COVID-19 Consumer Profiling Report

Report 11

Published: 1st March 2022

Fieldwork Period: 4th – 10th January & 1st – 7th February 2022

UK Results

Introduction

VisitEngland, VisitScotland and Visit Wales have commissioned a monthly Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays both within the UK and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.

The survey addresses: the likelihood of UK residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken .

The tracker was conducted weekly for 13 consecutive weeks from May 2020 to August 2020, fortnightly from September 2020 to September 2021, and monthly from November 2021 onwards. Each wave is based on a UK nationally representative sample of c1,500 adults aged 16+, with a boost sample for Scotland and Wales.

The findings in this report are based on aggregating data from the January and February 2021 fieldwork. Fieldwork periods are as follows: January (4th to 10th January); February (1st to 7th February).

Definitions used within this report (1)

The report looks at trip Intenders with the following definitions:

1. **Spring Intenders:** UK adults who intend to take a domestic overnight trip between April and June 2022
2. **Spring Intenders – Not Yet Booked:** UK adults who intend to take a domestic overnight trip between April and June 2022 but have not yet booked their trip
3. **Summer Intenders:** UK adults who intend to take a domestic overnight trip between July and September 2022
4. **Summer Intenders – Not Yet Booked:** UK adults who intend to take a domestic overnight trip between July and September 2022 but have not yet booked their trip
5. **Non-Intenders:** UK adults who don't have any domestic overnight trips planned, but would consider it

Chapter 2 looks at the profile and behaviour of Spring Intenders by destination type. Due to insufficient base sizes at an individual level, some destination types have been merged to produce the following categories:

- **Rural Intenders:** UK adults planning their next overnight UK trip to a 'countryside or village' or 'mountains or hills'
- **City or Town Intenders:** UK adults planning their next overnight UK trip to a 'large city' or a 'smaller city or town'

'Traditional seaside/coastal town' and 'rural coastline' have sufficient base sizes, so have not been merged with other destination types

Definitions used within this report (2)

In Chapter 3, investigating the intent to visit towns and cities, the following definitions have been used:

- **City Intenders:** Spring Intenders planning on taking an overnight trip to a 'city or large town' in the Spring period
- **City non-Intenders:** Spring Intenders not planning on taking an overnight trip to a 'city or large town' in the Spring period

Chapter 4 looks at Spring intentions by destination region. Due to insufficient base sizes at an individual region level, destinations have been merged where necessary. The following regional definitions have been used:

- **North of England:** North West, North East, Yorkshire and The Humber
- **Midlands and East of of England**: West Midlands, East Midlands, East of England
- **London (as standard)**
- **South East (as standard)**
- **South West (as standard)**
- **Scotland (as standard)**
- **Wales (as standard)**

Definitions used within this report (3)

Throughout the report, the following accommodation definitions are used:

- Hotel/Motel/Inn
- Guest house/B&B/Farmhouse
- Commercial accommodation: Rental holiday flat/apartment or Rented holiday home
- Private home: Second home/time share or friends/relative's home or in someone else's private home on a commercial basis (e.g. Airbnb)
- Caravan/Camping/Glamping: Touring caravan or campervan/motorhome or static caravan or tent or glamping/alternative
- Other accommodation: Hostel or other type of accommodation

To deliver clearer profiles, we also segment by life stage. Life stages are preferable to 'age' as they better describe someone's life situation. For the purpose of this report, we have used the following:

- **Pre-nesters:** Aged 16-34 without children in household
- **Families:** Aged 16-64 with children in household
- **Older independents:** Aged 35-64 with no children in household
- **Retirement age:** Aged 65+.

1. Spring and Summer Intenders Profile

Groups in focus

Figure 1. Proportion anticipating going on any overnight UK trips, Percentage, February 2022, UK

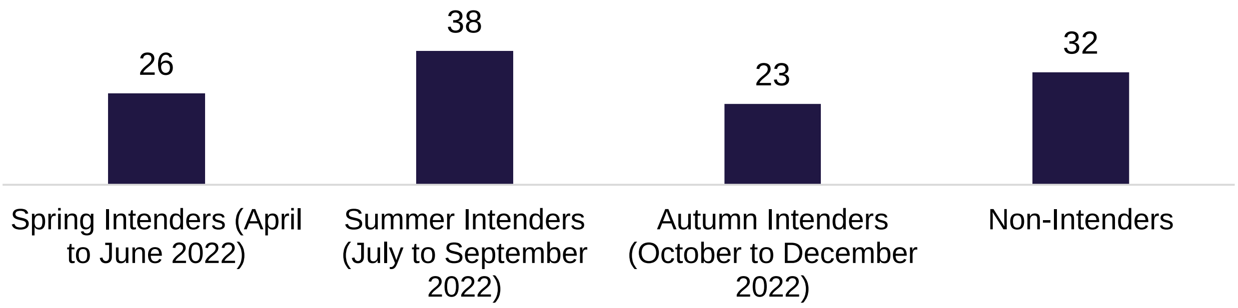
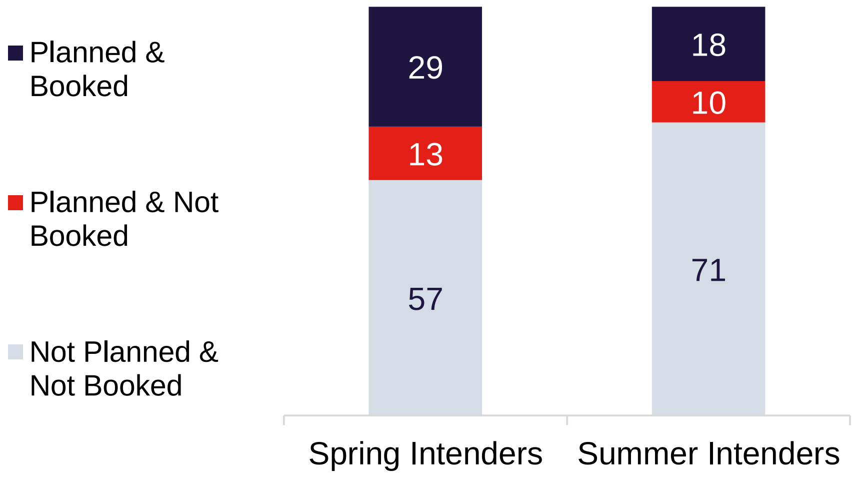


Figure 2. Proportion of Intenders that have already planned or booked their upcoming trip, Percentage, February 2022, UK



QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Figure 1 Base: All respondents. February 2021 = 1,756 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods. Figure 2 Base: Spring Intenders n=370; Summer Intenders n=xx.

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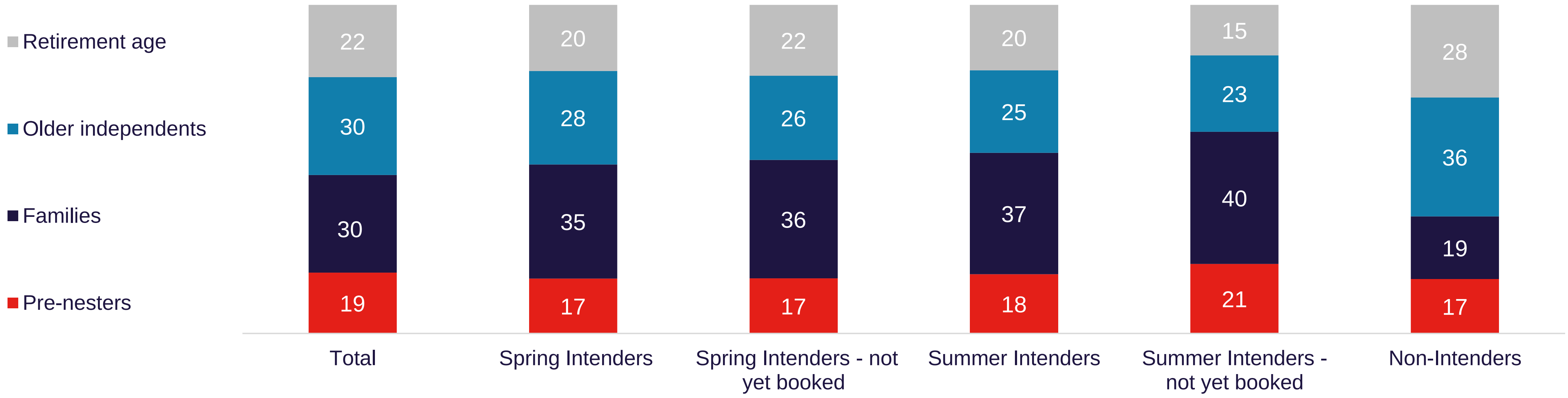
Life stage by UK overnight trip intention

Compared to the total sample, Intenders are more likely to be Families. Non-Intenders over-index on Older Independents.

Figure 3. Life stage by UK overnight trip intention, Percentage, January and February, UK

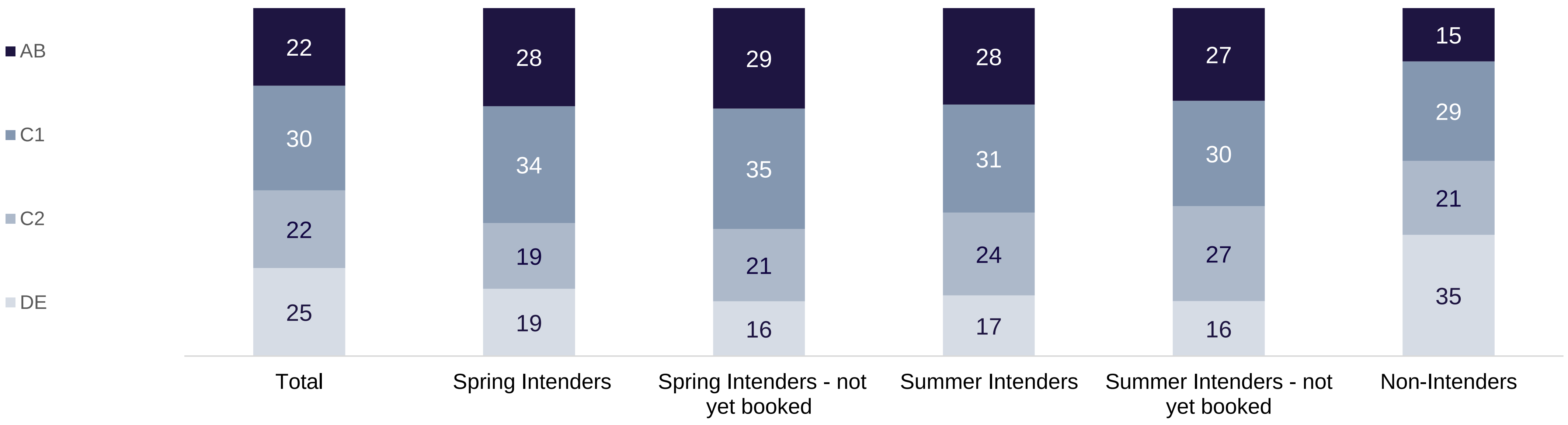


Source: Demographic questions. Life stage definitions: Pre-nesters – aged 16-34 without children in household; Families – aged 16-64 with children in household; Older independents – aged 35-64 with no children in household; Retirement age – aged 65+.
Base: Total n=3,511 Spring Intenders n=885; Spring Intenders – not yet booked n=425; Summer Intenders n=1,316; Summer Intenders – not yet booked n=623; Non-Intenders n=1,188

Social grade by UK overnight trip intention

Both Spring and Summer Intenders are more likely than average to belong to social grades AB (28% of both Spring and Summer Intenders). Non-Intenders are more likely to belong to social grades DE (35% vs 25% of total) .

Figure 4. Social grade by UK overnight trip intention, Percentage, January and February, UK

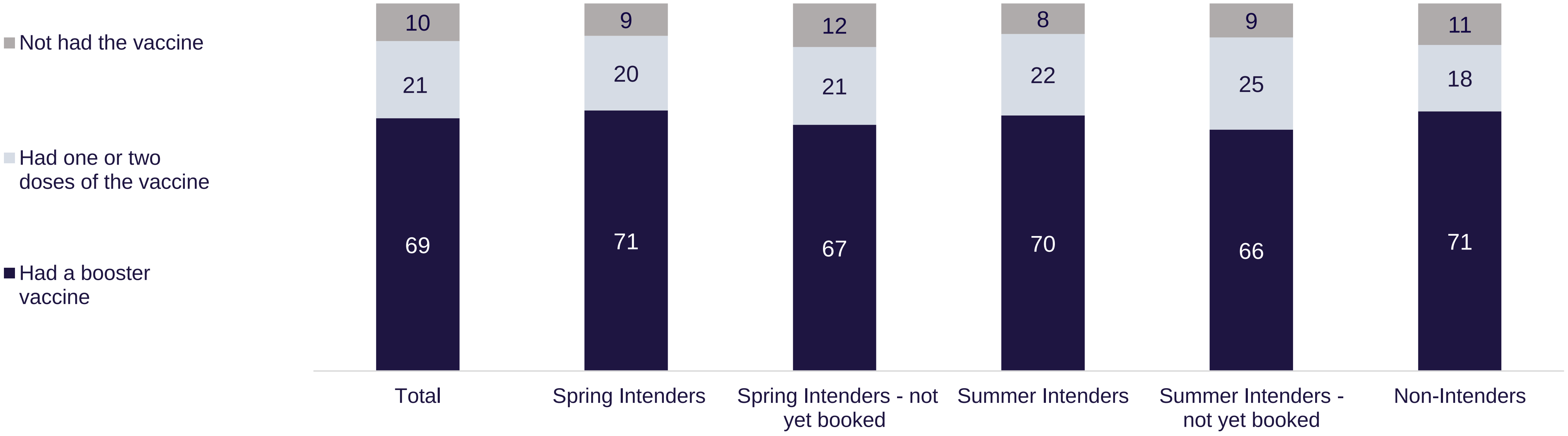


Source: Demographic questions. Base: Total n=3,511 Spring Intenders n=885; Spring Intenders – not yet booked n=425; Summer Intenders n=1,316; Summer Intenders – not yet booked n=623; Non-Intenders n=1,188

COVID-19 vaccination status by UK overnight trip intention

Vaccine take-up does not correlate with intention to take an overnight domestic trip – across all Intender groups and Non-Intenders, around 7 in 10 having had a booster vaccine.

Figure 5. Covid-19 vaccination status by UK overnight trip intention, Percentage, January and February, UK

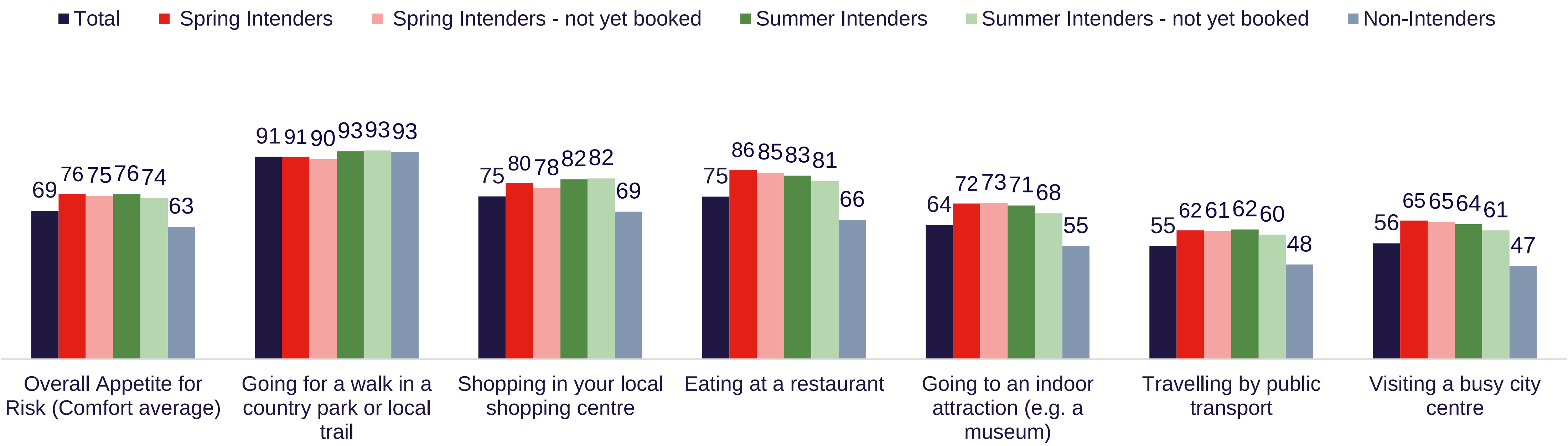


Q8a: Which of the following best describe how you feel about the COVID-19 vaccine?
Base: Total n=3,511 Spring Intenders n=885; Spring Intenders – not yet booked n=425; Summer Intenders n=1,316; Summer Intenders – not yet booked n=623; Non-Intenders n=1,188

Appetite for Risk: by UK overnight trip intention

There is a strong link between level of comfort conducting everyday activities and intentions to take an overnight domestic trip – compared to the total sample, the overall 'appetite for risk score' higher for Spring Intenders (76%) and Summer Intenders (75%), and lower for Non-Intenders (63%).

Figure 6. Level of comfort conducting a range of activities, NET very and fairly comfortable, Percentage, January and February, UK

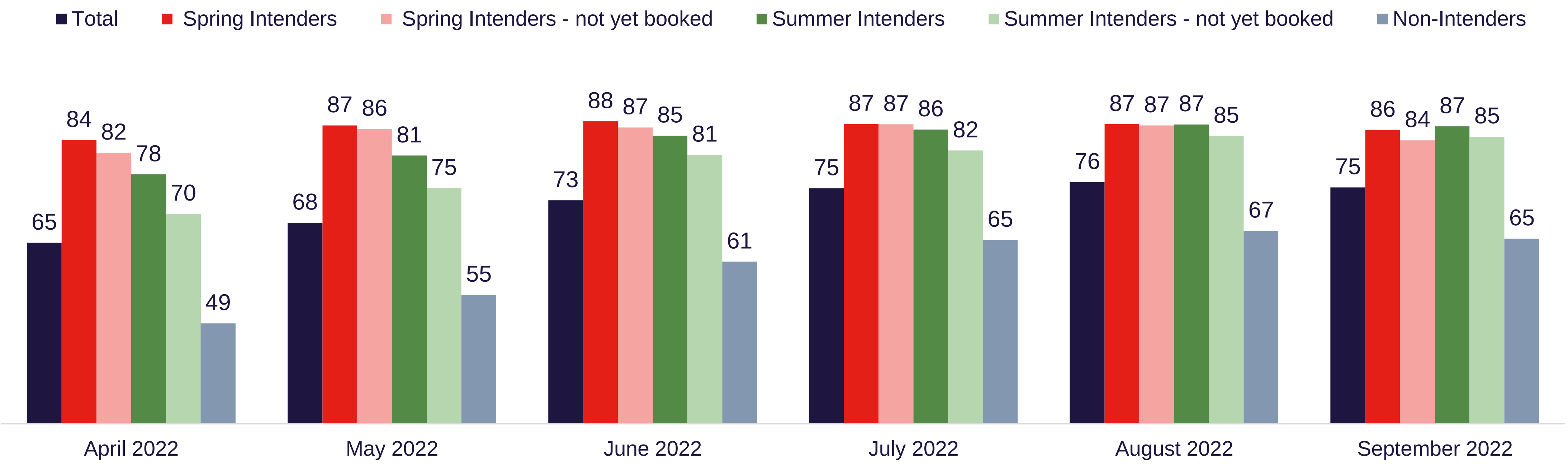


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: Total n=3,511 Spring Intenders n=885; Spring Intenders – not yet booked n=425; Summer Intenders n=1,316; Summer Intenders – not yet booked n=623; Non-Intenders n=1,188

Confidence in the ability to take a UK short break or holiday: by UK overnight trip intention

UK Intenders have a greater confidence that an overnight UK trip would go ahead (compared to the total sample). For April and May trips, the confidence is better amongst Spring Intenders, while by Summer, both, Spring and Summer Intenders show similar levels of confidence.

Figure 7. Confidence in the ability to take a UK short break or holiday across a range of different months, NET very and fairly confident, Percentage, January and February, UK

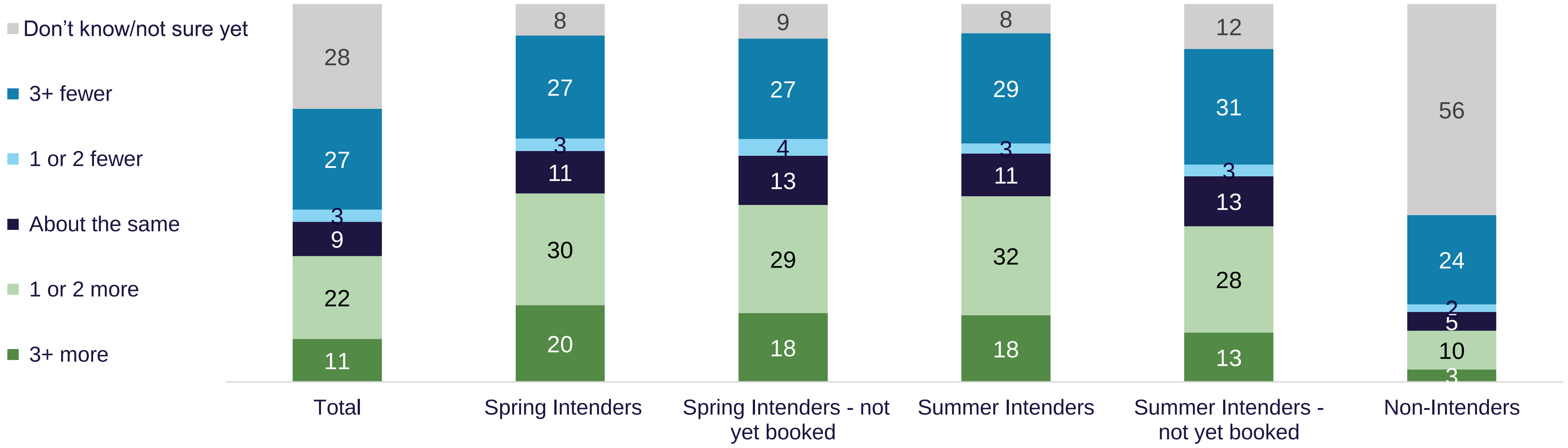


QVB7anew. We'd like you to imagine that you have booked a UK holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips? Base: Total n=3,511 Spring Intenders n=885; Spring Intenders – not yet booked n=425; Summer Intenders n=1,316; Summer Intenders – not yet booked n=623; Non-Intenders n=1,188

Relative number of UK trips in next 12 months by UK overnight trip intention

Spring Intenders and Summer Intenders are set to take more UK overnight trips in the next 12 months than they did in the past 12 months. Over half of Non-Intenders' are still unsure.

Figure 8. Number of UK overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, January and February 2021, UK

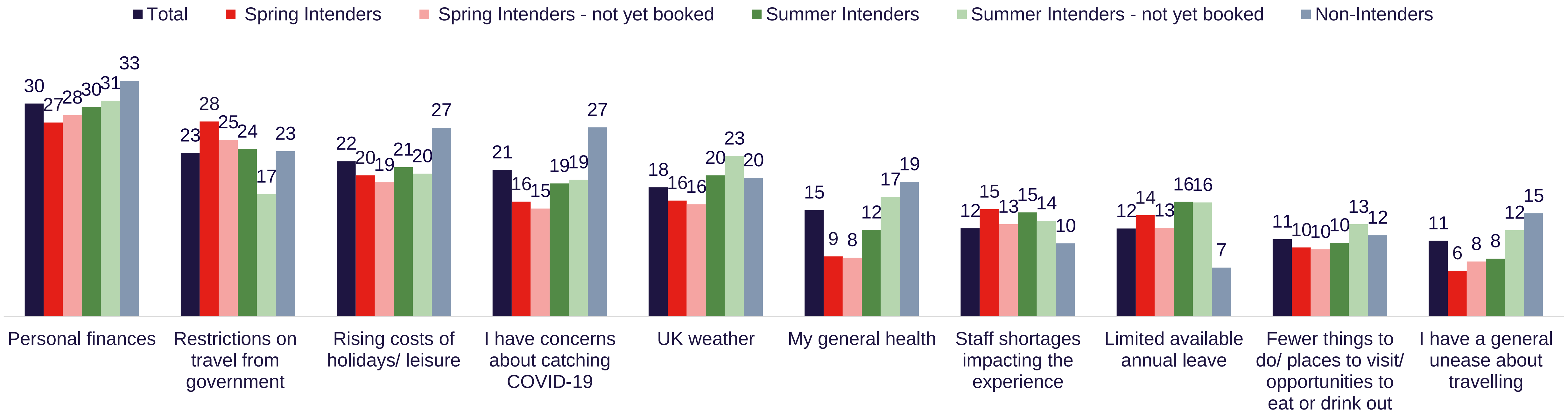


VB1a Thinking about the next 12 months, are you likely to take more, fewer or about the same number of UK and overseas holidays/short breaks as you took in the last 12 months? Base: Total n=3,511 Spring Intenders n=885; Spring Intenders – not yet booked n=425; Summer Intenders n=1,316; Summer Intenders – not yet booked n=623; Non-Intenders n=1,188

Perceived barriers to taking an overnight trip in the UK in Apr-Jun '22

Overall, the main barrier to taking a UK overnight trip in Spring is 'personal finances', followed by 'restrictions on travel from government' and 'rising costs of holidays'.

Figure 9. Barriers for taking an overnight UK trip in Spring 2022, Percentage Top 10, January and February 2021, UK

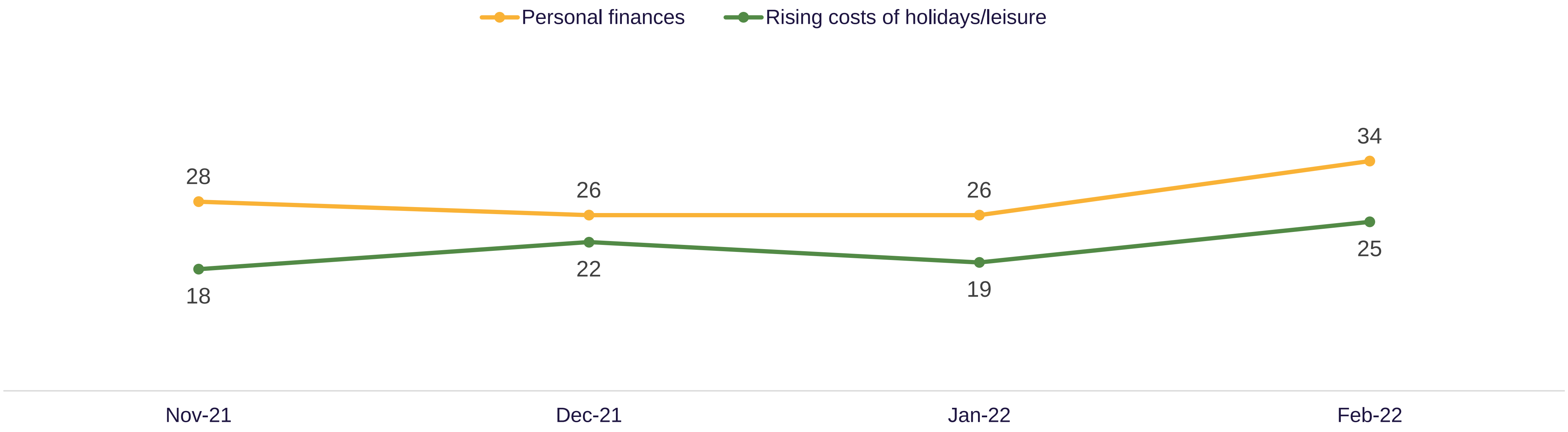


VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday between April and June 2022?
Base: Total n=3,511 Spring Intenders n=885; Spring Intenders – not yet booked n=425; Summer Intenders n=1,316; Summer Intenders – not yet booked n=623; Non-Intenders n=1,188

Trend of finances related barriers to taking an overnight trip in the UK in Apr-Jun ‘22

The incidence of those stating ‘personal finances’ or ‘rising costs of holidays/leisure’ as potential barriers to taking a domestic trip in Spring has significantly increased from January to February.

Figure 10. Perceived barriers to taking a UK short break or holiday in Spring, Wave-on-wave, Percentage, UK



VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday between April and June 2022?
Base: c.875 respondents per wave

Jan to Feb change in finances related barriers to taking an overnight trip in the UK in Apr-Jun '22

The increase from January to February is driven mainly by Pre-Nesters and Families for 'Personal finances', and by Families for 'Rising costs of holidays/leisure' barrier.

Figure 11. Personal finances as a potential barrier to taking an overnight trip in the UK in Spring, Percentage, January and February, UK

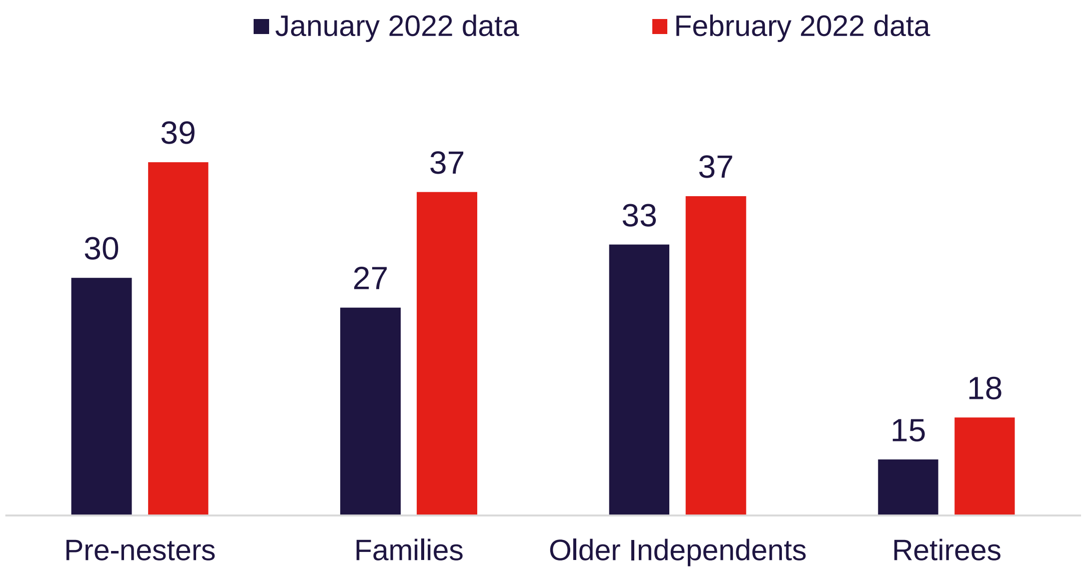
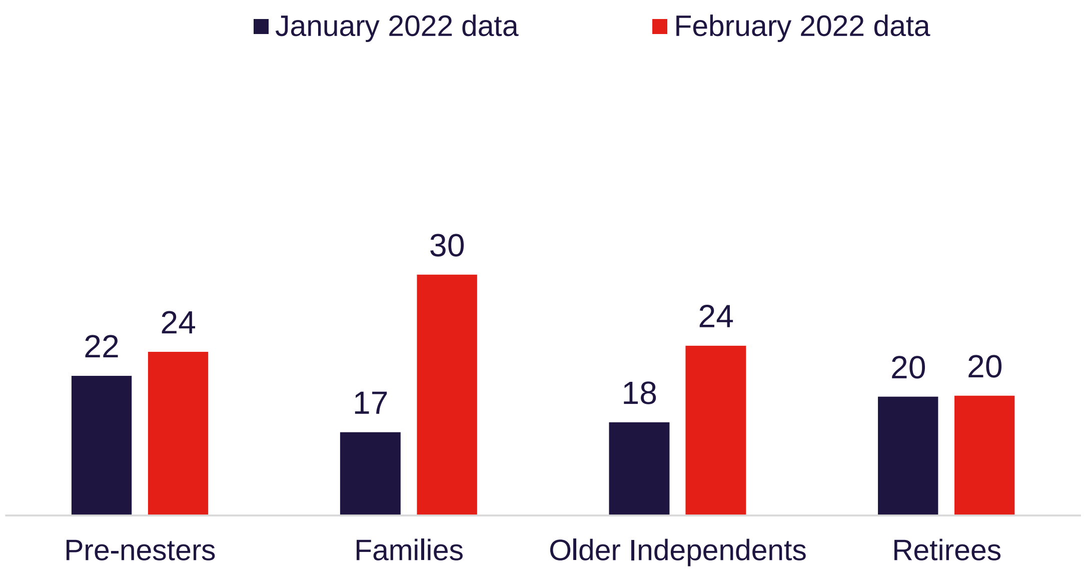


Figure 12. Rising costs of holidays/leisure as a potential barrier to taking an overnight trip in the UK in Spring, Percentage, January and February, UK



VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday between April and June 2022?
Base: Jan/Feb; Pre-nesters (163/206); Families (315/300); Older Independents (223/255); Retirees (178/114)

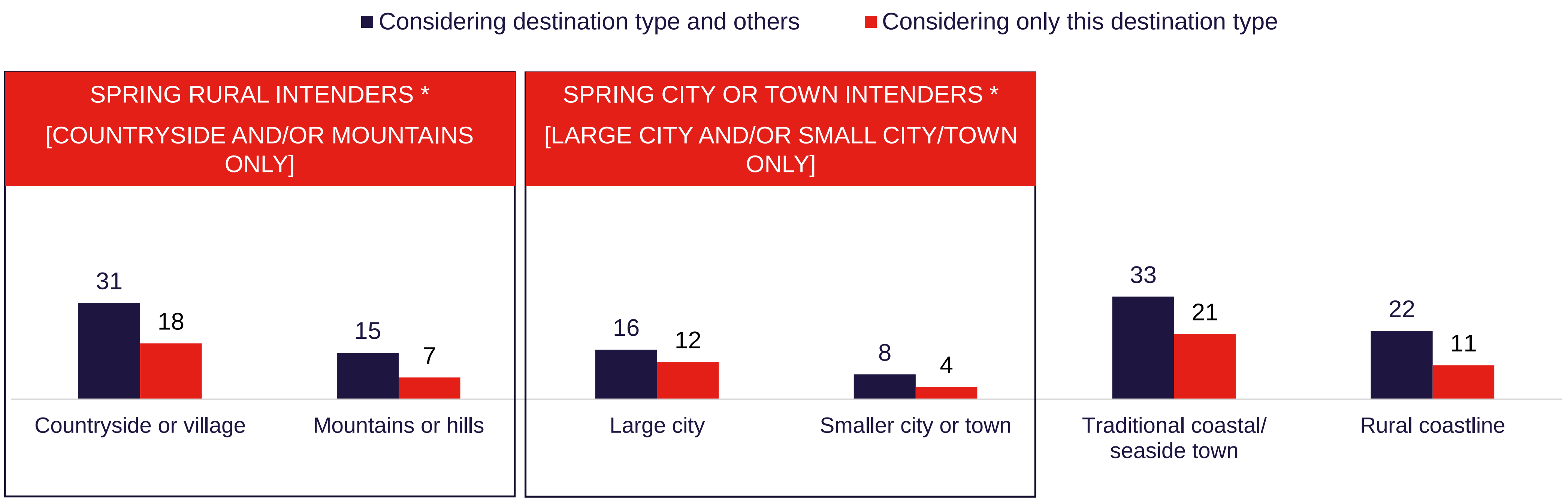
2. Spring Intenders

Profile by Destination Type

Destination types for next UK overnight trip(s) in Spring

Destinations we will be looking at in this section are: Spring Rural Intenders, Spring City or Town Intenders, Spring Traditional Coastal/Seaside Town Intenders and Spring Rural Coastline Intenders.

Figure 13. Main Destination Type of Intended Spring Trip, Percentage, January and February, UK



* For further analysis, the destination types were merged due to insufficient base sizes at an individual level.

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=667 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate to stay in more than one type of destination.

Destination types for next UK overnight trip(s) in Spring

Many Spring Intenders are planning to stay in more than one destination type. For example, 32% of those intending to stay in a rural coastline, also plan to stay in a traditional coastal town.

Table 1. Destination types also considered for Spring Trips, Percentage, January and February, UK, (Read chart vertically)

Column %	Traditional coastal/ seaside town	Countryside or village	Rural coastline	Smaller city or town	Large city	Mountains or hills
Traditional coastal/ seaside town		22%	32%	20%	8%	24%
Countryside or village	21%		26%	27%	8%	39%
Rural coastline	21%	18%		14%	6%	32%
Smaller city or town	5%	7%	5%		10%	6%
Large city	4%	4%	5%	20%		6%
Mountains or hills	11%	19%	22%	12%	6%	

QVB5a. Which of the following best describes the main types of destinations you are likely to stay in during your UK trip?
Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=667 Note: Multiple choice question.
Totals may exceed 100% as some respondents anticipate to go on more than one trip and/or stay in more than one type of destination.

Spring Rural Intenders* (41% share)

Spring Intenders planning a trip to rural destinations are more likely than all Spring Intenders to be retirees and to be less comfortable with everyday activities. They are also more likely to be planning on staying in ‘commercial rental’.

Figure 14. Life Stage of Spring Intenders, Percentage, January and February, UK

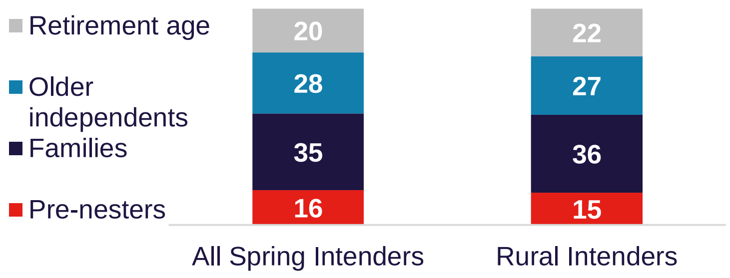


Figure 15. Average comfort level conducting everyday activities, NET very and fairly comfortable, January and February, UK

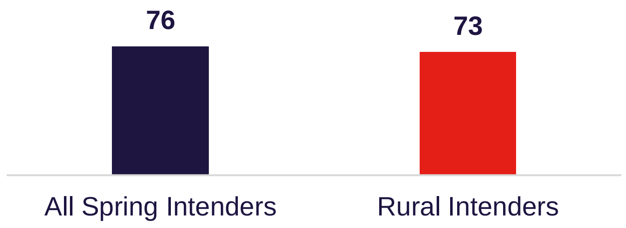


Figure 16. Trip Duration of Intended Spring Trip, Percentage, January and February, UK

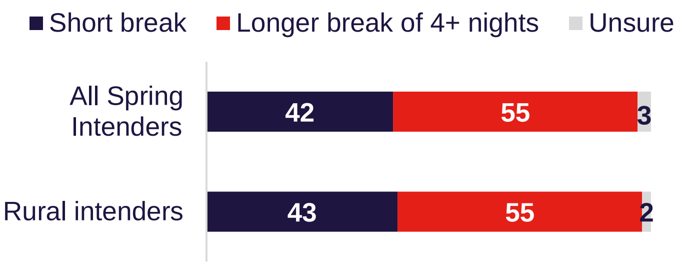


Figure 17. Trip Taker Party Make-up of Intended Spring Trip, Top 5, Percentage, January and February, UK

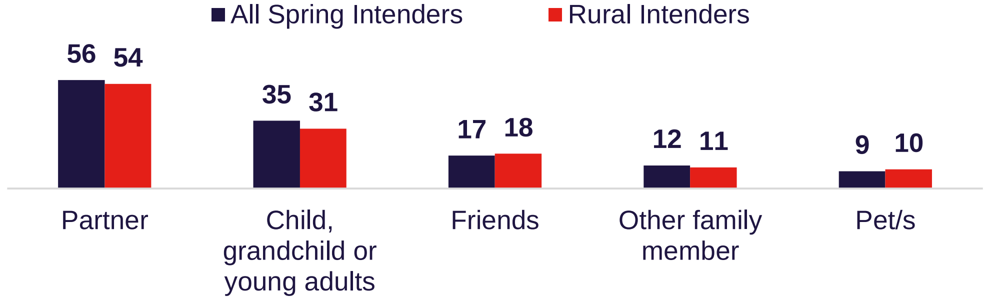
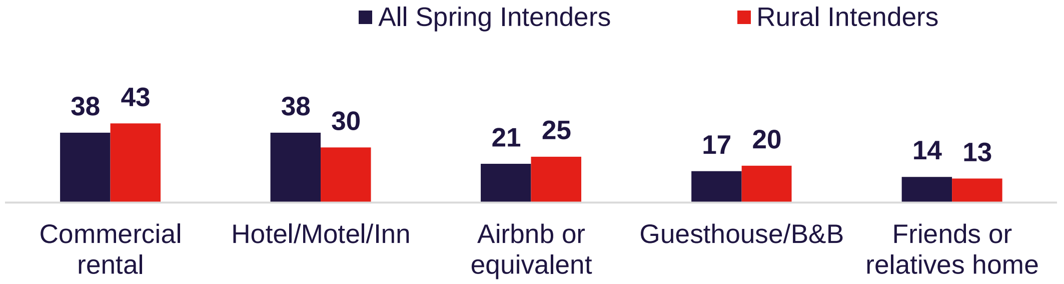


Figure 18. Accommodation Type of Intended Spring Trip, Top 5, Percentage, January and February, UK



*’Countryside or village’ and ‘Mountains or Hills’ merged due to low base sizes

Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=667; Base for life stage and comfort level chart: All rural Intenders (plan on an overnight trip to either a countryside or village or mountains or hills) n=282 ; Base for all other charts: Only rural Intenders (only plan on an overnight trip to either a countryside or village or mountains or hills) n=160.

Spring Traditional Seaside Town Intenders (33% share)

Spring Seaside Town Intenders are more likely than average to be travelling with children/young adults and friends, and to be staying in a 'static caravan – not owned by you'.

Figure 19. Life Stage of Spring Intenders, Percentage, January and February, UK

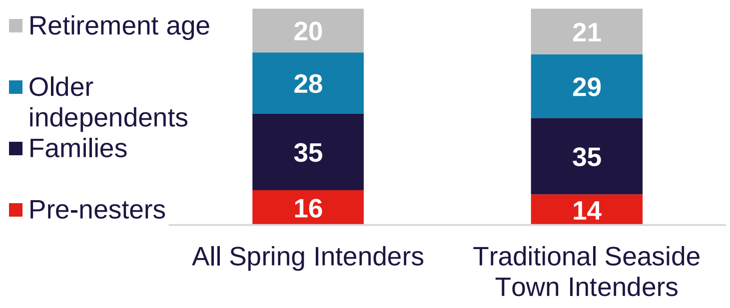


Figure 20. Average comfort level conducting everyday activities, NET very and fairly comfortable, January and February, UK

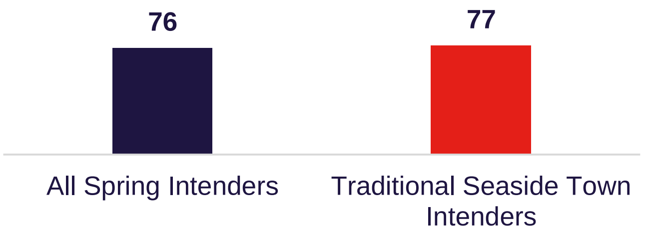


Figure 21. Trip Duration of Intended Spring Trip, Percentage, January and February, UK

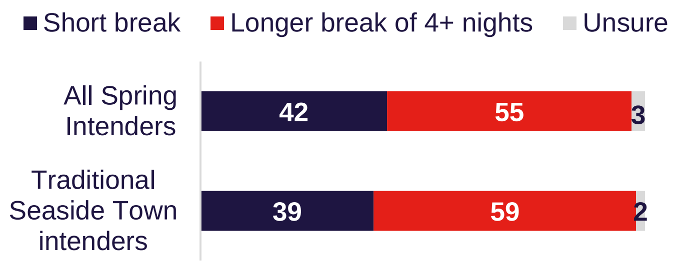


Figure 22. Trip Taker Party Make-up of Intended Spring Trip, Top 5, Percentage, January and February, UK

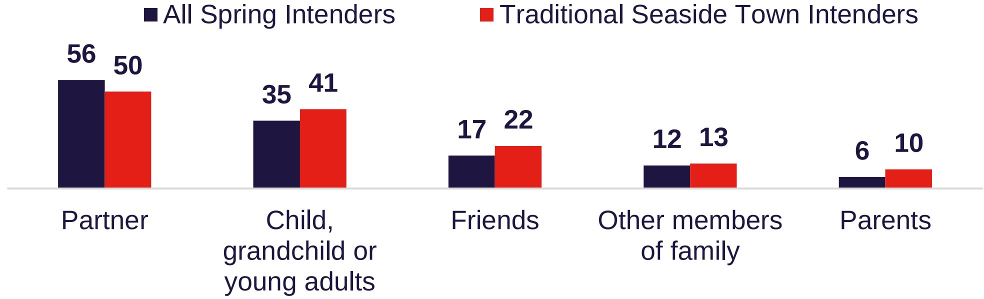
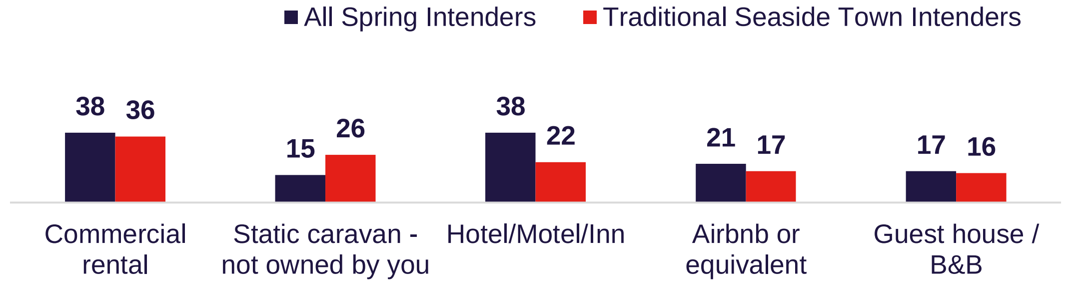


Figure 23. Accommodation Type of Intended Spring Trip, Top 5, Percentage, January and February, UK



Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=667; Base for life stage and comfort level chart: All Traditional Seaside/Town Intenders n=232 ; Base for all other charts: Only Traditional Seaside/Town Intenders n=142.

Spring City / Town Intenders* (23% share)

Spring Intenders planning a trip to a ‘City/Town’ are more likely than all Spring Intenders to be Pre-nesters, and to be comfortable doing everyday activities. They are also more likely than average to be taking a ‘short break’ and to be staying in a ‘hotel/motel/inn’.

Figure 24. Life Stage of Spring Intenders, Percentage, January and February, UK

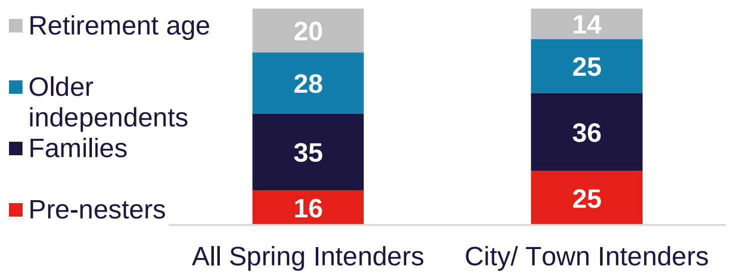


Figure 25. Average comfort level conducting everyday activities, NET very and fairly comfortable, January and February, UK

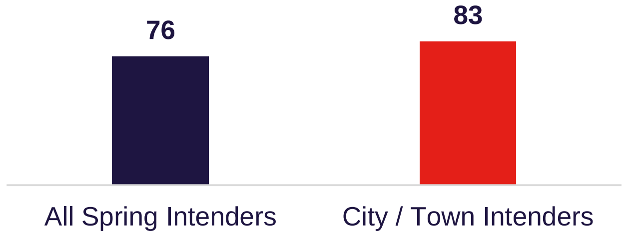


Figure 26. Trip Duration of Intended Spring Trip, Percentage, January and February, UK

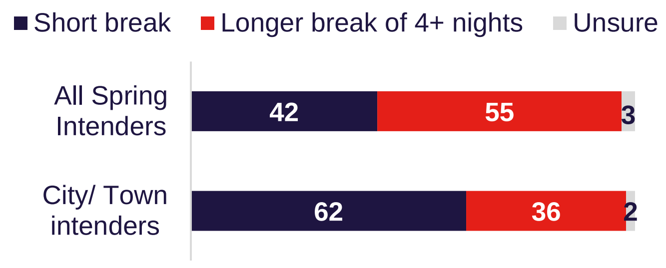


Figure 27. Trip Taker Party Make-up of Intended Spring Trip, Top 5, Percentage, January and February, UK

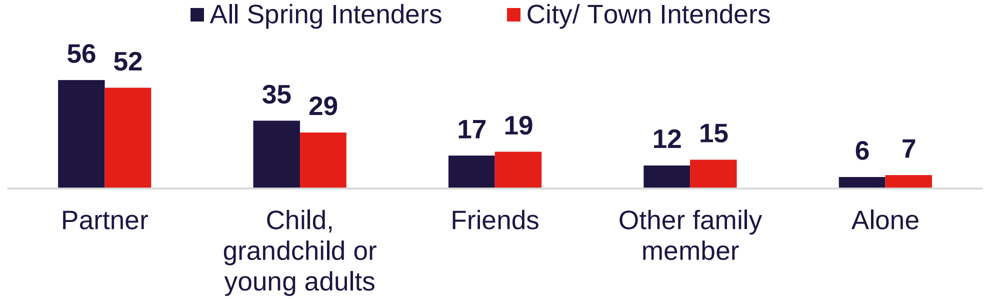
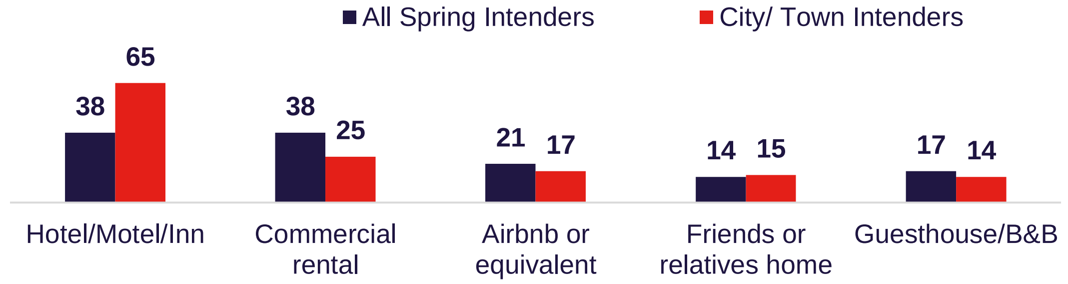


Figure 28. Accommodation Type of Intended Spring Trip, Top 5, Percentage, January and February, UK



*’Large city’ and ‘Smaller city or town’ merged due to low base sizes

Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=667; Base for life stage and comfort level chart: All City/Town Intenders (plan on an overnight trip to either ’Large city’ and ‘Smaller city or town’) n=174 ; Base for all other charts: Only City Intenders (only plan on an overnight trip to either ’Large city’ or ‘Smaller city or town’) n=129.

Spring Rural Coastline Intenders (22% share)

Spring Rural Coastline Intenders tend to be more likely than average to be families and to be taking a longer break of 4+ nights. They are also more likely to be intending to stay in commercial rental accommodation.

Figure 29. Life Stage of Spring Intenders, Percentage, January and February, UK

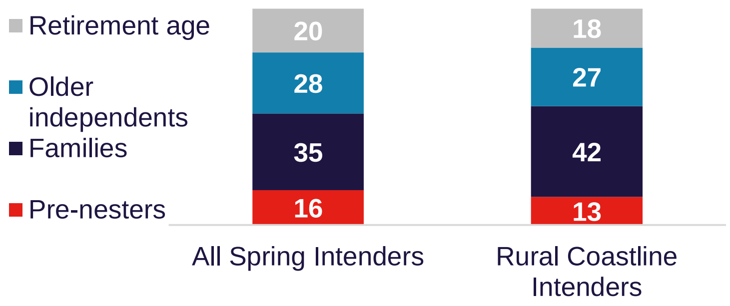


Figure 30. Average comfort level conducting everyday activities, NET very and fairly comfortable, January and February, UK

Figure 31. Trip Duration of Intended Spring Trip, Percentage, January and February, UK

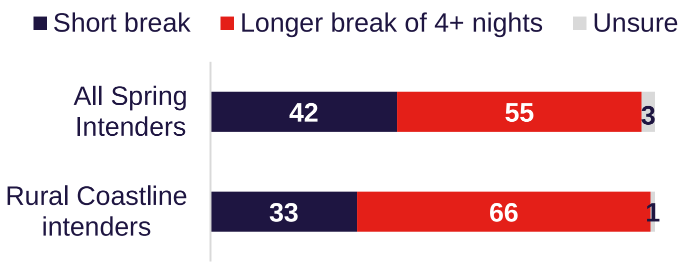


Figure 32. Trip Taker Party Make-up of Intended Spring Trip, Top 5, Percentage, January and February, UK

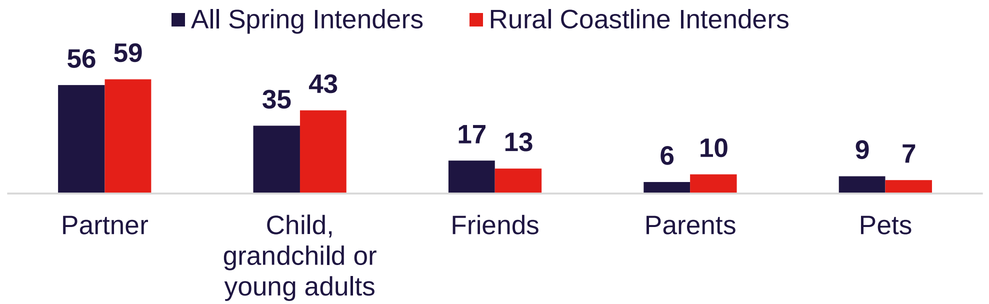
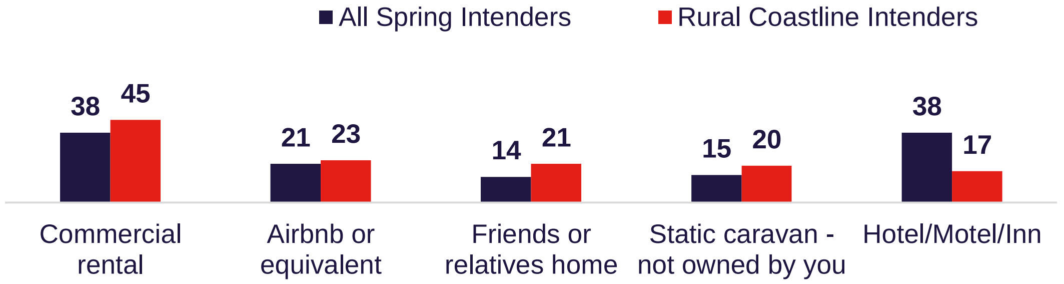


Figure 33. Accommodation Type of Intended Spring Trip, Top 5, Percentage, January and February, UK



Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=667; Base for life stage and comfort level chart: All Rural Coastline Intenders n=160 ; Base for all other charts: Only Rural Coastline Intenders n=77

COVID-19 influence on choice of destination - among next 12 months trip Intenders

As a result of Covid-19, 24% of UK adults say they will 'avoid destinations with lots of people / Stay in less populated places' when choosing a destination for their UK overnight trip in the next 12 months. They also plan to 'take UK trips at less busy times'.

Figure 33a. COVID-19 influence on choice of destination/s for UK holidays and short breaks, Percentage, February 2022, UK, Full list

VB7cnew. How if at all would you say COVID-19 is influencing your choice of destination/s for UK holidays or short breaks?
Base: All respondents travelling in the next 12 months n = 1113

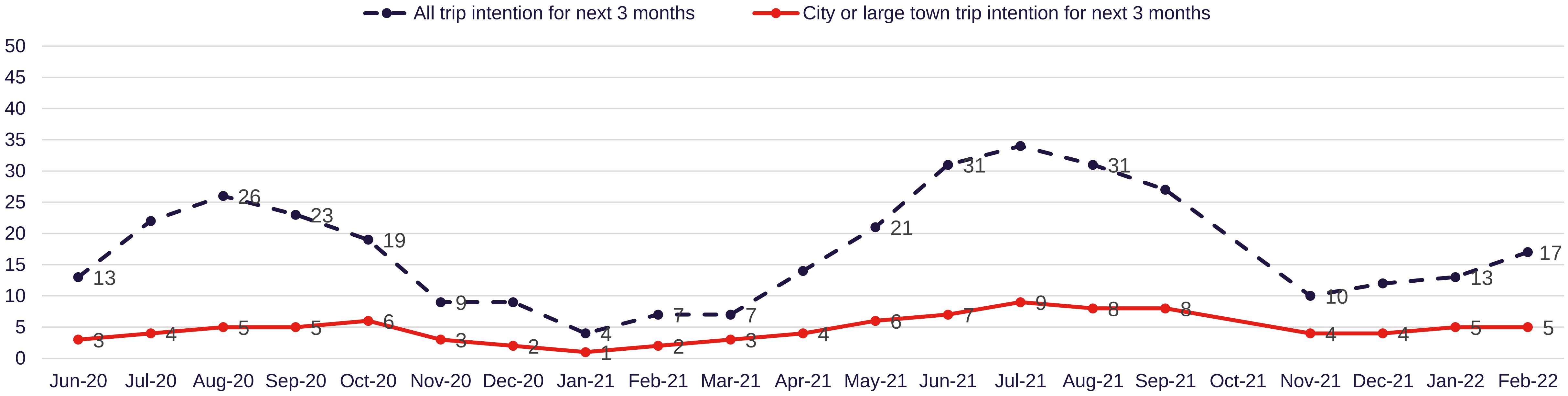
3. Spring Intenders

Focus on City or Large Town Intenders

Next 3 months overnight trip intention – trend by month for ‘city’ vs ‘any destination’

Next 3 months overnight trip intentions to any destination combined is clearly seasonal, peaking in summer. Cities as a next 3 months trip’s destination are slightly more level, contributing well to shoulder months.

Figure 34. Incidence of trips intended within next 3 months, Percentage wave-on-wave, UK



QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All respondents n=c,1750 each wave
*No research was conducted during October 2021

VisitBritain VisitEngland

Destination region of next UK overnight trip in a city or large town

London is the leading destination for ‘city or large town’ trips, followed by the North West of England.

Figure 35. Destination region of next UK overnight trip in a city or large town for Spring Intenders, Percentage, January and February, UK

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK; City Intenders n=129
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

Demographics of Spring City Intenders

Spring City Intenders have a higher proportion of Pre-nesters and higher social grades than Spring City Non-Intenders.

Figure 36. Life Stage of Spring Intenders, Percentage, January and February, UK

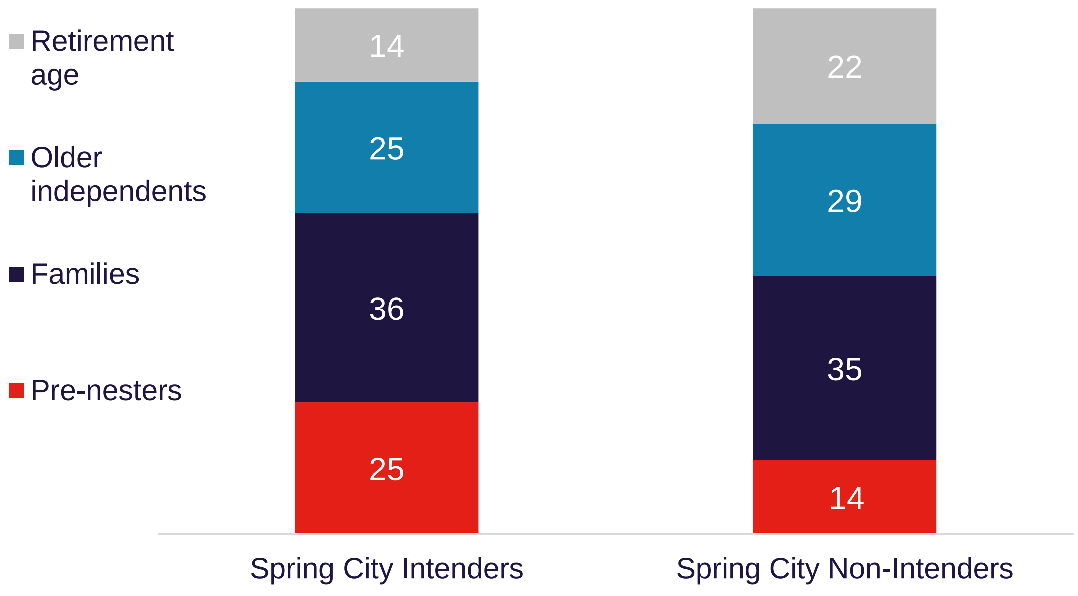
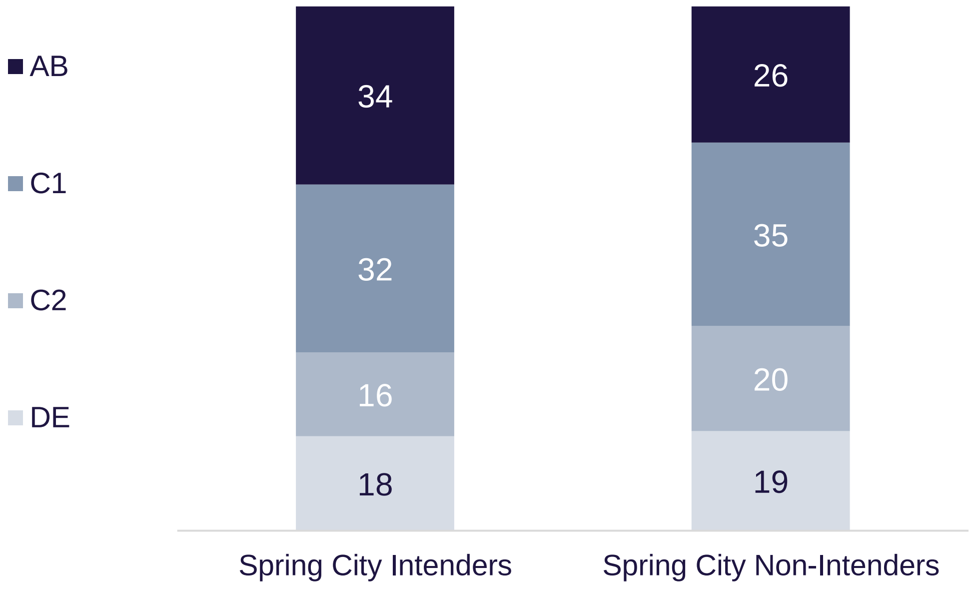


Figure 37. Social Grade of Spring Intenders, Percentage, January and February, UK

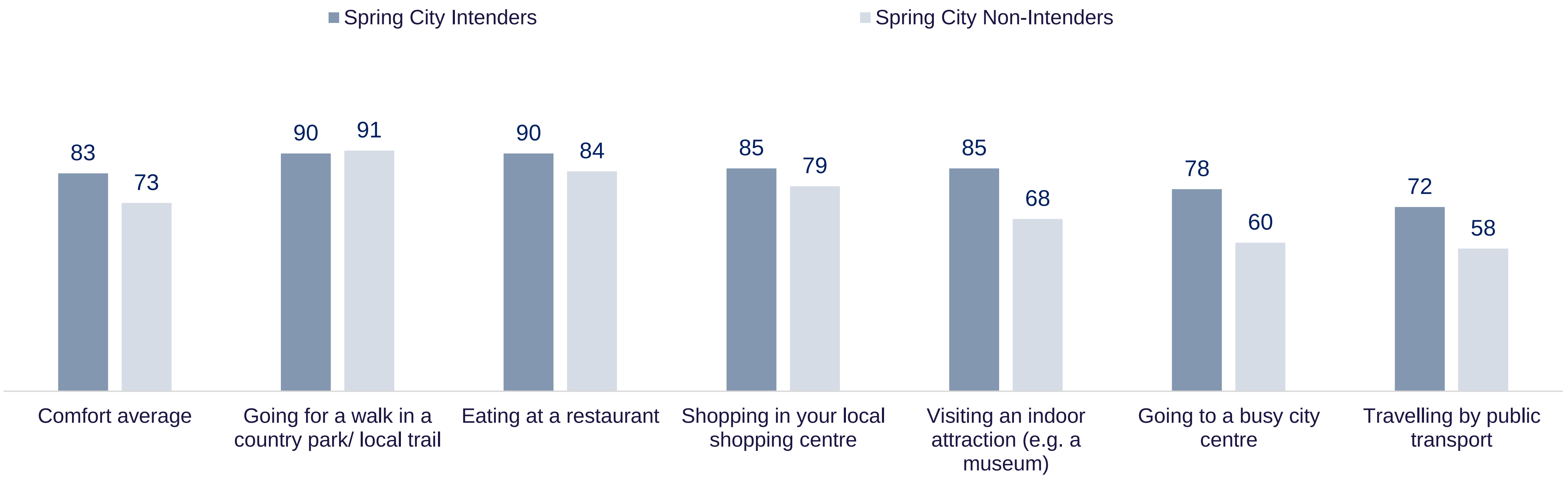


Source: Demographic questions. Base: City or large town Intenders n=174; Non-City or large town late Intenders n=532

Level of comfort undertaking activities of Spring City Intenders

Spring City Intenders are more comfortable than Spring City Non-Intenders with a range of everyday activities, in particular with ‘travelling by public transport’, ‘visiting an indoor attraction’, and ‘visiting a busy city centre’.

Figure 38. Level of comfort conducting activities, NET very and fairly comfortable, Percentage, January and February, UK

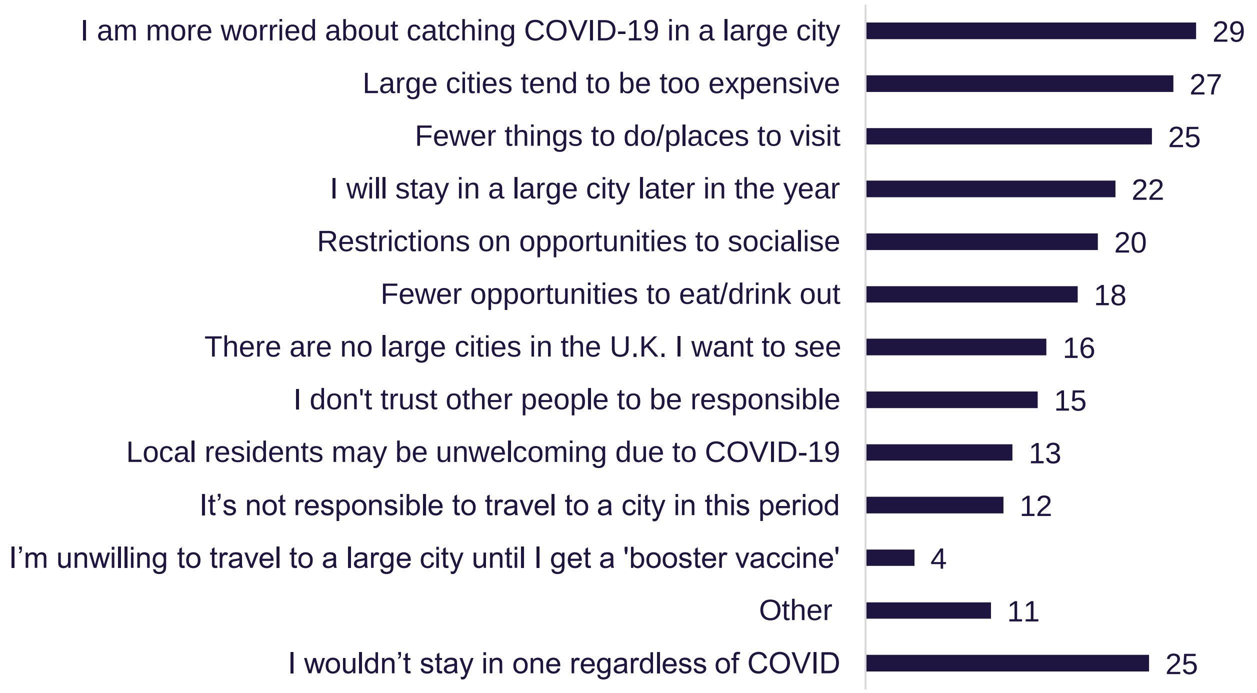


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: City or large town Intenders n=174; Non-City or large town late Intenders n=532

Reasons for not taking a trip to a city in Spring

Concerns about ‘catching COVID-19 in a large city’ is the leading reason for not staying in a large city amongst Spring Intenders, followed by ‘large cities tend to be too expensive’ and ‘fewer things to do/places to visit’.

Figure 39: Reasons for not staying in a large city amongst Spring Trip Intenders, Percentage, January and February, UK



VB5b. You indicated you don’t plan on staying in a large city during your UK trip in <insert month>. Why is this? Base: All Spring Intenders not planning on staying in a large city. n=581

Reasons for not taking a trip to a city in Spring – by life stage

‘Concerns around catching COVID-19’ is the top barrier to visiting a city for Older Independents and Retirees. ‘Large cities tend to be too expensive’ is a Top 2 reason for Pre-Nesters and Families’ with ‘fewer opportunities to eat/drink out’ also influential.

Tables 2-5. Top 5 Reasons for not taking a trip to a large city in Spring – by life stage, Percentage, January and February, UK

Pre-Nesters	
Large cities tend to be too expensive	29%
Fewer opportunities to eat/drink out	25%
I will stay in a large city later in the year	23%
Fewer things to do/places to visit	23%
I am more worried about catching COVID-19 in a large city	21%

Families	
I will stay in a large city later in the year	30%
Large cities tend to be too expensive	27%
Fewer opportunities to eat/drink out	27%
Fewer things to do/places to visit	27%
I wouldn’t stay in one regardless of COVID	26%

Older Independents	
I am more worried about catching COVID-19 in a large city	33%
I wouldn’t stay in one regardless of COVID	29%
Large cities tend to be too expensive	28%
Fewer things to do/places to visit	28%
Restrictions on opportunities to socialise	19%

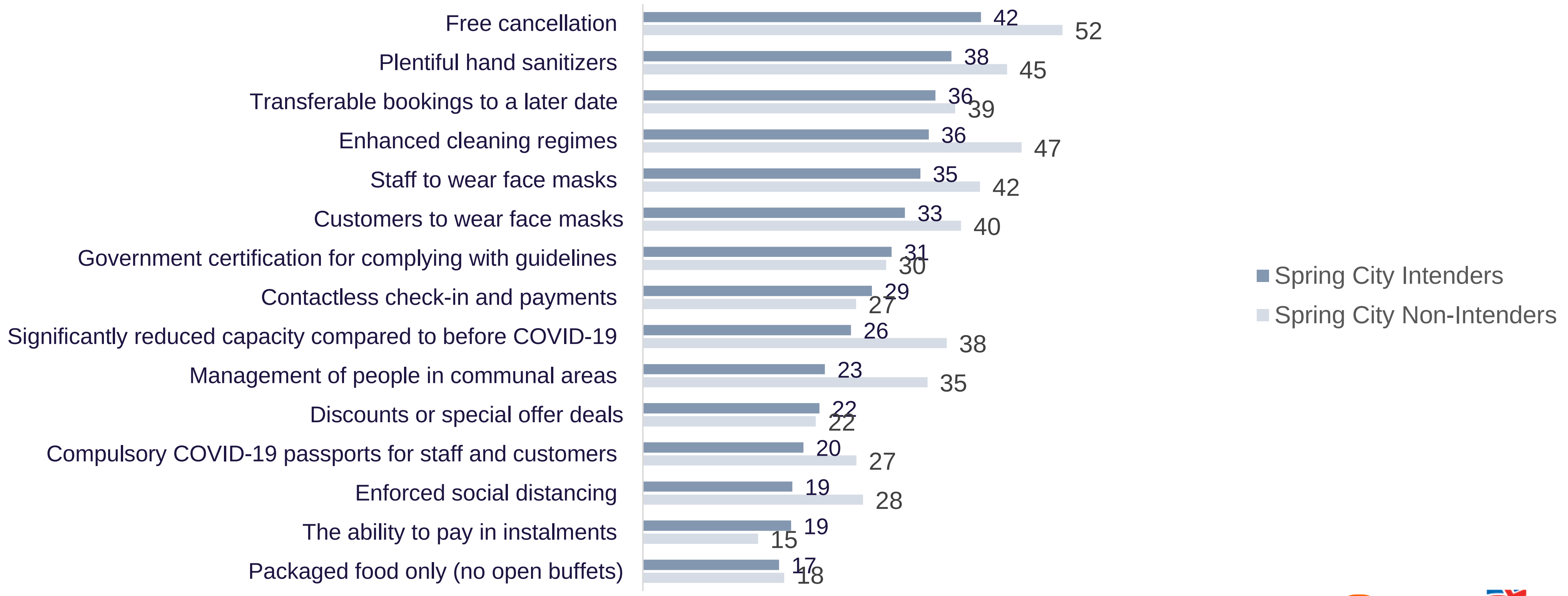
Retirees	
I am more worried about catching COVID-19 in a large city	40%
There are no large cities in the U.K. I want to see	27%
Restrictions on opportunities to socialise	23%
I wouldn’t stay in one regardless of COVID	22%
Large cities tend to be too expensive	21%

VB5b. You indicated you don’t plan on staying in a large city during your UK trip in <insert month>. Why is this? Base: All Spring Intenders not confident in taking a Spring overnight UK trip in a large city. Pre-nesters n=96; Families n=246; Older independents n=138; Retirees n=101

Required conditions for indoor leisure/ tourism providers

City Non-Intenders are significantly more likely than City Intenders to regard a wide range of conditions as essential for them to visit indoor leisure providers in the next few months – most notably, 'free cancellation', 'plentiful hand sanitizers', 'enhanced cleaning regimes', 'staff/customers to wear face masks' and measures to control over-crowding.

Figure 40. Conditions that are essential for indoor tourism and leisure providers to have in place to visit them in the next few months, Required by Spring City Intenders and Non-Intenders, Percentage, January and February 2021



Q63. Which, if any, of the following conditions would be essential for indoor tourism and leisure providers (e.g. indoor visitor attractions, restaurants, hotels etc.) to have in place for you to visit/use them over the next few months? Base: City or large town Intenders n=174; Non-City or large town late Intenders n=532

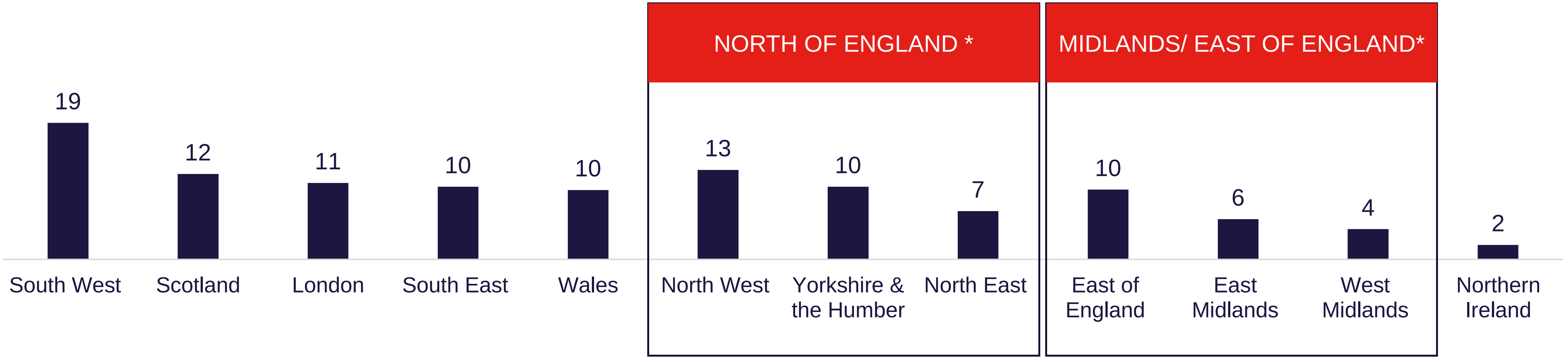
4. Spring Intenders

Profile by Destination Region

Destination regions for next Spring short break or holiday

The regions we will be looking at in this section are: England, Scotland, Wales, South West of England, London, South East of England (excluding London), North of England and Midlands/East of England.

Figure 41. Next UK overnight trip destination region for Spring Intenders, Percentage, January and February, UK



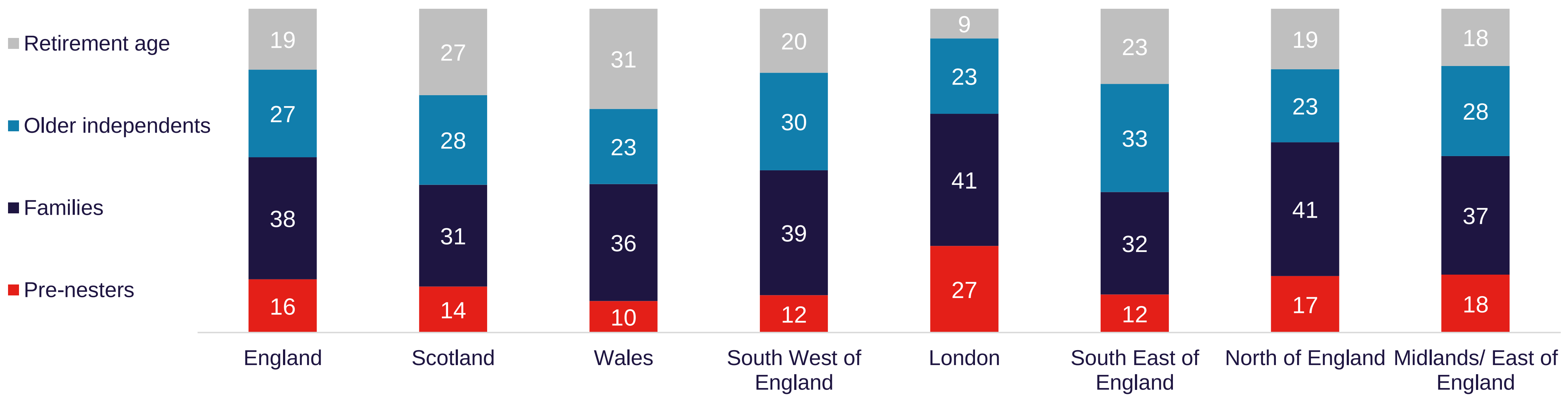
* For further analysis, these destinations regions have been merged due to insufficient base sizes at an individual region level.

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=646
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

Spring Intenders' life stage - by destination region

There are some notable variations in life stage representation by destination amongst Spring Intenders – London Intenders are the most likely to be 'Pre-nesters', Wales Intenders the most likely to be 'Retirees'.

Figure 42. Life stage of Spring Intenders by destination region, Percentage, January and February, UK



Sources: demographic questions and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Spring England n=499; Scotland n=107; Wales n=83; South West of England n=132; London n=86; South East of England n=68; North of England n=170; Midlands/East of England n=120 *Small base size treat with caution. For region definitions see introduction.

Spring Intenders' social grade - by destination region

London is the destination most likely to generate trips from AB social grades. Wales and Midlands/East of England are most likely to generate the highest proportion of visitors of a C1 social grade.

Figure 43. Social grade of Spring Intenders by destination region, Percentage, January and February, UK

Social grade question and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK in Spring England n=499; Scotland n=107; Wales n=83; South West of England n=132; London n=86; South East of England n=68; North of England n=170; Midlands/East of England n=120 *Small base size treat with caution. For region definitions see introduction.

Spring Intenders' region of residence - by destination region

The table below illustrates the region of residence (in rows) for Intenders to each destination (in columns). For example, 12% of Spring Intenders to England live in London.

Table 6. Region of residence of Spring Intenders by destination region, Percentage, January and February, UK, (Read chart vertically)

Region of residence [down]	England	Scotland	Wales	South West of England	London	South East of England	North of England	Midlands/ East of England
England	91%	59%	89%	93%	84%	94%	87%	95%
Scotland	6%	37%	1%	4%	10%	3%	10%	1%
Wales	3%	3%	11%	3%	6%	4%	1%	3%
London	12%	7%	10%	7%	22%	16%	15%	13%
South East	16%	11%	9%	25%	7%	42%	6%	10%
North West	13%	16%	19%	9%	16%	2%	20%	12%
East of England	10%	7%	4%	9%	2%	11%	5%	20%
East Midlands	8%	0%	10%	4%	5%	6%	6%	13%
Yorkshire & Humberside	10%	6%	10%	8%	3%	4%	15%	7%
North East	3%	2%	1%	1%	8%	0%	5%	3%
South West	10%	7%	9%	21%	11%	9%	5%	6%
West Midlands	8%	2%	15%	9%	9%	4%	9%	11%

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK in Spring England n=499; Scotland n=107; Wales n=83; South West of England n=132; London n=86; South East of England n=68; North of England n=170; Midlands/East of England n=120 *Small base size treat with caution. For region definitions see introduction.

Spring Intenders' trip destination type - by destination region

Destination type tends to reflect the destination region being considered, e.g. 74% of Spring London Intenders are considering a trip to a Large City, and 54% Spring Intenders intending a trip to Wales are planning to stay in a traditional coastal town.

Table 7. Destination type of Spring trip by destination region, Percentage, January and February, UK, (Read chart vertically)

Destination type	England	Scotland	Wales	South West of England	London	South East of England*	North of England	Midlands/ East of England
Traditional coastal/seaside town	33%	22%	54%	52%	10%	47%	31%	21%
Countryside or village	29%	40%	35%	28%	4%	33%	32%	37%
A city or large town	26%	16%	8%	10%	74%	15%	20%	21%
Rural coastline	20%	28%	26%	31%	4%	16%	18%	19%
Mountains or hills	11%	34%	19%	8%	3%	4%	20%	12%

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip? QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Spring, exclusively in England n=464; Scotland n=84; Wales n=60; South West n=101; London n-64; South East n=48*; North of England n=115; Midlands/East of England n=80
*Note small base sizes

Spring Intenders' trip taker party composition - by destination region

There are some difference by destination region in terms of who the Intenders plan to travel with, for example, 62% Spring Intenders intending a trip to South East of England are planning to go with a partner, and, 44% of those intending to go to North of England are planning to go with their children.

Table 8. Trip taker party composition of Spring trip by destination region, Percentage, January and February, UK, (Read chart vertically)

Destination type	England	Scotland	Wales	South West of England	London	South East of England	North of England	Midlands/ East of England
Partner	55%	49%	49%	53%	58%	62%	54%	48%
Children or young adults (aged 16-24)	37%	31%	33%	39%	27%	24%	44%	33%
Friend/s	16%	32%	23%	14%	16%	36%	15%	14%
Other members of my family	12%	9%	21%	16%	14%	5%	8%	15%
Pets	10%	7%	7%	12%	3%	14%	10%	10%
With parents of older adults	7%	3%	11%	7%	4%	6%	9%	3%
Will travel alone	6%	6%	3%	5%	5%	2%	2%	13%
Other	5%	1%	0%	6%	3%	6%	7%	2%

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? And QVB4d. With whom are you likely to be spending your holiday? Base: All respondents planning on taking a holiday or short break in the UK in Spring, exclusively in England n=464; Scotland n=84; Wales n=60; South West n=101; London n-64; South East n=48*; North of England n=115; Midlands/East of England n=80
*Note small base sizes

Spring Intenders' trip accommodation type - by destination region

The South West of England and the North of England are the regions most likely to attract visitors staying in 'commercial rental'. Hotels are most chosen for overnight trips to London.

Table 9. Accommodation type of Spring trip by destination region, Percentage, January and February, UK, (Read chart vertically)

Accommodation type	England	Scotland	Wales	South West of England	London	South East of England	North of England	Midlands/ East of England
Private home	43%	27%	17%	33%	48%	43%	38%	45%
Commercial rental	39%	30%	36%	42%	38%	14%	42%	36%
Camping/ caravan	38%	31%	38%	40%	31%	30%	40%	40%
Hotel / Motel / Inn	34%	44%	29%	24%	64%	30%	29%	26%
Guesthouse / B&B / Farmhouse	24%	17%	6%	17%	28%	13%	29%	22%
Other	10%	3%	4%	7%	13%	1%	10%	11%

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>? And QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Spring, exclusively in England n=464; Scotland n=84; Wales n=60; South West n=101; London n-64; South East n=48*; North of England n=115; Midlands/East of England n=80
*Note small base sizes

Spring Intenders' trip duration - by destination region

There is some variation in trip duration by destination. London, for example, is more likely a destination for short breaks, whereas the South West of England is dominated by longer breaks of 4+ nights.

Figure 44. Duration of Spring trip by destination region, Percentage, January and February, UK

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? Base: All respondents planning on taking a holiday or short break in the UK in Spring, exclusively in England n=464; Scotland n=84; Wales n=60; South West n=101; London n-64; South East n=48*; North of England n=115; Midlands/East of England n=80 *Note small base sizes

Methodology

Methodology

- The findings in this report are based on an online survey conducted amongst a sample of the UK adult population.
- In the first stage a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then ‘boosted’ in Wales and to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the UK overall and within each nation.

Master Data Table

- To access a .csv file of the data contained within the charts, please open this report with Adobe Reader. When you have done so, navigate to the left hand side of the page to the attachments area, symbolised by a paperclip icon, and click on the file to open the attachment.