COVID-19 Consumer Tracker

Wave 21

Fieldwork Period: 7 – 11 December

U.K. Results

Introduction

- VisitEngland, VisitScotland and Visit Wales have commissioned a Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight trips both within the U.K. 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 U.K. residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken and the type of reassurances they're seeking from the sector.
- This tracker is based on a U.K. nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales.
- The results are made publicly available and updated each wave at the following website:

  https://www.visitbritain.org/covid-19-consumer-sentiment-tracker

Definitions used within this report

In this report we look at the profiles and attitudes of a number of separate audiences depending on when they intend to take an overnight domestic trip. For ease of reference, the time periods have been given seasonal labels, although we appreciate these may not necessarily correspond with meteorological definitions.

- **Early Winter Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between sometime during December 2020.
- **Late Winter Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between January 2021 and March 2021.

Fieldwork Periods

Project Period	Fieldwork Period	Project Period	Fieldwork Period
Wave 1	18 – 22 May	Wave 13	10 – 14 August
Wave 2	25 – 29 May	Wave 14	31 August – 4 September
Wave 3	1 – 5 June	Wave 15	14 – 18 September
Wave 4	8 – 12 June	Wave 16	28 September – 2 October
Wave 5	15 – 19 June	Wave 17	12 – 16 October
Wave 6	22 – 26 June	Wave 18	26 – 30 October
Wave 7	29 June – 3 July	Wave 19	9 – 13 November
Wave 8	6 – 10 July	Wave 20	23 – 27 November
Wave 9	13 – 17 July	Wave 21	7 – 11 December
Wave 10	20 – 24 July	Wave 22	
Wave 11	27 – 31 July	Wave 23	
Wave 12	3 – 7 August	Wave 24	

Wave 21: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

*** Represents a significant change on previous wave**

Key Metrics	Wave 20	Wave 21	Wave Shift
National mood (average score out of 10)	6.5	6.5	N/A
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	15%	22%	+7*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.5	2.6	+0.1
Normality score (proportion expecting normality by March)	14%	14%	N/A
The main reasons for not feeling confident about taking a trip in December	1. Restrictions on travel from government 2. It's not responsible to travel	1. Restrictions on travel from government 2. I have concerns catching COVID-19	New no.2

Table 2. Top line Metrics – General Trip Intentions

Key Metrics	Wave 20	Wave 21	Wave Shift
Anticipated number of UK short breaks compared to normal (% more/the same)	36%	40%	+4*
Anticipated number of UK longer breaks compared to normal (% more/the same)	33%	38%	+5*
Near-term confidence in taking UK overnight trip (Dec/Jan confident)	15%/14%	18%/17%	+3/+3
Medium-term confidence in taking UK overnight trip (Feb/March confident)	20%/28%	22%/31%	+2/+3
Proportion going on a UK overnight trip in late winter (Jan-Mar)	11%	13%	+2
Split between longer break / short break / don't know for late winter trip	45%/49%/6%	42%/51%/7%	-3/+2/+1

Wave 21: Scorecard of Key Metrics (2)

Table 3. Top line Metrics – Destination and Accommodation Plans

*** Represents a significant change on previous Wave**

Key Metrics	Wave 20	Wave 21	Wave Shift
Leading UK destination likely to stay in between Nov- Dec	South West	South West	No change
Main *type* of destination likely to stay in between Nov – Dec	Countryside or village	City or large town	New no.1
Main accommodation type likely to stay in between Nov - Dec	Private home	Private home	No change

Table 4. Top line Metrics – Broader Leisure Activity

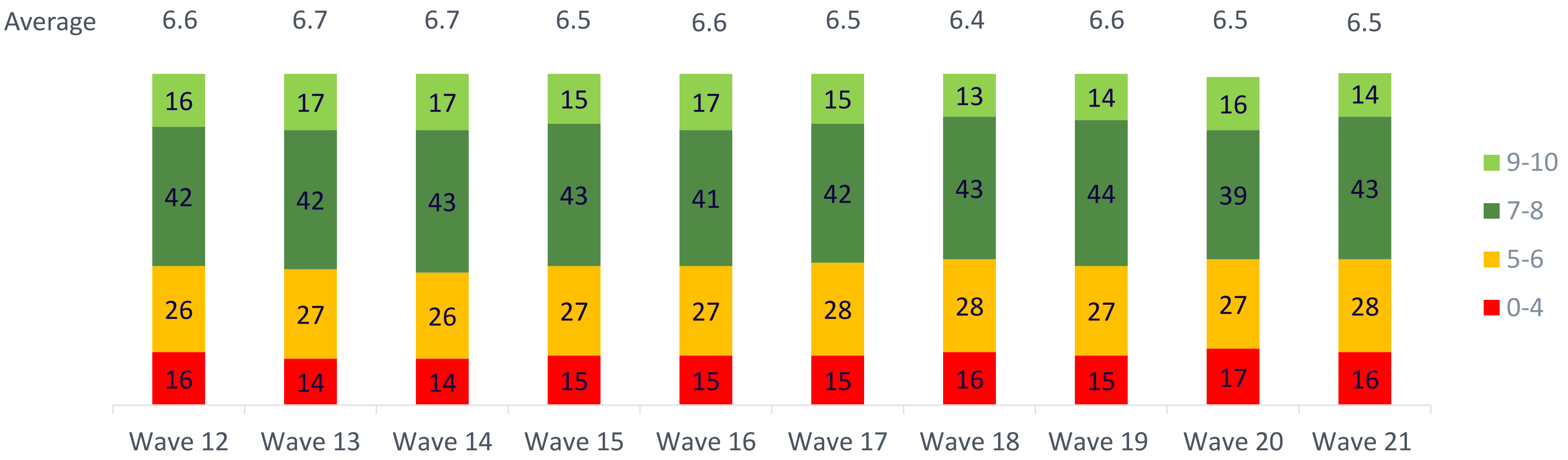
Key Metrics	Wave 20	Wave 21	Wave Shift
Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No change
Place/activity generating lowest engagement compared to normal	Indoor or covered attractions	Indoor or covered attractions	No change

1. The National Mood

The national mood

- The average mood of U.K. adults remains stable at 6.5 out of 10.

Figure 1. Current mood out of 10, Percentage wave-on-wave, UK



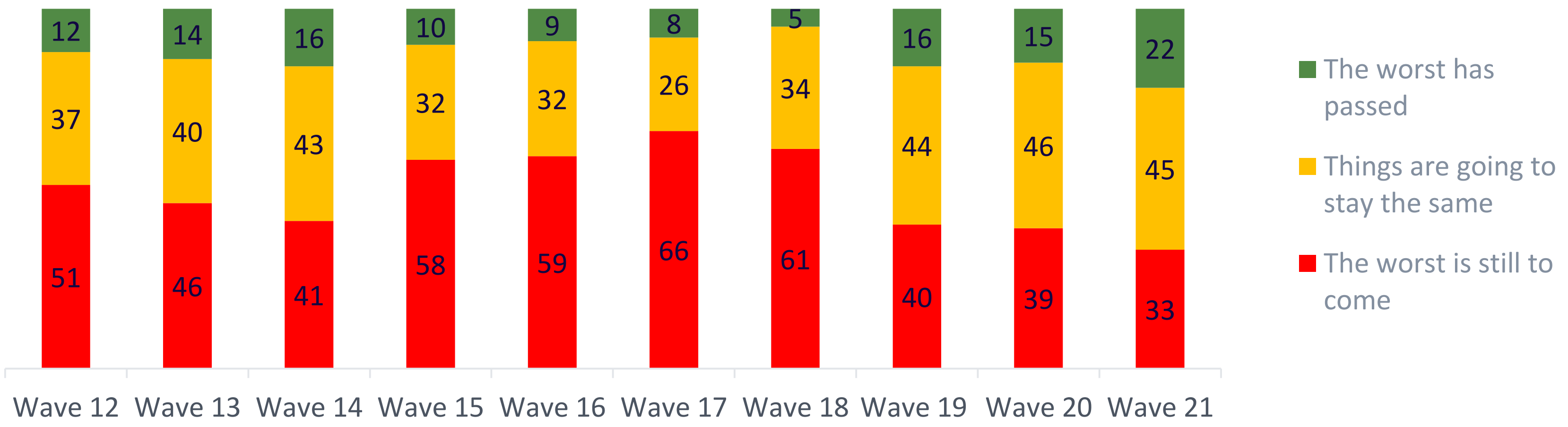
Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 21 n=1,756

Perceptions of the situation in relation to COVID-19

Perceptions of the situation in relation to COVID-19

- The proportion of U.K. adults believing ‘the worst has passed’ in relation to COVID-19 has risen for the third consecutive wave; on this occasion from 15% to 22%. The percentage feeling ‘the worst is still to come’ has also declined to the lowest proportion since early summer, at 33%.

Figure 2. Perception of the situation with regards to COVID-19, Percentage wave-on-wave, UK



Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? Base: All respondents. Wave 21 n=1,756

Perceptions of when things will return to 'close to normal'

- The proportion expecting life will return to 'something close to normal' by next March has remained consistent with the previous wave at 14%.
- It's not until spring (from April onwards) that expectations of 'normality' begin to appreciably climb.

Figure 3. Perceptions of when things will return 'close to normal' Percentage Wave 21, UK

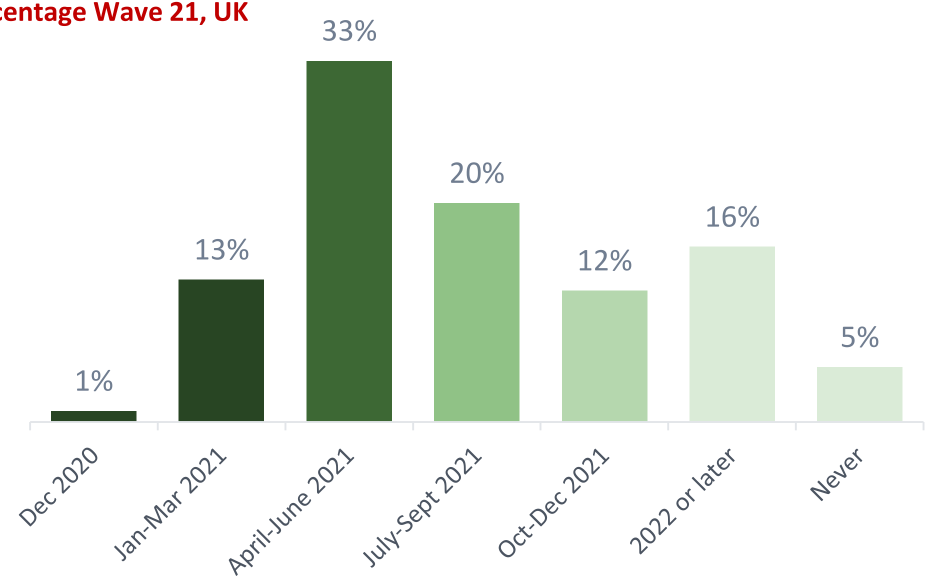
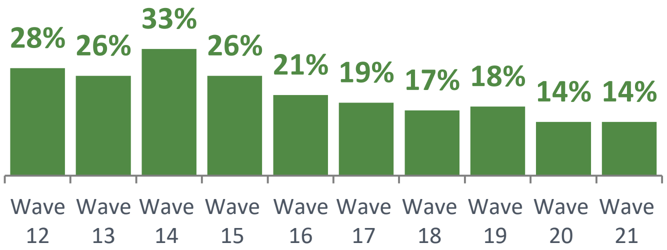


Figure 4. Proportion expecting normality by March, Percentage wave-on-wave, UK

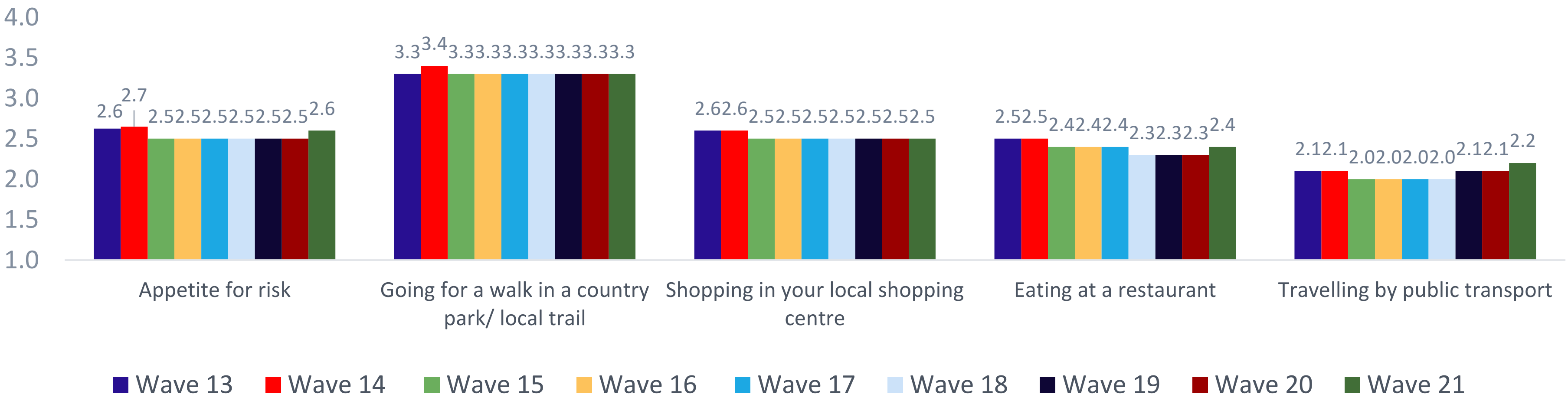


Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 21 n=1,756

Appetite for risk

- The ‘levels of comfort’ with undertaking everyday activities has remained relatively consistent since Wave 15, although the ‘appetite for risk’ average score does increase slightly this wave to 2.6.

Figure 5. Level of comfort conducting a range of activities separately and combined, Average Score wave-on-wave where 1= not at all comfortable doing activity and 4= very comfortable doing activity, UK



VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents excluding those stating ‘don’t know’ or who wouldn’t do activity under any circumstances. Mean average based on those that gave a score of 1-4. ‘Net: appetite for risk’ is calculated as a straight average of the four scores. Wave 21 n=1,756.

2. Trip Intentions

Note: ‘Early Winter’ is defined as Nov – Dec 2020 and ‘Late Winter’ as Jan – March 2021

Anticipated number of U.K. trips before March compared to normal

- 40% of U.K. adults intend to take the same or more U.K. short breaks compared to normal between now and the end of March, a slight increase from the previous wave (36%). 36% plan on taking fewer short breaks, whilst 25% 'don't know'.
- The pattern is similar for 'longer breaks,' with the proportion planning on taking more or the same number increasing from 33% to 38%.

Figure 13. Number of UK short breaks (1-3 nights) between now and the end of March compared to normal, Percentage Wave 21, UK

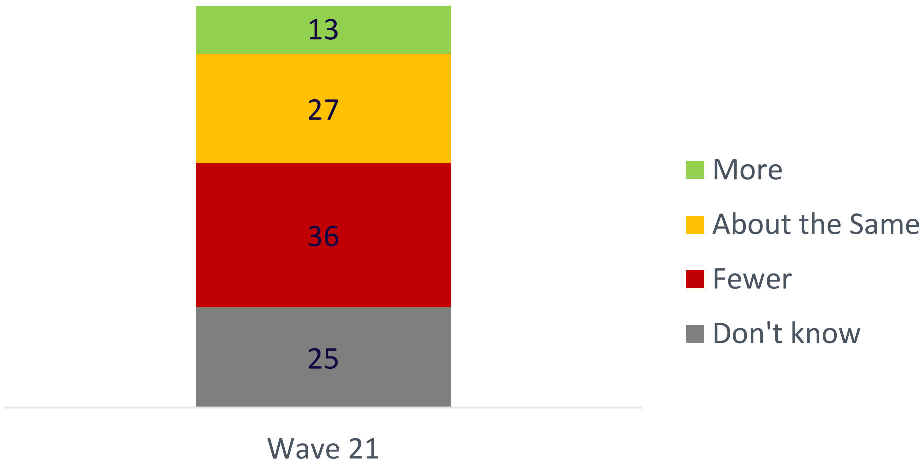
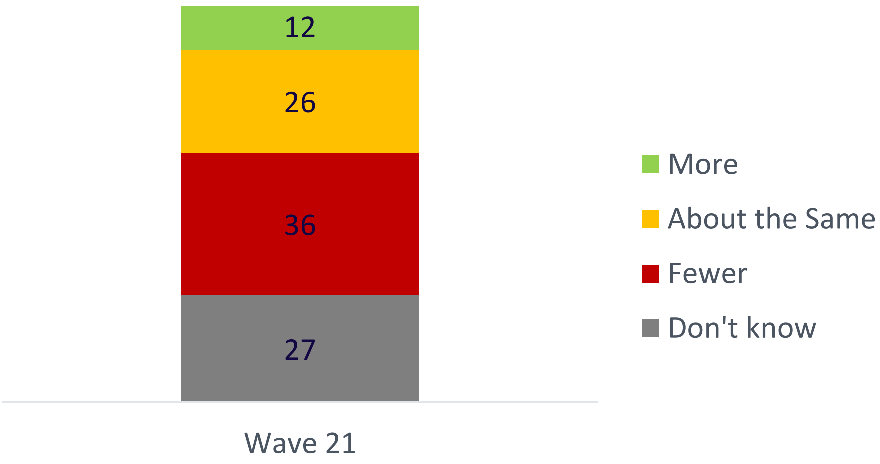


Figure 14. Number of UK longer breaks (4+ nights) between now and the end of March compared to normal, Percentage Wave 21, UK



QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of UK holidays/short breaks between now and the end of March 2021? Base: All respondents. Wave 21 n=1,756.

Anticipated number of OVERSEAS trips before March compared to normal

- 28% of U.K. adults plan on taking more or about the same number of overseas short breaks compared to normal between now and the end of March, compared to 25% recorded in the previous wave.
- A similar propotion (30%) plan on taking more or about the same amount of overseas longer breaks of 4+ nights.
- The majority, however, either plan on taking fewer overseas trips or 'don't know'.

Figure 15. Number of OVERSEAS short breaks (1-3 nights) between now and the end of March compared to normal, Percentage Wave 21, UK

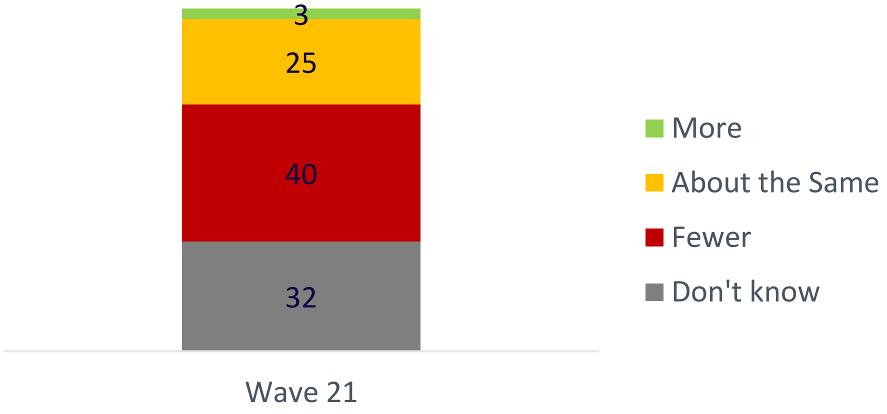
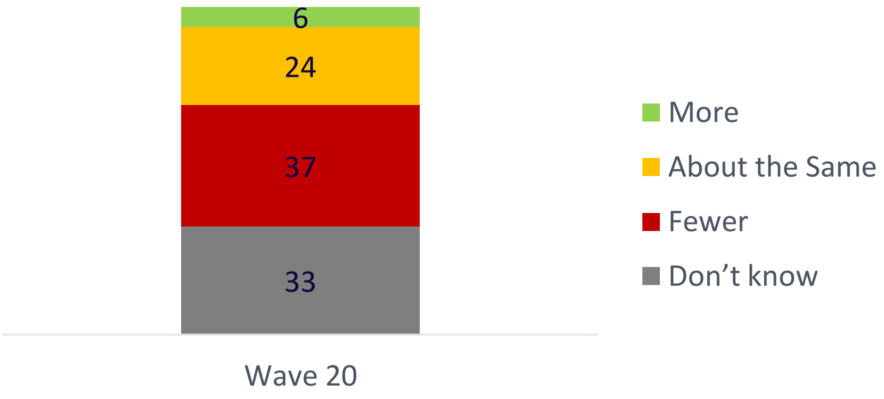


Figure 16. Number of OVERSEAS longer breaks (4+ nights) between now and the end of March compared to normal, Percentage Wave 21, UK



QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of overseas holidays/short breaks between now and the end of March 2021? Base: All respondents. Wave 21 n=1,756.

Confidence in the ability to take a U.K. overnight trip

- Confidence in being able to take an overnight domestic trip remains subdued in the early part on 2021, with May being the first month when a majority express confidence.
- Despite comparatively low levels of confidence in the near and medium terms, these show an improving trend since the last wave.
- The rise in confidence for trips in March 2021 represents the first increase for this time period since Wave 14 from early September.

Figure 17. Confidence in taking a UK overnight trip across a range of different months, Percentage, Wave 21, UK

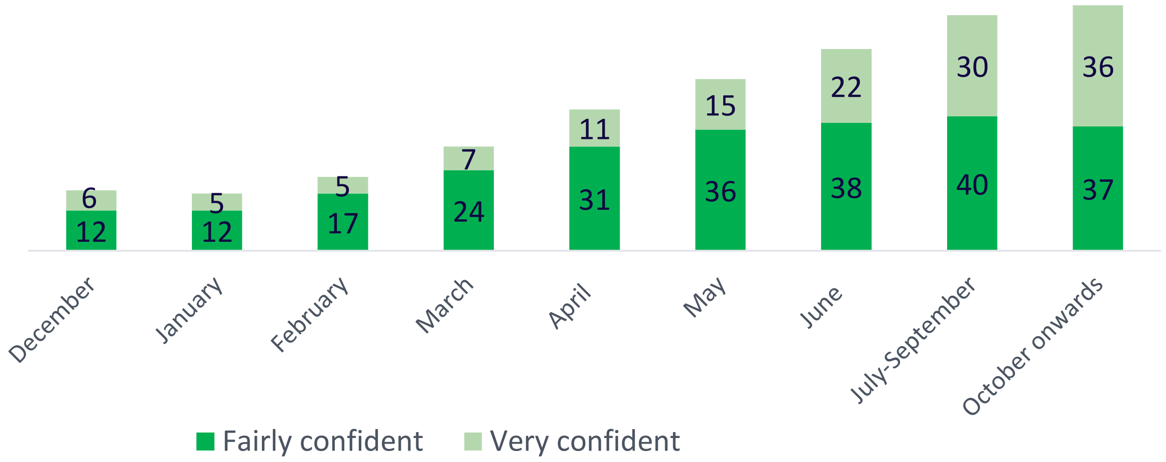
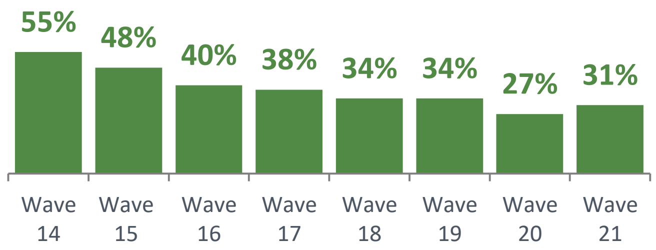


Figure 18. Confidence in taking a UK overnight trip in March 2021, Percentage wave-on-wave, UK



QVB7anew. We'd like you to imagine that you have booked a UK holiday or short break in each of the 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: All respondents. Wave 21 n=1,756.

Reasons for not feeling confident about taking trips in the U.K. – Top 5

- ‘Restrictions on travel from government’ is the leading reason U.K. adults do not feel confident about taking an overnight trip throughout the winter period; cited significantly more frequently than the next reason. Linked to this, ‘opportunities to eat/drink out,’ ‘restrictions on opportunities to socialise’ and having ‘fewer things to do’ also make the top five reasons for not taking a trip.
- ‘Concerns about catching COVID-19’ and ‘it’s not responsible to travel in this period’ additionally continue to be leading reasons across both periods.

Figure 19. Top 5 reasons for not being confident about travelling in early winter*, Percentage Wave 21, UK

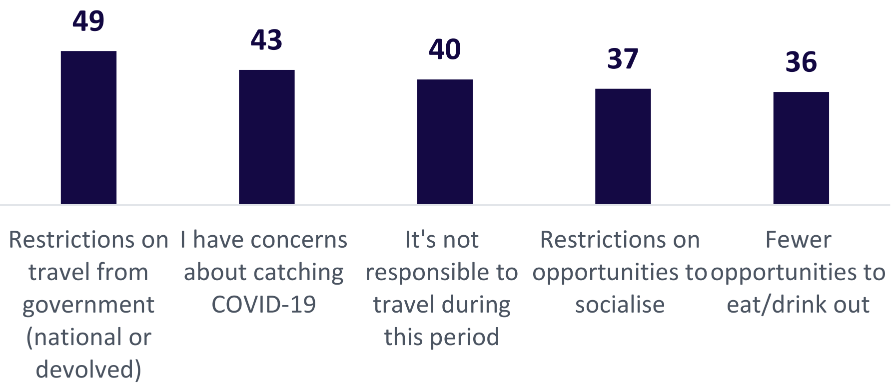
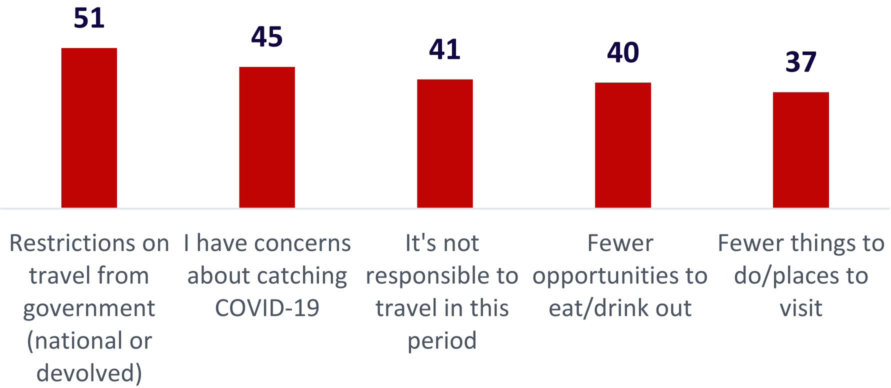


Figure 20. Top 5 reasons for not being confident about travelling in late winter*, Percentage Wave 21, UK



QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a UK short break or holiday? Base: Wave 21 respondents not confident about taking a break in early winter n=267 and in late winter n=798. *Early is defined as December. Late Winter is defined as Jan - Mar 2021.

When anticipating to plan and book next U.K. overnight trip

- 14% claim to have already planned and 10% already ***booked*** their next domestic overnight trip, a slight increase from Wave 20 (at 12% and 8% respectively).
- A further 25% say they intend to plan and 23% intend to book their next trip this winter, both of which have increased since the previous wave.
- Just under 1 in 5 'don't know but would like to' plan or book an overnight domestic trip.

Figure 21. When anticipate PLANNING next UK overnight trip, Percentage Wave 21, UK

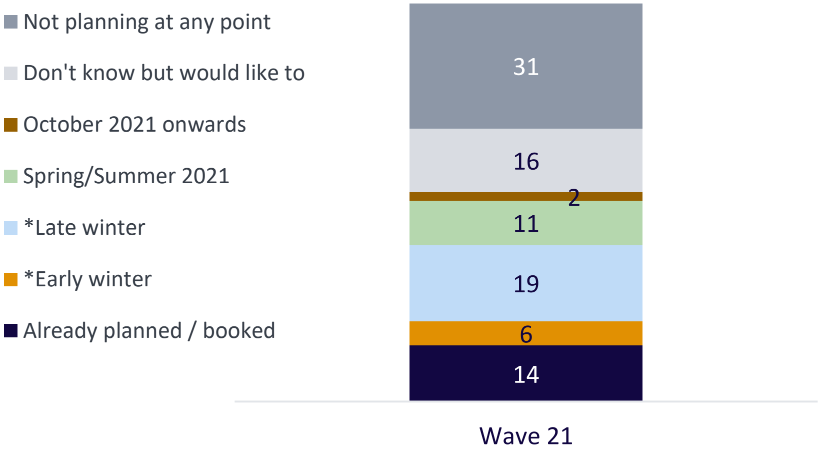
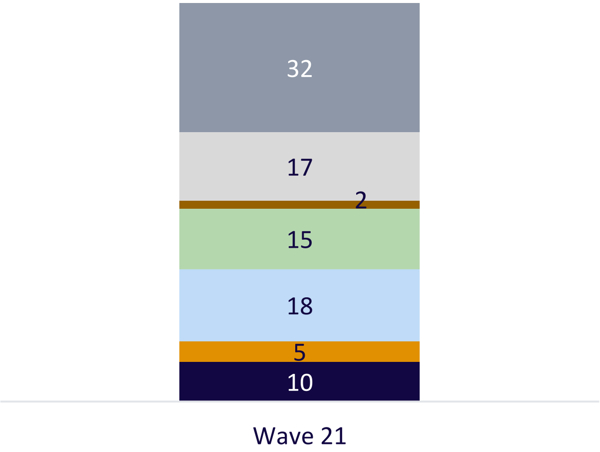


Figure 22. When anticipate BOOKING next UK overnight trip, Percentage Wave 21, UK

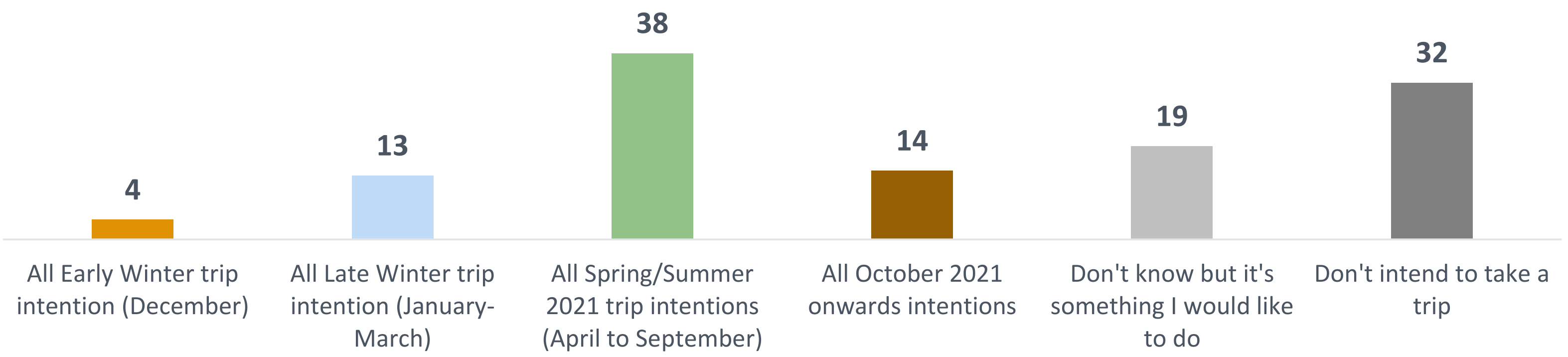


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 21 n=1,756. *Early winter is defined as December. Late winter is defined as Jan - Mar 2021

When anticipating going on a U.K. overnight trip

- 4% of U.K. adults plan on taking a domestic overnight trip before the end of the year, consistent with the 4% reported in wave 20 (two weeks previously). Roughly 1 in 8 (13%) intend to take an overnight trip between January and March rising to over a third (38%) during the Spring or Summer of 2021 – intentions across both time periods slightly increasing versus the previous wave (at 11% and 37% respectively).
- 32% of U.K. adults are not intending to take any domestic overnight trips at all, consistent with waves 19 and 20.
- Of all December overnight trips, 84% are scheduled to happen across the festive period (between the 24th and 31st December).

Figure 23. Proportion anticipating GOING on any overnight UK trip, Percentage Wave 21, 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? Base: All respondents. Wave 21 n=1,756.

Proportion already planned or booked their next U.K. overnight trip

- 75% of U.K. early winter intenders (overnight trips between now and the end of the year) have already planned this trip while almost half have already booked it.
- A minority of late winter intenders (overnight trips between January – March 2021) have planned or booked their trips; at 33% and 18% respectively.

Figure 24. Proportion of Intenders that have already *planned* their trip, Percentage Wave 21, UK

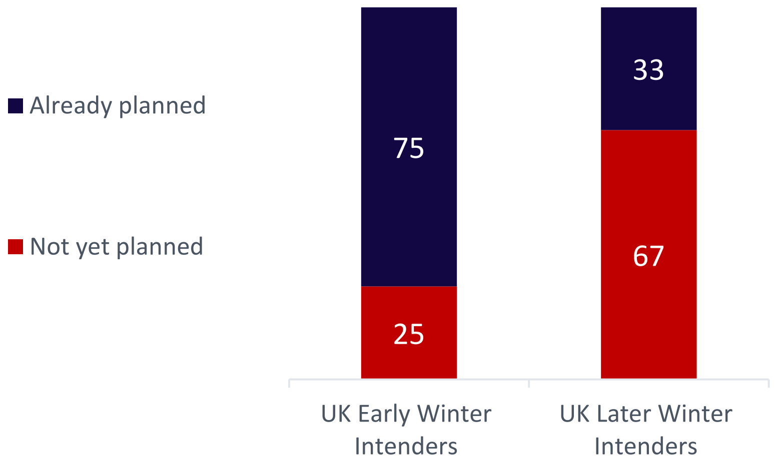
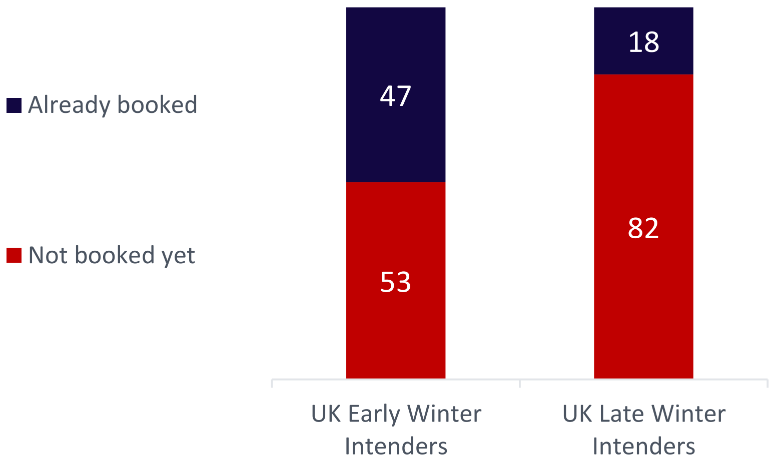


Figure 25. Proportion of Intenders that have already *booked* their trip, Percentage Wave 21, UK

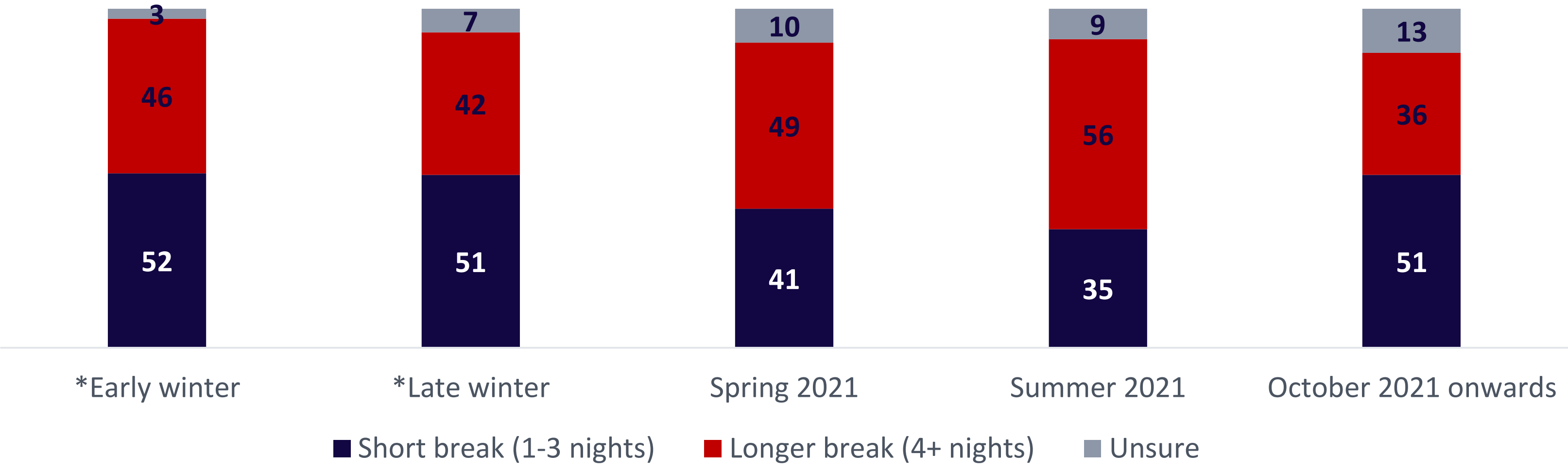


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 21 respondents planning on taking a holiday or short break in the UK in early winter (December) n=89 and in late winter (January-March) n=200

Length of next overnight U.K. trip, by time period

- Shorter breaks of 1-3 nights look set to account for a higher volume of trips than longer breaks of 4+ nights in early and late winter.
- From Spring 2021 onwards, longer breaks make up the majority of overnight trips, with short breaks making up the majority again from October 2021 onwards.

Figure 26. Length of next UK holiday or short break by time period, Percentage Wave 21, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 21 respondents intending to take next holiday in each time period: Early winter n=89; Late winter n=200; Spring 2021 n=270; Summer 2021 n=206; October 2021 onwards n= 92. *Early is defined as December. Late winter is defined as January - March 2021

Where planning on staying on next U.K. overnight trip

- The South West is the leading destination for an overnight stay in both the early winter and late winter periods (with 30% and 14% intending to visit respectively).
- However, in late winter, there is far less separation with the North West (12%), London (12%), and Wales (11%) trailing the South West's share by just a few percentage points at most.

Figure 27. Where planning on staying on next UK overnight trip in early winter, Percentage Waves 20-21, UK

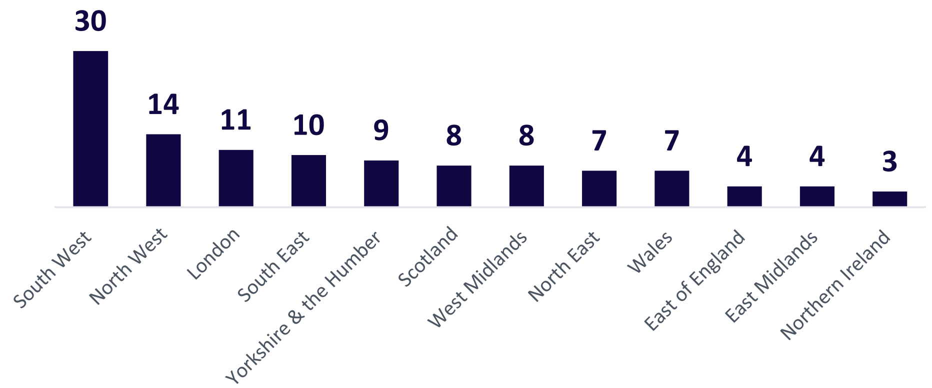
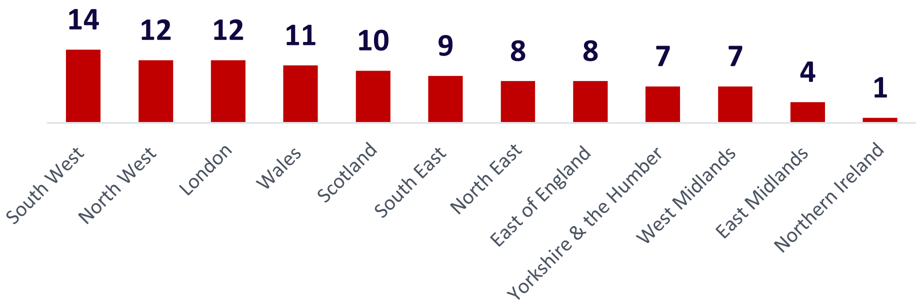


Figure 28. Where planning on staying on next UK overnight trip in late winter, Percentage Waves 20-21, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Wave 20-21 respondents planning on taking a holiday or short break in the UK for early winter (Nov-Dec) n=158 and for late winter (January-March) n=353

Main mode of transport for next U.K. overnight trip

- Across both time periods, 'own car' is the leading mode of transport for travelling to a destination, with 44% anticipating this in early winter and 47% in later winter.
- Travel by 'train' is the second most preferred mode in both early and late winter, followed by 'plane' and 'car – hired/rented/taxi'.

Figure 29. Top 5 main modes of travel to destination for trip in early winter, Percentage, Wave 21, UK

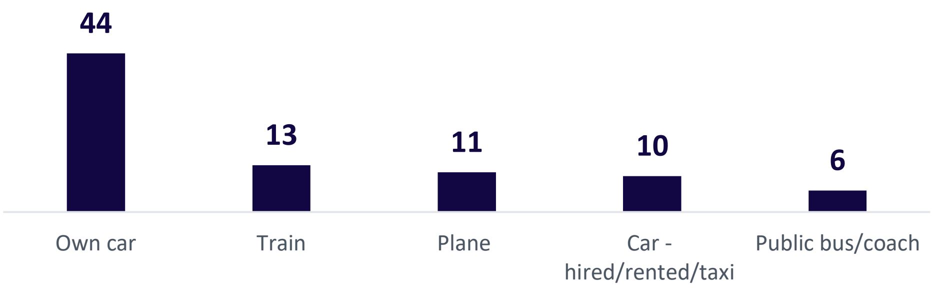
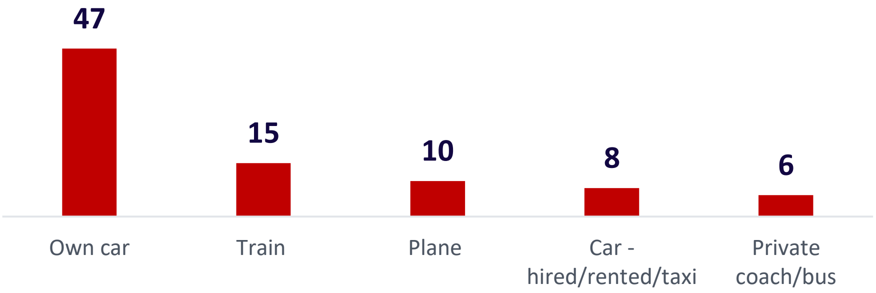


Figure 30. Top 5 main modes of travel to destination for trip in late winter, Percentage, Wave 21, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 21 respondents planning on taking a holiday or short break in the UK for early winter (December) n=89 and from late winter (January-March) n=200.

Type of destination for next U.K. overnight trip

- The leading destination type for an overnight trip this winter is 'city or large town', with just over 30% share.
- 'City or large town' is followed by 'countryside or village' in late winter (29%) and 'traditional coastal/seaside town' (24%).

Figure 31. Main type of destination for trip in early winter, Percentage Waves 20-21, UK

Figure 32. Main type of destination for trip in late winter, Percentage Waves 20-21, UK

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All Wave 20-21 respondents planning on taking a holiday or short break in the UK for early winter (Nov-Dec) n=158 and for late winter (January-March) n=353.

Type of accommodation for next U.K. overnight trip

- ‘Private home’ is the leading accommodation choice with a 60% and 42% share in early and late winter respectively.
- During the late winter period it is closely followed by ‘hotel/motel/inn (39%) and ‘commercial rental’ (38%).

Figure 33. Accommodation planning on staying in on next UK overnight trip in early winter, Net percentage Waves 20-21

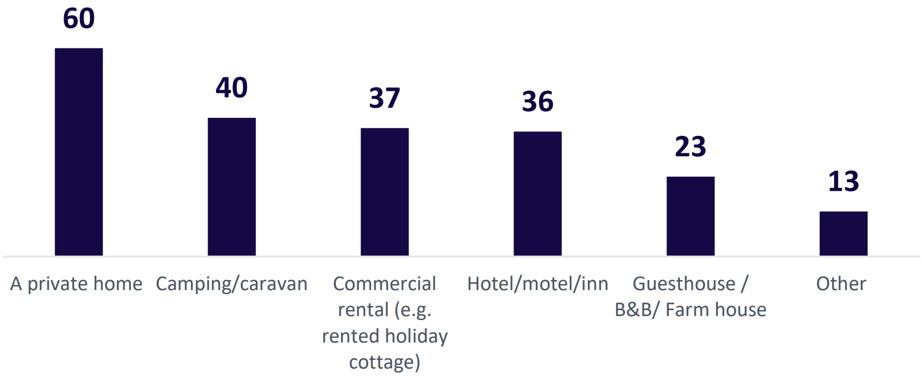
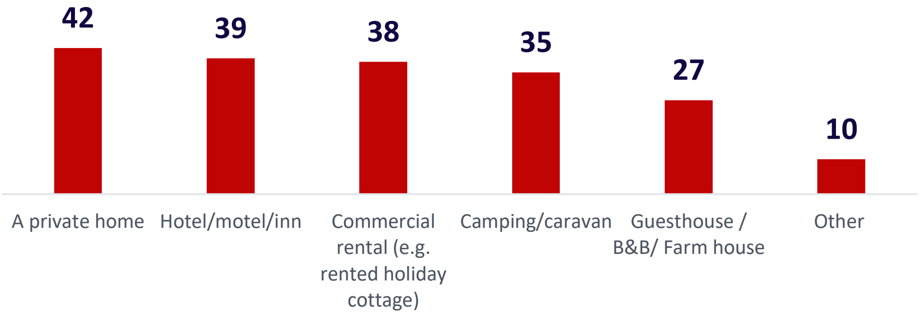


Figure 34. Accommodation planning on staying in on next UK overnight trip in late winter, Net percentage Waves 20-21

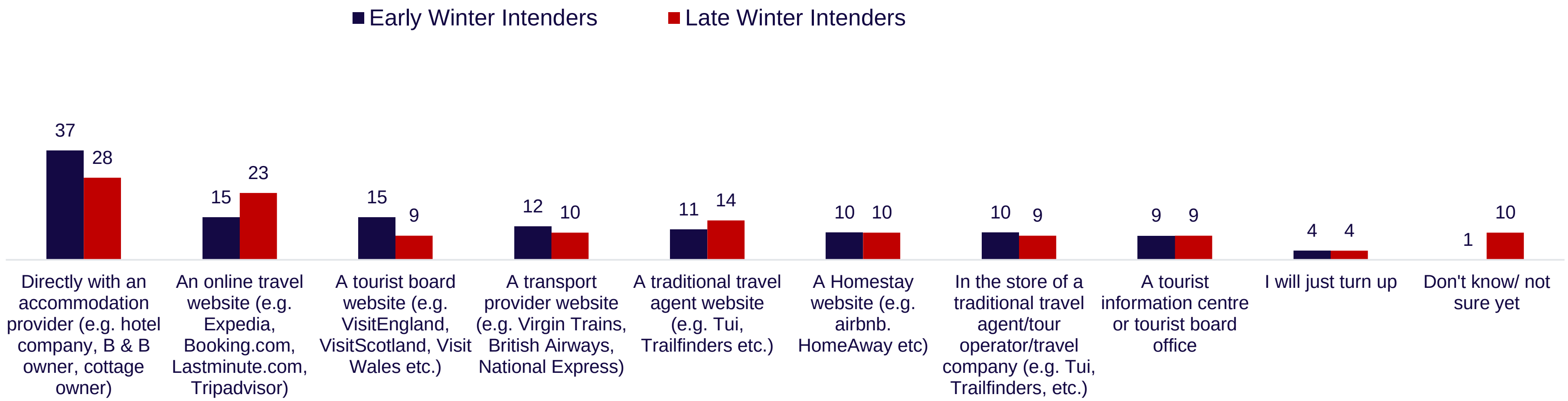


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Wave 20-21 respondents planning on taking a holiday or short break in the UK for early winter (November-December) n=158 and for late winter (January-March) n=353.

Method of booking accommodation for next U.K. overnight trip

- Over 1 in 3 ‘early winter intenders’ are most likely to book directly with an accommodation provider, while just over 1 in 4 ‘late winter intenders’ are likely to book via this method. This is closely followed by an online travel website on 23%.
- Although small individually, other channels make up booking preferences for over half of intenders across both time periods.

Figure 35. Accommodation booking channel for next trip in early winter and late winter, Percentage Wave 21, U.K.



VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All Wave 21 respondents planning on taking a holiday or short break in the UK for early winter (December) n=89 and for late winter (January-March) n=200

Conditions essential to stay in accommodation this winter

- At a net level, there is little to separate ‘booking incentives’, ‘social distancing measures’, ‘guest/staff interventions’ and ‘cleanliness measures’.
- The top five single most important conditions accommodation providers need to have in place are: ‘staff to wear face masks’; ‘free cancellation’; ‘plentiful hand sanitisers’; ‘guests to wear face masks’ and ‘enforced social distancing’.

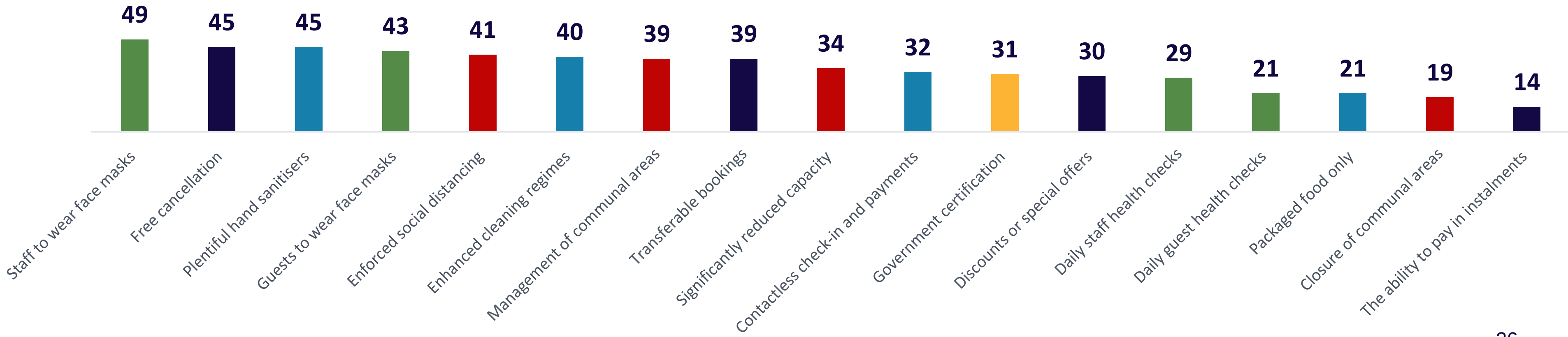
Figure 36. Conditions that are essential for a stay in accommodation this winter, Percentage and Net Percentages Wave 21, UK

75% Net: Booking incentives

75% Net: Social distancing measures

71% Net: Cleanliness measures

72% Net: Guest/Staff interventions



Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them over the next few months? Base: All Wave 21 early and late winter Intenders n=289

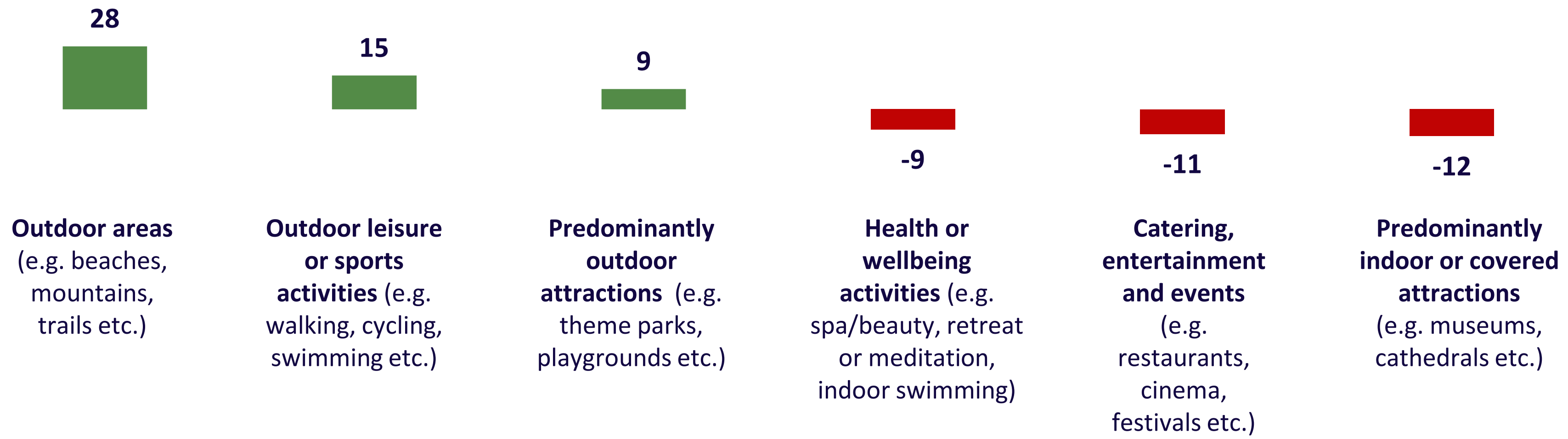
3. General leisure behaviour

Note: ‘Early Winter’ is defined as Nov – Dec 2020 and ‘Late Winter’ as Jan – March 2021

General leisure activity intentions as lockdown restrictions are lifted

- Consistent with previous waves, outdoor areas are most likely to attract more visitors/engagement than normal (net +28), followed by outdoor leisure or sports activities (+15) and outdoor attractions (+9).
- ‘Predominantly indoor attractions’ (net -12) and ‘catering, entertainment and events’ (-11) remain behind ‘health or wellbeing activities’ (-8) in being likely to attract fewer visitors/engagement than normal.

Figure 37. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Wave 21, UK



QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted? Base: All Wave 21 respondents n=1,756

General leisure activity intentions as lockdown restrictions are lifted

- 12% of U.K. adults anticipate taking a day-trip during the Christmas break (between 24 and 31 December), rising to 26% amongst families, and dropping to 4% amongst retirees.
- 52% of U.K. adults anticipate taking fewer 'Christmas day-trips' this year than they would normally expect to.

Figure 38. Proportion anticipating a day trip during the Christmas period, Percentage, Wave 21 U.K.

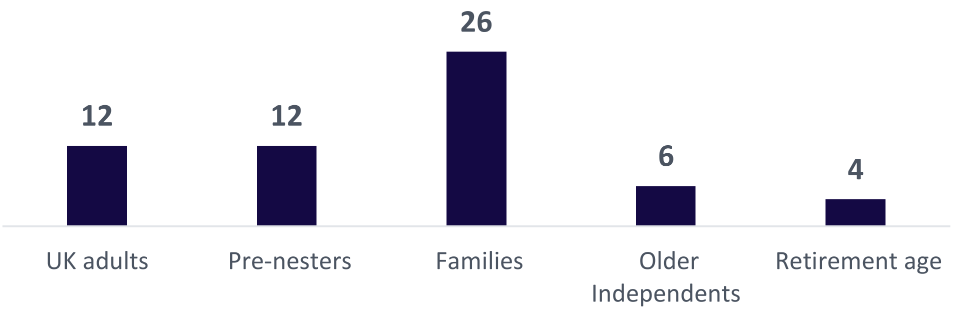
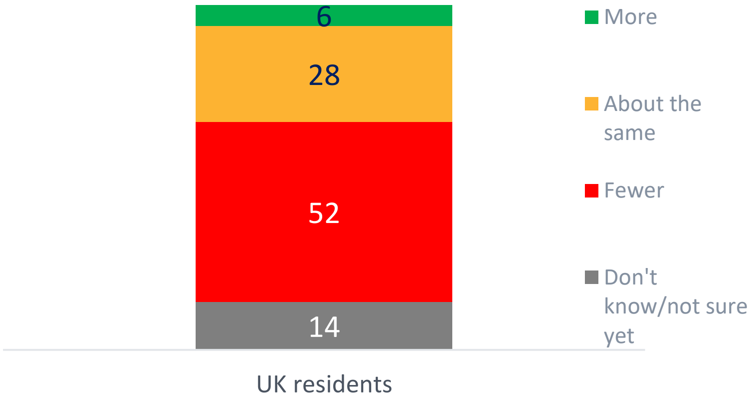


Figure 39. Anticipated number of day-trips over the Christmas period compared to normal, Wave 21 , U.K.



VB15a. you intending to go on any day trips during the Christmas period? By Christmas period we mean broadly between Christmas Eve and New Year Base: All U.K. Residents n=1756; Residents n=1043; pre-nesters n=409; Families n=578; Older independents n=427; retirement age n=342

Methodology

Methodology

- The findings in this report are based on an online survey conducted amongst a sample of the U.K. 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 U.K. overall and within each nation.
- This report presents findings from Wave 21 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-20 where appropriate. Wave 21 fieldwork was conducted between 7th to 11th December 2020.

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.