee engagement, as well as digital and social communications. Kekst CNC is part of Publicis Groupe, the world's third largest communications group.