COVID-19 Consumer Tracker

Wave 23

Fieldwork Period: 11 – 15 January

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 11th – 15th January.
- 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	11 – 15 January
Wave 12	3 – 7 August	Wave 24	

Wave 23: Scorecard of Key Metrics (1)

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

Table 1. Top line Metrics – General Sentiment Scores

Key Metrics	Wave 22	Wave 23	Wave Shift
National mood (average score out of 10)	6.5	6.4	-0.1
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	7%	11%	+4*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.5	2.3	-0.2
Normality score (proportion expecting normality by June)	33%	21%	-12*
The main reasons for not feeling confident about taking a trip in winter	1. Restrictions on travel from government 2. It's not responsible to travel	1. Restrictions on travel from government 2. It's not responsible to travel	No change

Table 2. Top line Metrics – General Trip Intentions

Key Metrics	Wave 22	Wave 23	Wave Shift
Anticipated number of UK short breaks compared to normal (% more/the same)	NA^	33%	No change
Anticipated number of UK longer breaks compared to normal (% more/the same)	NA^	32%	No change
Near-term confidence in taking UK overnight trip (Jan/Feb confident)	10%/13%	7%/7%	-3*/-6*
Medium-term confidence in taking UK overnight trip (March/April confident)	20%/28%	8%/14%	-12*/-14*
Proportion going on a UK overnight trip in winter (January – March)	11%	4%	-7*
Split between longer break / short break / don't know for winter trip	37%/60%/4%	53%/43%/4%	+16*/-17*/-

^Question wording changed this wave to accommodate revised time periods

Wave 23: Scorecard of Key Metrics (2)

Table 3. Top line Metrics – Destination and Accommodation Plans

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

Key Metrics	Wave 22	Wave 23	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	Countryside or Village	New No. 1
Main accommodation type likely to stay in winter	Private home	Commercial rental	New No. 1

Table 4. Top line Metrics – Broader Leisure Activity

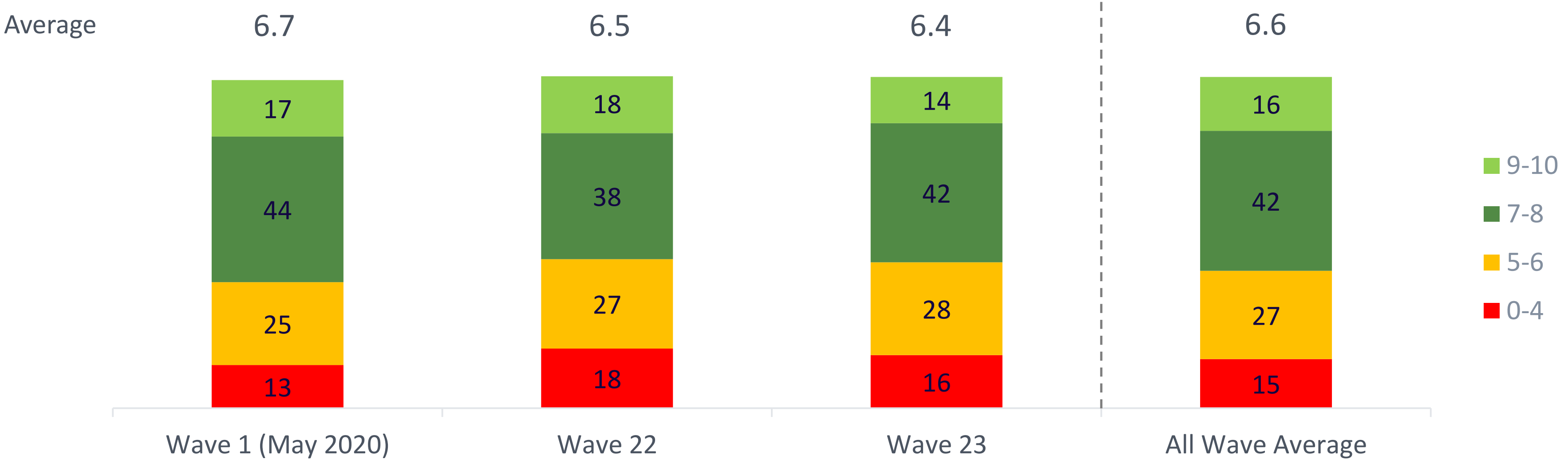
Key Metrics	Wave 22	Wave 23	Wave Shift
Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No change
Place/activity generating lowest engagement compared to normal	Catering, entertainment and events	Catering, entertainment and events	No change

1. The National Mood

The national mood

- The average mood of U.K. adults has dropped to 6.4 out of 10; lower than the ‘all wave average’ and the joint lowest recorded (with Wave 18 in October) since the research commenced in May 2020.

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

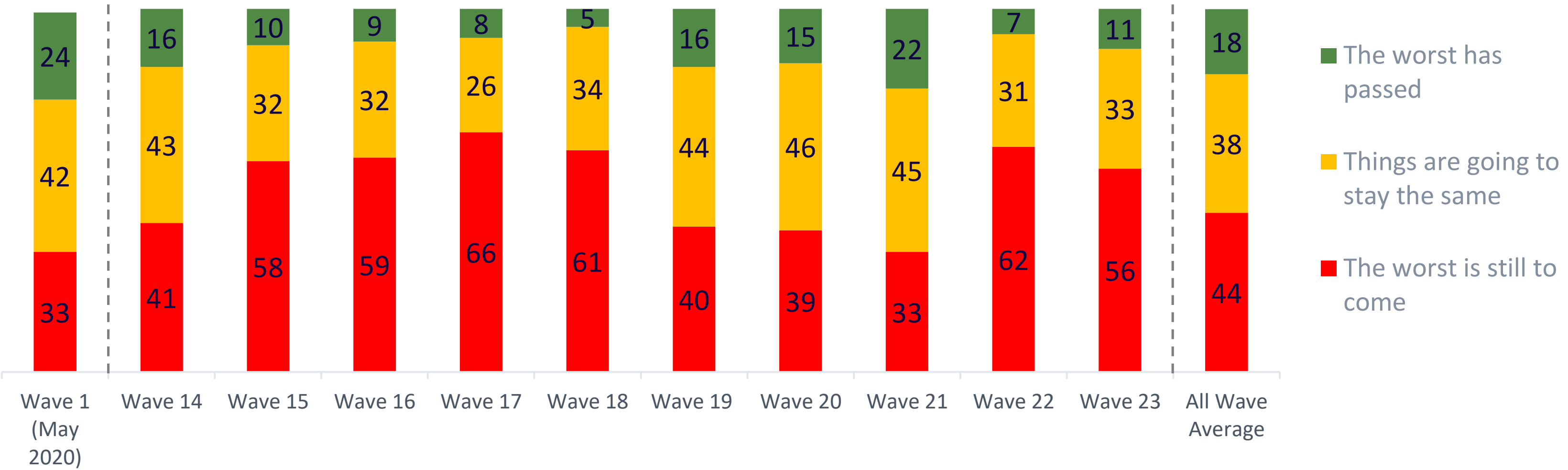


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 23 n=1,758
Wave average is based on Wave 1 to Wave 22.

Perceptions of the situation in relation to COVID-19

- The proportion feeling ‘the worst is still to come’ has fallen by 6 percentage points since Wave 22 but remains 12 percentage points higher than the ‘all wave average’ and 23 percentage points higher than recorded by Wave 21 in early December.
- 11% now believe ‘the worst has passed’ – improving slightly on Wave 22.

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 23 n=1,758 Wave average is based on Wave 1 to Wave 22.

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

- Virtually nobody expects 'normality' returning to their lives by end March and even by end June, just 21% anticipate life returning close to normal representing a significant 12 percentage point drop compared to last wave.

Figure 3. Cumulative perceptions of when things will return 'close to normal'. Cumulative percentage Wave 23, UK

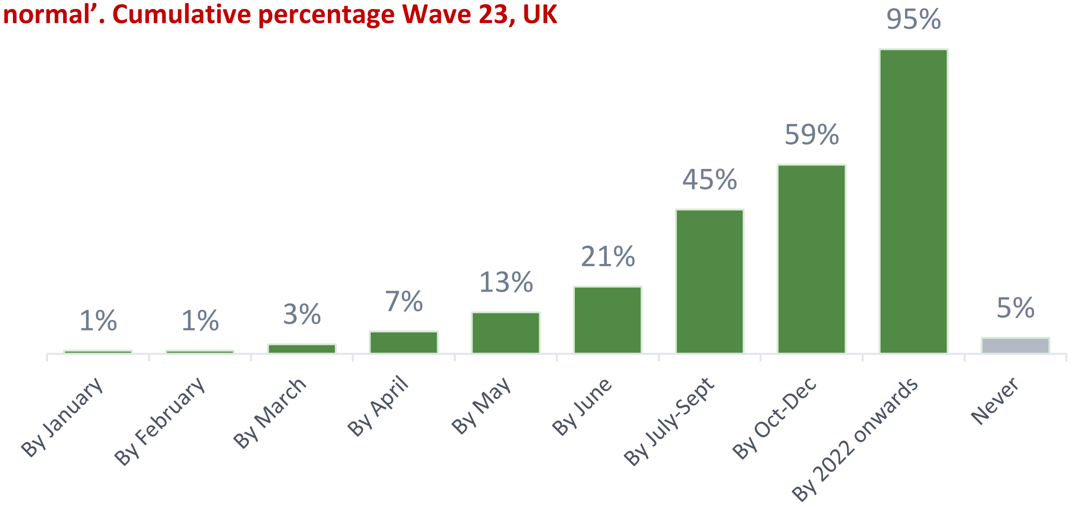
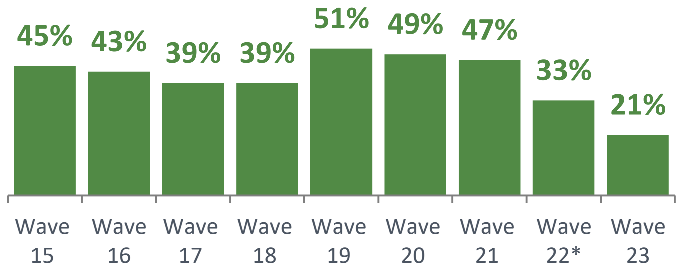


Figure 4. Proportion expecting normality by June, Percentage wave-on-wave, UK

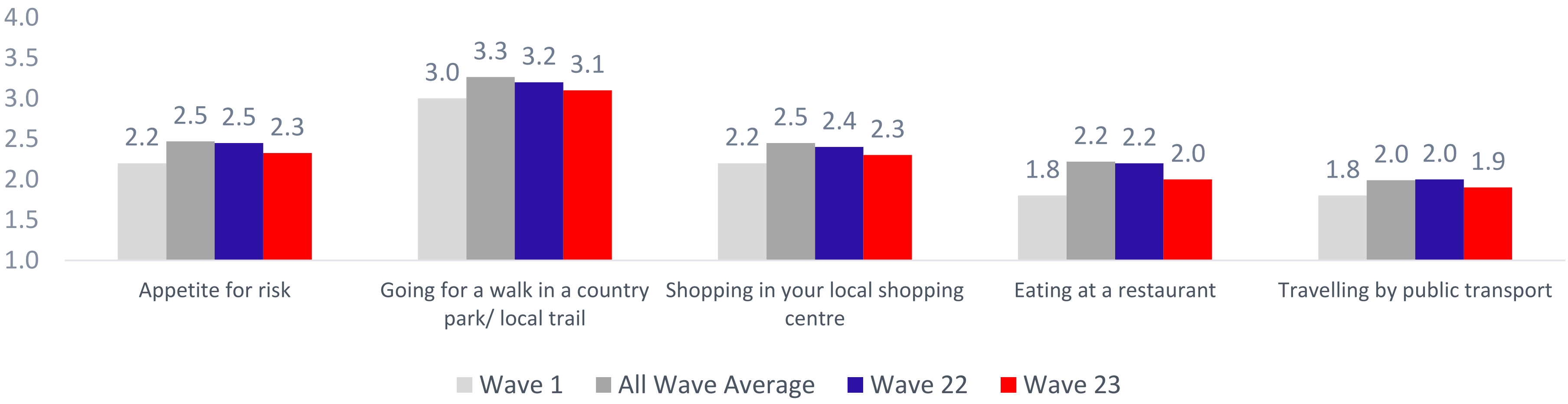


Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 23 n=1,758
*Due to questionnaire wording changes, 'by June' figures pre-Wave 22 are based on expectations of normality returning 'sometime between April and June'.

Appetite for risk

- The overall 'appetite for risk' score has dipped since Wave 22, falling from 2.5 to 2.3, the lowest since Wave 4 (June 2020) and below the all wave average of 2.5.
- The 'comfort' in undertaking all individual activities have recorded declines.

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 23 n=1,758 . Wave average is based on Wave 1 to Wave 22.

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 June compared to normal

- A third of U.K. adults anticipate taking more or about the same number of overnight domestic trips, compared to normal, between now and the end of June.
- Nearly half anticipate taking fewer trips compared to normal, whilst around 1 in 5 are unsure.

Figure 6. Number of UK short breaks (1-3 nights) between now and the end of June compared to normal, Percentage Wave 23, UK

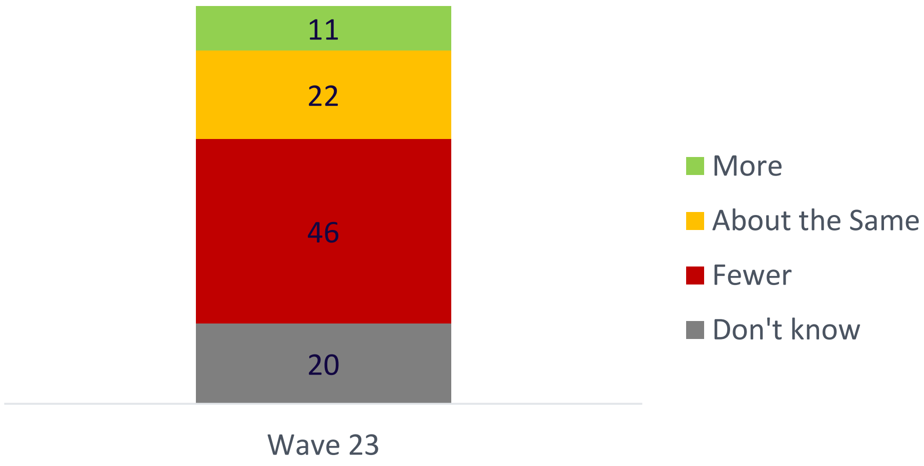
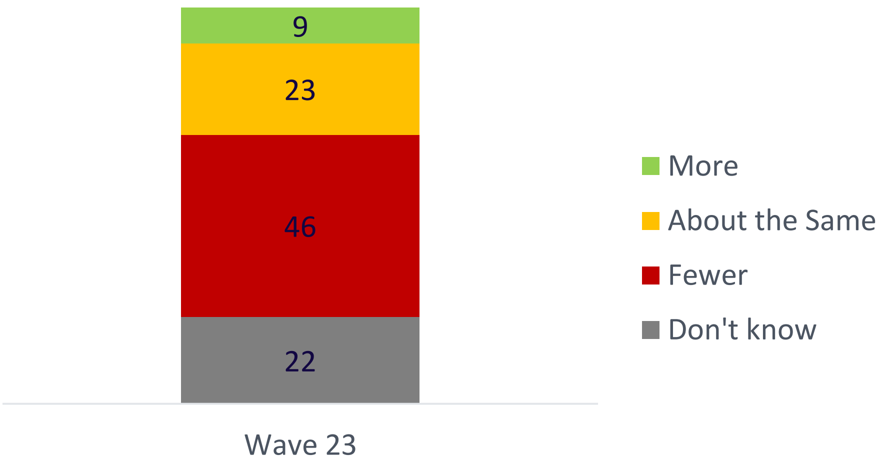


Figure 7. Number of UK longer breaks (4+ nights) between now and the end of June compared to normal, Percentage Wave 23, UK



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 June 2021? Base: All respondents. Wave 23 n=1,758.

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

- Around 1 in 4 of U.K. adults plan on taking more or about the same number of overseas breaks, compared to normal, between now and the end of June.
- Just under half (49%) anticipate taking fewer overseas trips.

Figure 8. Number of OVERSEAS short breaks (1-3 nights) between now and the end of June compared to normal, Percentage Wave 23, UK

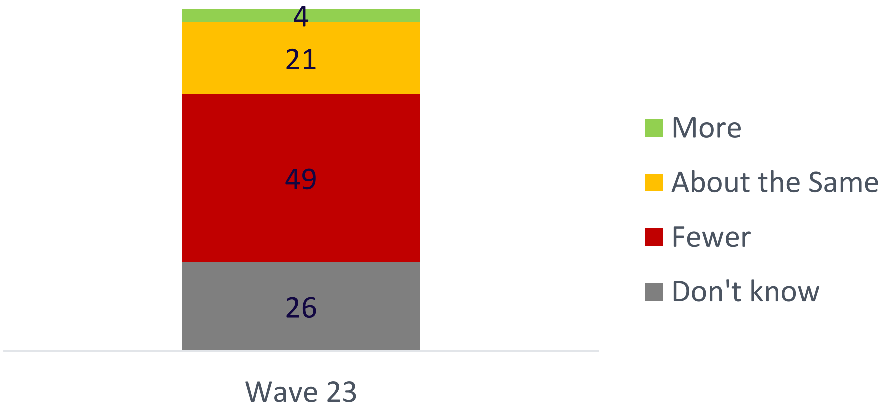
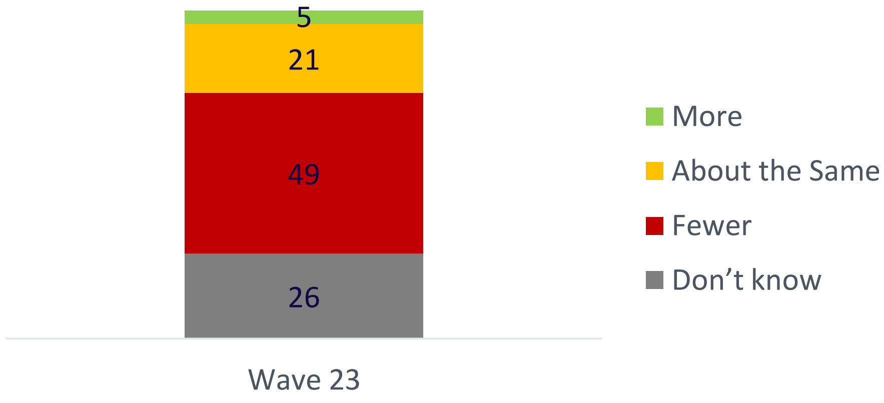


Figure 9. Number of OVERSEAS longer breaks (4+ nights) between now and the end of June compared to normal, Percentage Wave 23, UK



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 June 2021? Base: All respondents. Wave 23 n=1,758.

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

- Few are confident that a booked overnight domestic trip would go ahead as planned at any point this winter (between January and March)
- Confidence begins to rise for trips in Spring, although it isn't until the summer period from July onwards that over half of UK adults express confidence.
- Compared to Wave 22, confidence levels have declined for each individual time frame – for trips in June there has been a 12 percentage point fall versus the previous wave.

Figure 10. Confidence in taking a UK overnight trip across a range of different months, Percentage, Wave 23, UK

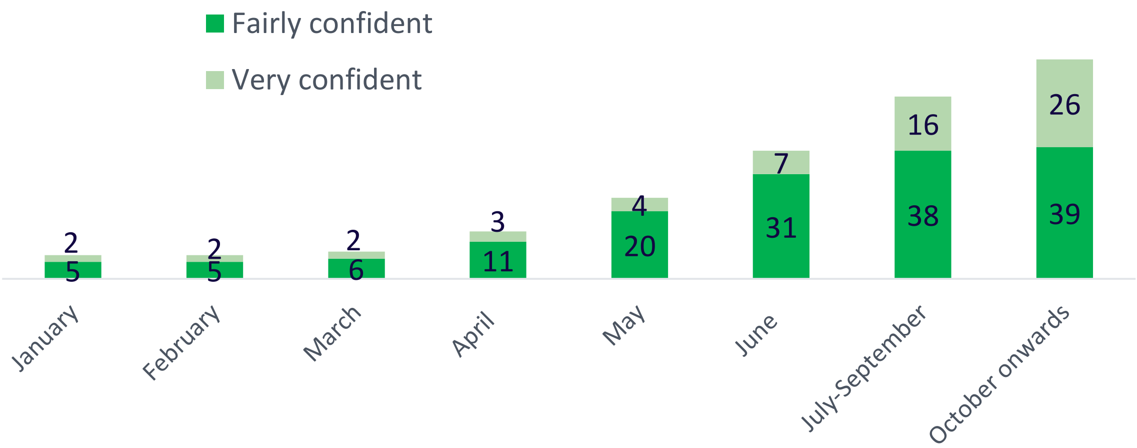
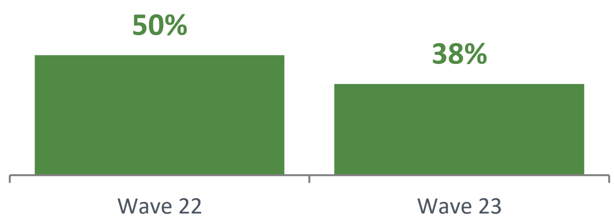


Figure 11. Confidence in taking a UK overnight trip in June 2021, Percentage wave-on-wave, UK



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 23 n=1,758.

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

- Consistent with Wave 22, ‘restrictions on travel from government’ remains the leading reason U.K. adults do not feel confident about taking an overnight trip this winter, followed by ‘it’s not responsible to travel during this period’ and ‘I have concerns about catching COVID-19’.
- The leading three reasons for spring trips are the same, while restrictions on socialising also features in the top 5 for both.

Figure 12. Top 5 reasons for not being confident about travelling in Winter*, Percentage Wave 23, UK

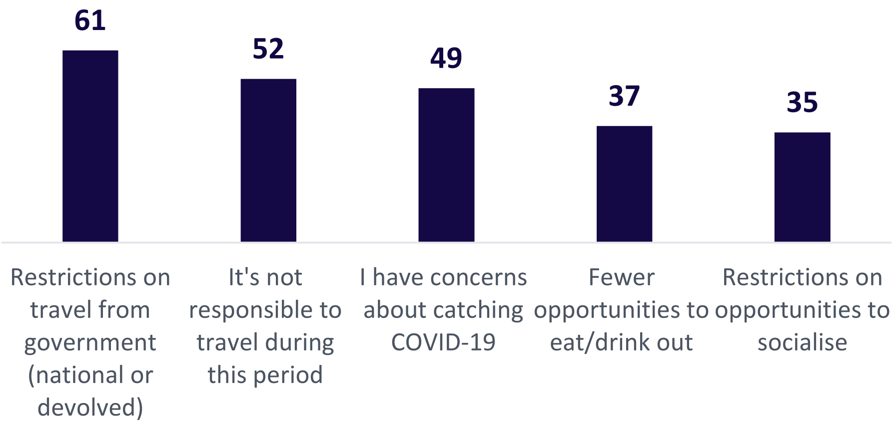
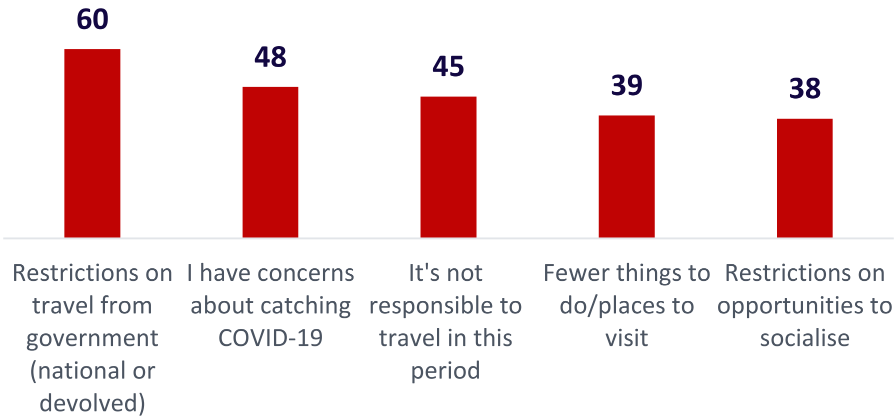


Figure 13. Top 5 reasons for not being confident about travelling in Spring*, Percentage Wave 23, UK



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 23 respondents not confident about taking a break in Winter n=728 and in Spring n=727. *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

- 11% claim to have already planned and 7% already *booked* their next domestic overnight trip. A further 14% say they intend to plan and 11% intend to book their next trip sometime this winter (between January and March) representing a significant decline on Wave 22 (down from 21% and 18% respectively).

Figure 14. When anticipate PLANNING next UK overnight trip, Percentage Wave 23, UK

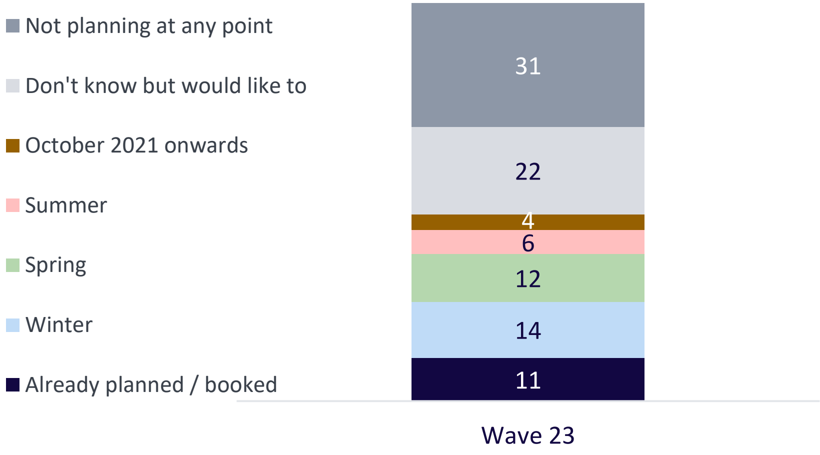
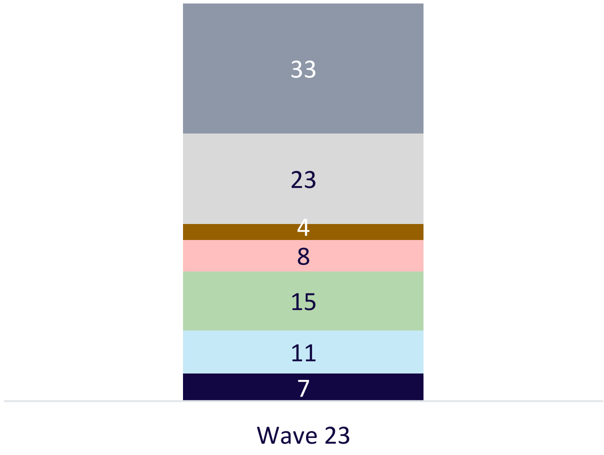


Figure 15. When anticipate BOOKING next UK overnight trip, Percentage Wave 23, UK

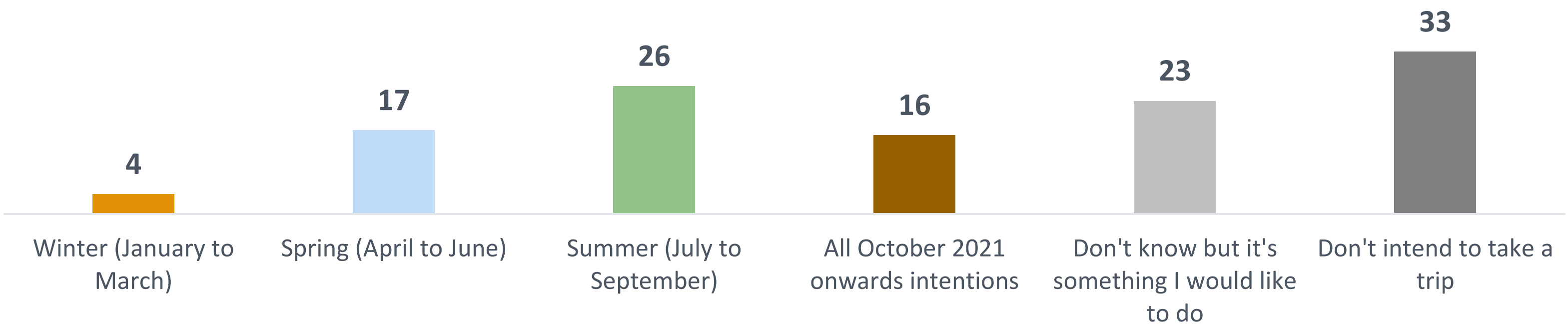


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 23 n=1,758. *Winter = January to March; Spring = April to June; Summer = July to September

When anticipating going on a U.K. overnight trip

- Only 4% of adults are currently planning on taking an overnight trip in the U.K. this winter period; rising to 17% in the spring and 26% during the summer months.
- The proportion anticipating a spring trip has dropped 4 percentage points versus last wave, although summer trip intent has marginally increased (by 1 percentage point).
- 33% are not intending to take any domestic overnight trips at all, which represents a 2 percentage point increase on Wave 22.

Figure 16. Proportion anticipating GOING on any overnight UK trip, Percentage Wave 23, 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 23 n=1,758. Note: Research was conducted before the England lockdown announcement on 4th January

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

- While just under half of Winter Intenders (47%) have already planned their next overnight trip in the U.K, less than a quarter claim to have actually booked it.
- The proportion of those who have either already planned or booked a trip for this spring has risen slightly to 28% and 21% respectively (up from 25% and 18% in Wave 22).

Figure 17. Proportion of Intenders that have already *planned* their trip, Percentage Wave 23, UK

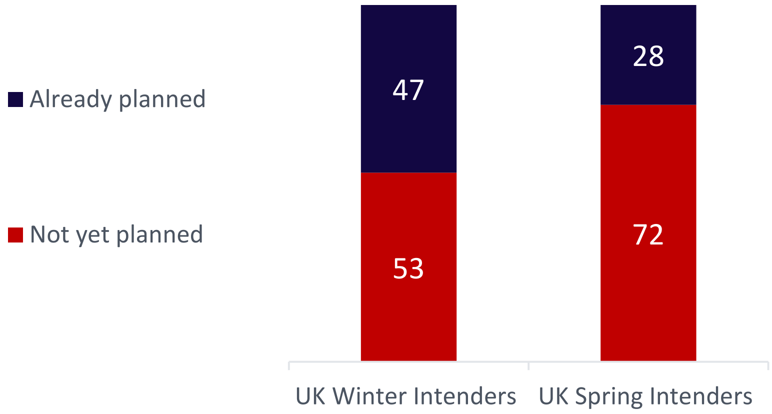
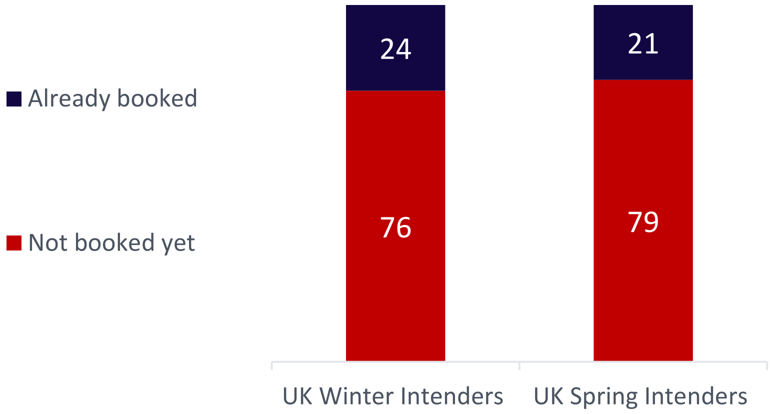


Figure 18. Proportion of Intenders that have already *booked* their trip, Percentage Wave 23, UK

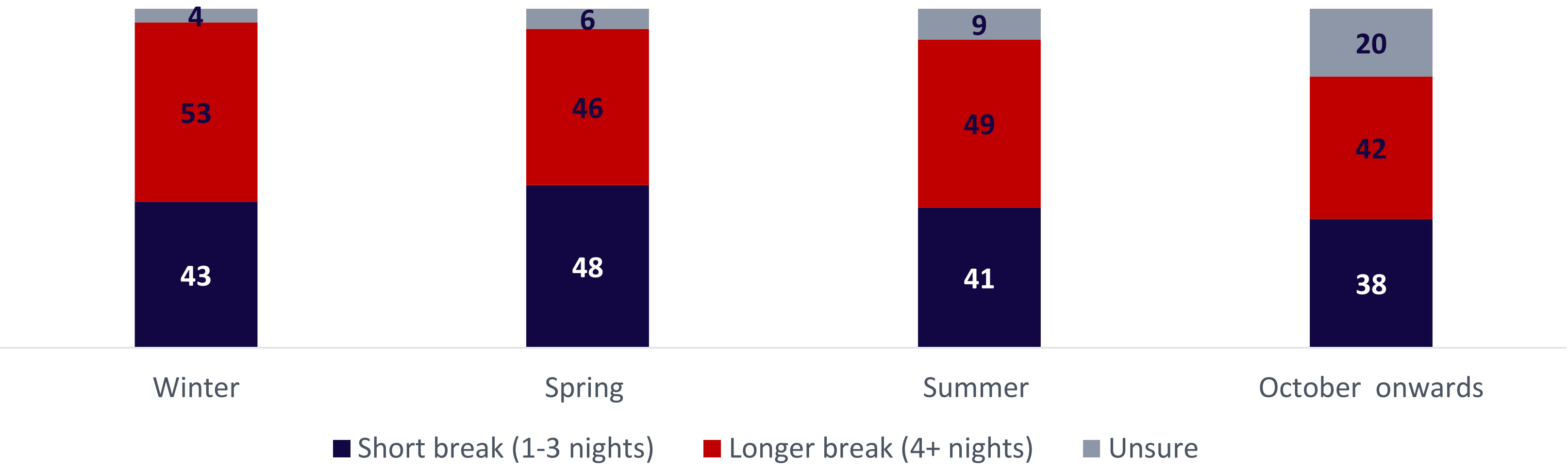


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 23 respondents planning on taking a holiday or short break in the UK in winter (January to March) n=81 and in spring (April to June) n=250

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

- Longer breaks of 4+ nights currently make up the majority of intended overnight trips this winter, although this is indicative due to low base sizes.
- For spring, it's a relatively even split between shorter (1-3 nights) and longer breaks, while longer breaks continue to make up the majority of trips destined to happen during the summer period.

Figure 19. Length of next UK holiday or short break by time period, Percentage Wave 23, UK



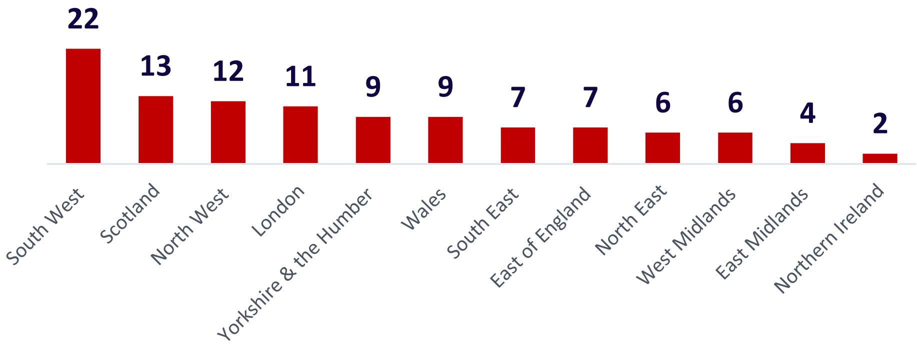
QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 23 respondents intending to take next holiday or short break in each time period: Winter n=81 (Jan – March); Spring n=250 (Apr – June); Summer n=293 (July – Sept); October 2021 onwards n=148

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 a particularly dominant position for the latter.
- The South West's 22% share of spring trips is 9 percentage points ahead of Scotland in second place, closely followed by the North West and London.

Figure 20. Where planning on staying on next UK overnight trip in winter, Percentage Waves 22-23, UK

Figure 21. Where planning on staying on next UK overnight trip in spring, Percentage Waves 22-23, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Wave 22-23 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=218 and spring (April to June) n=526

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

- Across both time periods, 'own car' continues to lead as the main mode of transport for travelling to an overnight destination, with 42% anticipating this in winter and 60% in spring.
- For spring trips, travelling by 'train' emerges as the second most preferred mode – followed by 'plane' in third place.

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

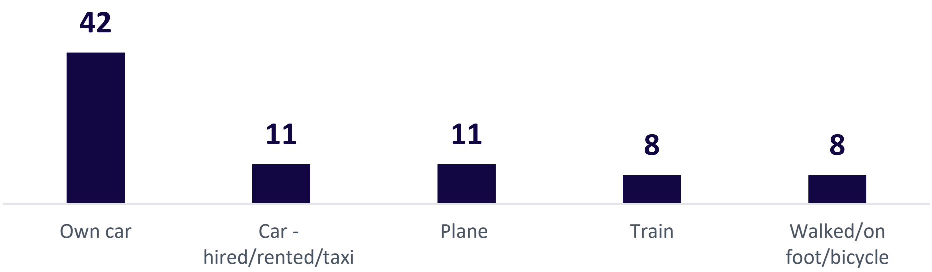
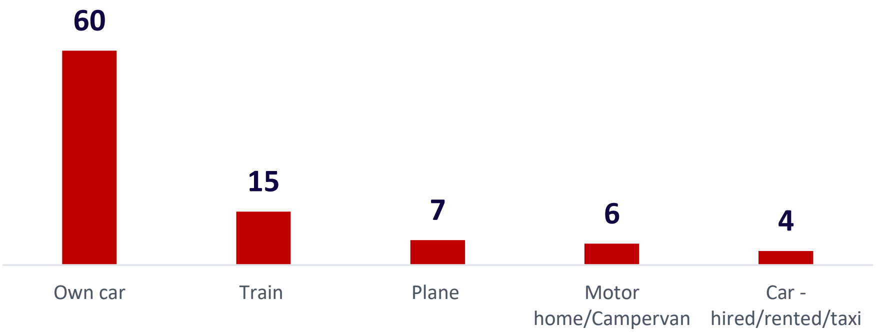


Figure 23. Top 5 main modes of travel to destination for trip in spring, Percentage, Wave 23, UK



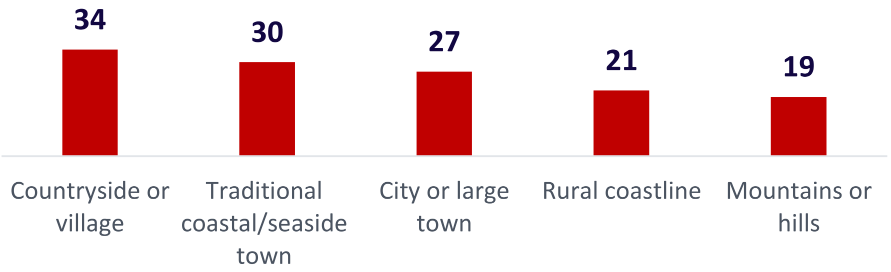
QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 23 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=81 and from spring (April to June) n=250 .

Type of destination for next U.K. overnight trip

- ‘Countryside or village’ is the leading destination type for overnight winter trips, overtaking ‘city or large town’ (which was the preferred destination type in Wave 22).
- ‘Countryside or village’ also leads for spring trips with a 34% share, followed by ‘traditional coastal/seaside towns’ on 30%.

Figure 24. Main type of destination for trip in winter, Percentage Waves 22-23, UK

Figure 25. Main type of destination for trip in spring, Percentage Waves 22-23, 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 22-23 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=218 and spring (April to June) n=526

Type of accommodation for next U.K. overnight trip

- On average, respondents are selecting two types of accommodation for their intended winter breaks, which is higher than we've recorded in previous waves and perhaps reflects a degree of uncertainty about how restrictions may influence their trip.
- In spring, 'hotel/motel/inn' leads with a 37% share, closely followed by 'commercial rentals' (such as holiday cottages) on 34%.

Figure 26. Accommodation planning on staying in on next UK overnight trip in winter, Net percentage Waves 22-23

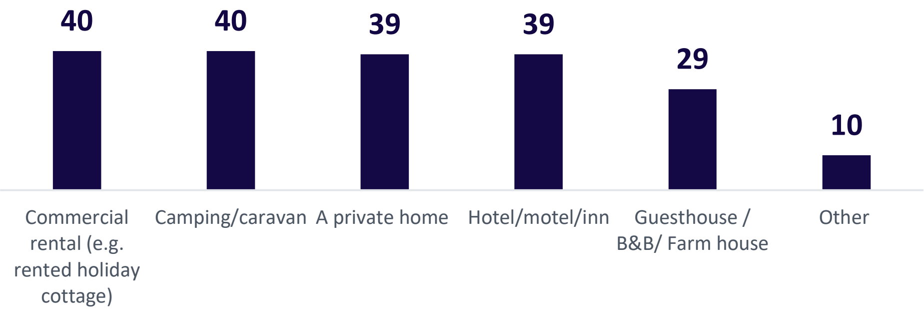
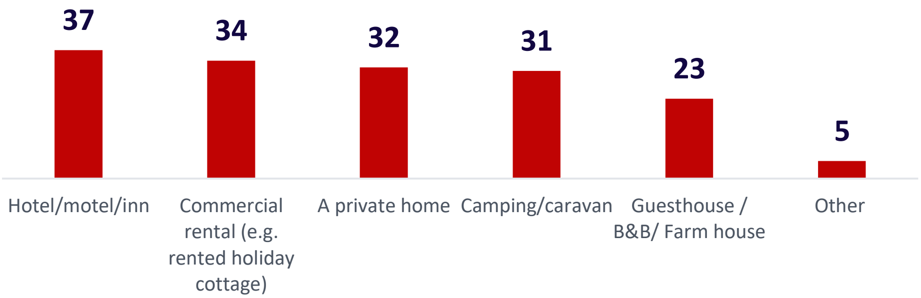


Figure 27. Accommodation planning on staying in on next UK overnight trip in spring, Net percentage Waves 22-23

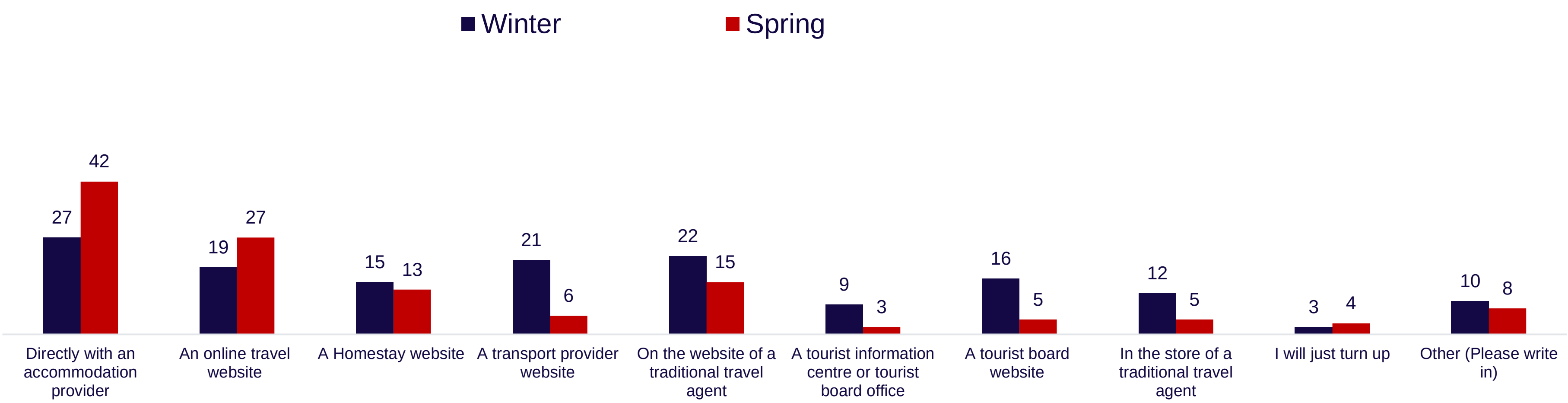


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Wave 22-23 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=218 and spring (April to June) n=526

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

- Booking directly with an accommodation provider is the leading method of booking across both review periods, although spring trips index higher when compared to those destined to be taken during the winter months.
- An online travel website is the next most preferred booking channel for Spring Intenders, with around 1 in 4 choosing this method.

Figure 28. Accommodation booking channel for next trip in winter and spring, Percentage Wave 23, U.K.

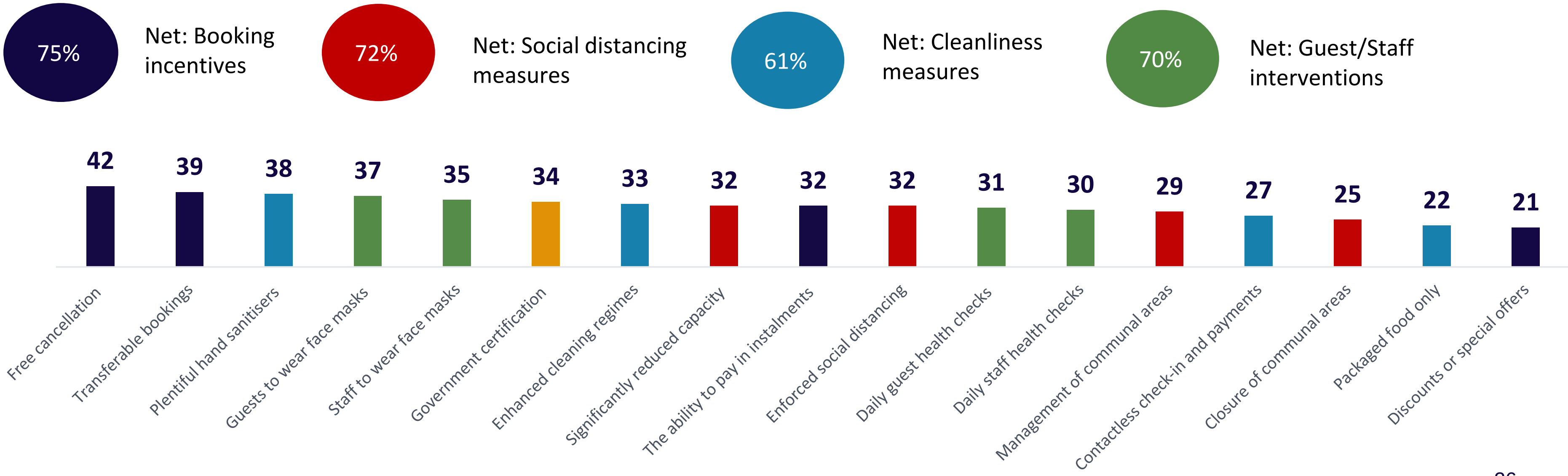


VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All Wave 23 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=81 and for spring (April to June) n=250

Conditions essential to stay in accommodation this winter

- At a net level, ‘booking incentives’ are considered the most important attributes for accommodation providers to have in place this winter (e.g. ‘free cancellations’ and ‘transferable bookings’), ahead of cleanliness, distancing and other Covid-related interventions.

Figure 29. Conditions that are essential for a stay in accommodation this winter, Percentage and Net Percentages Wave 23, 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 23 Winter Intenders n=81

General leisure activity intentions as lockdown restrictions are lifted

- Consistent with Wave 22, the order of activity intentions remains the same. Outdoor areas are most likely to attract more visitors/engagement than normal once restrictions are lifted (net +26), followed by outdoor leisure or sports activities (+14) and outdoor attractions (+1). ‘Catering, entertainment and events’ (-25) sit behind ‘predominantly indoor attractions’ (net -22) and ‘health or wellbeing activities’ (-20) in being likely to attract fewer visitors/engagement than normal.
- The anticipated likelihood to undertake all types of activity has declined since Wave 22

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 23, UK

Outdoor areas (e.g. beaches, mountains, trails etc.)	Outdoor leisure or sports activities (e.g. walking, cycling, swimming etc.)	Predominantly outdoor attractions (e.g. theme parks, playgrounds etc.)	Health or wellbeing activities (e.g. spa/beauty, retreat or meditation, indoor swimming)	Predominantly indoor or covered attractions (e.g. museums, cathedrals etc.)	Catering, entertainment and events (e.g. restaurants, cinema, festivals etc.)

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 23 respondents n=1,757

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 23 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-22 where appropriate. Wave 23 fieldwork was conducted between 11th and 15th January 2021.

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.