COVID-19 Consumer Tracker

Wave 25

Fieldwork Period: 8 – 12 February

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 8th – 12th February.
- 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 <u>January and March 2021</u>
- **Spring Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between <u>April and June 2021</u>

Fieldwork Periods

Project Period	Fieldwork Period	Project Period	Fieldwork Period	Project Period	Fieldwork Period
Wave 1	18 – 22 May	Wave 13	10 – 14 August	Wave 25	8 – 12 February
Wave 2	25 – 29 May	Wave 14	31 August – 4 September	Wave 26	
Wave 3	1 – 5 June	Wave 15	14 – 18 September	Wave 27	
Wave 4	8 – 12 June	Wave 16	28 September – 2 October	Wave 28	
Wave 5	15 – 19 June	Wave 17	12 – 16 October	Wave 29	
Wave 6	22 – 26 June	Wave 18	26 – 30 October	Wave 30	
Wave 7	29 June – 3 July	Wave 19	9 – 13 November	Wave 31	
Wave 8	6 – 10 July	Wave 20	23 – 27 November	Wave 32	
Wave 9	13 – 17 July	Wave 21	7 – 11 December	Wave 33	
Wave 10	20 – 24 July	Wave 22	18 – 23 December	Wave 34	
Wave 11	27 – 31 July	Wave 23	11 – 15 January	Wave 35	
Wave 12	3 – 7 August	Wave 24	25 – 29 January	Wave 36	

Wave 25: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

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

Key Metrics	Wave 24	Wave 25	Wave Shift
National mood (average score out of 10)	6.5	6.5	No change
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	19%	29%	+10*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.3	2.5	+0.2
Normality score (proportion expecting normality by June)	18%	16%	-2
The main reasons for not feeling confident about taking a trip in Spring	1. Restrictions on travel from government 2. Concerns about catching Covid-19	1. Restrictions on travel from government 2. Not responsible to travel in this period	New Number 2

Table 2. Top line Metrics – General Trip Intentions

Key Metrics	Wave 24	Wave 25	Wave Shift
Anticipated number of UK short breaks compared to normal (% more/the same)	32%	32%	No change
Anticipated number of UK longer breaks compared to normal (% more/the same)	31%	31%	No change
Near-term confidence in taking UK overnight trip (Feb/March confident)	6%/8%	7% /9%	+1/+1
Medium-term confidence in taking UK overnight trip (April/May confident)	11%/20%	12%/20%	+1/=
Proportion going on a UK overnight trip in Spring (April – June)	14%	13%	-1
Split between longer break / short break / don't know for Spring trip	54%/39%/7%	50%/41%/10%	-4/+2/+3

Wave 25: Scorecard of Key Metrics (2)

Table 3. Top line Metrics – Destination and Accommodation Plans

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

Key Metrics	**Wave 24**	**Wave 25**	**Wave Shift**
Leading UK destination likely to stay in Spring	South West	South West	No Change
Main *type* of destination likely to stay in Spring	Traditional coastal/seaside town	Traditional coastal/seaside town	No Change
Main accommodation type likely to stay in Spring	Camping/caravan	Camping/caravan	No change

Table 4. Top line Metrics – Broader Leisure Activity

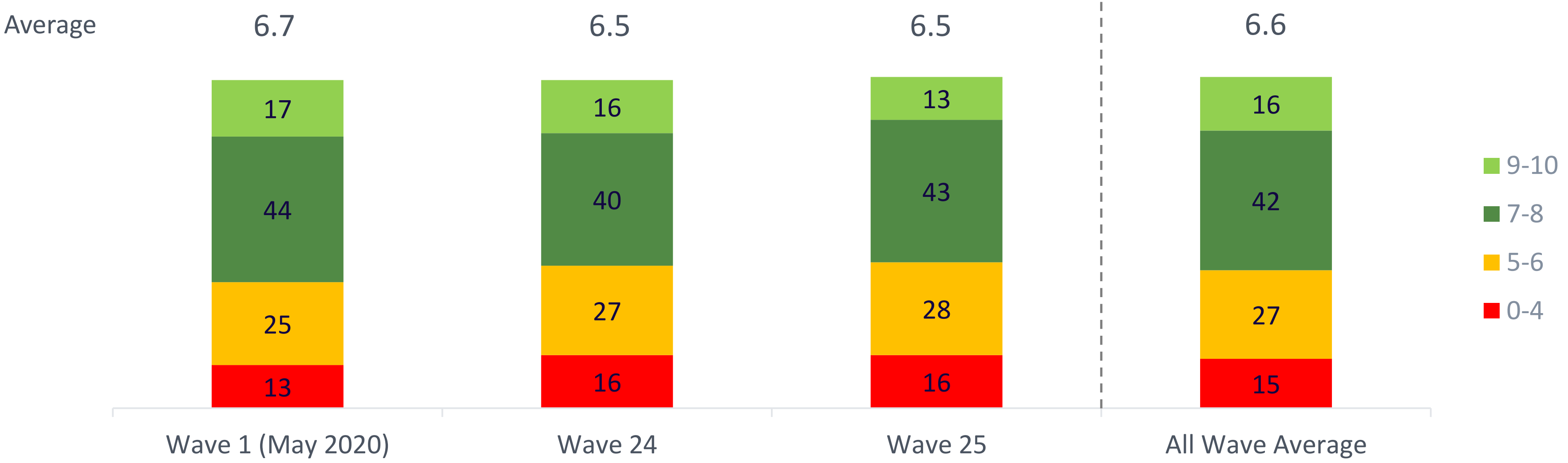
Key Metrics	**Wave 24**	**Wave 25**	**Wave Shift**
Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No change
Place/activity generating lowest engagement compared to normal	Predominantly indoor or covered attractions	Predominantly indoor or covered attractions	No Change

1. The National Mood

The national mood

- The average mood of U.K. adults is unchanged on last wave and remains 6.5 out of 10.

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

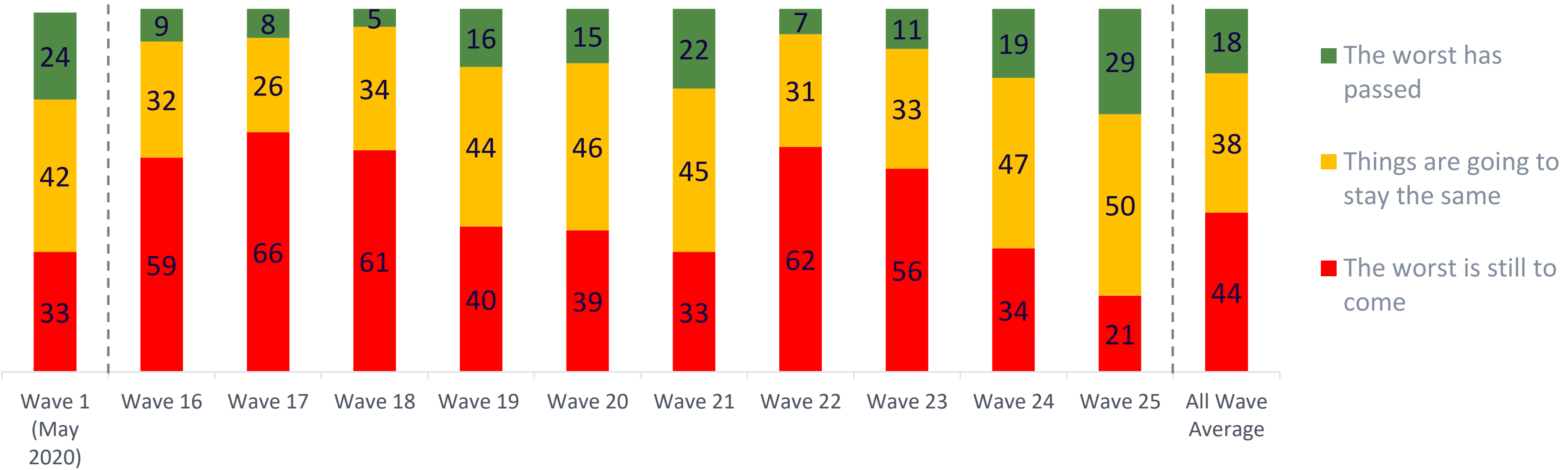


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 25 n=1,760
Wave average is based on Wave 1 to Wave 24.

Perceptions of the situation in relation to COVID-19

- The proportion who consider 'the worst has passed' has significantly increased for the second consecutive wave to 29%.
- Accordingly, there has also been a 13 percentage point decline in the proportion stating 'the worst is still to come' compared to Wave 24.
- However, half of U.K. adults still feel 'things are going to stay the same' in the coming month.

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 25 n=1,760 Wave average is based on Wave 1 to Wave 24.

Perceptions of when things will return to ‘close to normal’

- 16% of U.K. adults anticipate life will return to something ‘close to normal’ by June this year, a slight decline on Wave 24.
- 42% expect ‘normality’ to return during the July-September period, although it’s not until we reach the final quarter of this year that the majority anticipate life will return to something ‘close to normal’ (56%).

Figure 3. Cumulative perceptions of when things will return ‘close to normal’. Cumulative percentage Wave 25, UK

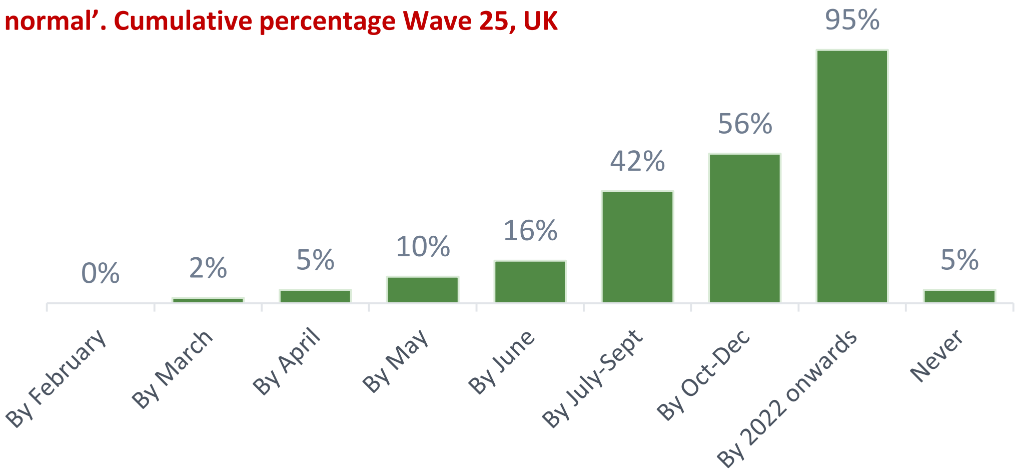
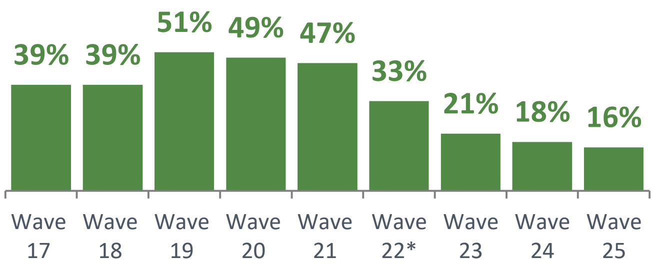


Figure 4. Proportion expecting normality by June, Percentage wave-on-wave, UK

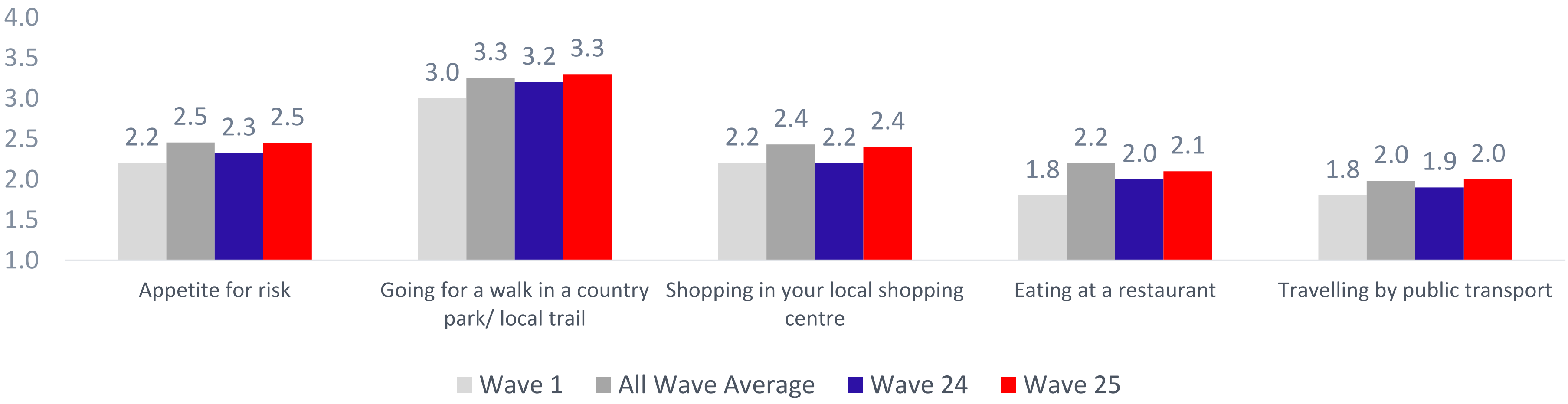


Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 25 n=1,760
*Due to questionnaire wording changes, ‘by June’ figures pre-Wave 22 are based on expectations of normality returning ‘sometime between April and June’.

Appetite for risk

- The overall ‘appetite for risk’ score has risen by 0.2 points to 2.5
- All activities experience a rise in ‘comfort’ levels compared to Wave 24, with ‘going for a walk in a country park/local trail’, ‘shopping in your local shopping centre’ and ‘travelling by public transport’ returning to the All Wave Average.

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 25 n=1,760 . Wave average is based on Wave 1 to Wave 24.

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

- Consistent with Wave 24, almost a third of U.K. adults anticipate taking more or about the same number of domestic overnight short breaks (32%) and longer breaks (31%) compared to normal between now and the end of June.
- The proportion anticipating taking *fewer* trips has slightly fallen versus last wave, although more are now stating they 'don't know'.

Figure 6. Number of UK short breaks (1-3 nights) between now and the end of June compared to normal, Percentage Wave 25, UK

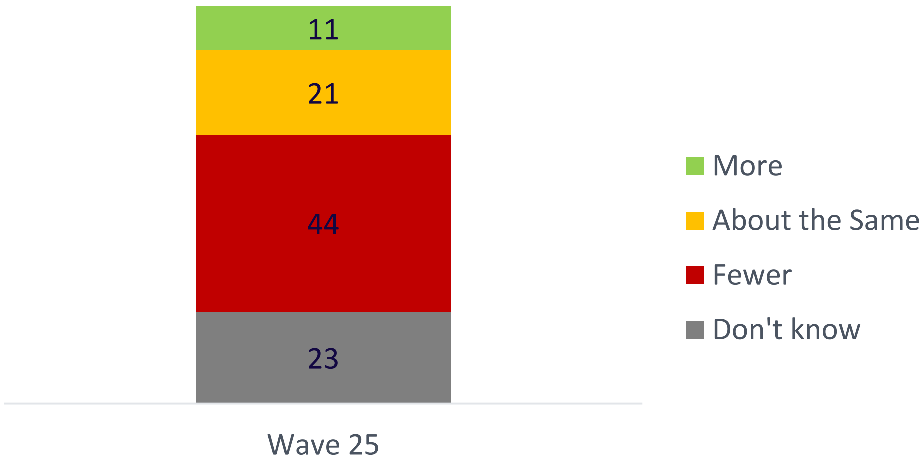
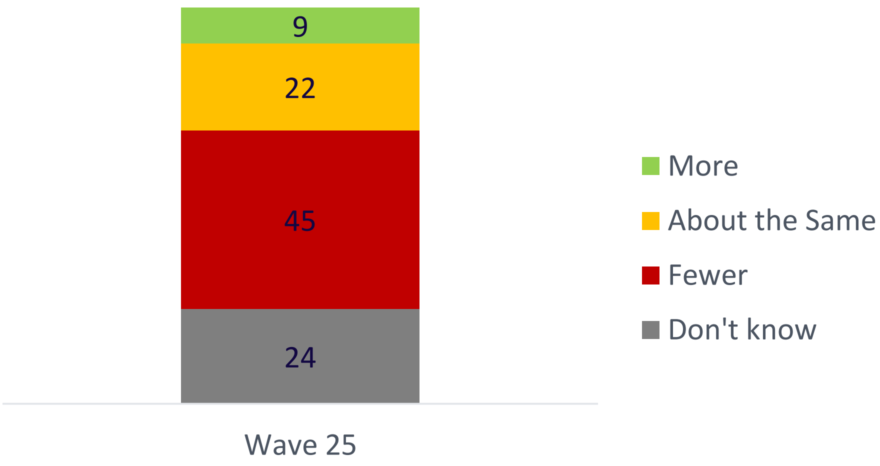


Figure 7. Number of UK longer breaks (4+ nights) between now and the end of June compared to normal, Percentage Wave 25, UK



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 25 n=1,760.

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 short breaks (24%) and longer breaks (25%) compared to normal between now and the end of June.
- As with domestic trip intent, the proportion who expect to be taking *fewer* overseas trips declines versus Wave 24, although the proportion who 'don't know' has increased.

Figure 8. Number of OVERSEAS short breaks (1-3 nights) between now and the end of June compared to normal, Percentage Wave 25, UK

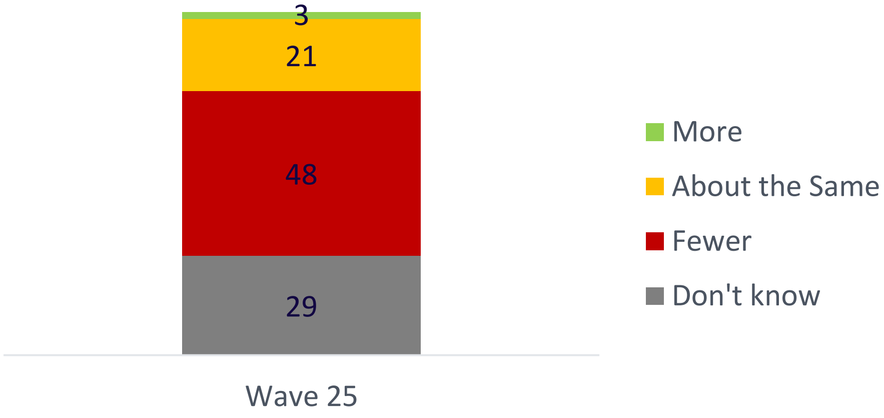
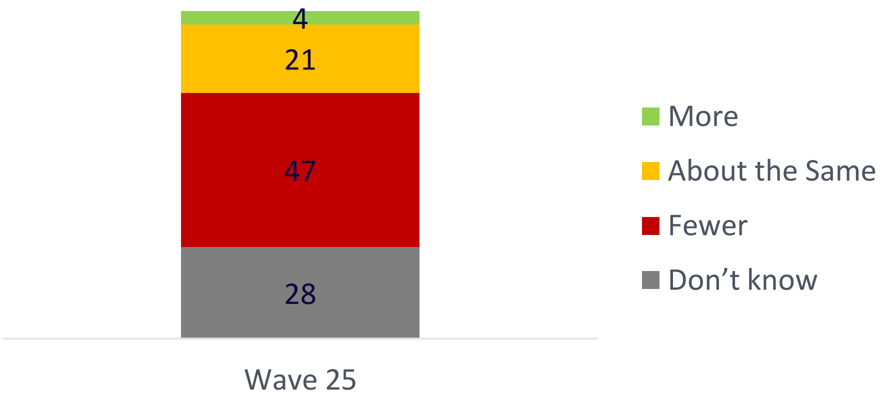


Figure 9. Number of OVERSEAS longer breaks (4+ nights) between now and the end of June compared to normal, Percentage Wave 25, UK



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 25 n=1,760.

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

- Few are confident that an overnight domestic trip booked for this winter (defined as between now and the end of March) would be likely to go ahead as planned.
- Confidence in the ability to take domestic trips does begin to rise during the Spring and Summer periods, with evidence the levels are now stabilising; 32% are presently confident a June trip could proceed as planned, which is unchanged from Wave 24.
- It's not until October onwards that confidence returns to a firm majority of UK adults (63%).

Figure 10. Confidence in taking a UK overnight trip across a range of different months, Percentage, Wave 25, UK

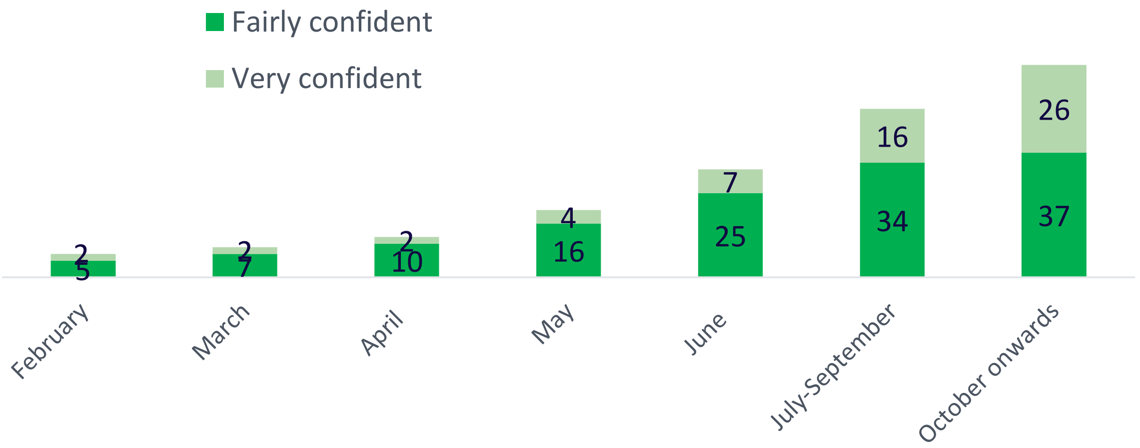
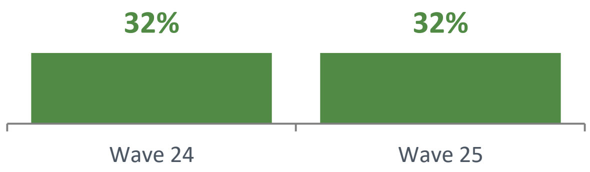


Figure 11. Confidence in taking a UK overnight trip in June 2021, Percentage wave-on-wave, UK



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 25 n=1,760.

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

- Consistent with recent waves, ‘restrictions on travel from government’ remains the primary reason people do not feel confident about taking an overnight trip during either this Winter or Spring. However, concerns about catching COVID-19 is a less dominant factor than in Wave 24.
- The leading five reasons for not feeling confident about taking trips this Spring are the same as Winter, although in a slightly differing rank order.

Figure 12. Top 5 reasons for not being confident about travelling in Winter*, Percentage Wave 25, UK

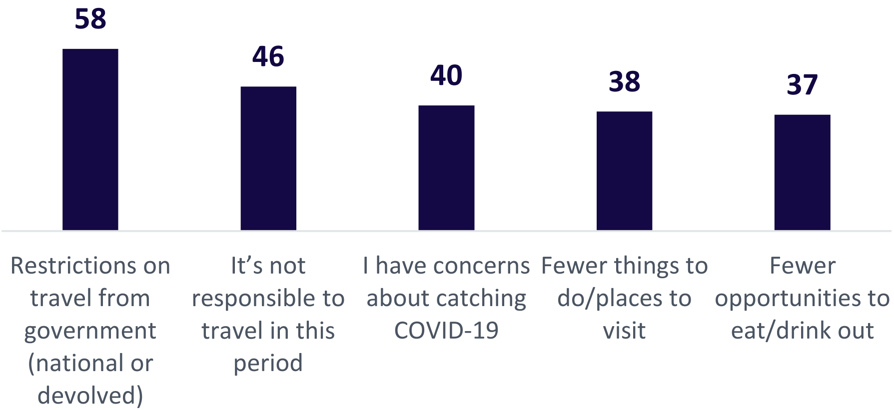
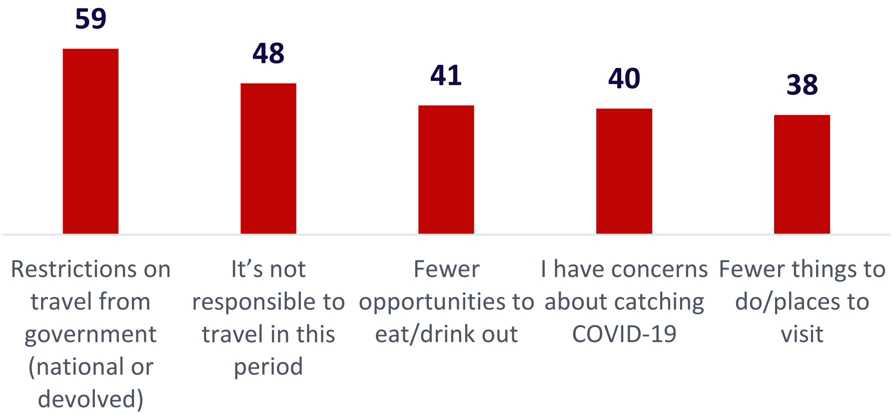


Figure 13. Top 5 reasons for not being confident about travelling in Spring*, Percentage Wave 25, UK



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 25 respondents not confident about taking a break in Winter n=378 and in Spring n=567. *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 8% already *booked* their next domestic overnight trip, generally consistent with the previous two waves.
- 33% state they have either already planned or intend to plan their next trip by this Spring (defined as before the end of June) while 28% have already booked or intend to book their next trip by then.
- Just over a third are not intending to plan or book a trip at any point, which is slightly up on Wave 24.

Figure 14. When anticipate PLANNING next UK overnight trip, Percentage Wave 25, UK

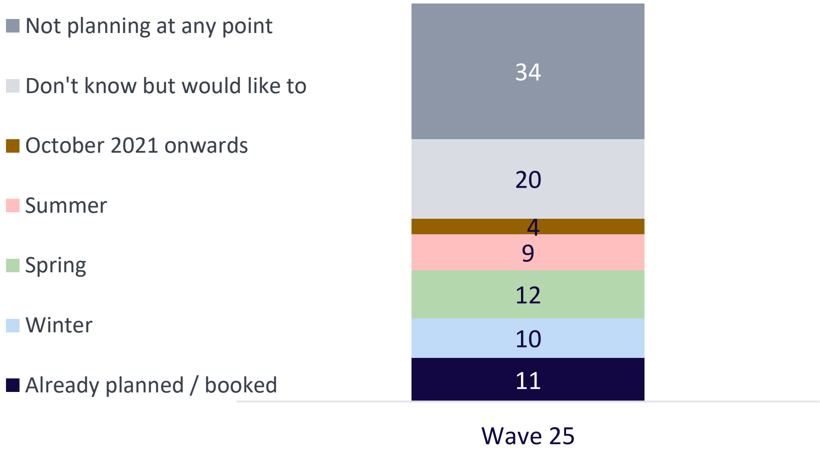
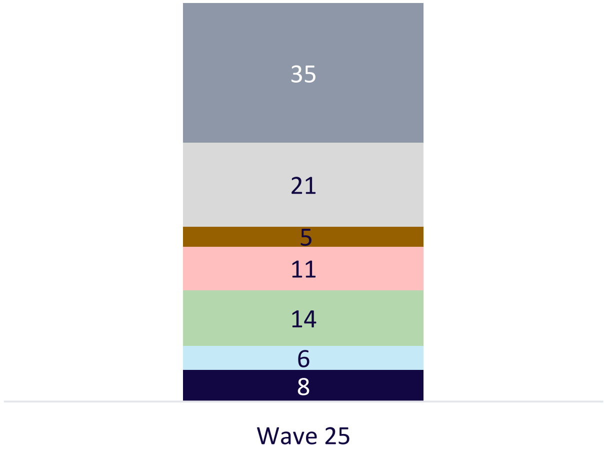


Figure 15. When anticipate BOOKING next UK overnight trip, Percentage Wave 25, UK

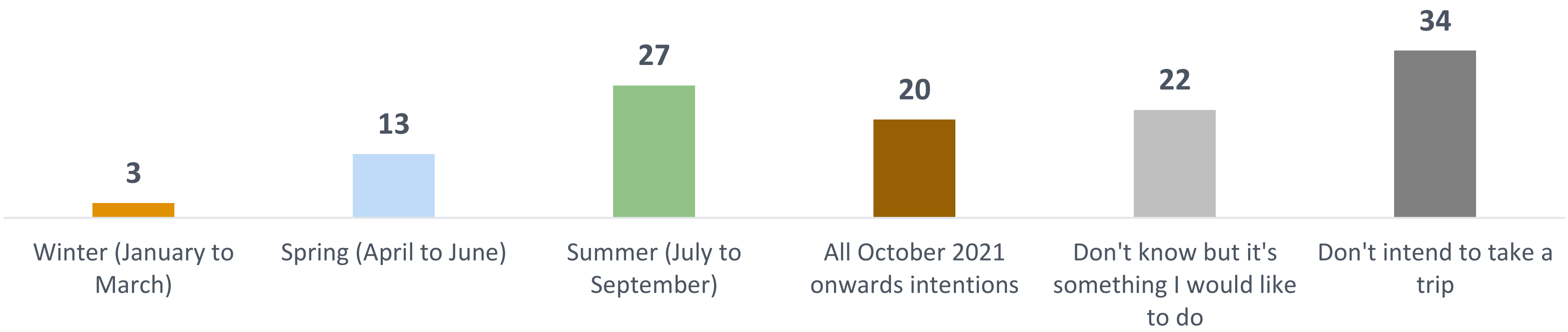


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 25 n=1,760. *Winter = January to March; Spring = April to June; Summer = July to September

When anticipating going on a U.K. overnight trip

- Only 3% of U.K adults now plan on taking a domestic overnight trip by the end of March. Some 13% anticipate taking one between April and June, which is 1 point down compared to Wave 24.
- Summer trip intent, at 27%, remains unchanged from Wave 24. Trip intent from October onwards is also stable at 20%.
- 34% are not intending to take any domestic overnight trips at all, which is up 2 percentage points on the previous wave

Figure 16. Proportion anticipating GOING on any overnight UK trip, Percentage Wave 25, 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 25 n=1,760.

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

- Just over half of Winter Intenders (52%) claim to have already planned their trip although just 30% have actually booked it.
- The proportion of those who have already planned or booked a Spring trip (between April – June) has risen to 44% and 31% respectively (up from 38% and 29% in Wave 24).

Figure 17. Proportion of Intenders that have already *planned* their trip, Percentage Wave 24-25 for Winter and Wave 25 for Spring, UK

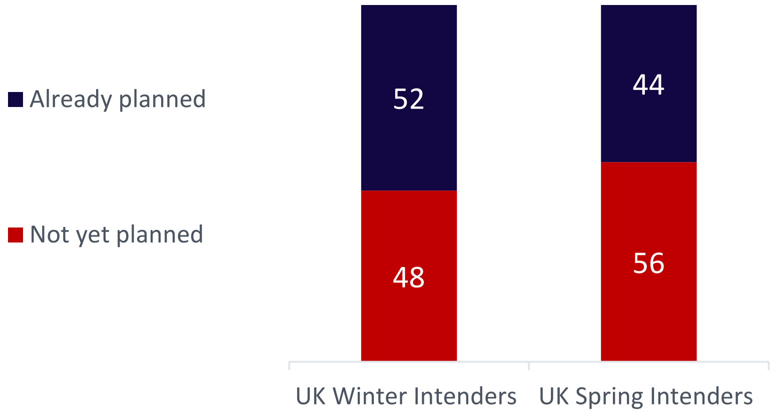
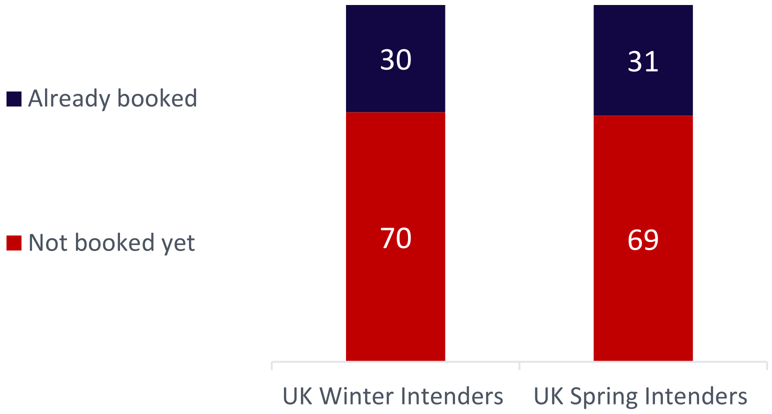


Figure 18. Proportion of Intenders that have already *booked* their trip, Percentage Wave 24-25 for Winter and Wave 25 for Spring, UK

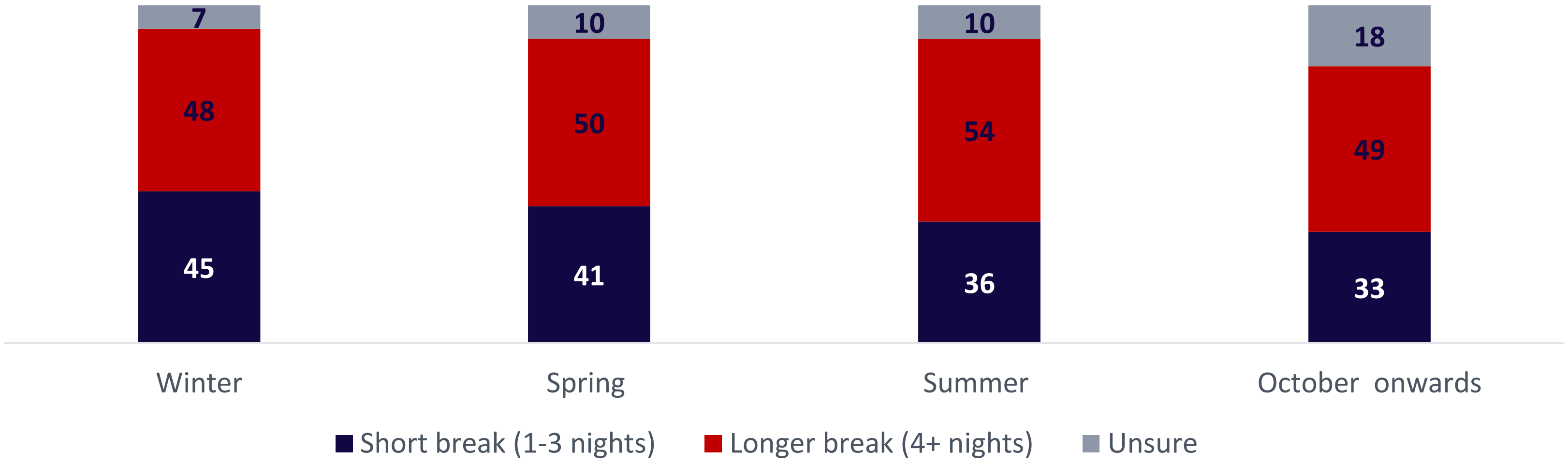


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 24-25 respondents planning on taking a holiday or short break in the UK in winter (January to March) n=113; All Wave 25 respondents in spring (April to June) n=209

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

- Overall, longer breaks of 4+ nights make up the majority of intended trips, but particularly those planned for the summer period (July – September).

Figure 19. Length of next UK holiday or short break by time period, Percentage Wave 24-25 for Winter and Wave 25 for Spring/Summer/October onwards, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 24-25 respondents intending to take next holiday or short break in each time period: Winter n=128 (Jan – March); All Wave 25 respondents: Spring n=209 (Apr – June); Summer n=345 (July – Sept); October 2021 onwards n=171

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

- Little separates the top 4 regions for an overnight stay this winter, although it should be re-iterated that only 3% of U.K. adults actually anticipate taking a trip during this period.
- The South West remains the leading destination for an overnight trip this Spring with a dominant 29% share, significantly ahead of second placed Scotland on 16%.

Figure 20. Where planning on staying on next UK overnight trip in winter, Percentage Waves 24-25, UK

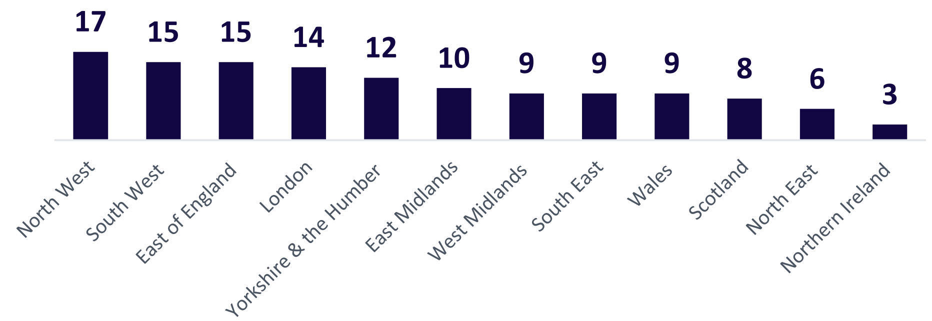
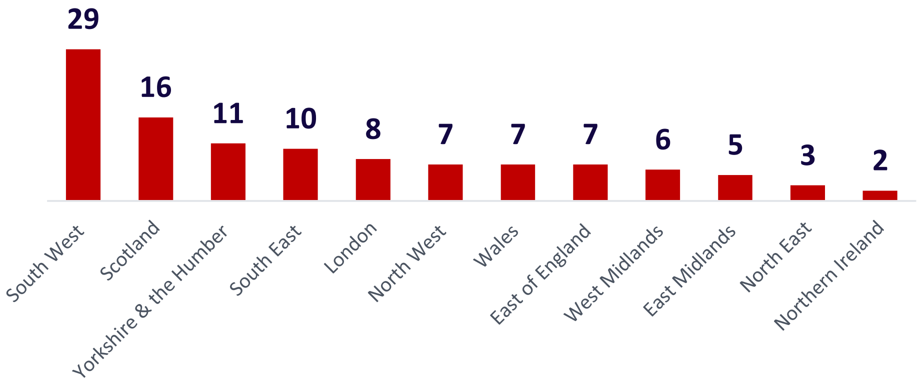


Figure 21. Where planning on staying on next UK overnight trip in spring, Percentage Waves 24-25 , UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Wave 24-25 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=113 and spring (April to June) n=434

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

- Across both time periods, 'own car' continues to lead as the primary mode of transport for travelling to an overnight destination, with 44% anticipating using their car for winter trips, rising to 62% in spring.
- 'Train' is the second most likely mode of travel to an overnight destination in winter and spring, with a 17% share.

Figure 22. Top 5 main modes of travel to destination for trip in winter, Percentage, Wave 24-25, UK

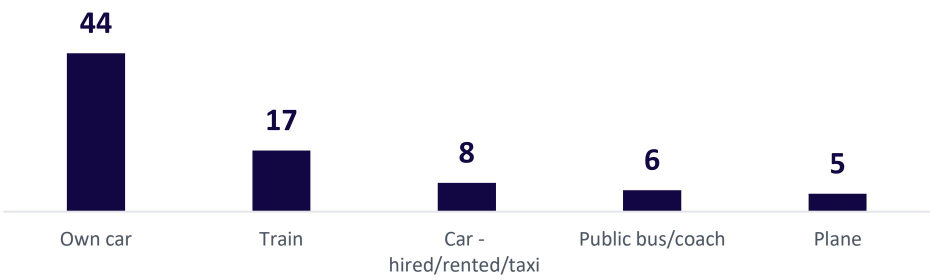
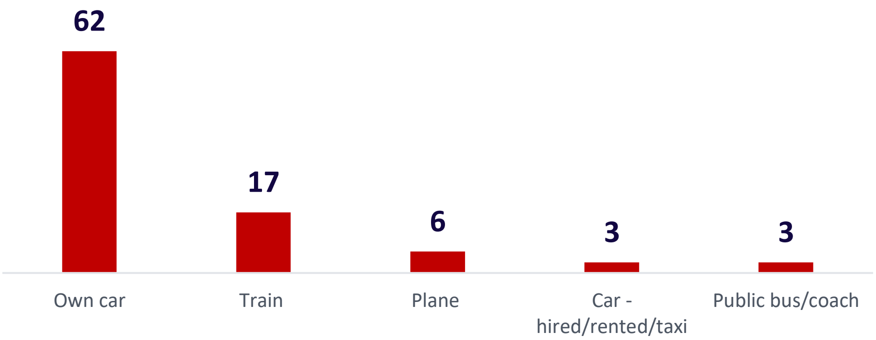


Figure 23. Top 5 main modes of travel to destination for trip in spring, Percentage, Wave 25, UK



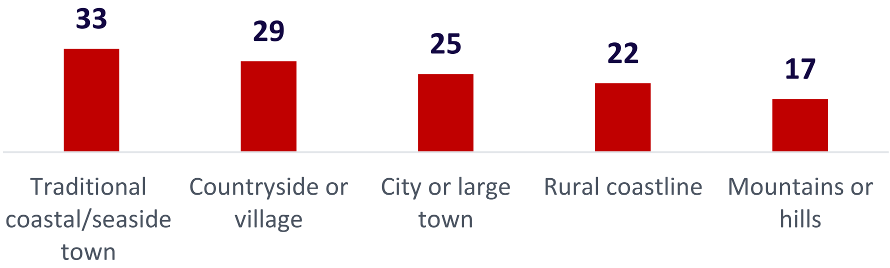
QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 24-25 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=113 and All Wave 25 respondents from spring (April to June) n=209 .

Type of destination for next U.K. overnight trip

- There is minimal separation in share between the top three destination types for Winter trips.
- ‘Traditional coastal/seaside town’ remains the lead destination type for Spring trips, followed by ‘countryside or village’.

Figure 24. Main type of destination for trip in winter, Percentage Waves 24-25, UK

Figure 25. Main type of destination for trip in spring, Percentage Waves 24-25, 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 24-25 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=113 and spring (April to June) n=434

Type of accommodation for next U.K. overnight trip

- ‘Camping/caravan’, ‘a private home’, and ‘commercial rental’ remain the top 3 accommodation types for the comparatively few trips that are destined to happen this Winter.
- For Spring trips, ‘camping/caravan’, ‘hotel/motel/inn’ and ‘commercial rental’ are being considered by around 1 in 3 people respectively.

Figure 26. Accommodation planning on staying in on next UK overnight trip in winter, Net percentage Waves 24-25

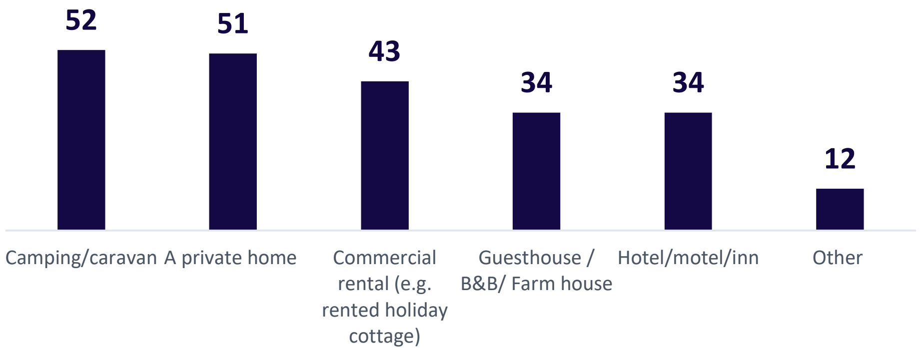
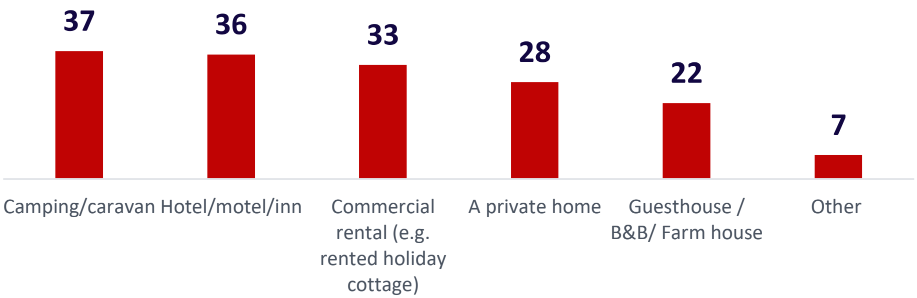


Figure 27. Accommodation planning on staying in on next UK overnight trip in spring, Net percentage Waves 24-25

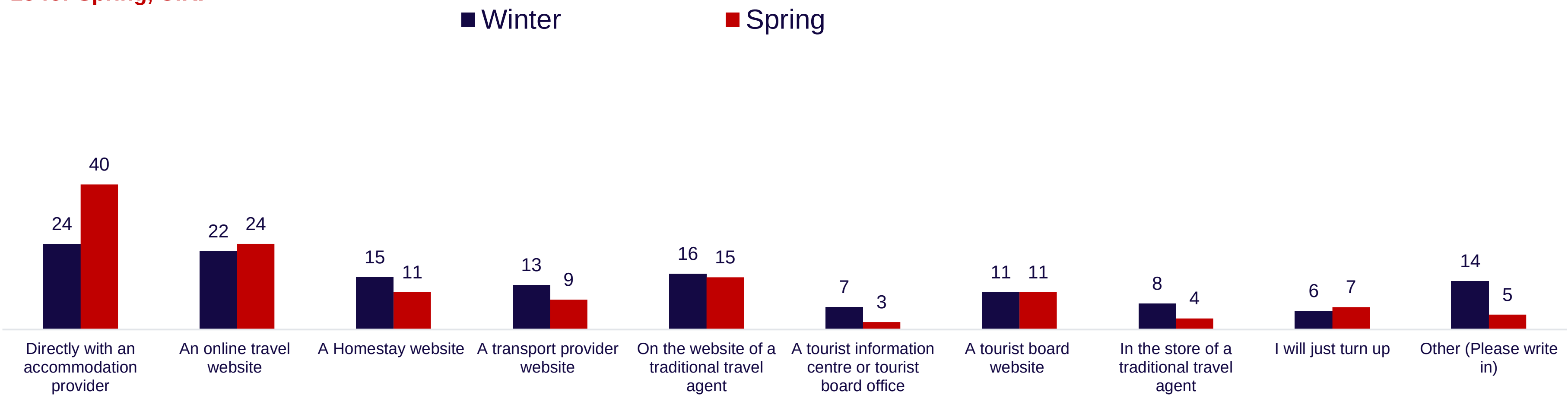


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Wave 24-25 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=113 and spring (April to June) n=434

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

- Booking directly with an accommodation provider remains the leading method of confirming accommodation across both time periods.
- An online travel website is the next most preferred booking channel for both Winter and Spring Intenders, with 22% and 24% choosing this method respectively.

Figure 28. Accommodation booking channel for next trip in winter and spring, Percentage Wave 24-25 for Winter and Wave 25 for Spring, U.K.

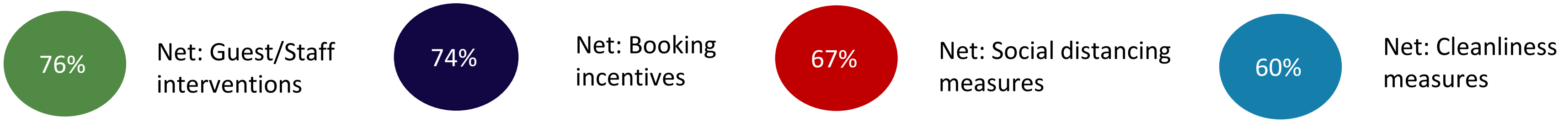


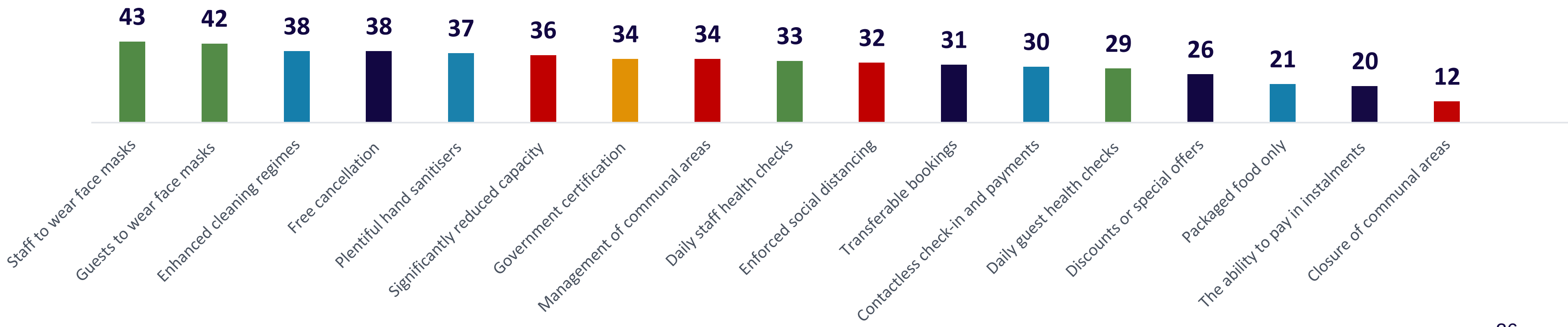
VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All Wave 24-25 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=113 and All Wave 25 respondents for spring (April to June) n=209

Conditions essential to stay in accommodation this winter

- At a net level, ‘guest/staff interventions’ are the factors considered most essential for accommodation providers to have in place, driven primarily by the need for face masks to be worn by both guests and staff. ‘Booking incentives’ are close behind, with ‘free cancellations’ the most important requirement within this category.

Figure 29. Conditions that are essential for a stay in accommodation this winter, Percentage and Net Percentages Wave 24-25, UK



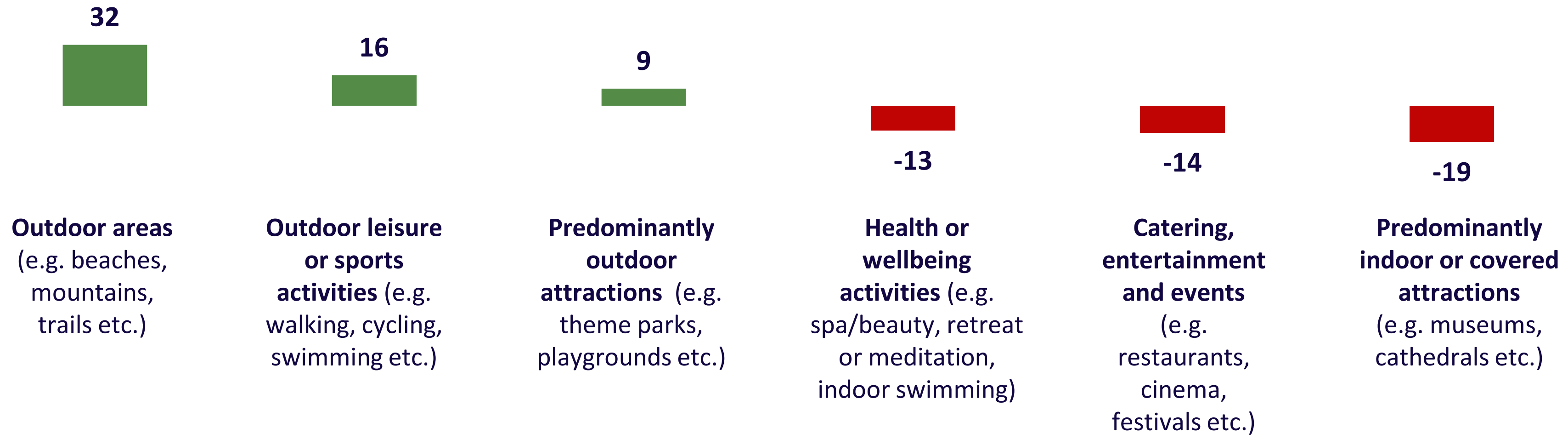


Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them over the next few months? Base: All Wave 24-25 Winter Intenders n=113

General leisure activity intentions as lockdown restrictions are lifted

- Consistent with Wave 24, outdoor areas are most likely to attract more visitors/engagement than normal (net +32), followed by outdoor leisure or sports activities (+16) and outdoor attractions (+9) – with outdoor attractions showing the biggest rise (+5 since Wave 24).
- ‘health or wellbeing activities’ (-13), ‘Catering, entertainment and events’ (-14) and ‘predominantly indoor attractions’ (net -19) are likely to attract fewer visitors/engagement than normal, though the net decline has improved compared to Wave 24.

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 25, 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 25 respondents n=1,760

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 25 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-24 where appropriate. Wave 25 fieldwork was conducted between 8th and 12th February 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.