COVID-19 Consumer Tracker

Wave 29

Published: 29th April 2021

Fieldwork Period: 19-23 April 2021

UK 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 UK and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.
- The survey addresses themes such as: the likelihood of UK residents to travel; when and where they plan to go; specific trip details such as destination and accommodation types, alongside the reassurances they're seeking from the sector.
- This tracker is based on a UK nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales.
- Fieldwork for this wave's results took place between 19th to 23rd April 2021.
- 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.

– **Spring Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between April and June 2021
– **Summer Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between July and September 2021

Fieldwork Periods

Project Period	Fieldwork Period	Project Period	Fieldwork Period	Project Period	Fieldwork Period
Wave 1	18 – 22 May	Wave 14	31 August – 4 September	Wave 27	22 – 26 March
Wave 2	25 – 29 May	Wave 15	14 – 18 September	Wave 28	6 – 10 April
Wave 3	1 – 5 June	Wave 16	28 September – 2 October	Wave 29	19 – 23 April
Wave 4	8 – 12 June	Wave 17	12 – 16 October	Wave 30	
Wave 5	15 – 19 June	Wave 18	26 – 30 October	Wave 31	
Wave 6	22 – 26 June	Wave 19	9 – 13 November	Wave 32	
Wave 7	29 June – 3 July	Wave 20	23 – 27 November	Wave 33	
Wave 8	6 – 10 July	Wave 21	7 – 11 December	Wave 34	
Wave 9	13 – 17 July	Wave 22	18 – 23 December	Wave 35	
Wave 10	20 – 24 July	Wave 23	11 – 15 January	Wave 36	
Wave 11	27 – 31 July	Wave 24	25 – 29 January	Wave 37	
Wave 12	3 – 7 August	Wave 25	8 – 12 February	Wave 38	
Wave 13	10 – 14 August	Wave 26	8 – 12 March		

Wave 29: Scorecard of Key Metrics

Key Metrics	Wave 28	Wave 29	Wave Shift
National mood (average score out of 10)	6.6	6.7	+0.1
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	40%	38%	-2
Appetite for Risk: Comfort in undertaking a range of activities (1-4 comfort score)	2.48	2.56	+0.08
Normality score (proportion expecting normality by June)	5%	8%	+3*
Leading two reasons for not feeling confident about taking a trip in Spring (Apr – June)	1. Restrictions on travel from government 2. Fewer opportunities to eat/drink out	1. Restrictions on travel from government 2. Fewer opportunities to eat/drink out	No change
Near-term confidence in taking UK overnight trip (April/May confident)	17%/23%	26%/31%	+7*/+8*
Medium-term confidence in taking UK overnight trip (June/July confident)	38%/49%	44%/53%	+6*/+4*
Anticipated number of UK short breaks compared to normal (% more/the same)	49%	51%	+2
Anticipated number of UK longer breaks compared to normal (% more/the same)	47%	47%	No change
Proportion going on a UK overnight trip in Spring (April – June)	13%	15%	+2
Proportion going on a UK day trip in next two weeks	22%	24%	+2
Leading UK overnight destination likely to stay in Spring (Apr – June)	South West	South West	No change
Main *type* of overnight destination likely to stay in Spring (Apr – June)	Traditional coastal/seaside town	Countryside or village	New No.1
Main overnight accommodation type likely to stay in Spring (Apr – June)	Commercial rental	Commercial rental and Camping/Caravan	New Joint No.1
Place/activity likely to attract highest engagement compared to normal, post-lockdown	Outdoor areas (e.g. beaches, trails etc)	Outdoor areas (e.g. beaches, trails etc)	No change
Place/activity likely to attract lowest engagement compared to normal, post-lockdown	Predominantly indoor or covered attractions	Predominantly indoor or covered attractions	No change

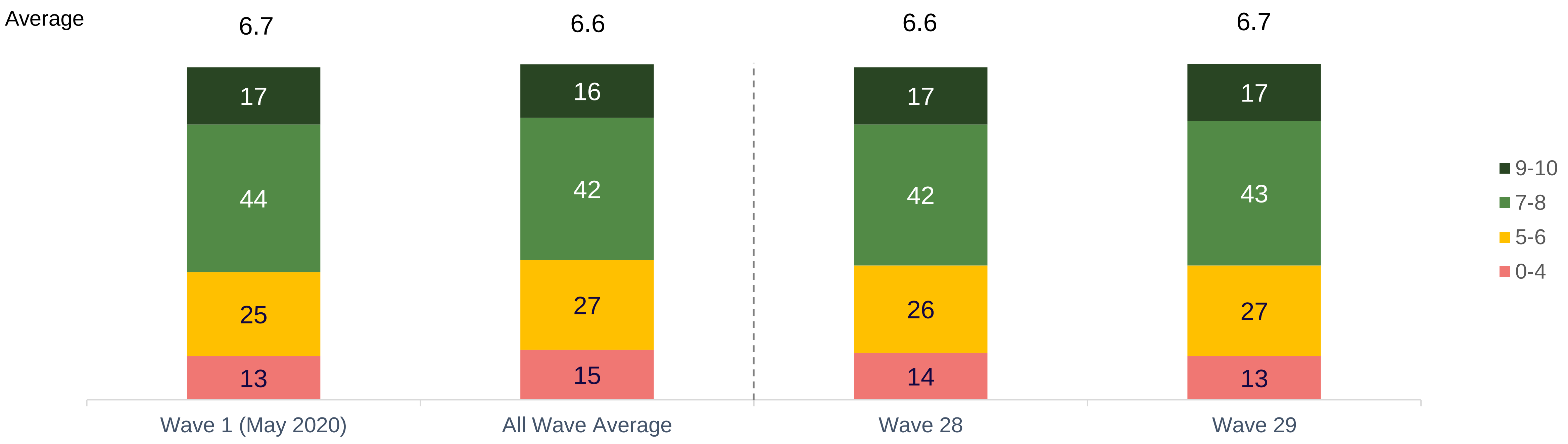
*** Represents a significant change on previous wave**

1. The National Mood

The National Mood

- **At 6.7 out of 10, the average mood of U.K. adults in Wave 29 sits marginally higher than the 'all wave average' of 6.6.**

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

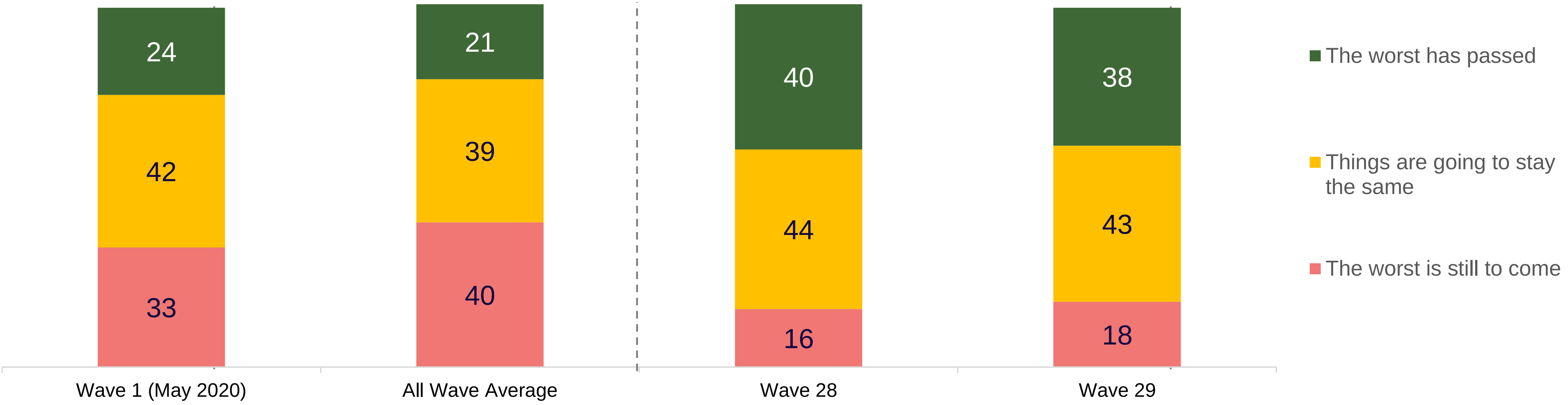


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 29 n=1,764
Wave average is based on Wave 1 to Wave 28.

Perceptions of the situation relating to COVID-19

- **38% of U.K. adults believe 'the worst has passed' in relation to COVID-19. While this represents a slight decrease on Wave 28 it is still significantly higher than the 'all wave average' of 21%.**
- **As with the previous wave, despite generally growing levels of optimism, the highest proportion still believe 'things are going to stay the same' while almost a fifth remain of the opinion 'the worst is still to come'.**

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 29 n=1,764 Wave average is based on Wave 1 to Wave 28.

Perceptions of when things will 'return close to normal'

- **15% of U.K. adults anticipate life will return to something 'close to normal' by July this year, rising to 21% by August, representing increases since Wave 28 when they were 12% and 19% respectively.**
- **The proportion expecting 'normality' by the end of the year is broadly unchanged this wave, but remains at under 50% of UK adults.**

Figure 3. Perceptions of when things will return 'close to normal', cumulative percentage, Wave 29, UK

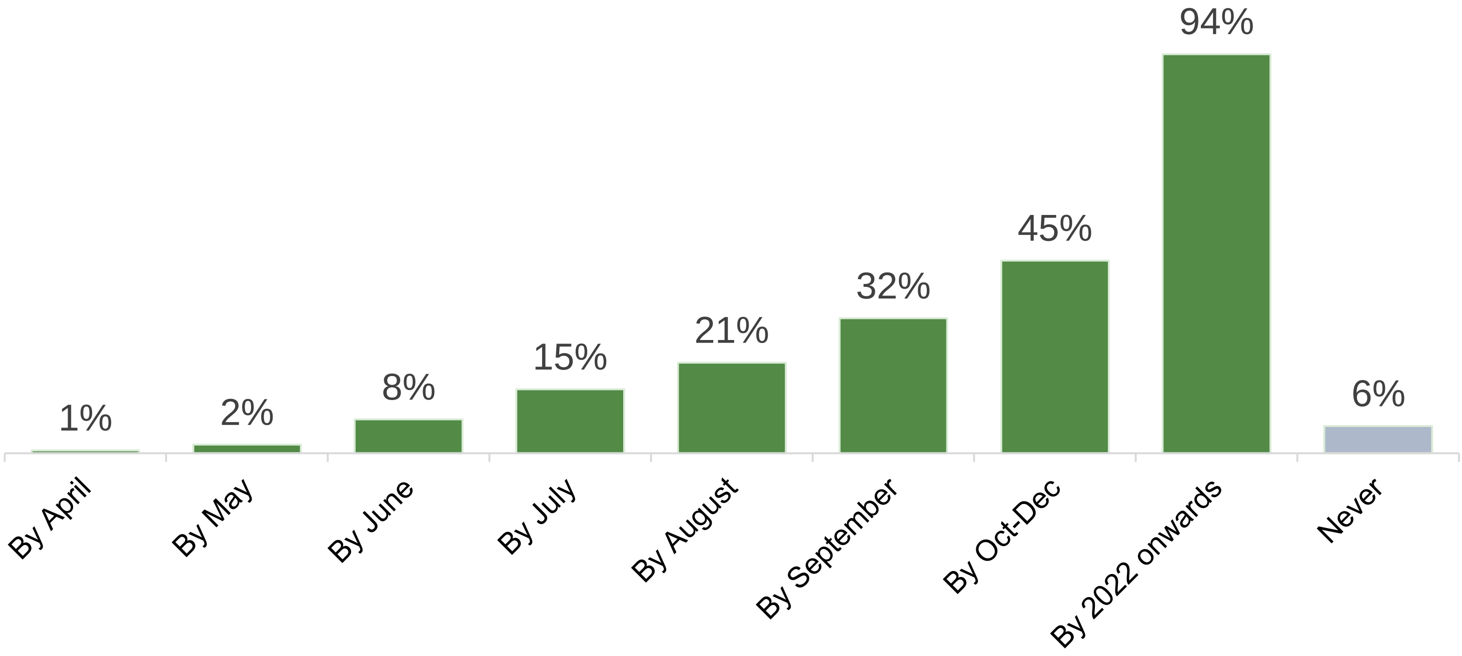
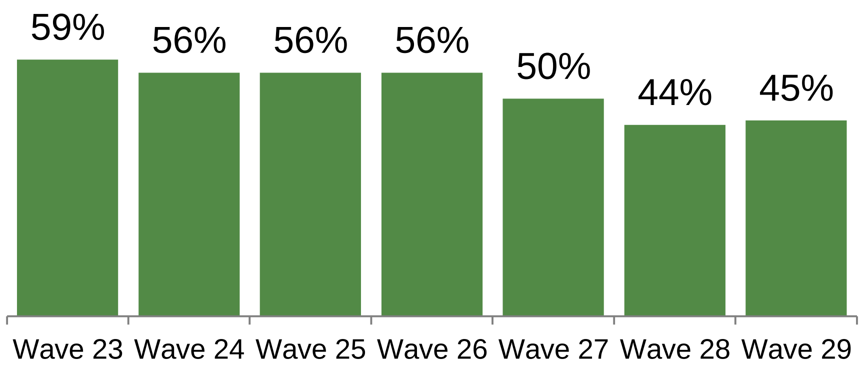


Figure 4. Proportion expecting normality by December, percentage wave-on-wave, UK



Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 29 n=1,764

Confidence in the ability to take overnight trips in UK

- **31% of U.K. adults are confident that an overnight domestic trip booked for May would go ahead as planned. Although a minority, this represents a significant rise on the Wave 28 figures when just 23% cited confidence.**
- **Confidence has also increased significantly for June and exhibits a strong gain for July. August and September confidence remains largely unchanged this wave.**

Figure 5. Confidence in taking a UK overnight trip across different time periods, percentage, Wave 29, UK

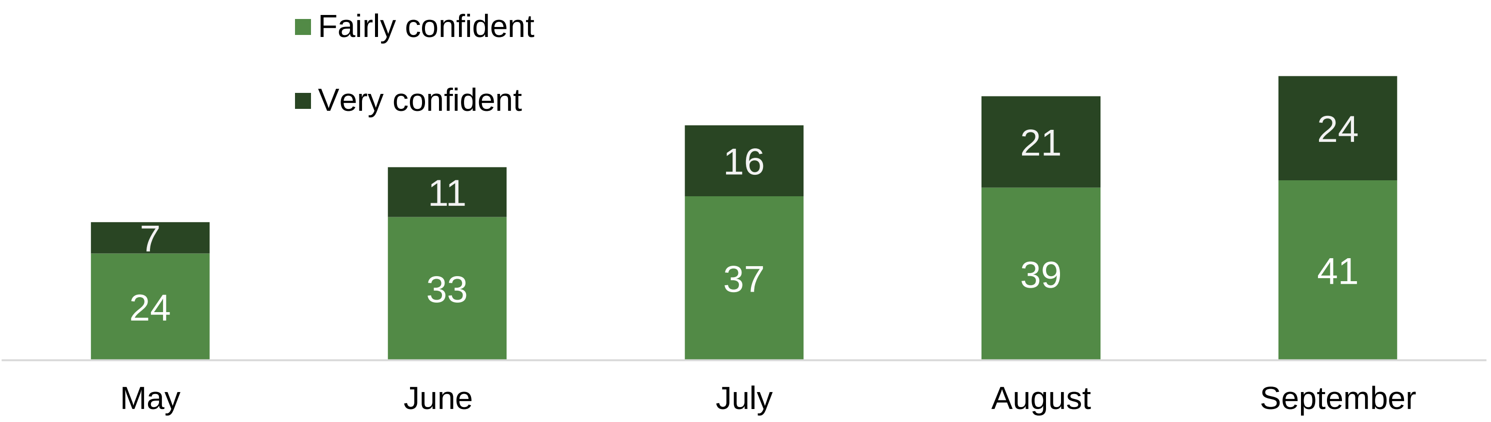
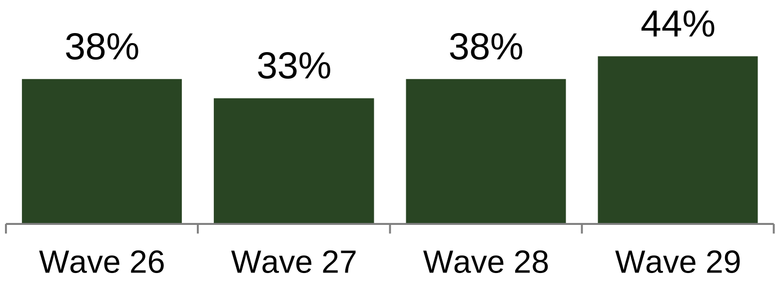


Figure 6. Confidence in taking a UK overnight trip in June 2021, percentage wave-on-wave, UK



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 29 n=1,764

Top 5 reasons for not feeling confident about taking overnight trips in the UK

- ‘Restrictions on travel from government’ remains the primary reason people do not feel confident about taking an overnight trip during spring, with restrictions on opportunities to eat/drink out and on things to do as the second and third most cited reasons for lower confidence during this period.
- For the summer period, UK adults are split between ‘concerns around catching COVID-19’ and ‘restrictions on travel from the government’ with ‘personal finances’ also given as a leading reason for lacking confidence in taking overnight domestic trips.

Figure 7. Top 5 reasons for not being confident about travelling in Spring*, percentage Wave 29, UK

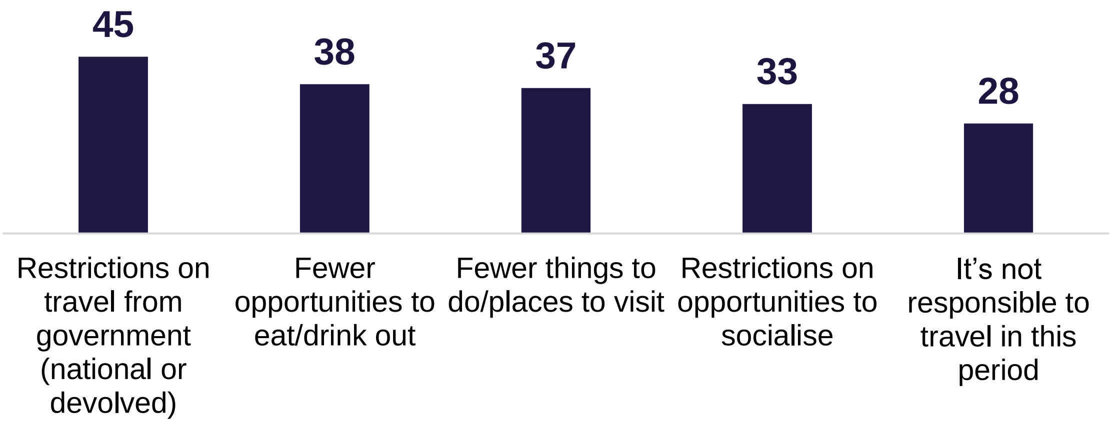
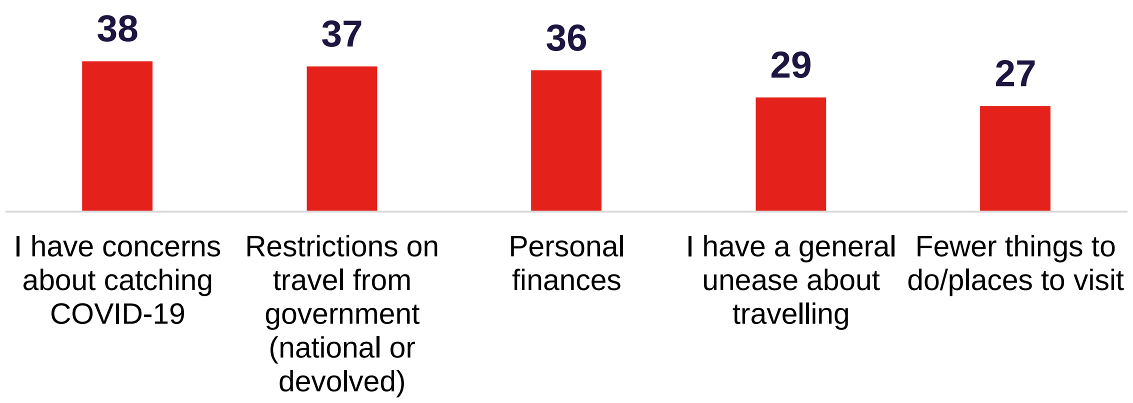


Figure 8. Top 5 reasons for not being confident about travelling in Summer*, percentage Wave 29, UK

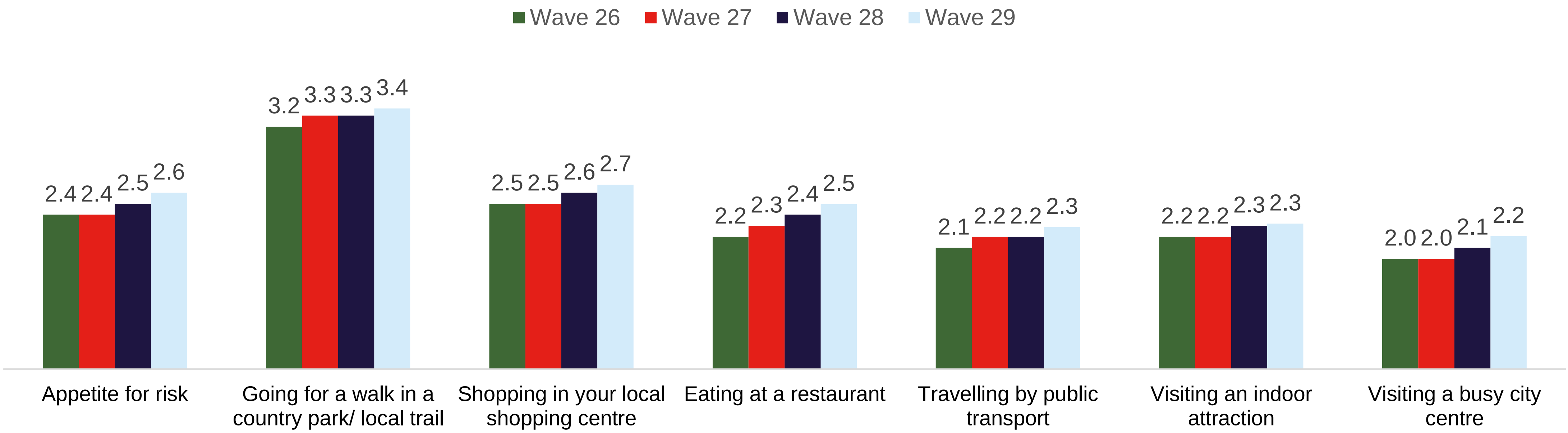


QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a UK short break or holiday? Base: Wave 29 respondents not confident about taking a break in Spring n=309 and Summer n=434. *Spring is defined as April to June, Summer is defined as July to September

The 'Appetite for Risk'

- **This wave's overall 'appetite for risk' score is 2.6, which represents a slight gain on the previous wave**
- **The increase is driven by small increases in comfort levels across most of the activities listed (only 'visiting an indoor attraction' remains at exactly the same level as recorded in Wave 28).**

Figure 9. Level of comfort conducting a range of activities separately and combined, average score where 1= not at all comfortable doing activity and 4= very comfortable doing activity, average wave-on-wave, 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 29 n=1,764

2. Overnight Trip Intentions

Anticipated number of U.K. and overseas trips compared to normal

- Between now and the end of the year, around half of UK adults intend to take more or about the same number of domestic short breaks (51%) or longer breaks of 4+ nights (47%) compared to normal – both of which are relatively consistent with Wave 28.
- A significantly lower proportion anticipate taking more or about the same number of overseas trips this year compared to normal, within which only a small minority anticipate taking ‘more trips’.

Figure 10. Number of U.K. overnight trips between now and the end of the year compared to normal, Percentage Wave 29, UK

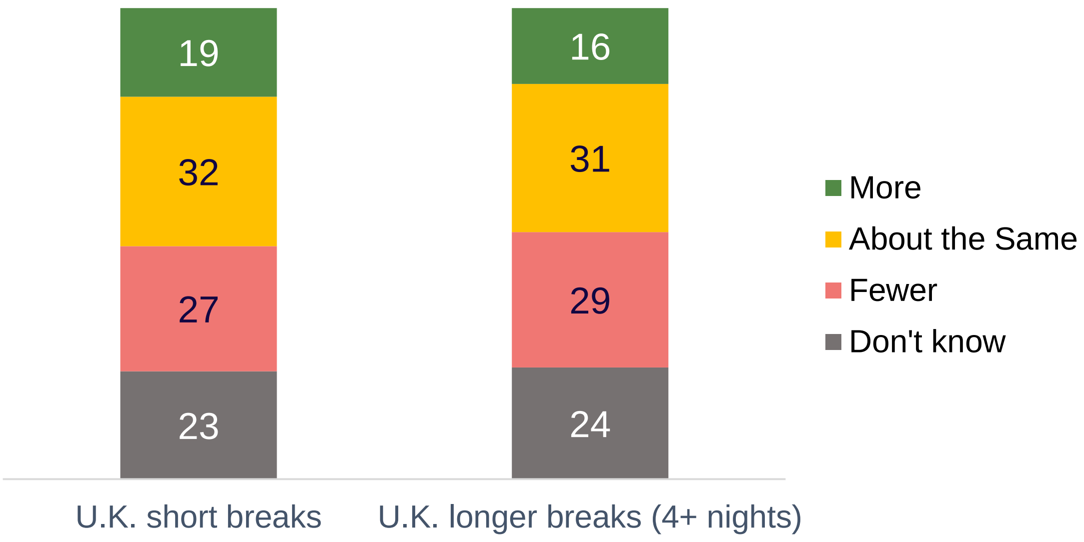
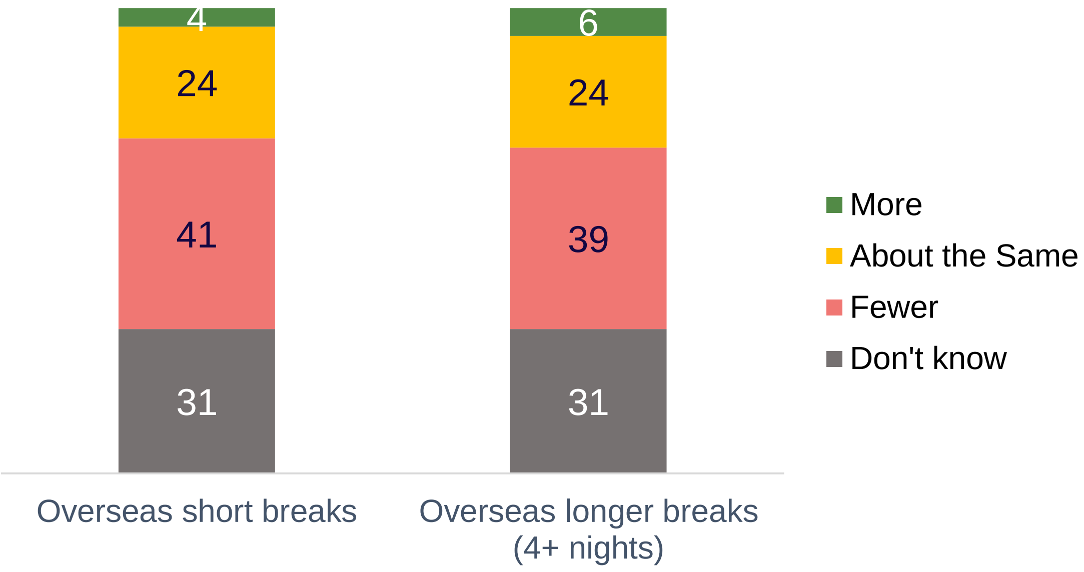


Figure 11. Number of OVERSEAS overnight trips between now and the end of the year compared to normal, Percentage Wave 29, UK



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 the year 2021? Base: All respondents. Wave 29 n=1,764.

When anticipate to plan and book the next overnight trip in UK

- **22% claim to have already planned and 16% already booked their next domestic overnight trip, both of which have slightly increased on Wave 28 when they were 20% and 15% respectively.**
- **This wave, the proportions of those not intending to either plan or book a domestic overnight trip at any point experiences slight gains on Wave 28; ‘not planning’ up from 21% to 24% and ‘not booking’ from 22% to 24%.**

Figure 12. When anticipate TO PLAN the next UK overnight trip, percentage Wave 29, UK

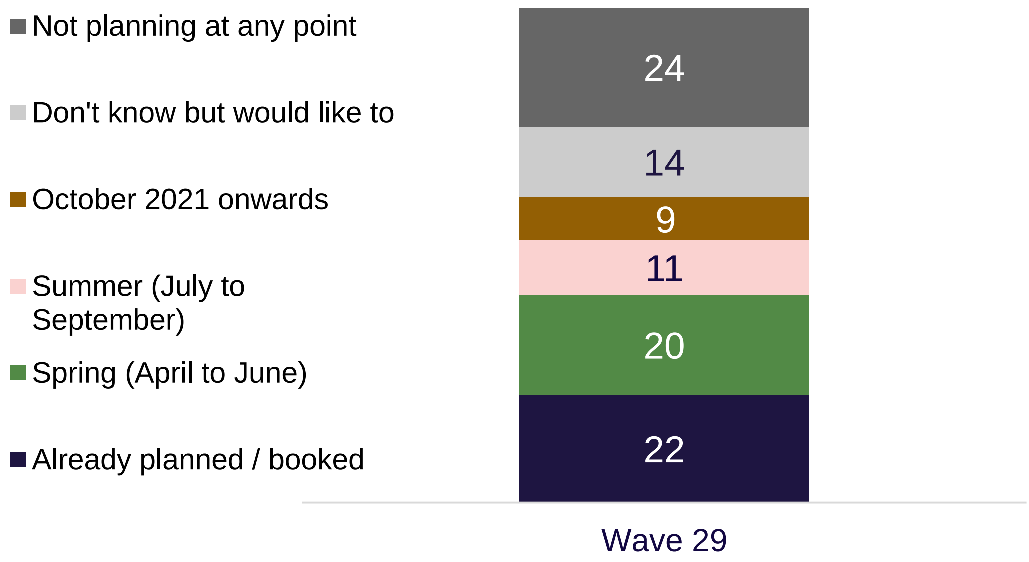
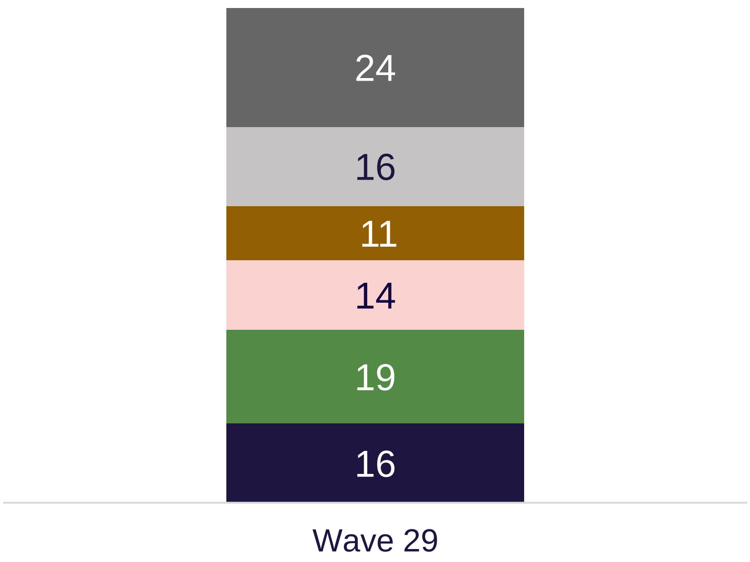


Figure 13. When anticipate BOOKING the next UK overnight trip, Percentage Wave 29, UK

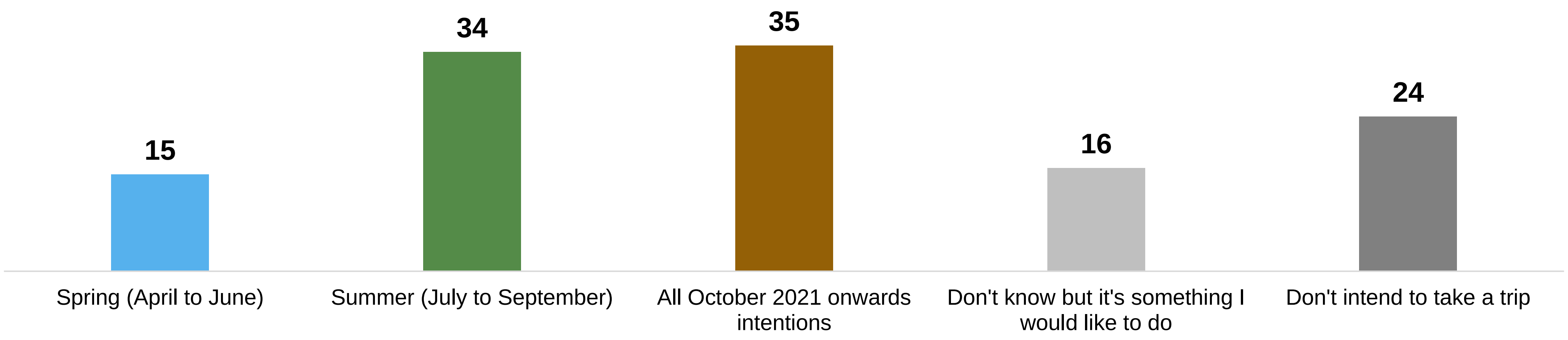


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 29 n=1,764; Spring = April to June; Summer = July to September

When anticipate taking overnight trips in the UK

- **15% of UK adults are currently intending to take at least one domestic overnight trip by the end of June. Just over a third (34%) anticipate taking a summer trip while a similar proportion (35%) intend to take a domestic overnight trip at some point from October 2021 onwards. 24% are not intending to take any domestic overnight trips at all.**
- **All these figures are broadly consistent with Wave 28.**

Figure 14. Proportion anticipating going on any overnight UK trips, percentage Wave 29, 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 29 n=1,764
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Planning and booking timeline compared to normal

- **Spring intenders are *planning* their trips slightly further away from the actual travel date than normal, however, for summer trip intenders the planning window is broadly consistent with typical 'pre-pandemic' behaviour.**
- **Both spring and summer intenders anticipate actually *booking* their trips significantly closer to the travel date than usual; this is particularly the case for those wanting to take a trip during the summer period.**

Figure 15. <u>PLANNING</u> lead times for Spring or Summer trips compared to normal, percentage wave 29, U.K.

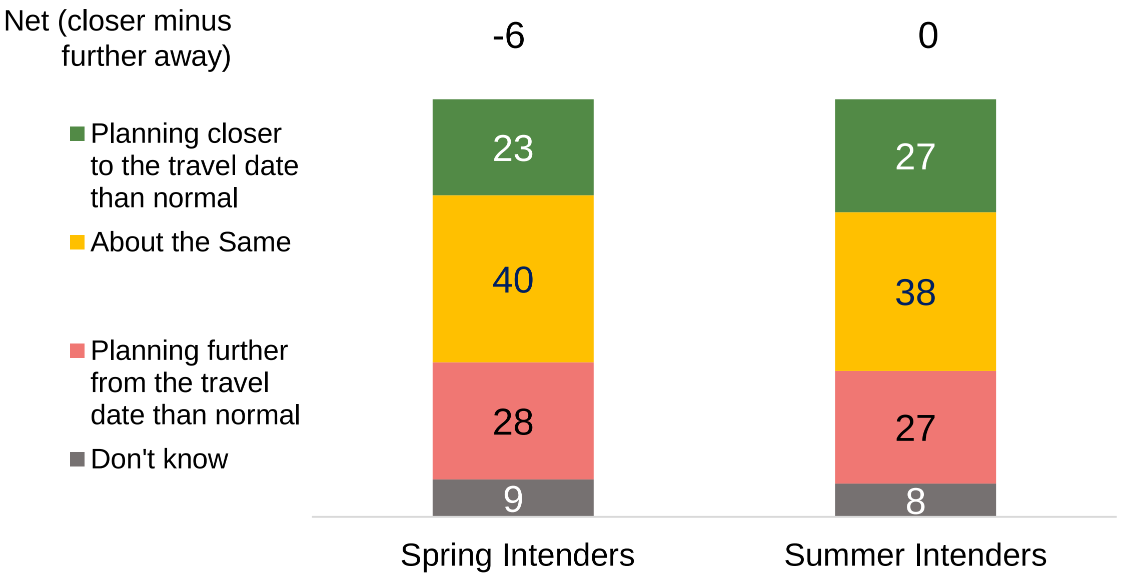
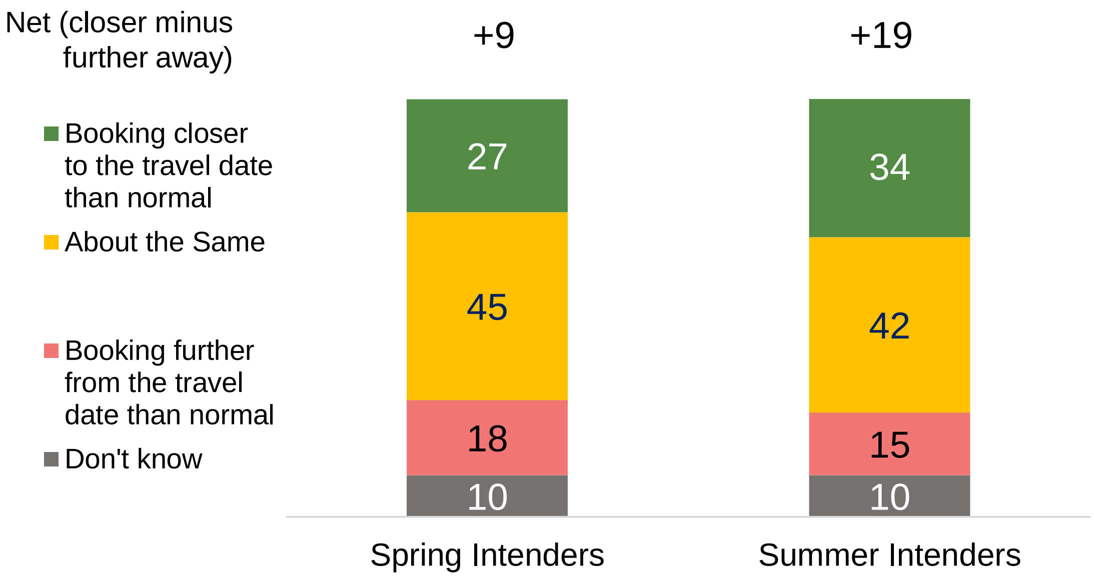


Figure 16. <u>BOOKING</u> lead times for Spring or Summer trips compared to normal, percentage wave 29, U.K.



VB6diic. Compared to normal, when did or will you plan and book your next UK trip?
Base: All Wave 29 respondents planning on taking a holiday or short break in the UK in Spring (April to June) n=267; Summer (July to September) n=455

Proportion of trip intenders that have already planned or booked their next overnight trip in the UK

- **More than 3 in 5 spring intenders (63%) claim to have already planned their trip with 47% having already booked it. The proportion of intenders who have already planned or booked a summer trip now stands at 33% and 26% respectively, both of which have increased since Wave 28 (29% and 22%).**
- **Some 29% of spring bookings and 20% of summer bookings have been transferred over from trips that have previously been cancelled or postponed due to Covid-related travel restrictions.**

Figure 17. Proportion of Intenders that have already *planned* their trip, percentage Wave 29 for Spring and Summer, UK

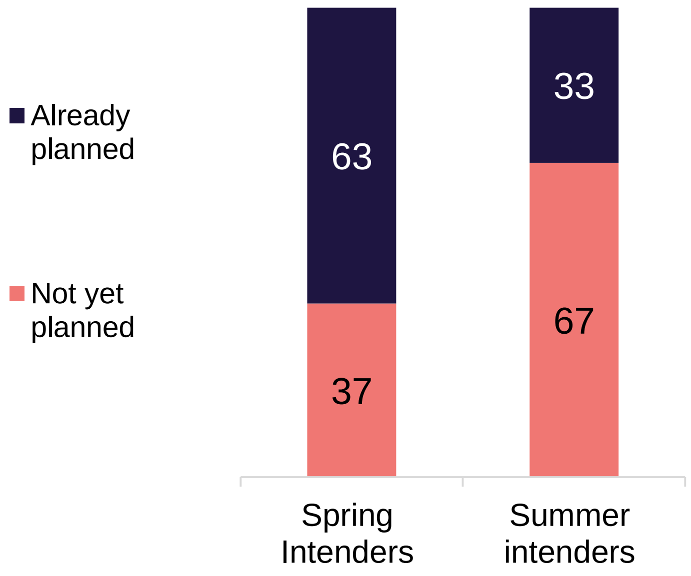


Figure 18. Proportion of Intenders that have already *booked* their trip, percentage Wave 29 for Spring and Summer, UK

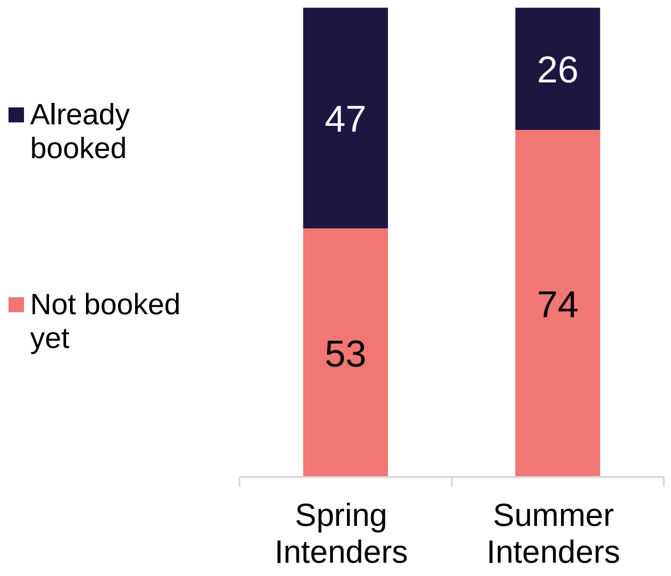
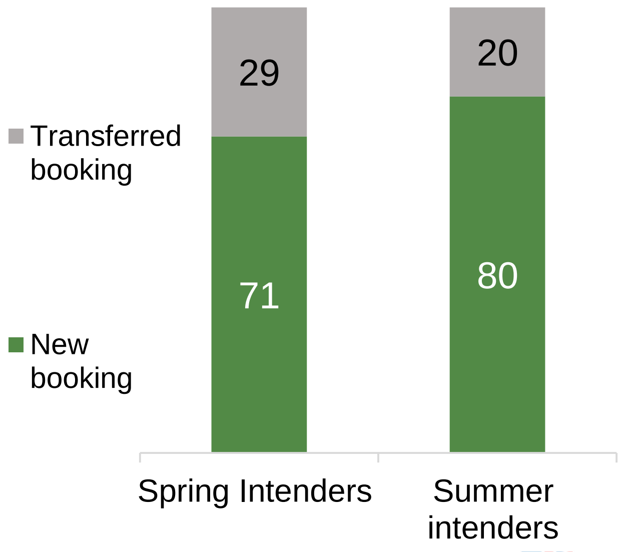


Figure 19. Proportion of next trips that are *transferred bookings*, percentage Wave 29 for Spring and Summer, UK

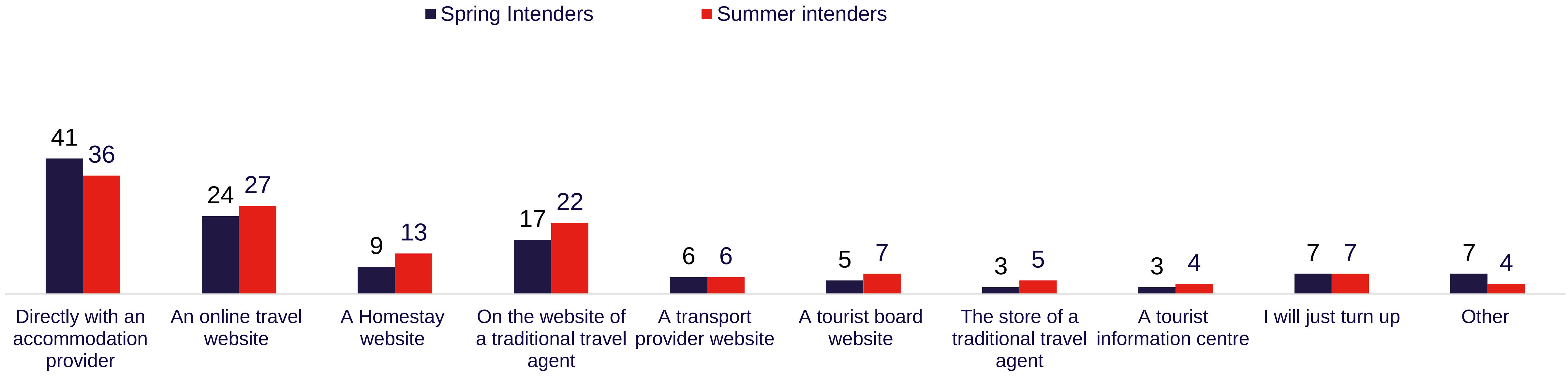


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 29 respondents planning on taking a holiday or short break in the UK in Spring (April to June) n=267; Summer (July to September) n=455

Ideal method of booking accommodation for next overnight trip in UK

- **'Directly with an accommodation provider' remains the leading anticipated method of booking accommodation across both spring and summer. An 'online travel website' is the next most preferred booking channel across both time periods.**
- **'On the website of a traditional travel agent' gains traction this wave compared to wave 28, where 17% of spring intenders and 22% of summer intenders anticipate using this method of booking (up from 14% and 18% respectively).**

Figure 19a. Accommodation booking channel for next trip in Spring and Summer, percentage Wave 29, UK



VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip. VB6diii Is this next trip a transferred booking from a trip that was previously cancelled or postponed due to COVID-19?
Base: All Wave 29 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=267; Summer (July to September) n=455

Where planning on staying on next overnight trip in UK

- **The South West of England remains the lead destination for an overnight domestic trip during the spring and summer periods, with a 25% and 26% share respectively.**
- **In line with the previous wave, comparatively little separates the subsequent five destinations with shares typically around the 10% mark.**

Figure 21. Where planning on staying on next UK overnight trip in Spring, percentage Waves 28 and 29, UK

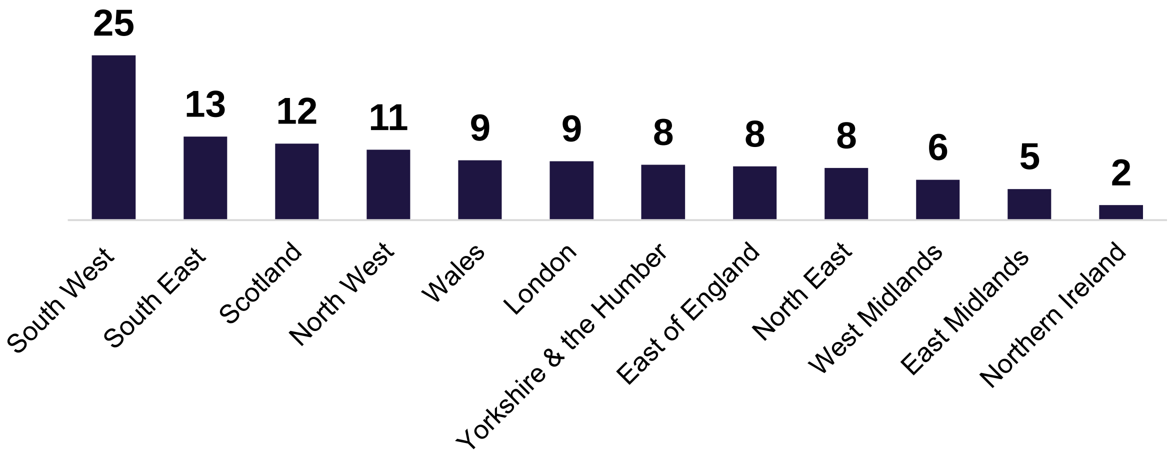
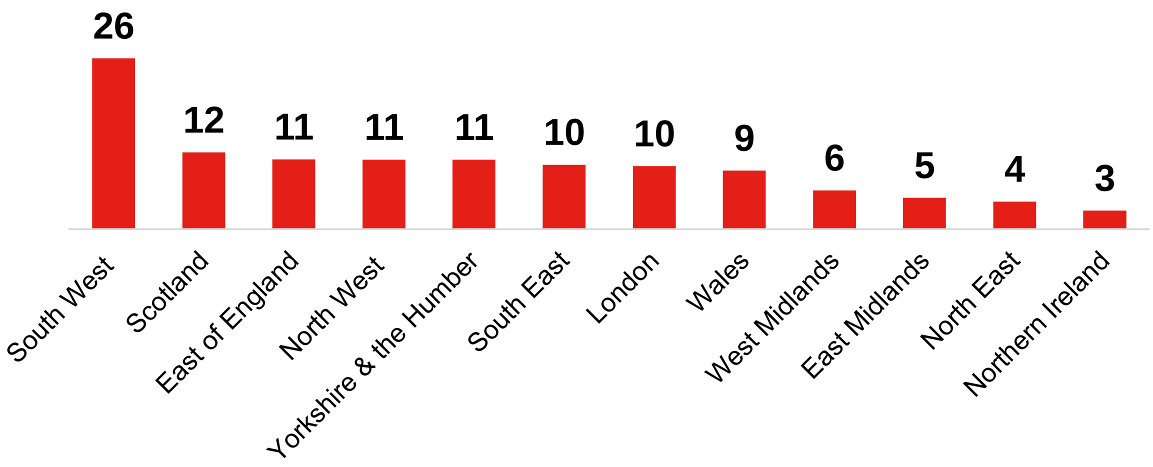


Figure 22. Where planning on staying on next UK overnight trip in Summer, Percentage Waves 28 and 29, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Waves 28 and 29 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=350; Summer (July to September) n=745
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

Destination type for next overnight trip in UK

- **Little separates the leading two destination types for spring or summer overnight trips – around 3 in 10 are likely to choose either ‘countryside or village’ or a ‘traditional coastal/seaside town’ locations for their stay.**

Figure 23. Main type of destination for trip in spring, percentage
Waves 28 and 29, UK

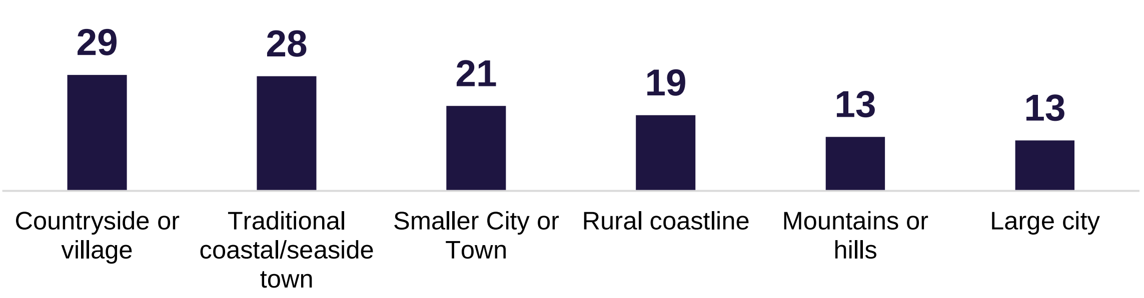
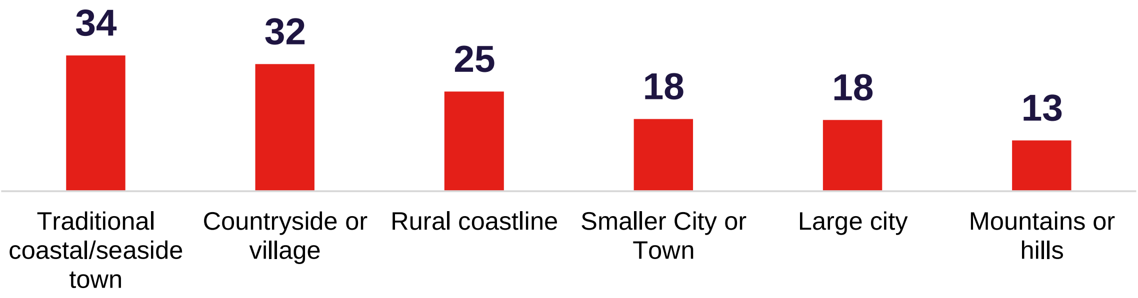


Figure 24. Main type of destination for trip in summer, percentage
Waves 28 and 29, UK



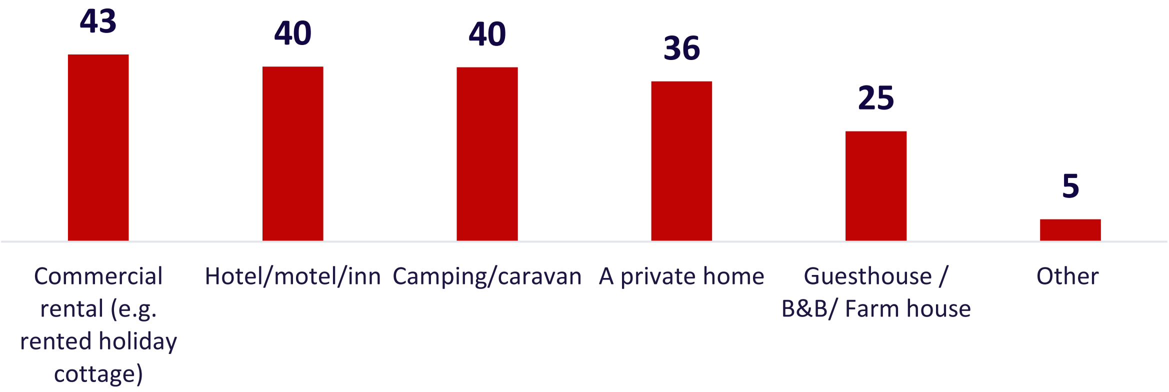
QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All Waves 28 and 29 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=350; Summer (July to September) n=745
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

Accommodation type for next overnight trip in UK

- For spring trips, ‘commercial rental’ and ‘camping/caravan’ are the leading accommodation choices, although only marginally ahead of ‘hotel/motel/inn’ and ‘private home’.
- The leading accommodation types remain the same for trips destined to be taken during the summer period, albeit in a slightly different rank order

Figure 25. Accommodation planning on staying in on next UK overnight trip in spring, net percentage Waves 28 and 29

Figure 26. Accommodation planning on staying in on next UK overnight trip in summer, net percentage Waves 28 and 29

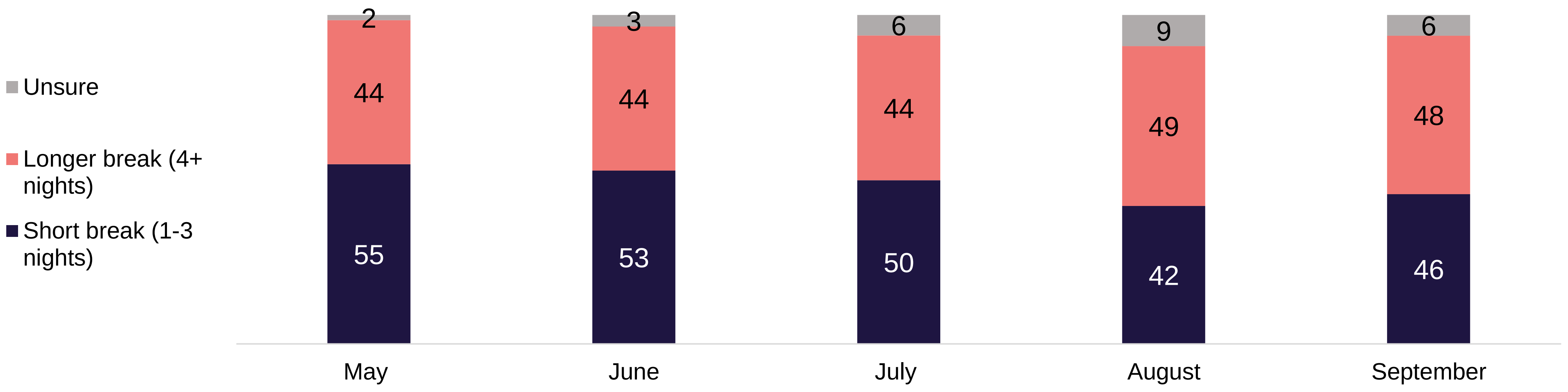


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Waves 28 and 29 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=350; Summer (July to September) n=745
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

Duration of the next overnight trip in UK

- **Overnight domestic trips planned from May through to July tend to slightly favour shorter breaks of 1-3 nights duration.**
- **August is characterised by a switch towards longer breaks of 4+, while September exhibits a broadly even split between short trips and longer breaks.**

Figure 27. Length of next UK holiday or short break by time period, percentage Waves 28 and 29, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 28 and 29 respondents intending to take next holiday or short break in each time period: April n=103, May n=189, June n=211, July n=322, August n=358, September n=243

Main mode of transport for next overnight trip in UK

- **Across both time periods, ‘own car’ is by far the leading primary mode of transport for travelling to an overnight destination, with 65% stating this for spring trips and 63% for summer trips.**
- **‘Train’ remains the second most likely mode of travel to an overnight destination in both time periods.**

Figure 28. Top 5 main modes of travel to destination for trip in spring, percentage, Wave 29, UK

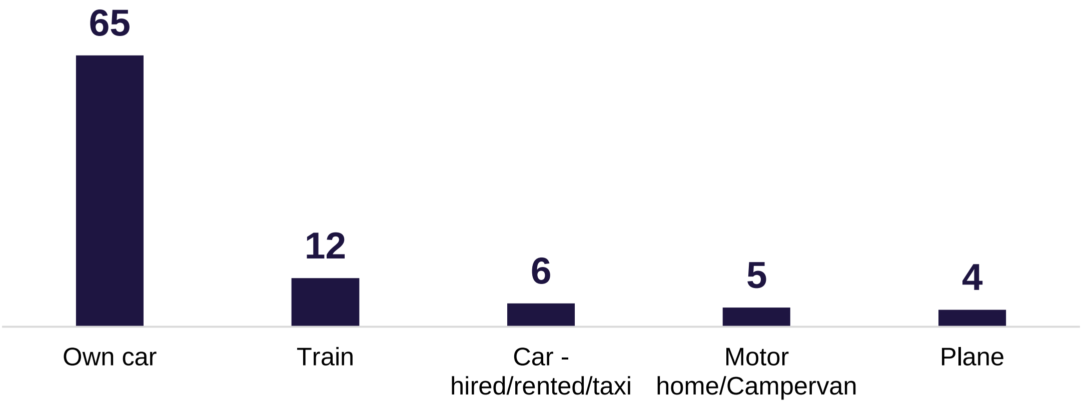
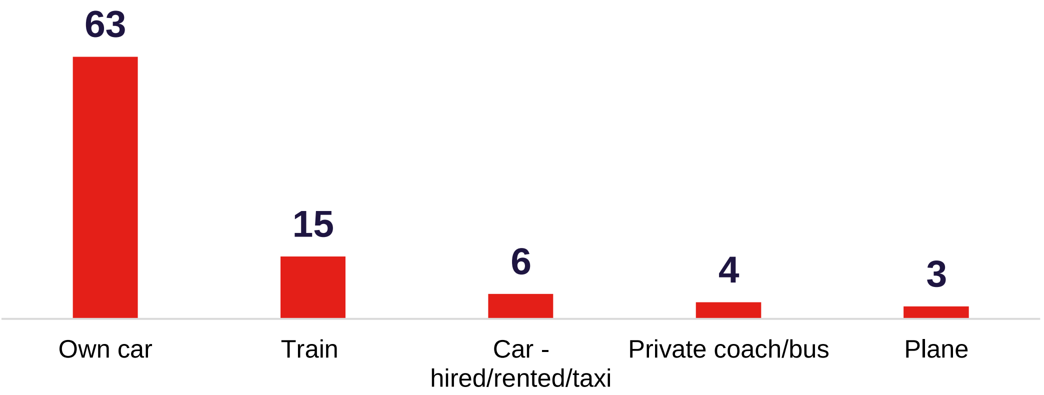


Figure 29. Top 5 main modes of travel to destination for trip in summer, percentage, Wave 29, UK

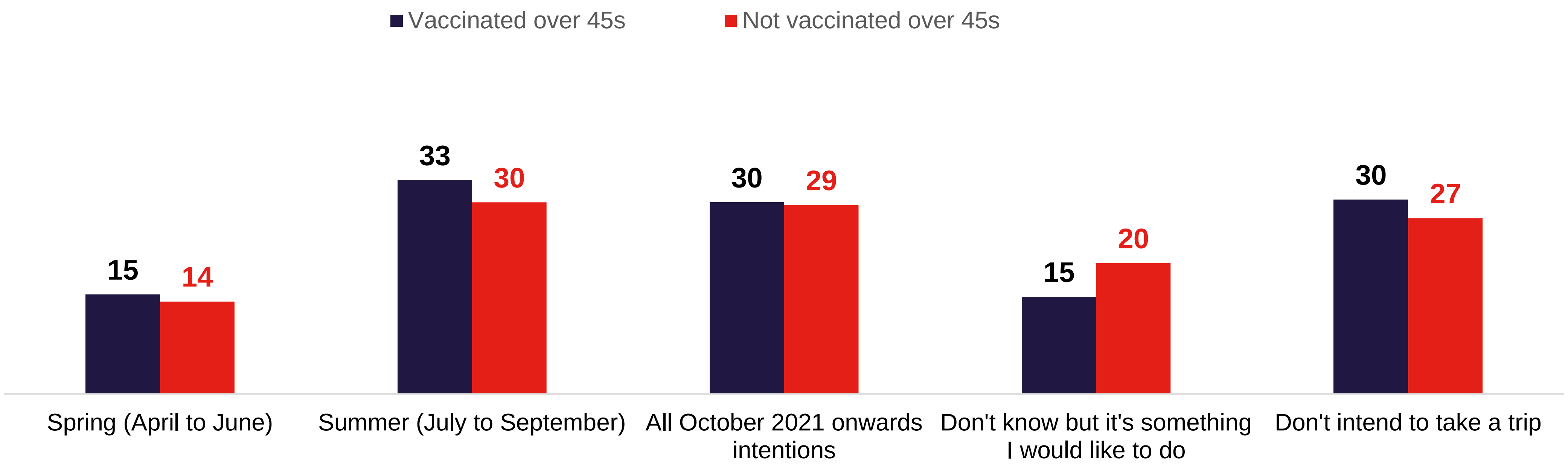


QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 29 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=267; Summer (July to September) n=455.

Vaccine impact on domestic overnight trip intent

- **UK adults aged over 45 who claim to have had at least one dose of a Covid-19 vaccine exhibit marginally higher overnight trip intent over the summer period compared to those who have not been vaccinated.**

Figure 30. Proportion anticipating going on any overnight UK trip by vaccine status, Percentage Wave 29, UK

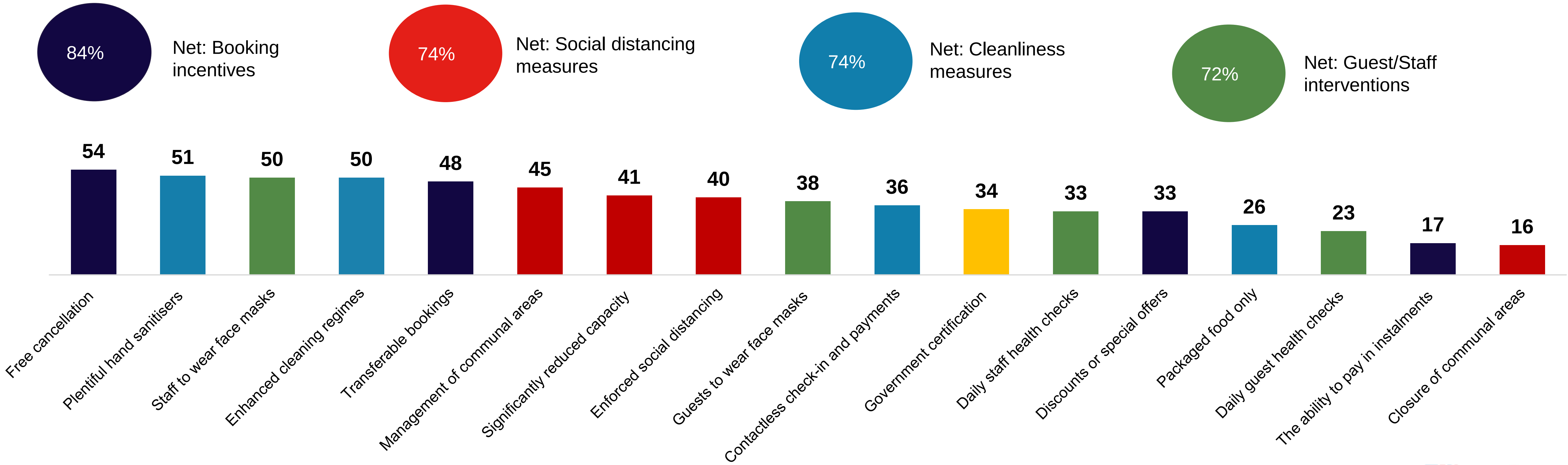


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All vaccinated respondents aged 45+ n=638; Non-vaccinated respondents aged over 45 n=148
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Essential conditions for staying in accommodation

- At a net level, ‘Booking Incentives’ (led by ‘free cancellations’ and ‘transferable bookings’) is considered the most desirable attribute for accommodation providers to have in place to secure a booking.
- However, it’s also clear that hygiene, cleanliness and distancing measures are additionally felt to be important drivers of accommodation choice.

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

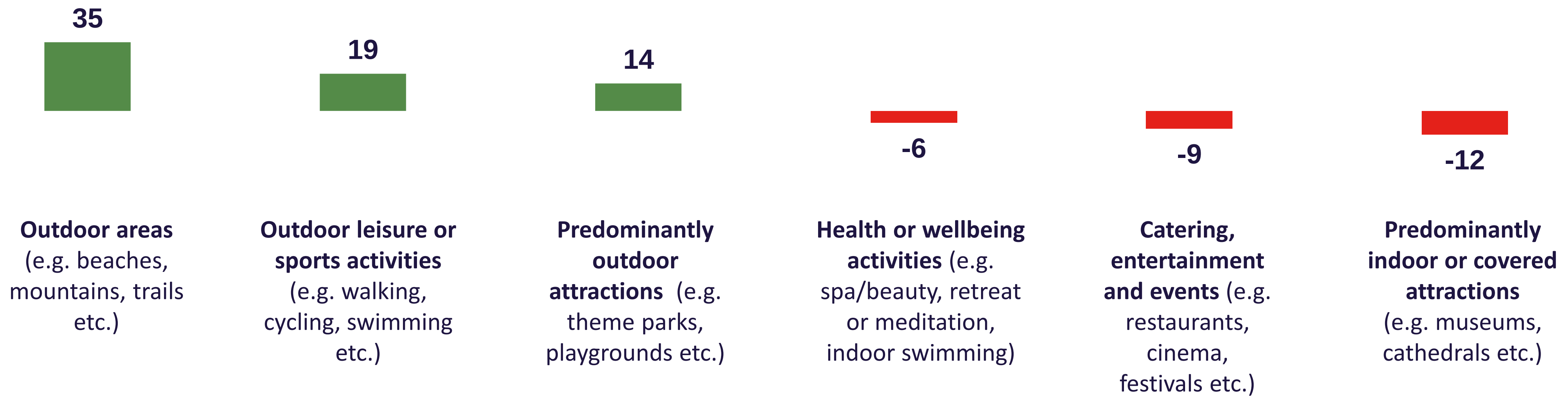


Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them over the next few months?
Base: All Wave 29 Spring Intenders n=267

Leisure activity engagement in the next few months

- Engagement levels for outdoor areas and activities have dipped since last wave, although they continue to generate net positive levels of intent.
- Overall, outdoor areas are most likely to attract more visitors/engagement than normal (net +35), followed by outdoor leisure or sports activities (+19) and outdoor attractions (+14).
- ‘Health or wellbeing activities’ (-6), ‘catering, entertainment and events’ (-9) and ‘predominantly indoor attractions’ (net -12) are likely to attract fewer visitors/engagement than normal, although they are slowly approaching normality.

Figure 31. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’, Wave 29, UK



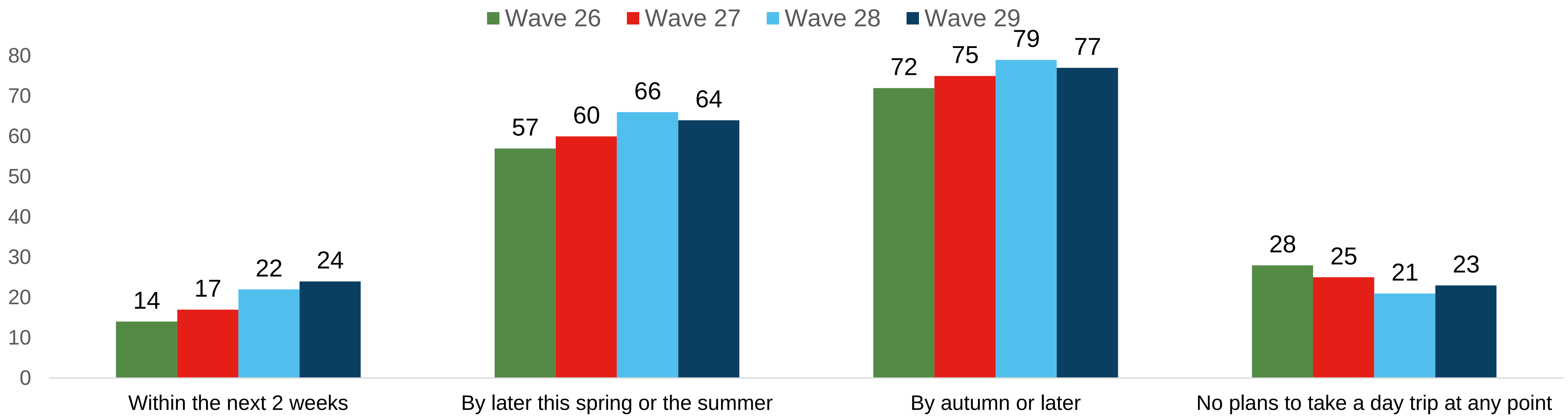
QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do over the next few months? Base: All Wave 29 respondents n=1,764

4. Day Trip Intentions

Day trip intentions

- **The likelihood to take day trips in the short term continues to build, with almost a quarter of adults anticipating taking one in the next 2 weeks.**
- **Medium and longer-term day trip intent appears to have dipped this wave, although it's not by a significant margin.**

Figure 32. Likelihood to take any day trip, percentage wave-on-wave, UK

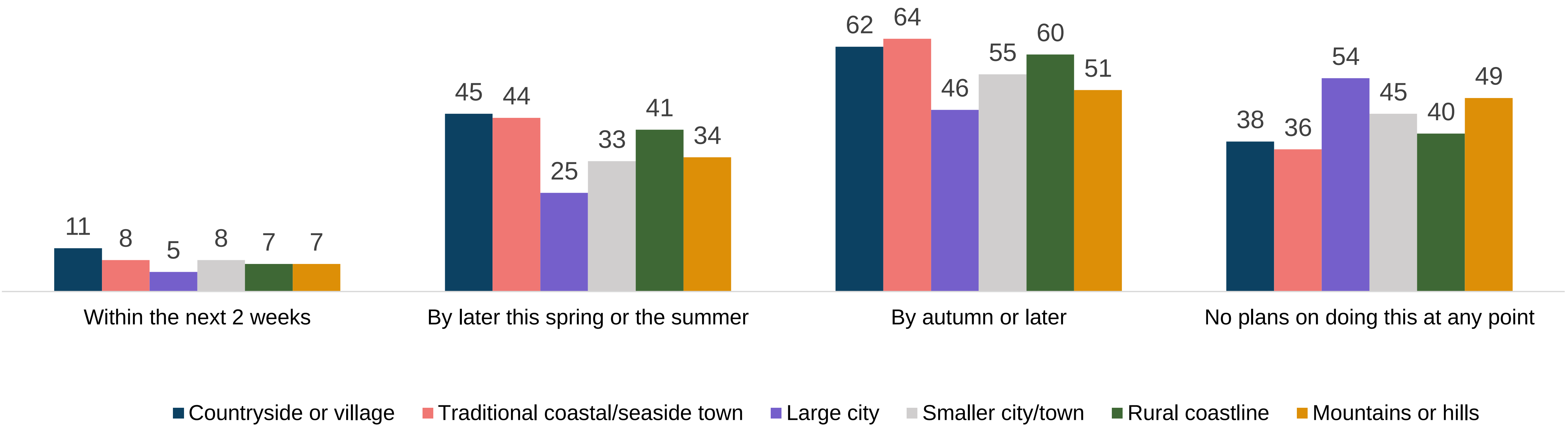


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 29 respondents n = 1,764
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.

Day trip intention by destination type

- **The destinations of choice for day trippers are more likely to be rural or coastal in nature.**
- **Urban day trips, particularly to 'large cities', exhibit lower levels of intent during the spring and summer periods relative to other destinations, with just over half of UK adults currently having no plans to visit a large city for a day trip at any point.**

Figure 33. Likelihood to take a day trip by destination type, percentage, Wave 29, UK

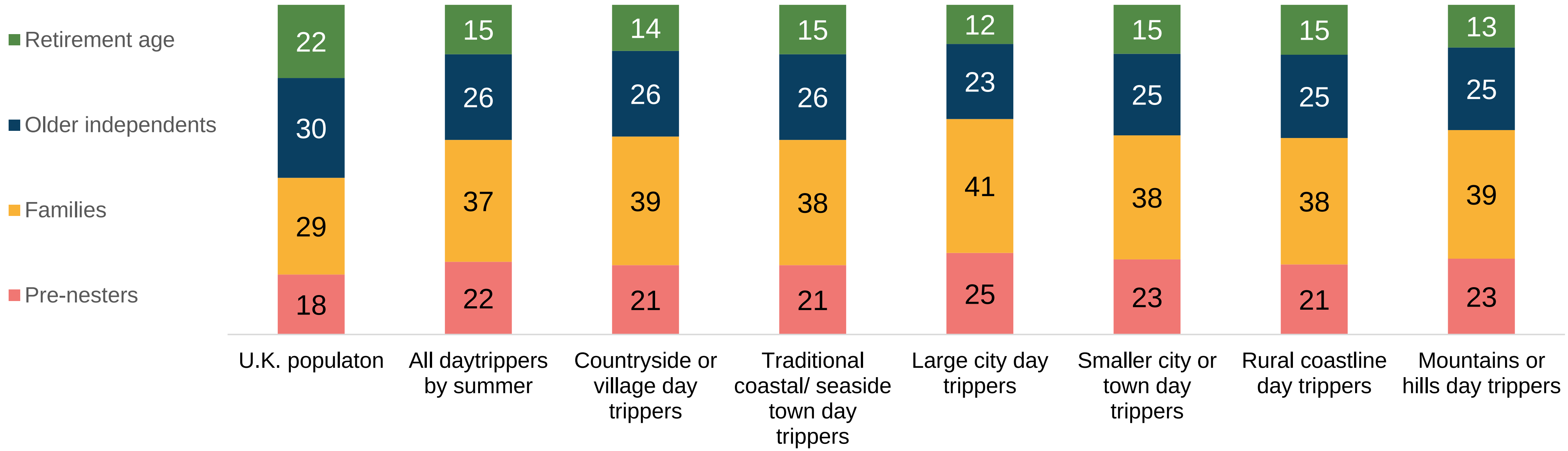


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 29 respondents n = 1,764
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.

Life stage of day trip intenders

- **Day trippers have higher representation amongst the pre-nester and family life stages compared to the overall UK adult population.**
- **The skew towards younger groups is most marked in the profile for those anticipating a day trip to a large city.**

Figure 34. Breakdown of day trip intenders* by life stage, percentage, Wave 29, UK



Demographics questions and QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 29 respondents: *All day trippers within the next 2 weeks/early spring summer n=1075; All day-trippers Countryside or village day trippers n=780; Traditional coastal/ seaside town day trippers n=785 Large city day trippers n=458 Smaller city or town day trippers n=599 Rural coastline day trippers n=715 Mountains or hills day trippers n=618

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 Scotland to ensure sufficient base sizes for separate nation analysis. The data are subsequently weighted to make the sample representative of the U.K. overall and within each nation.
- This report presents findings from Wave 29 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-28 where appropriate. Wave 29 fieldwork was conducted between 19th and 23rd April 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.