COVID-19 Consumer Tracker

Wave 22

Fieldwork Period: 18 – 23 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.
- NOTE: Fieldwork for this Wave's results took place between 18th – 23rd December, which is prior to the 4th January announcement of England's lockdown. Therefore, it's likely that winter trip intent will be lower than indicated in this report.
- 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 strict meteorological definitions.

- **Winter Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between January and March 2021
- **Spring Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between April and June 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	18 - 23 December
Wave 11	27 – 31 July	Wave 23	
Wave 12	3 – 7 August	Wave 24	

Wave 22: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

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

Key Metrics	Wave 21	Wave 22	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')	22%	7%	-15*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.6	2.5	-0.1
Normality score (proportion expecting normality by June)	47%	33%	-14*
The main reasons for not feeling confident about taking a trip in winter	1. Restrictions on travel from government 2. I have concerns catching COVID-19	1. Restrictions on travel from government 2. It's not responsible to travel	New no.2

Table 2. Top line Metrics – General Trip Intentions

Key Metrics	Wave 21	Wave 22	Wave Shift
Anticipated number of UK short breaks compared to normal (% more/the same)	40%	33%	-7*
Anticipated number of UK longer breaks compared to normal (% more/the same)	38%	32%	-6*
Near-term confidence in taking UK overnight trip (Jan/Feb confident)	17%/22%	10%/13%	-7*/-9*
Medium-term confidence in taking UK overnight trip (March/April confident)	31%/42%	20%/28%	-11*/-14*
Proportion going on a UK overnight trip in winter (January – March)	13%	11%	-2
Split between longer break / short break / don't know for winter trip	42%/51%/7%	37%/60%/4%	-5/+9/-3

Wave 22: Scorecard of Key Metrics (2)

Table 3. Top line Metrics – Destination and Accommodation Plans

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

Key Metrics	Wave 21	Wave 22	Wave Shift
Leading UK destination likely to stay in winter	South West	South West	No change
Main *type* of destination likely to stay in winter	City or large town	City or large town	No change
Main accommodation type likely to stay in winter	Private home	Private home	No change

Table 4. Top line Metrics – Broader Leisure Activity

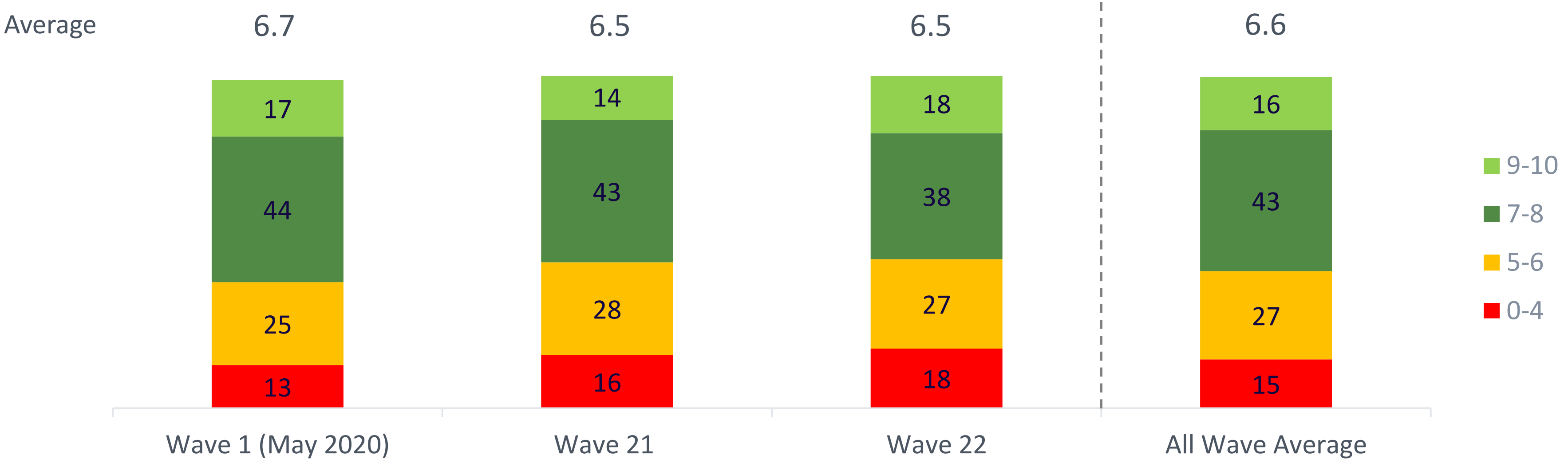
Key Metrics	Wave 21	Wave 22	Wave Shift
Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No change
Place/activity generating lowest engagement compared to normal	Indoor or covered attractions	Catering, entertainment and events	New lowest

1. The National Mood

The national mood

- The average mood of U.K. adults remains at 6.5 out of 10; lower than the 'all wave average' although unchanged from the previous wave.

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

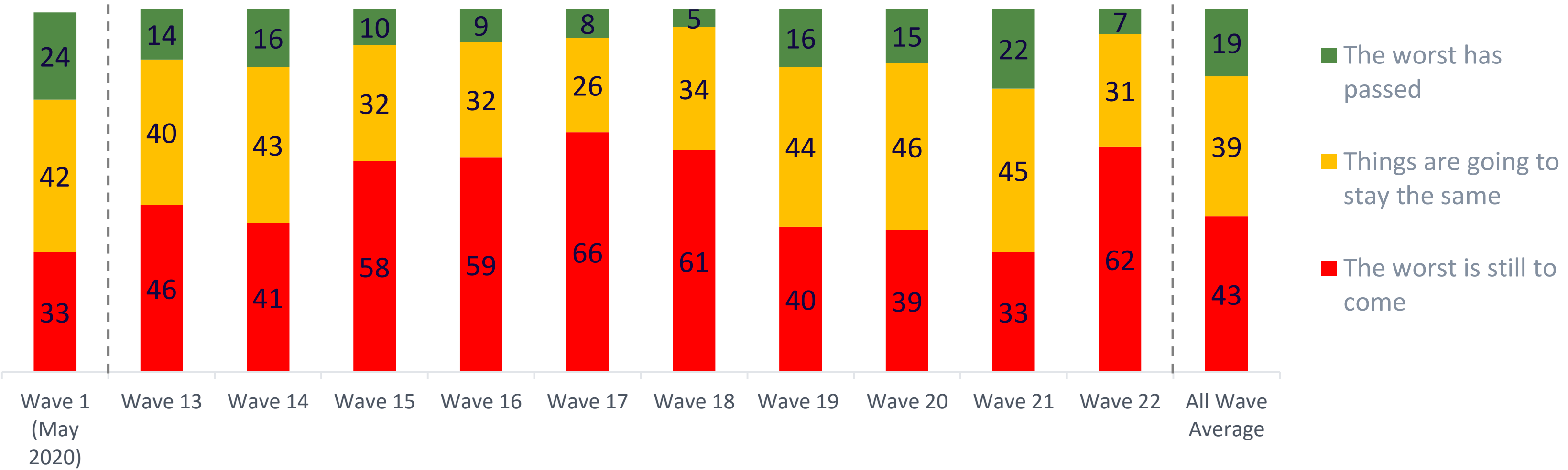


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 22 n=1,761
Wave average is based on Wave 1 to Wave 21.

Perceptions of the situation in relation to COVID-19

- The proportion of U.K. adults feeling ‘the worst is still to come’ has almost doubled since the last wave (conducted in early December), with majority (62%) presently of this opinion; some 19 percentage points higher than the ‘all wave average’.
- Only 7% now believe ‘the worst has passed’ – over three times lower than in Wave 21.

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 22 n=1,761 Wave average is based on Wave 1 to Wave 21.

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

- A third of U.K. adults anticipate something 'close to normality' returning by June. This compares to 47% in Wave 21.
- Just over half (54%) expect normality returning between July-September; rising to 7 in 10 (70%) by October to December.

Figure 3. Cumulative perceptions of when things will return 'close to normal'. Cumulative percentage Wave 22, UK

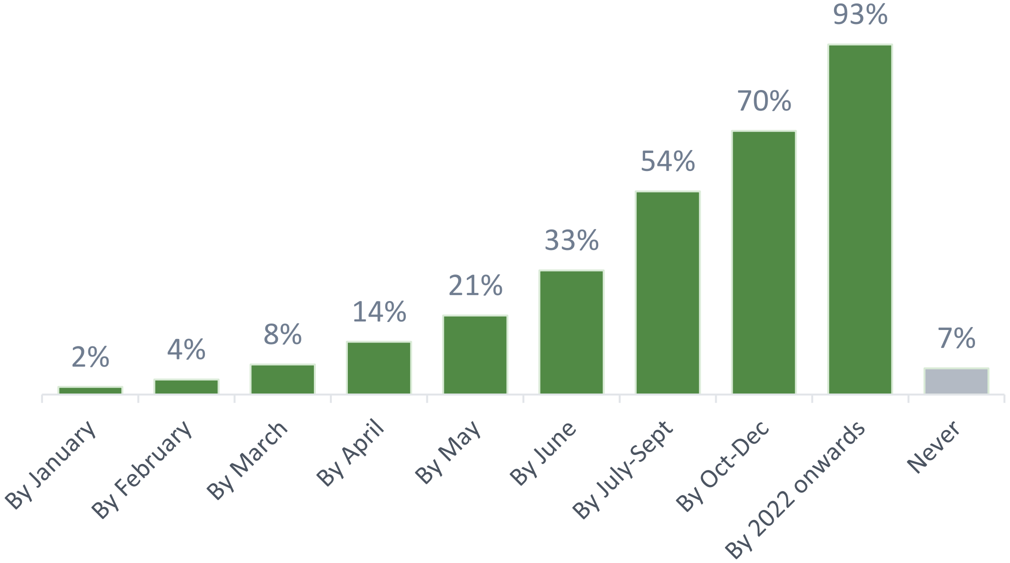
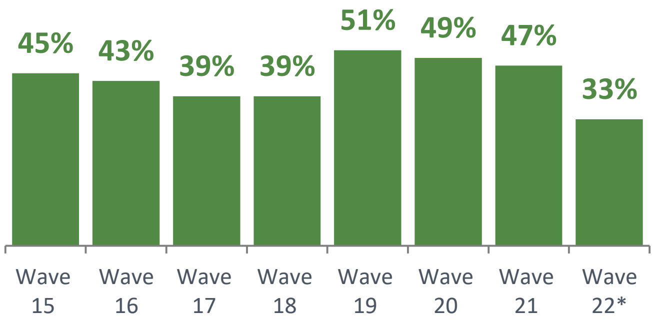


Figure 4. Proportion expecting normality by June, Percentage wave-on-wave, UK

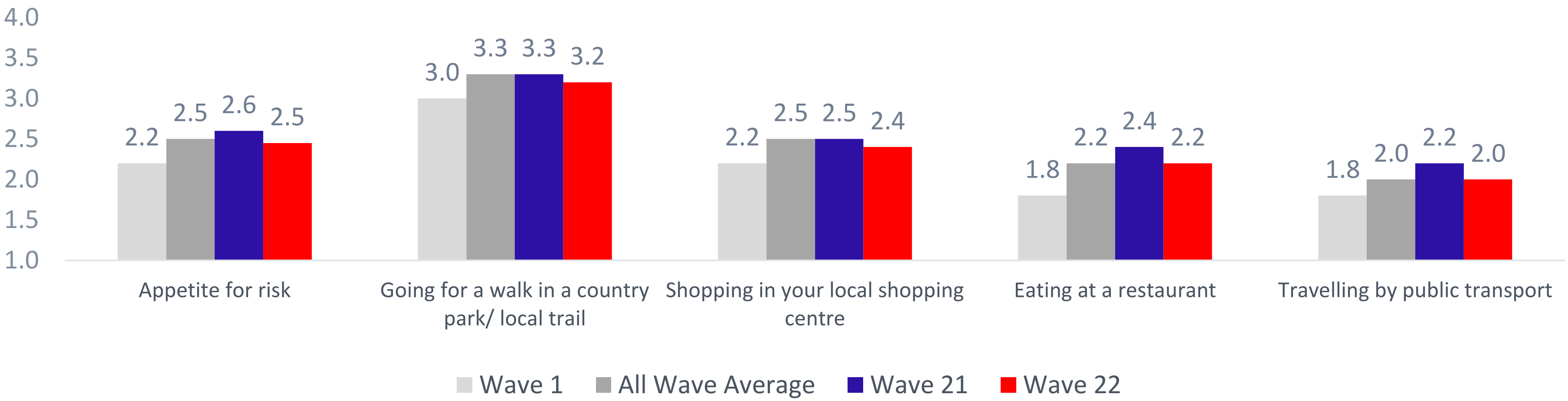


Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 22 n=1,761
*Due to questionnaire wording changes, 'by June' figures pre-Wave 22 are based on expectations of normality returning 'sometime between April and June'.

Appetite for risk

- The overall ‘appetite for risk’ score has dipped since Wave 21.
- This is driven by the ‘comfort’ in undertaking all individual activities falling, with ‘eating at a restaurant’ and ‘travelling by public transport’ declining by a relatively large 0.2 points.

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 22 n=1,761. Wave average is based on Wave 1 to Wave 21.

2. Trip Intentions

Note: Winter is defined as January to March; Spring is defined as April to June

Anticipated number of U.K. trips by end of March compared to normal

- 33% 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, representing a significant decline on the 40% recorded in Wave 21. The 46% who plan on taking *fewer* short breaks, is also a significant rise on Wave 21.
- The pattern is similar for longer breaks, with the proportion planning on taking 'more or the same' compared to normal falling from 38% to 32%.

Figure 6. Number of UK short breaks (1-3 nights) between now and the end of March compared to normal, Percentage Wave 22, UK

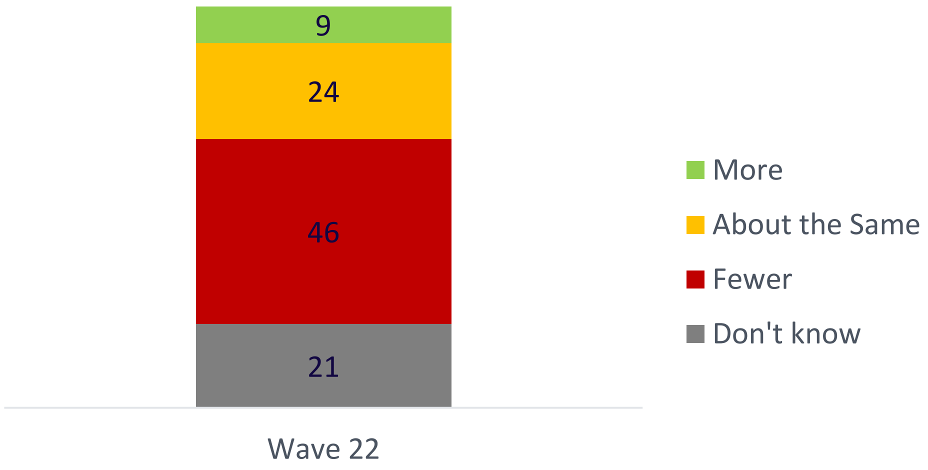
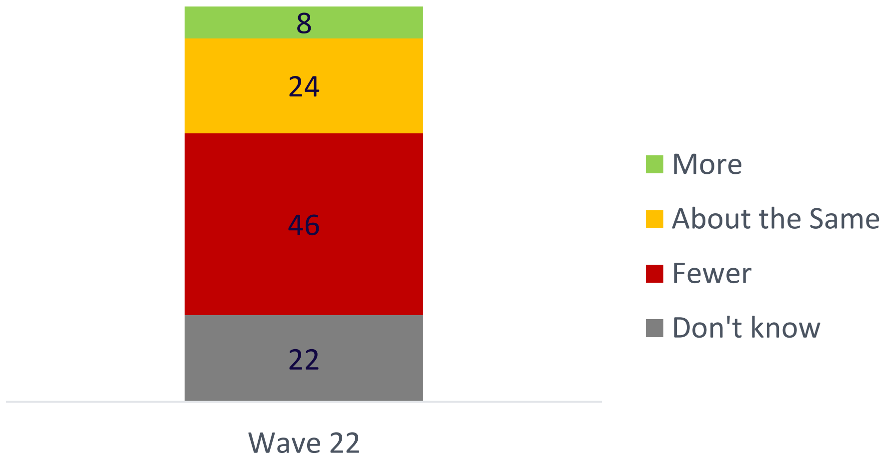


Figure 7. Number of UK longer breaks (4+ nights) between now and the end of March compared to normal, Percentage Wave 22, UK



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 22 n=1,761.

Anticipated number of overseas trips by end of March compared to normal

- Just over 1 in 4 (26%) of U.K. adults plan on taking more or about the same number of overseas *short* breaks and *longer* breaks compared to normal between now and the end of March.
- 47% anticipate taking fewer trips, compared to 40% (short breaks) and 37% (longer breaks) recorded in Wave 21.

Figure 8. Number of OVERSEAS short breaks (1-3 nights) between now and the end of March compared to normal, Percentage Wave 22, UK

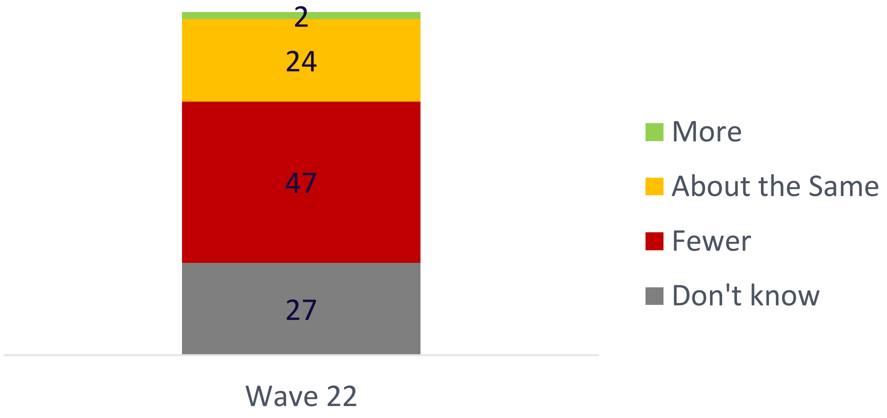
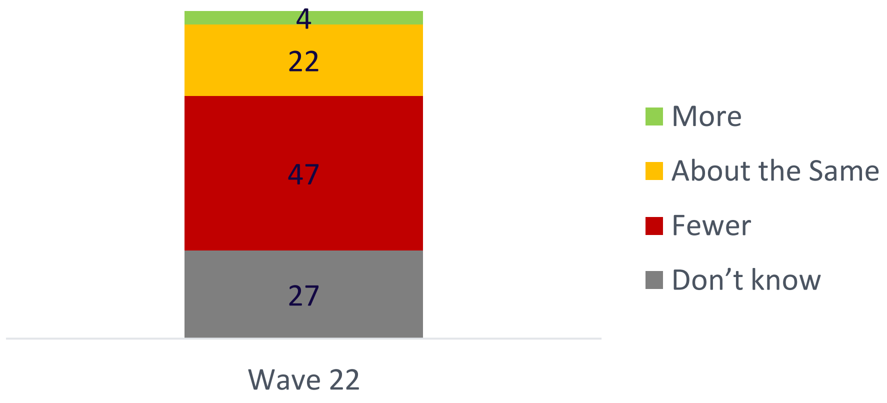


Figure 9. Number of OVERSEAS longer breaks (4+ nights) between now and the end of March compared to normal, Percentage Wave 22, UK



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 22 n=1,761.

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

- A minority of U.K. adults are confident that a booked overnight domestic trip would be able to go ahead as planned this winter
- Confidence begins to rise for trips in Spring, although it isn't until the summer period, from July to September, that a majority (63%) are confident.
- Compared to Wave 21, confidence has declined for each individual time frame.

Figure 10. Confidence in taking a UK overnight trip across a range of different months, Percentage, Wave 22, UK

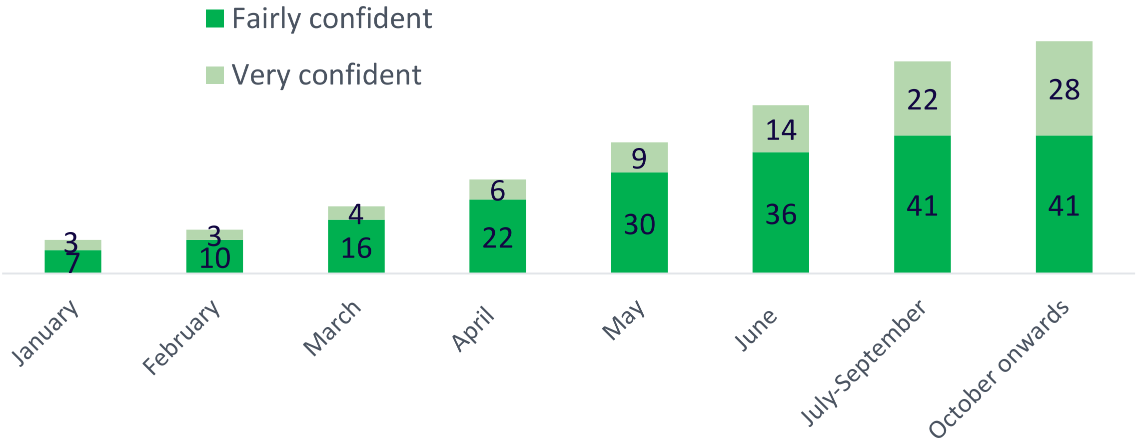
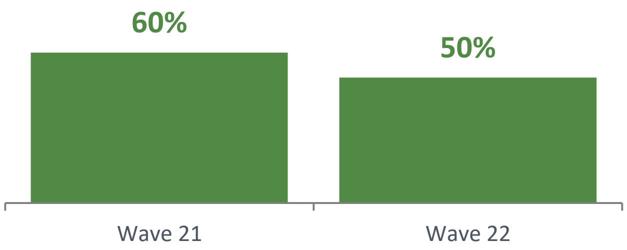


Figure 11. Confidence in taking a UK overnight trip in June 2021, Percentage wave-on-wave, UK



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 22 n=1,761.

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

- ‘Restrictions on travel from government’ remains the leading reason U.K. adults do not feel confident about taking an overnight trip in winter, followed by ‘it’s not responsible to travel during this period’ and ‘I have concerns about catching COVID-19’. The proportion stating each of these is higher than in Wave 21.
- The leading three reasons for not feeling confident about taking trips this Spring are the same as Winter.

Figure 12. Top 5 reasons for not being confident about travelling in Winter*, Percentage Wave 22, UK

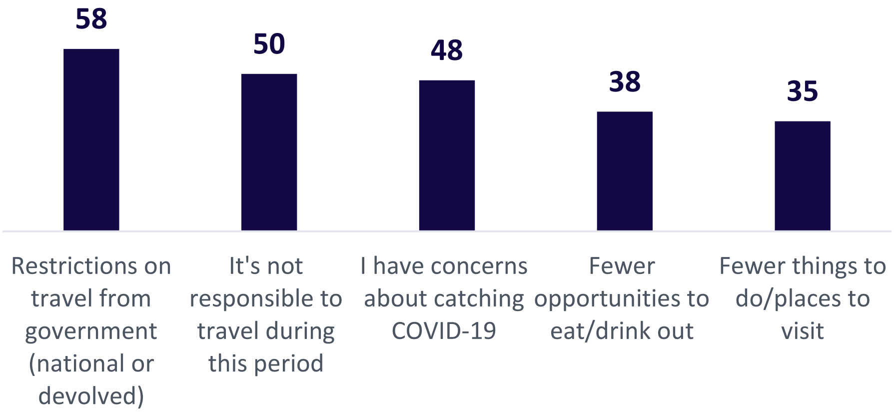
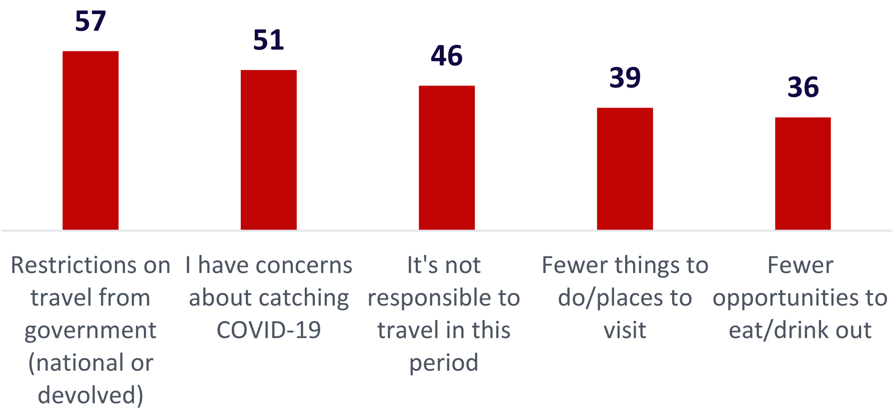


Figure 13. Top 5 reasons for not being confident about travelling in Spring*, Percentage Wave 22, UK



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 22 respondents not confident about taking a break in Winter n=564 and in Spring n=562. *Winter is defined as January to March; Spring is defined as April to June

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

- 12% claim to have already planned and 8% already ***booked*** their next domestic overnight trip, representing slight declines compared to Wave 21 (from 14% and 10% respectively). A further 21% say they intend to plan and 18% intend to book their next trip sometime this winter (between January and March).

Figure 14. When anticipate PLANNING next UK overnight trip, Percentage Wave 22, UK

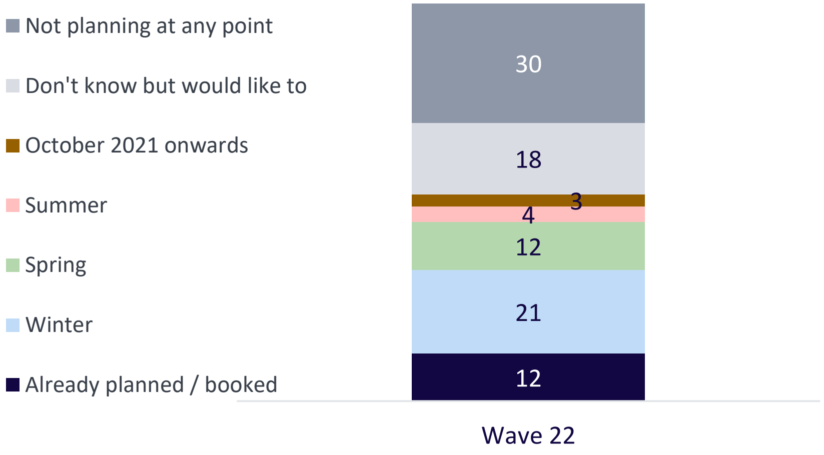
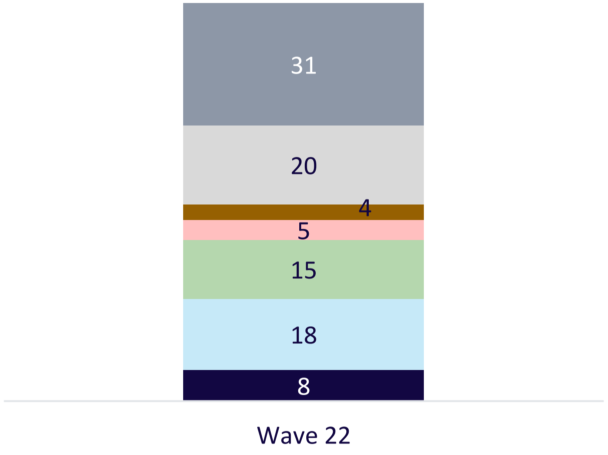


Figure 15. When anticipate BOOKING next UK overnight trip, Percentage Wave 22, UK

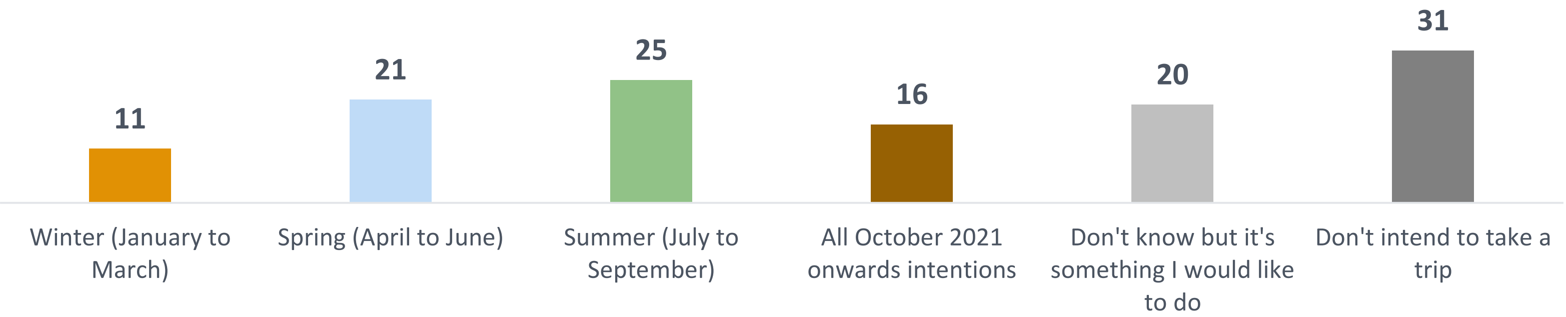


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 22 n=1,761. *Winter = January to March; Spring = April to June; Summer = July to September

When anticipating going on a U.K. overnight trip

- 11% plan on taking an overnight trip in the U.K. this winter, rising to 21% in the spring and 25% over the summer months.
- 31% are not intending to take any domestic overnight trips at all, which is consistent with wave 21.

Figure 16. Proportion anticipating GOING on any overnight UK trip, Percentage Wave 22, 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 22 n=1,761. Note: Research was conducted before the England lockdown announcement on 4th January

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

- 41% claim to have already planned while 19% have already booked their next winter overnight trip in the U.K.
- Lower proportions have either already planned or booked a trip during spring, at 25% and 18% respectively.
- The relatively low rates of booking among both winter and spring intenders indicates a significant degree of uncertainty remains concerning the likelihood of trips being able to go ahead as planned.

Figure 17. Proportion of Intenders that have already *planned* their trip, Percentage Wave 22, UK

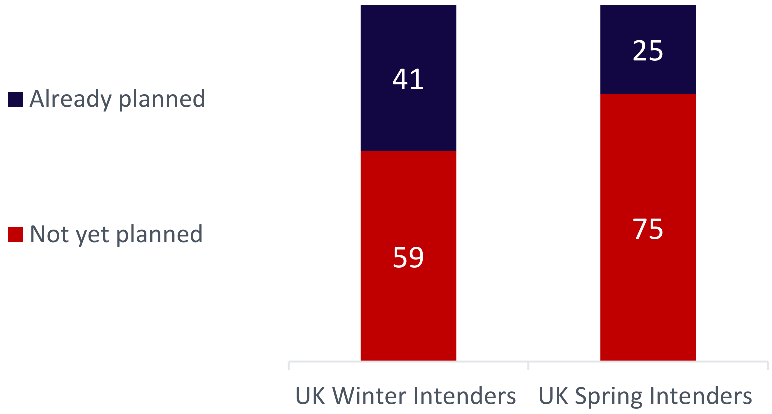
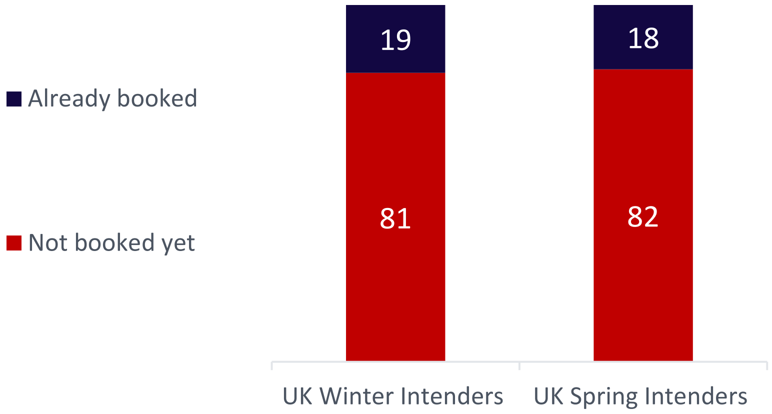


Figure 18. Proportion of Intenders that have already *booked* their trip, Percentage Wave 22, UK

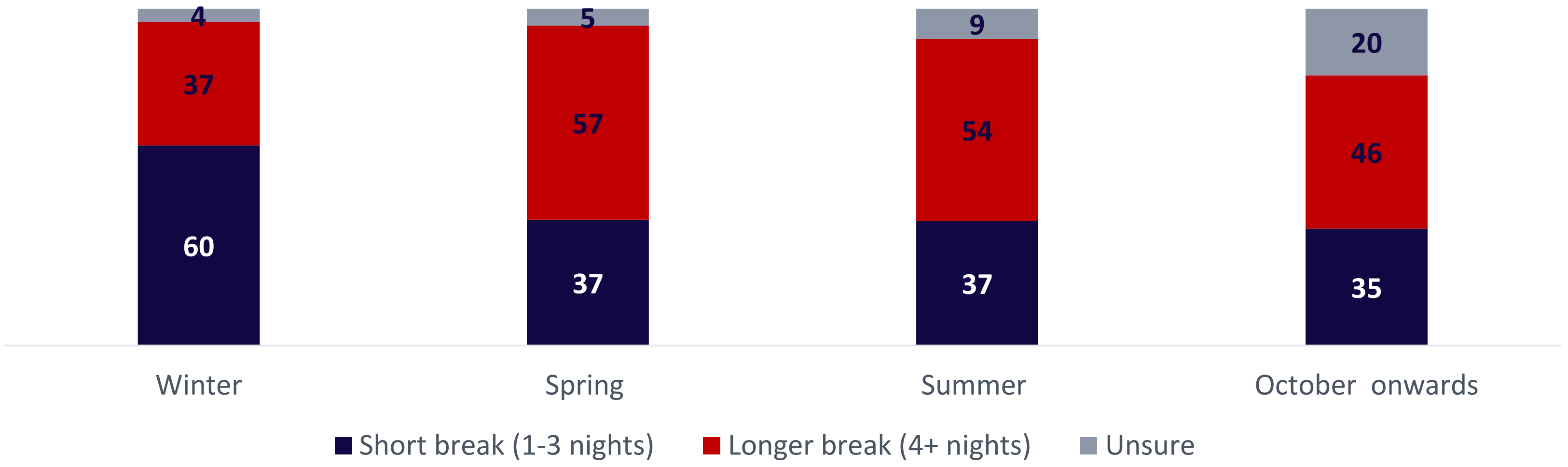


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 22 respondents planning on taking a holiday or short break in the UK in winter (January to March) n=194 and in spring (April to June) n=276

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

- Shorter breaks of 1-3 nights make up the majority of intended trips this winter.
- From Spring 2021 onwards, longer breaks dominate, with short breaks making up the majority again from October 2021 onwards.

Figure 19. Length of next UK holiday or short break by time period, Percentage Wave 22, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 22 respondents intending to take next holiday or short break in each time period: Winter n=194 (Jan – March); Spring n=276 (Apr – June); Summer n=247 (July – Sept); October 2021 onwards n=122

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

- The South West is the leading destination for an overnight stay in both the winter and spring time periods (with 17% and 20% intending to visit respectively).
- However, there is minimal separation among the next three intended destinations, where Scotland, London and the North West each exhibit broadly similar shares.

Figure 20. Where planning on staying on next UK overnight trip in winter, Percentage Waves 21-22, UK

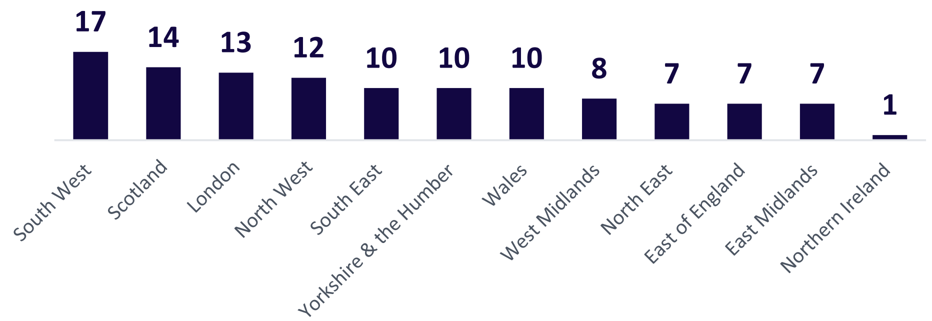
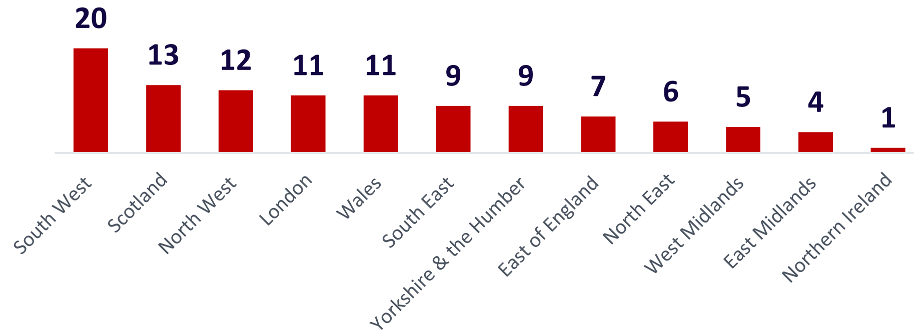


Figure 21. Where planning on staying on next UK overnight trip in spring, Percentage Waves 21-22, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Wave 21-22 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=482 and spring (April to June) n=545

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 an overnight destination, with 53% anticipating this in winter and 51% in spring.
- Travel by ‘train’ is the second most preferred mode in both winter and spring, followed by ‘plane’ and ‘car – hired/rented/taxi’.

Figure 22. Top 5 main modes of travel to destination for trip in winter, Percentage, Wave 22, UK

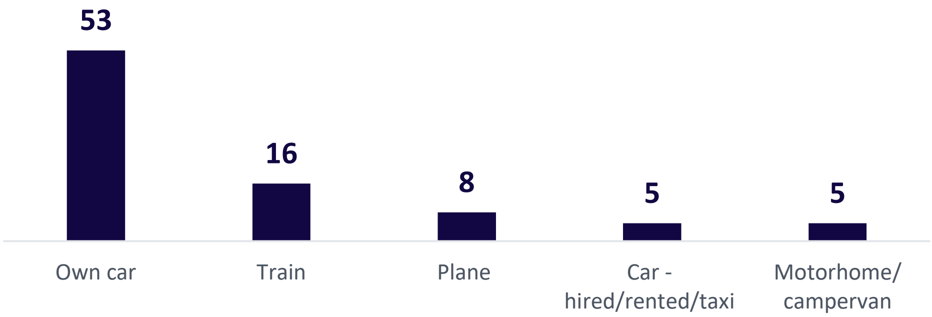
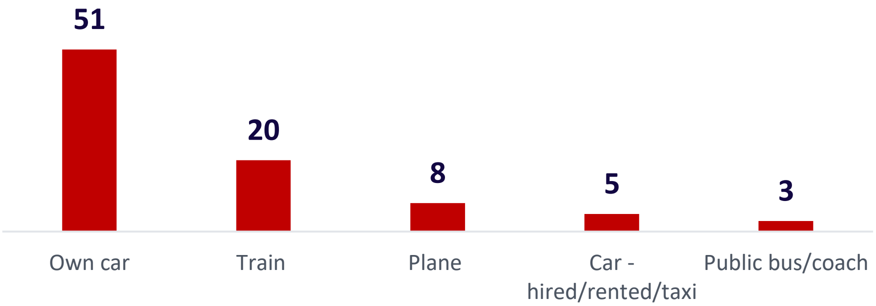


Figure 23. Top 5 main modes of travel to destination for trip in spring, Percentage, Wave 22, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 22 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=194 and from spring (April to June) n=276 .

Type of destination for next U.K. overnight trip

- ‘City or large town’ (35%) is the leading destination type for a trip this winter, 5 percentage points ahead of ‘countryside or village’ (on 30%).
- ‘Countryside or village’ is the leading destination type for spring trips with 33% share, followed by ‘traditional coastal/seaside town’ at 29%.

Figure 24. Main type of destination for trip in winter, Percentage Waves 21-22, UK

Figure 25. Main type of destination for trip in spring, Percentage Waves 21-22, 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 21-22 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=482 and spring (April to June) n=545

Type of accommodation for next U.K. overnight trip

- ‘Private home’ (45%) is the leading accommodation choice in winter, followed by ‘commercial rental’, ‘hotel/motel/inn’ and ‘camping/caravan’.
- In spring, ‘hotel/motel/inn’ leads with a 40% share, closely followed by ‘commercial rental’ (37%).
- The relatively large number of choices selected by respondents on this question possibly indicates high levels of uncertainty regarding the precise nature of their next trip.

Figure 26. Accommodation planning on staying in on next UK overnight trip in winter, Net percentage Waves 21-22

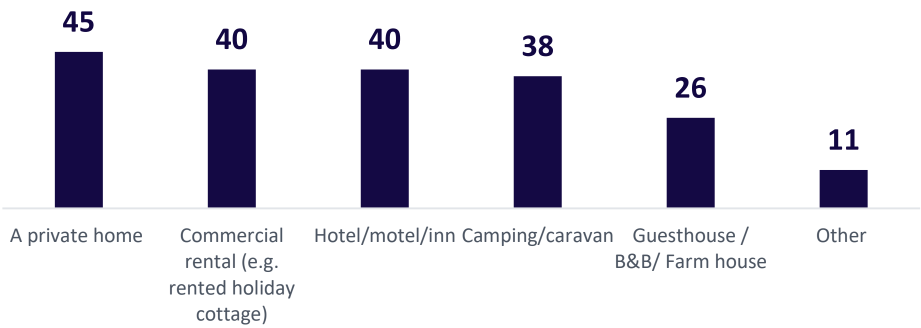
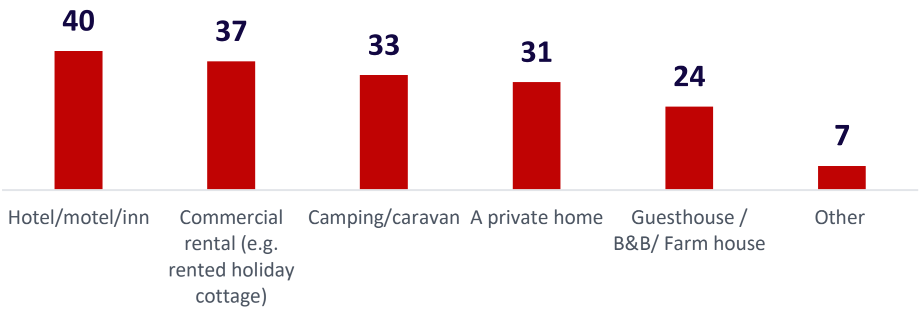


Figure 27. Accommodation planning on staying in on next UK overnight trip in spring, Net percentage Waves 21-22

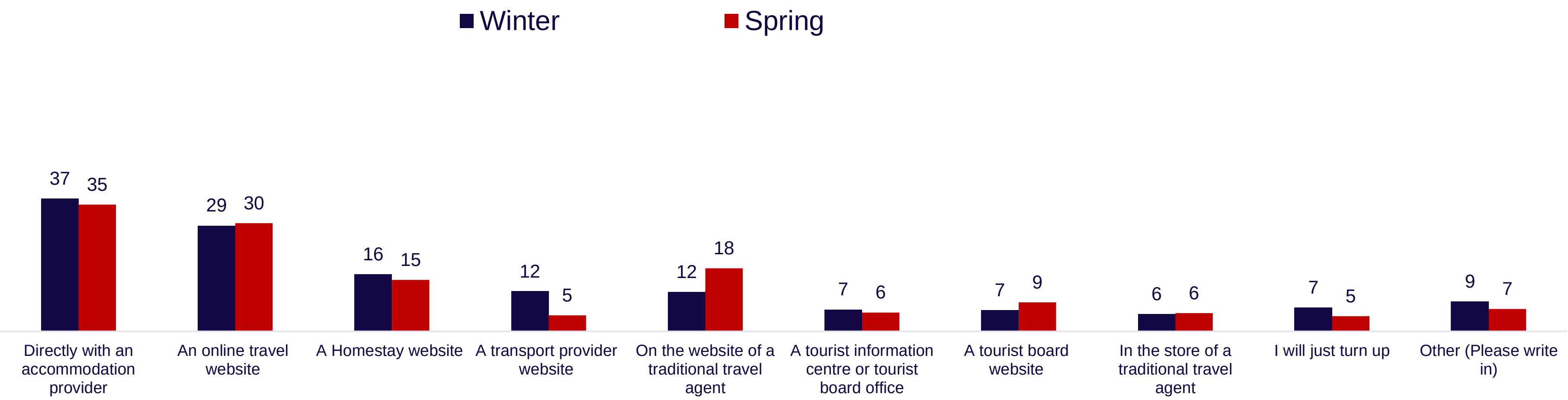


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Wave 21-22 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=482 and spring (April to June) n=545

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

- Just over 1 in 3 winter and spring intenders claim they're most likely to book directly with an accommodation provider
- An online travel agent is the next most preferred booking channel, with around 3 in 10 choosing this method across both time periods.
- 'Traditional travel agents' index higher for spring trips compared to winter.

Figure 28. Accommodation booking channel for next trip in winter and spring, Percentage Wave 22, U.K.

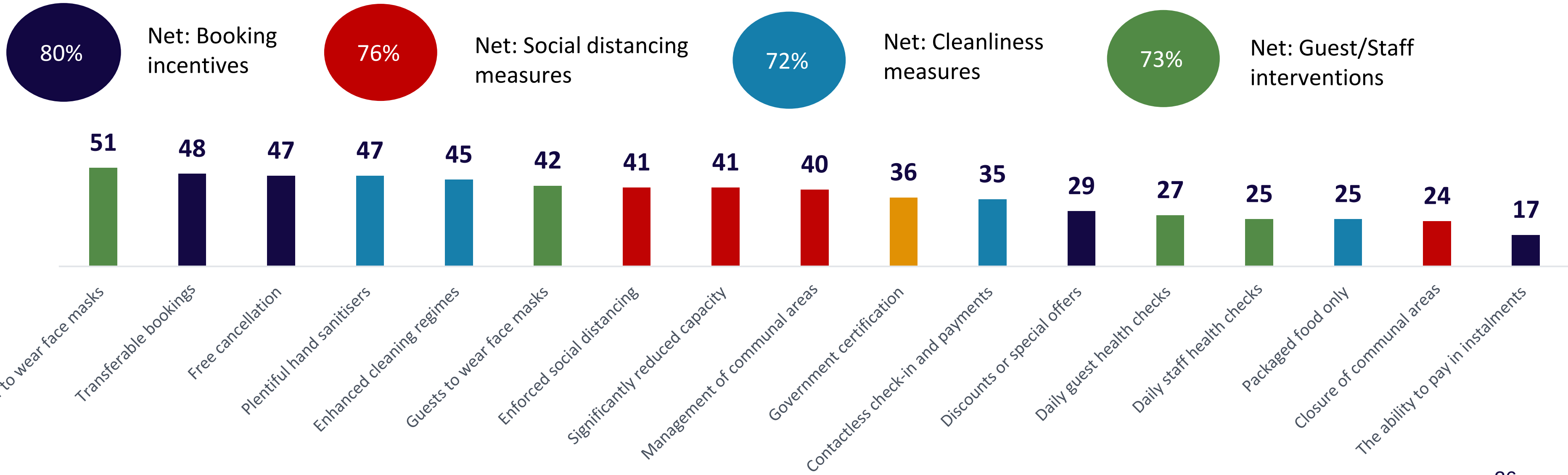


VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All Wave 22 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=194 and for spring (April to June) n=276

Conditions essential to stay in accommodation this winter

- At a net level 'booking incentives' receive the highest levels of endorsement driven by a desire for 'transferable bookings and 'free cancellations'.
- The single most important condition for accommodation providers to have in place is to ensure staff wear face masks.

Figure 29. Conditions that are essential for a stay in accommodation this winter, Percentage and Net Percentages Wave 22, UK

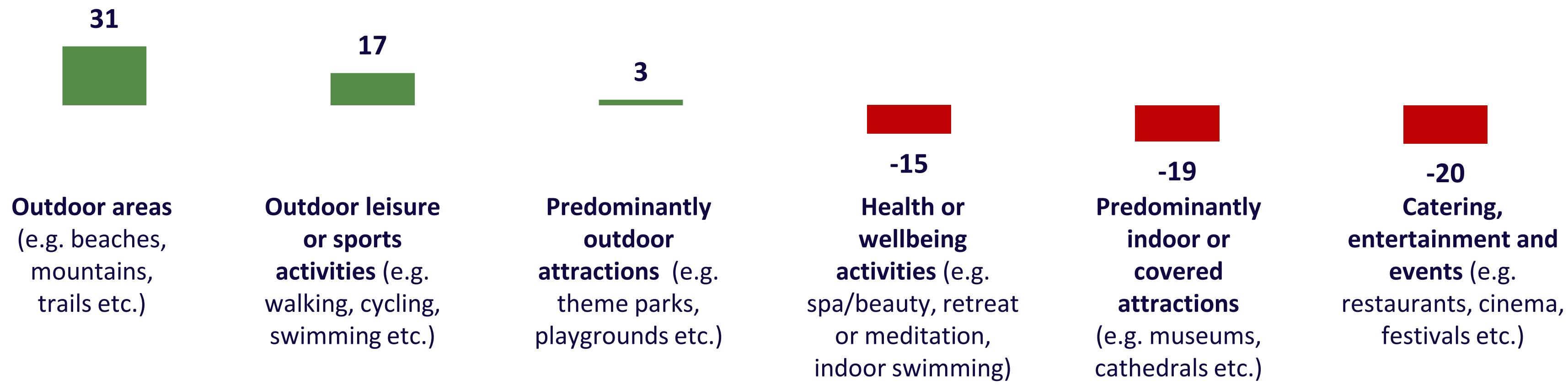


Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them over the next few months? Base: All Wave 22 Winter Intenders n=194

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 +31), followed by outdoor leisure or sports activities (+17) and outdoor attractions (+3). 'Catering, entertainment and events' (-20) sit behind 'predominantly indoor attractions' (net -19) and 'health or wellbeing activities' (-15) in being likely to attract fewer visitors/engagement than normal.
- The anticipated likelihood to undertake outdoor leisure or sports activities activities and trips to outdoor areas has increased since Wave 21, whilst all other activities have declined.

Figure 30. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Wave 22, 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 22 respondents n=1,761

3. Business Trip Intentions

Intentions for overnight business trips between now and end March

- 8% of U.K. adults in employment say they are intending to take a domestic overnight business trip between now and end March 2021.
- Around 2 in 5 (43%) stated this trip would be for a meeting – split relatively equally between meetings of 6 or more people and 5 or fewer. Just under a quarter (24%) stated the trip would be for team building purposes.

Figure 31. Proportion anticipating an overnight business trip by end March 2021, Percentage, Wave 22, U.K. adults in employment

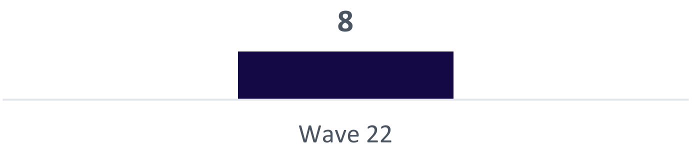
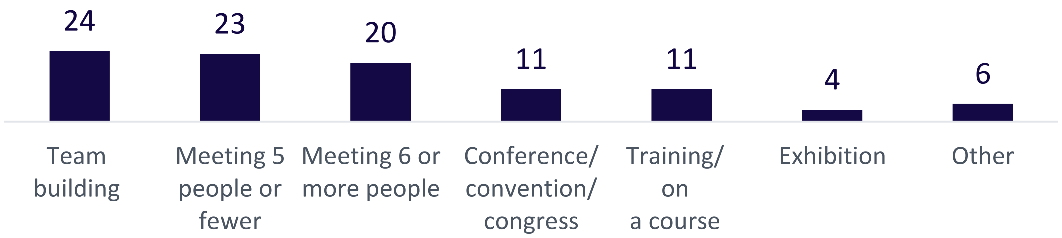


Figure 32. Reasons for taking an overnight business trip, Percentage, Wave 22, U.K. adults in employment planning a trip



QVB14a/b. Now looking ahead, are you intending to take any overnight business trips in the UK between now and March 2021? VB14b: What would be the main reason for this overnight business trip? Base: Wave 22 respondents currently in employment n = 1,310. All taking a business trip n=111

Anticipated number of overnight business trips between now and the end of March compared to normal

- Of the U.K. adults in employment, 43% anticipate taking fewer overnight business trips than normal between now and end March. The leading reason for this is cancellation (41%), although 3 in 10 (31%) cited personal choice due to concerns around COVID-19, with postponements being a factor for 1 in 4 (26%). Taken together, cancellations and postponements are cited by 59%.

Figure 33. Anticipated number of overnight business trips compared to normal, Percentage Wave 22, U.K. residents in employment

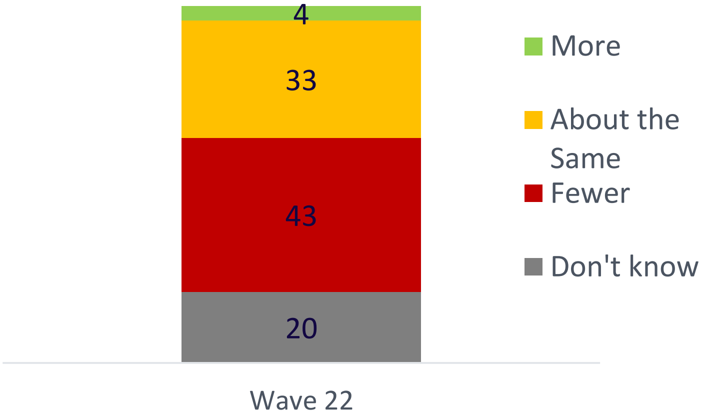
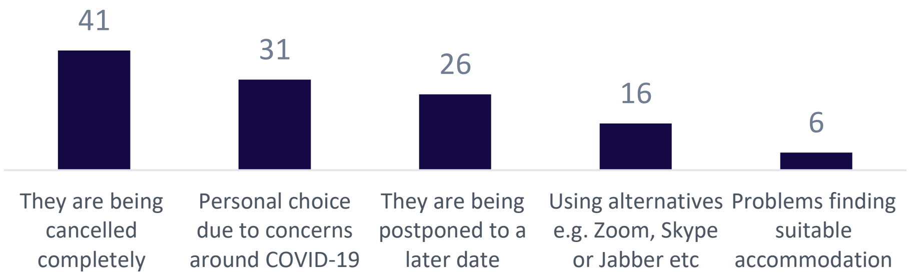


Figure 34. Top 5 factors contributing to taking fewer overnight business trips, Percentage, Merged Wave 22, UK



QVB14c/d. Compared to normal, are you likely to take more, fewer or about the same number of overnight business trips between now and the end of March? Which, if any, of the following factors are contributing to you feeling that you'll be taking fewer overnight business trips? Base: Wave 22 respondents currently in employment 1,310. All taking fewer business trips n=562

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 22 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-21 where appropriate. Wave 22 fieldwork was conducted between 18th and 23rd 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.