

COVID-19 Consumer Tracker

Wave 31

Published: 27th May 2021

Fieldwork Period: 17 – 21 May 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 17th to 21st May 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 May 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 | 4 – 9 May |
| Wave 5 | 15 – 19 June | Wave 18 | 26 – 30 October | Wave 31 | 17 – 21 May |
| 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 31: Scorecard of Key Metrics

| Key Metrics | Wave 30 | Wave 31 | Wave Shift |
|--|--|--|------------|
| National mood (average score out of 10) | 6.7 | 6.8** | +0.1 |
| Perceptions of the situation regarding Covid-19 (% stating 'worst has passed') | 48% | 39% | -9* |
| Appetite for Risk: Comfort in undertaking a range of activities (1-4 comfort score) | 2.65 | 2.70 | +0.05 |
| Normality score (proportion expecting normality by December) | 47% | 43% | -4* |
| Leading two reasons for not feeling confident about taking a trip in Spring (May - June) | 1. Restrictions on travel from government 2. Fewer things to do/places to visit | 1. Restrictions on travel from government 2. Fewer things to do/places to visit | No change |
| Near-term confidence in taking UK overnight trip (May/June confident) | 33%/43% | 38%/45% | +5*/+2 |
| Medium-term confidence in taking UK overnight trip (July/August confident) | 55%/61% | 54%/60% | -1/-1 |
| Anticipated number of UK short breaks compared to normal (% more/the same) | 51% | 52% | +1 |
| Anticipated number of UK longer breaks compared to normal (% more/the same) | 48% | 50% | +2 |
| Proportion going on a UK overnight trip in Spring (May - June) | 14% | 13% | -1 |
| Proportion going on a UK day trip in next two weeks | 25% | 26% | +1 |
| Leading UK overnight destination likely to stay in Spring (May - June) | South West | South West | No change |
| Main <i>type</i> of overnight destination likely to stay in Spring (May - June) | Traditional coastal/seaside town | Traditional coastal/seaside town | No change |
| Main overnight accommodation type likely to stay in Spring (May - June) | Camping/caravan | Camping/caravan | No change |
| 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

** Please note that this figure was previously reported incorrectly as 6.7 and has since been updated



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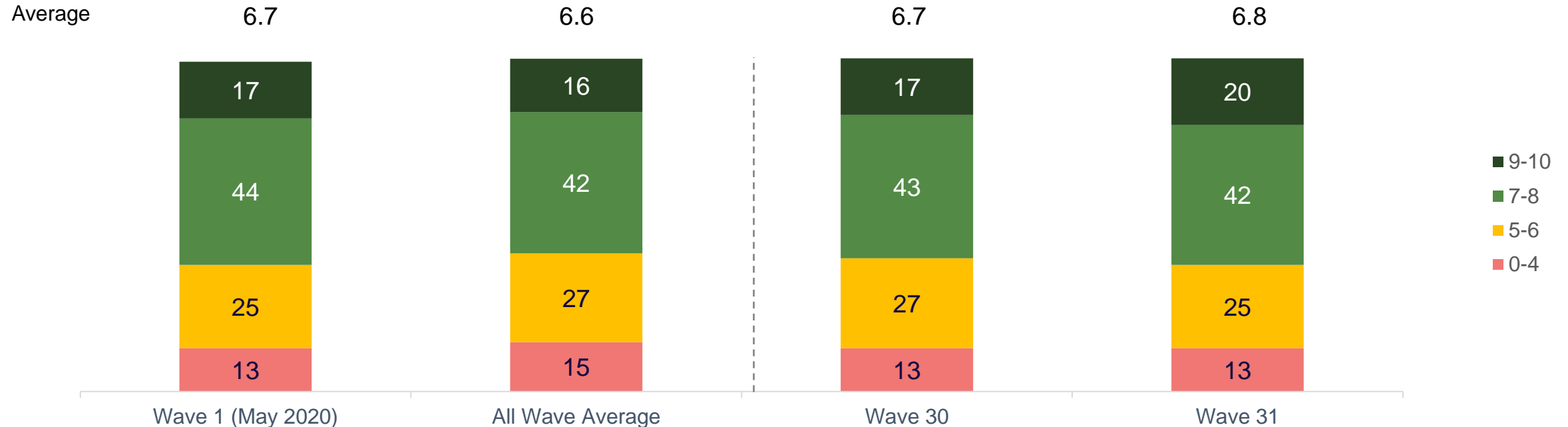
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1. The National Mood

The National Mood

- The average mood of U.K. adults has increased slightly since Wave 30 and is above the 'all wave average', at 6.8 out of 10.
- Although still a minority, there has been a significant rise in the proportion rating their mood as 9-10 out of 10 since Wave 30 (from 17% to 20%).

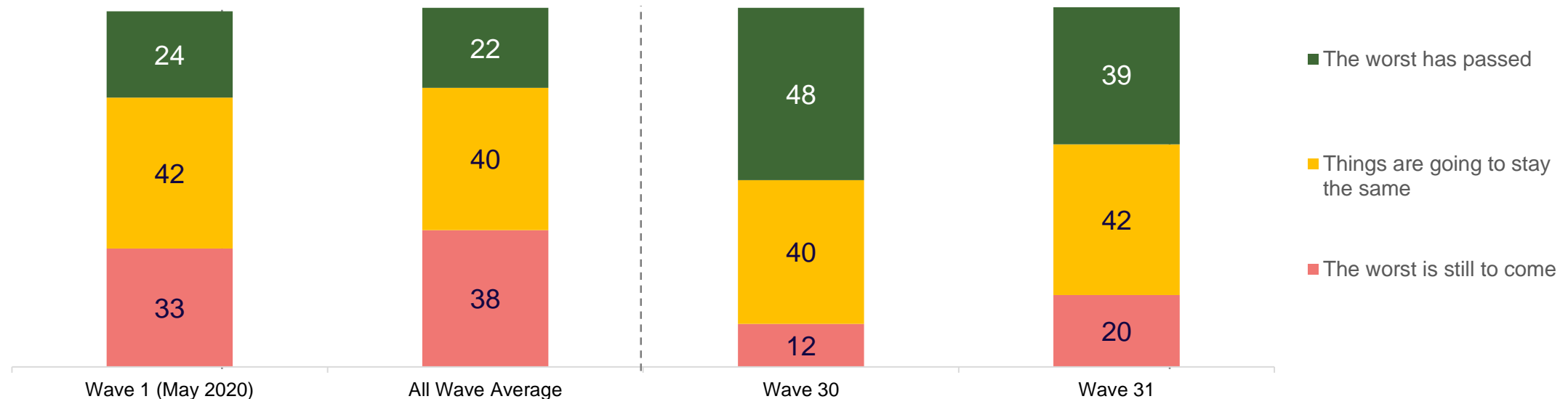
Figure 1. Current mood out of 10, Percentage wave-on-wave, UK



Perceptions of the situation relating to COVID-19

- The proportion who believe 'the worst has passed' in relation to COVID-19 has dropped by a significant 9 percentage points since Wave 30 – from 48% to 39%. Around 2 in 5 (42%) believe 'things are going to stay the same', whilst 1 in 5 (20%) think 'the worst is still to come' representing a significant rise on Wave 30.

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



Perceptions of when things will 'return close to normal'

- Only a minority expect life to return 'something close to normal' by this summer – 13% by July, 21% by August and 30% by September – figures that are consistent with Wave 30.
- 43% expect normality by the end of the year, a significant drop on Wave 30 (47%).

Figure 3. Perceptions of when things will return 'close to normal', cumulative percentage, Wave 31, UK

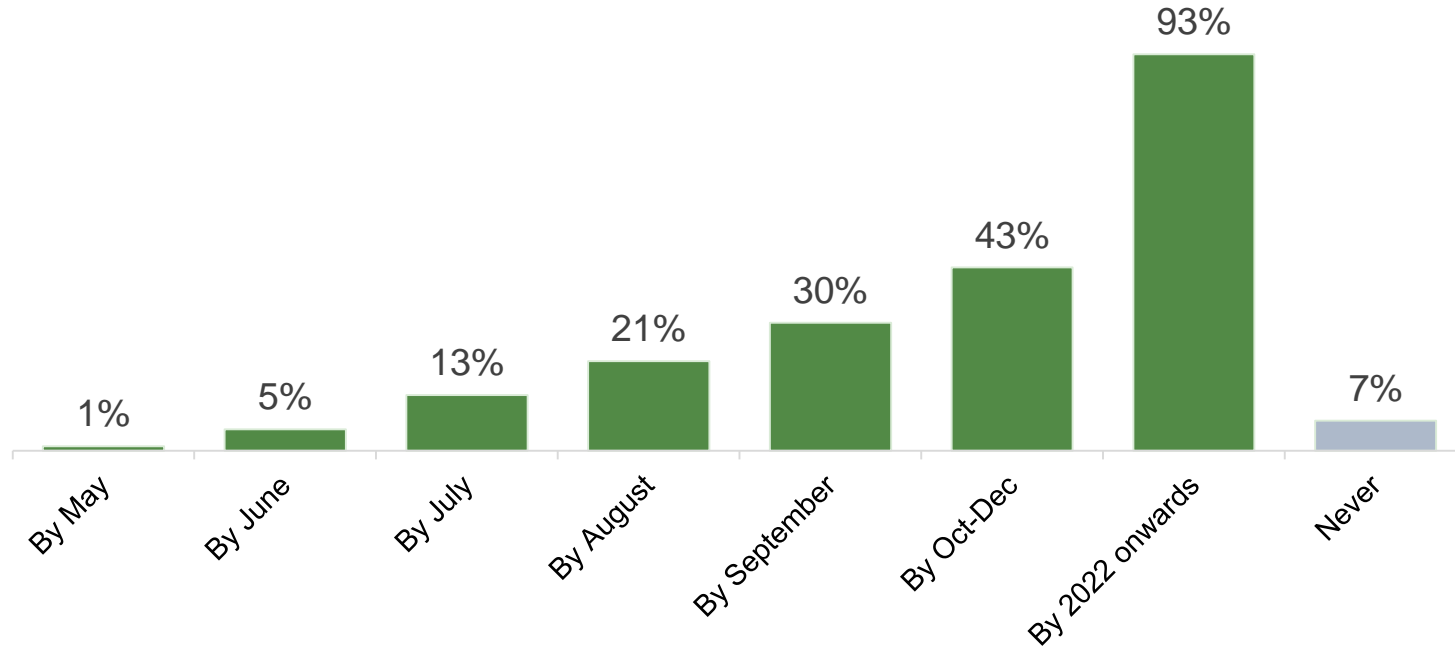
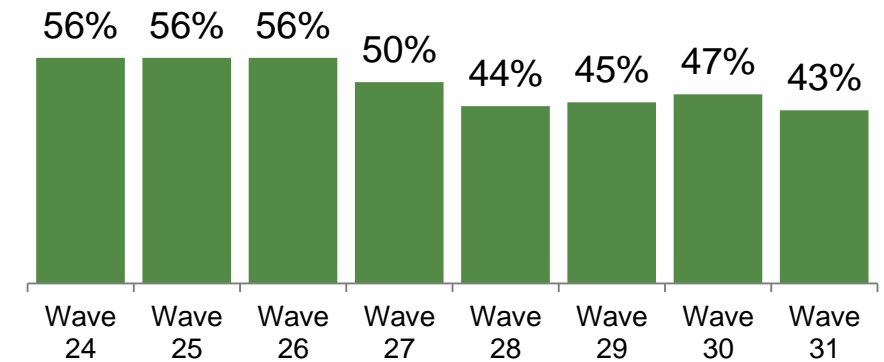


Figure 4. Proportion expecting normality by December, percentage wave-on-wave, UK



Confidence in the ability to take overnight trips in UK

- 38% of U.K. adults are currently confident that an overnight domestic trip booked for May would go ahead, representing a significant rise on Wave 30 when 33% felt this way.
- Confidence that trips would go ahead increases with each subsequent month with a majority citing confidence from July onwards.

Figure 5. Confidence in taking a UK overnight trip across different time periods, percentage, Wave 31, UK

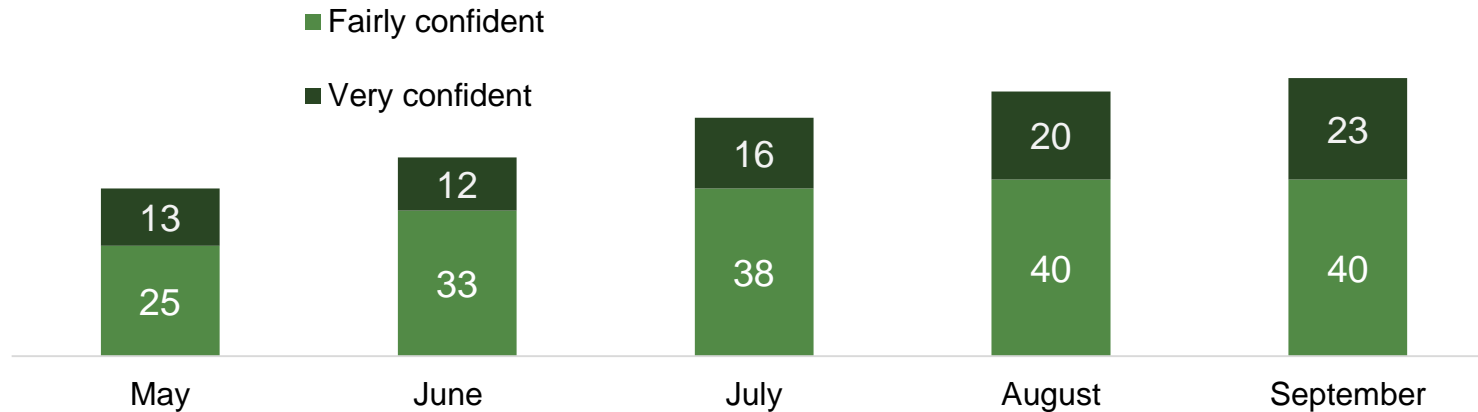
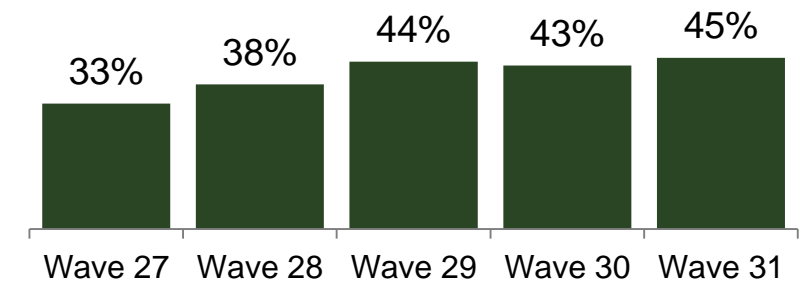


Figure 6. Confidence in taking a UK overnight trip in June 2021, percentage wave-on-wave, UK



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

- ‘Restrictions on travel from government’ is the top reason people do not feel confident about taking an overnight trip during spring, some 6 percentage points ahead of ‘fewer things to do/places to visit’.
- ‘Restrictions from government’ is also the leading reason cited by those lacking confidence in taking summer trips, with ‘concerns about catching COVID-19’ and ‘personal finances’ close behind.

Figure 7. Top 5 reasons for not being confident about travelling in Spring*, percentage Wave 31, UK

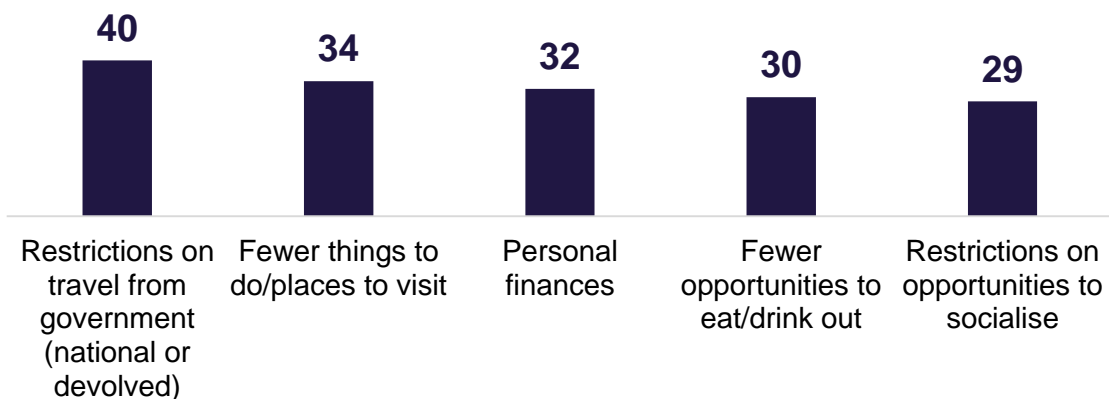
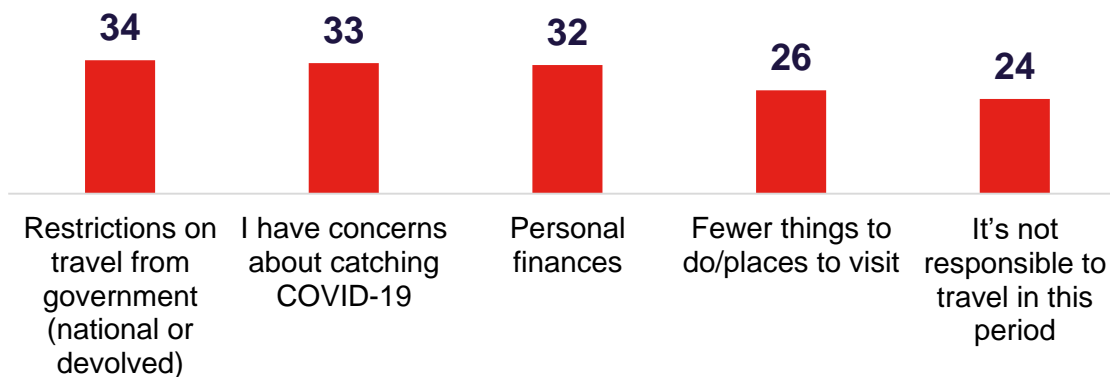


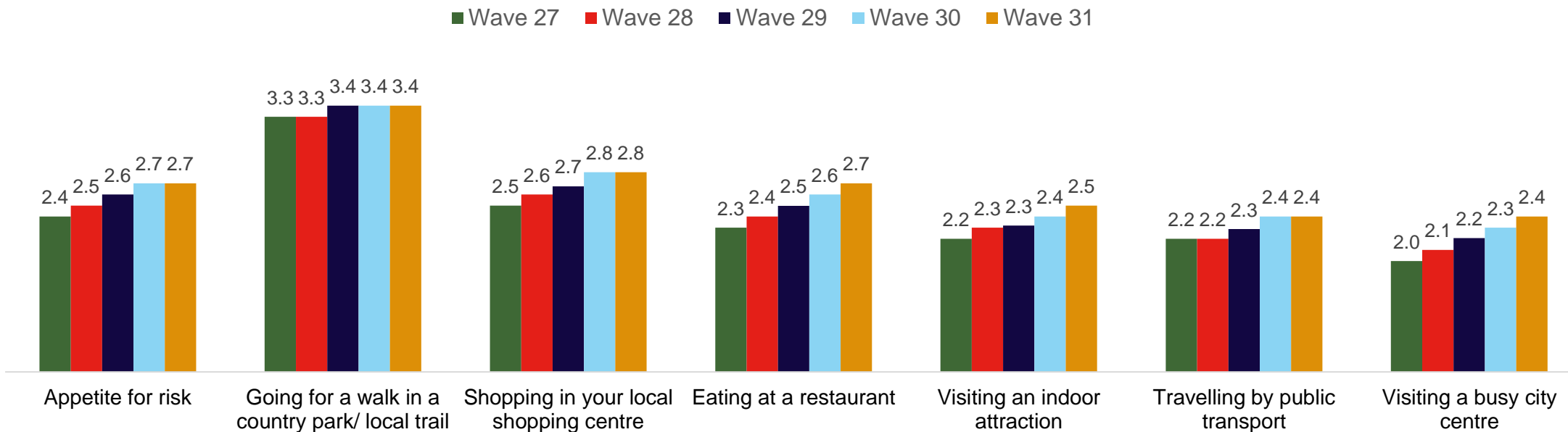
Figure 8. Top 5 reasons for not being confident about travelling in Summer*, percentage Wave 31, UK



The 'Appetite for Risk'

- This wave's 'appetite for risk' score is 2.7, unchanged from last wave.
- However, there have been some increases in comfort levels for a range of activities including 'eating at a restaurant', 'visiting an indoor attraction' and 'visiting a busy city centre'.

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 31 n=1,760



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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 U.K. adults intend to take more or about the same number of domestic short breaks (52%) or longer breaks of 4+ nights (50%) compared to normal, which is broadly consistent with Wave 30.
- Also consistent with previous reporting, a significantly lower proportion anticipate taking more or about the same number of overseas trips this year compared to normal.

Figure 10. Number of U.K. overnight trips between now and the end of the year compared to normal, Percentage Wave 31, UK

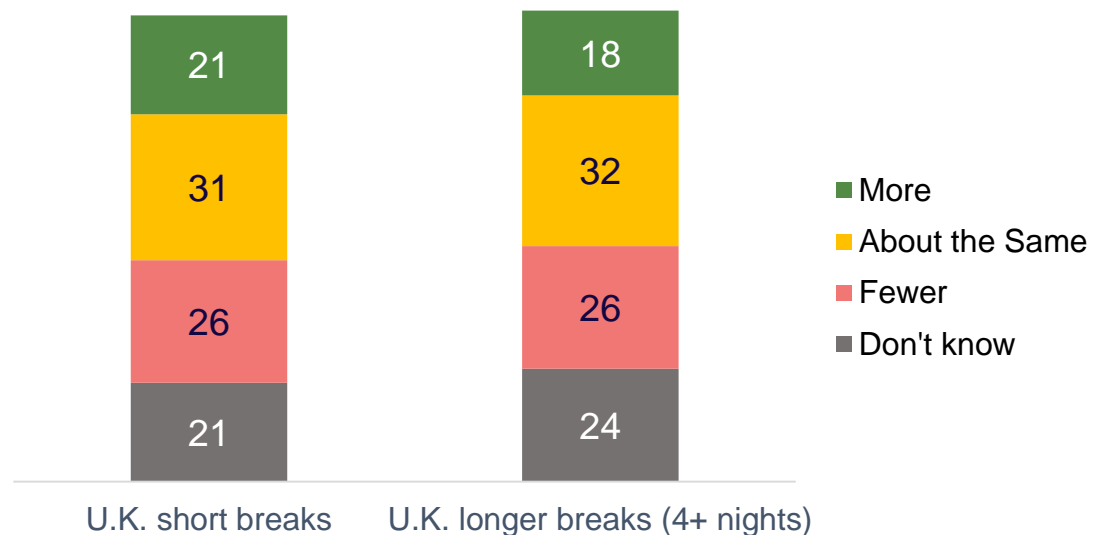
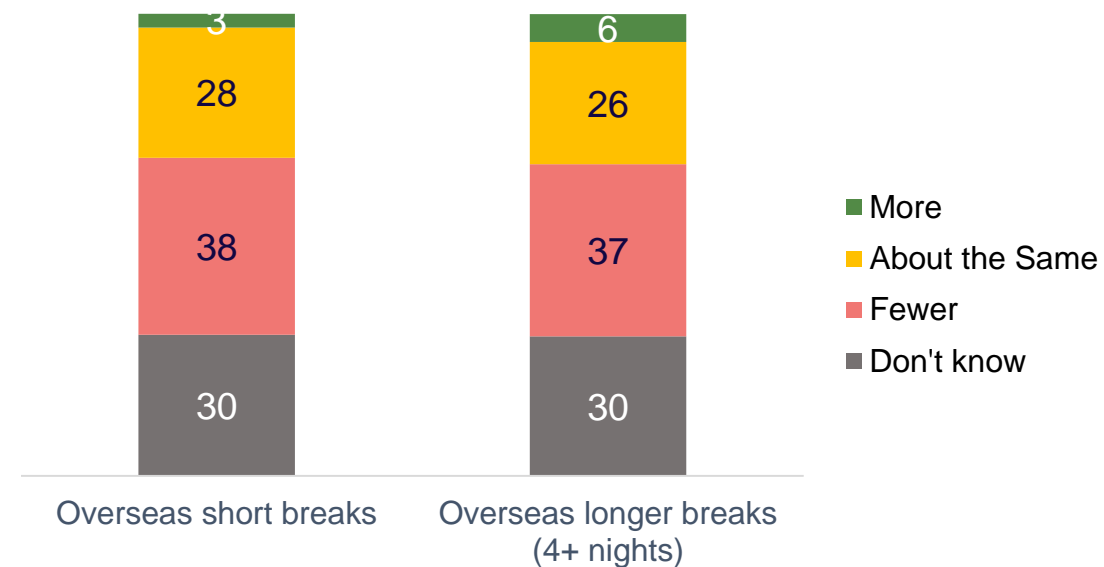


Figure 11. Number of OVERSEAS overnight trips between now and the end of the year compared to normal, Percentage Wave 31, UK

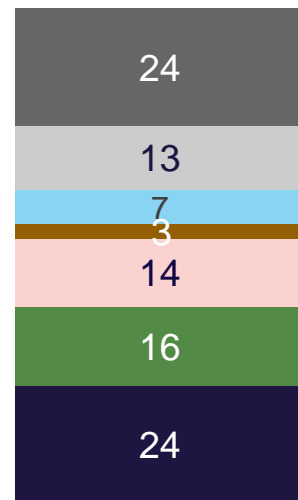


When anticipate to plan and book the next overnight trip in UK

- 24% of U.K. adults claim to have already planned and 19% already booked their next domestic overnight trip, both of which have risen by 2 percentage points since Wave 30.
- 40% are likely to have planned a domestic overnight trip by the end of spring, with almost a third (32%) expecting to have one booked.

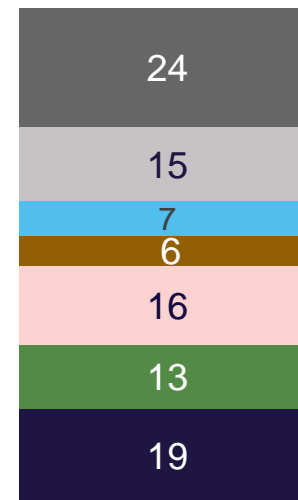
Figure 12. When anticipate TO PLAN the next UK overnight trip, percentage Wave 31, UK

- Not planning at any point
- Don't know but would like to
- 2022 onwards
- October to December
- Summer (July to September)
- Spring (May to June)
- Already planned / booked



Wave 31

Figure 13. When anticipate BOOKING the next UK overnight trip, Percentage Wave 31, UK



Wave 31

When anticipate taking overnight trips in the UK and impact on U.K. trip if overseas restrictions lifted

- Nearly half (49%) of U.K. adults anticipate taking an overnight domestic trip by the end of 2021. 13% plan to do so this spring, 34% in the summer and 23% between October and December. Intent is largely consistent with Wave 30.
- The vast majority would continue to take their planned U.K. trip even if all overseas travel restrictions were lifted.

Figure 14. Proportion anticipating going on any overnight UK trips, percentage Wave 31, UK

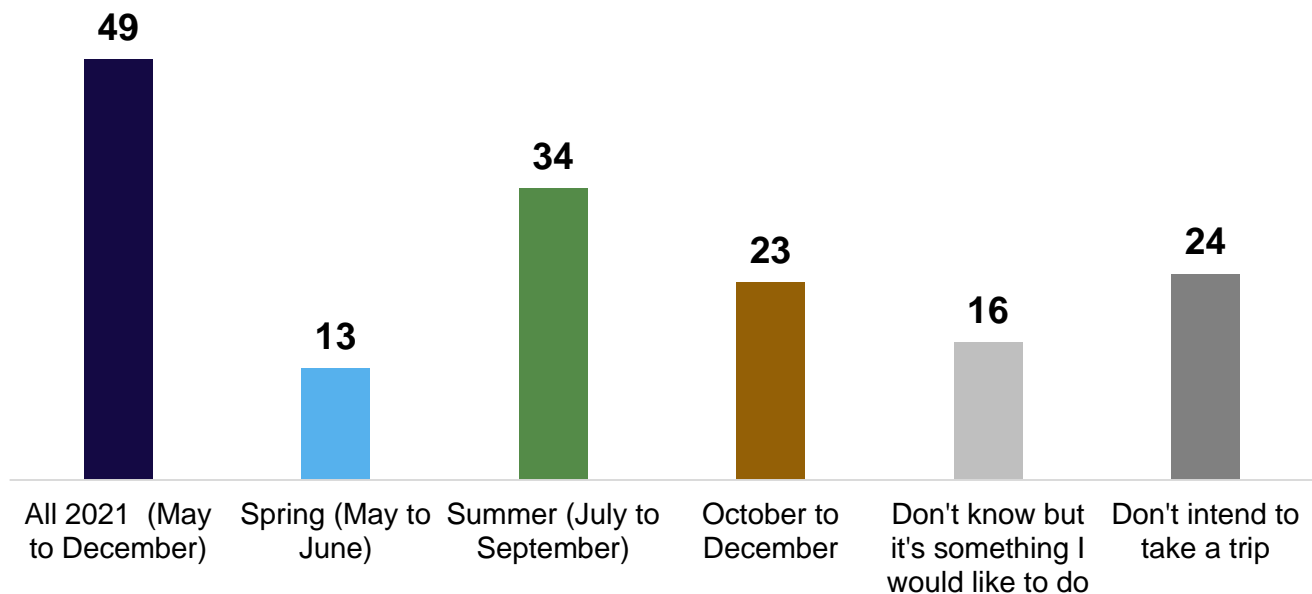
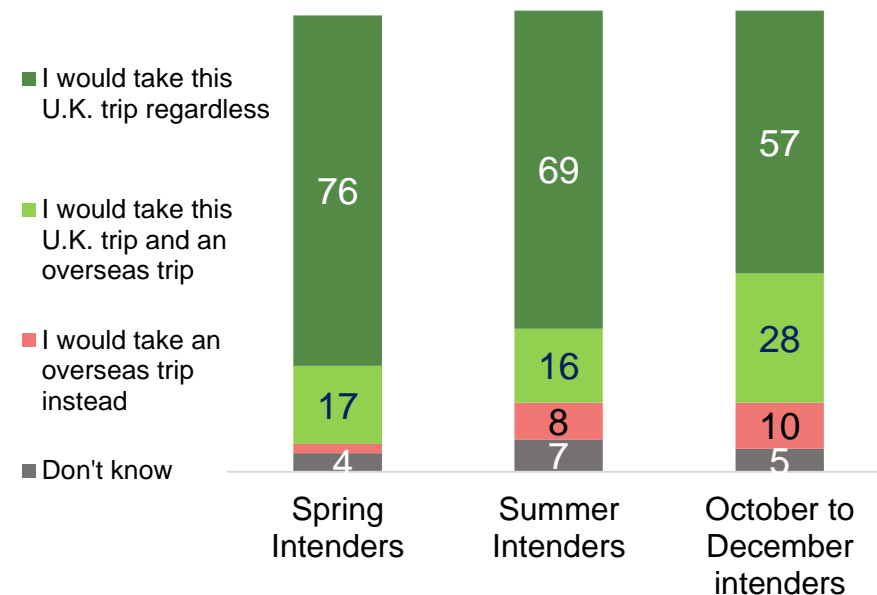


Figure 14b. Impact on U.K. trip if majority of overseas travel restrictions were lifted, percentage Wave 31, UK



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 31 n=1,760
 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods. VB6gii. In the event of the vast majority of restrictions relating to overseas travel being lifted, how, if at all, would this impact your planned overnight trip in the UK during <<insert month>>? Base: All Wave 31 respondents planning on taking a holiday or short break in the UK in Spring (May to June) n=211; Summer (July to September) n=448

Planning and booking timeline compared to normal

- The *planning* phase of spring trips is currently occurring slightly closer to the travel date than normal (on a net score basis) while for summer trips planning is happening further in advance.
- The ‘net’ position among both spring and summer intenders is that the actual *booking* of trips is presently happening closer to the travel date than usual.

Figure 15. **PLANNING** lead times for Spring or Summer trips compared to normal, percentage Wave 31, U.K.

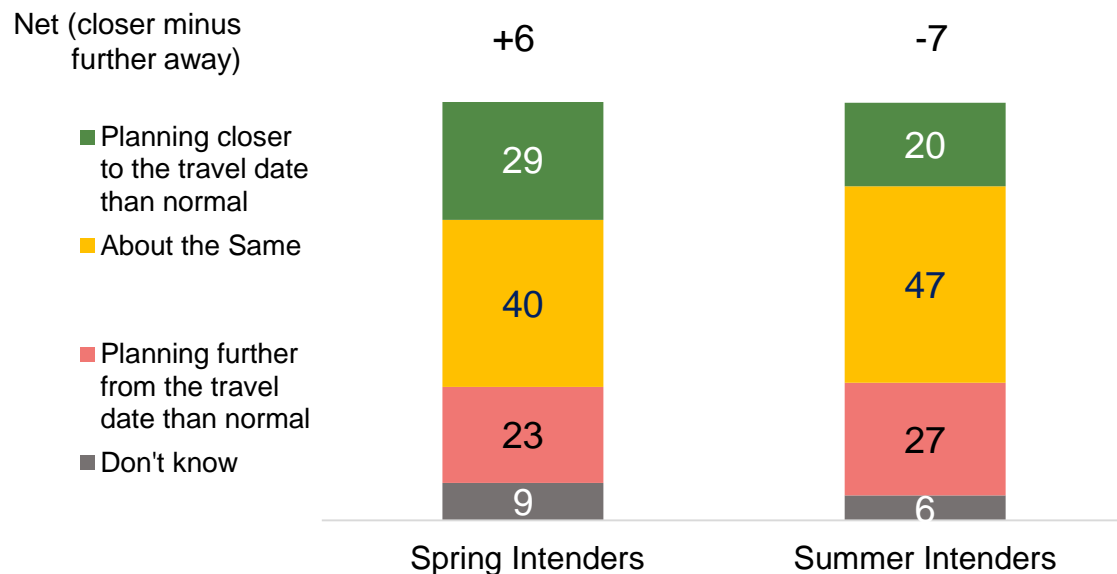
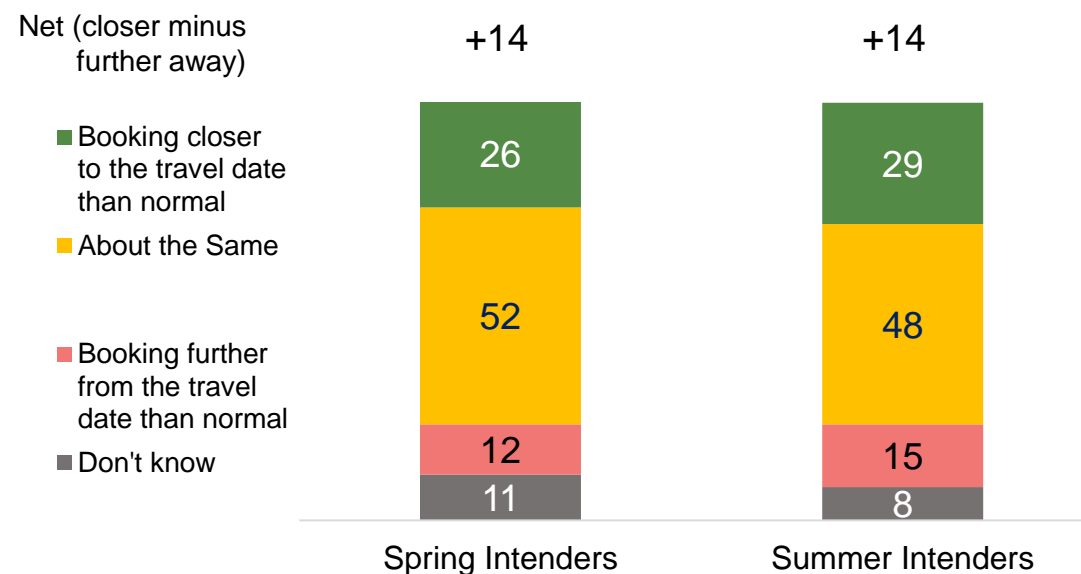


Figure 16. **BOOKING** lead times for Spring or Summer trips compared to normal, percentage Wave 31, U.K.



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

- 7 in 10 (70%) spring intenders have already planned their forthcoming trip with 60% having already booked it (versus 69% and 54% in Wave 30).
- The proportion of summer intenders that have already planned (42%) or booked (35%) their trip has also increased since Wave 30 (up from 37% and 29% respectively).
- 27% of spring and 25% of summer overnight trips are transferred bookings that were previously cancelled or postponed due to Covid.

Figure 17. Proportion of Intenders that have already planned their trip, percentage Wave 31 for Spring and Summer, UK

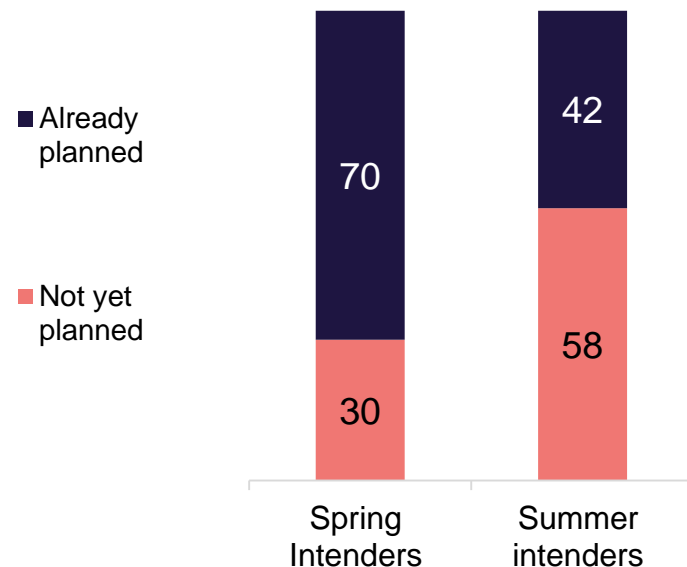


Figure 18. Proportion of Intenders that have already booked their trip, percentage Wave 31 for Spring and Summer, UK

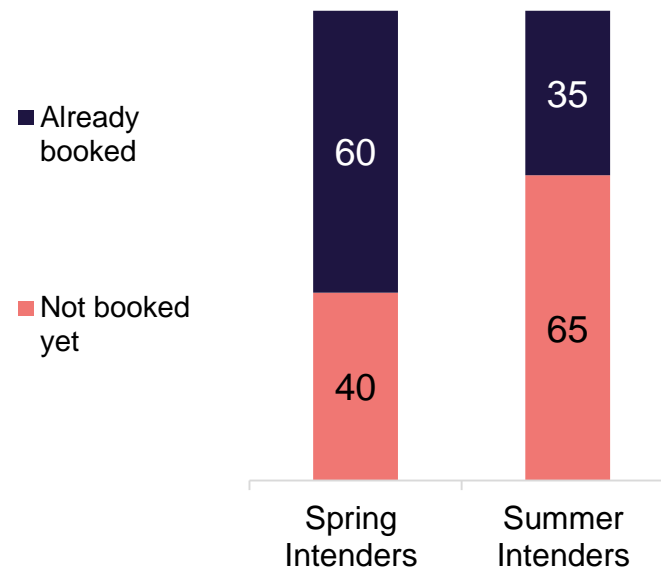
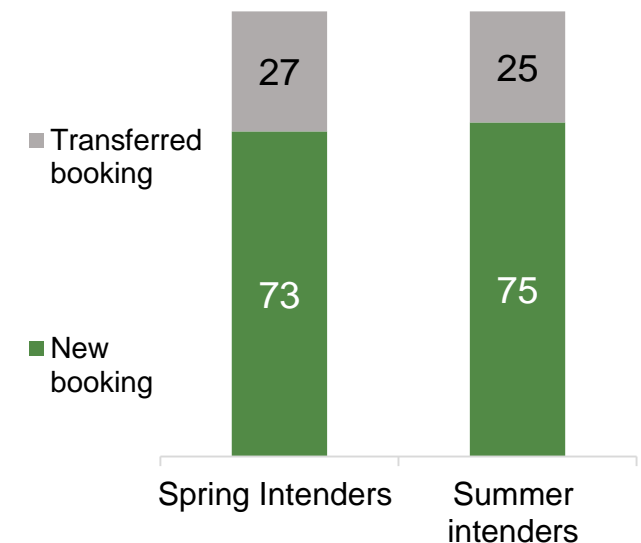


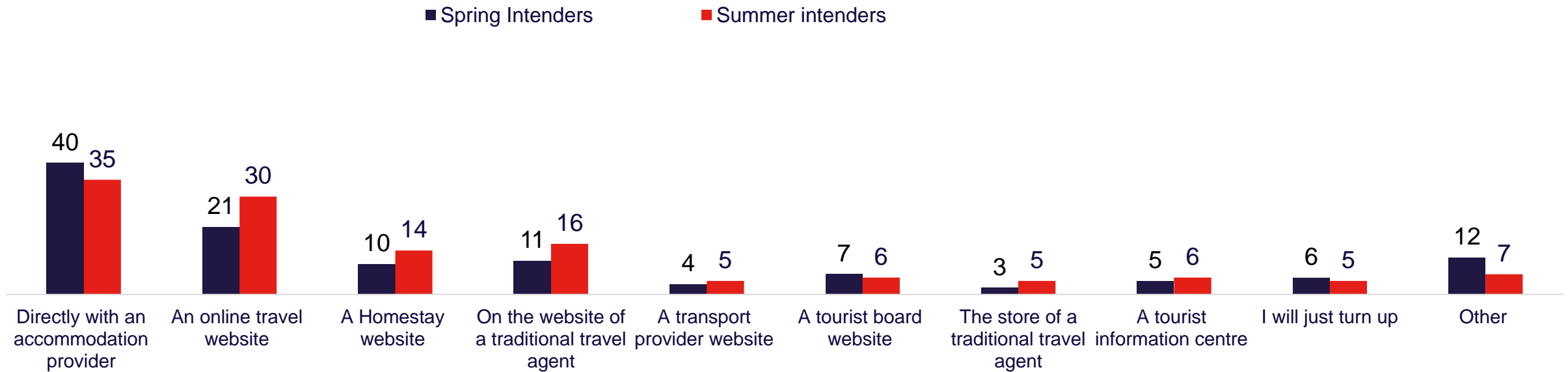
Figure 19. Proportion of next trips that are transferred bookings, percentage Wave 31 for Spring and Summer, UK



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.

Figure 19a. Accommodation booking channel for next trip in Spring and Summer, percentage Wave 31, 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 31 respondents planning on taking a holiday or short break in the UK in Spring (May to June) n=211; Summer (July to September) n=448

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 both the spring and summer periods.
- In line with previous waves, little separates the visitor share of the subsequent five destinations.

Figure 21. Where planning on staying on next UK overnight trip in Spring, percentage Waves 30 and 31, UK

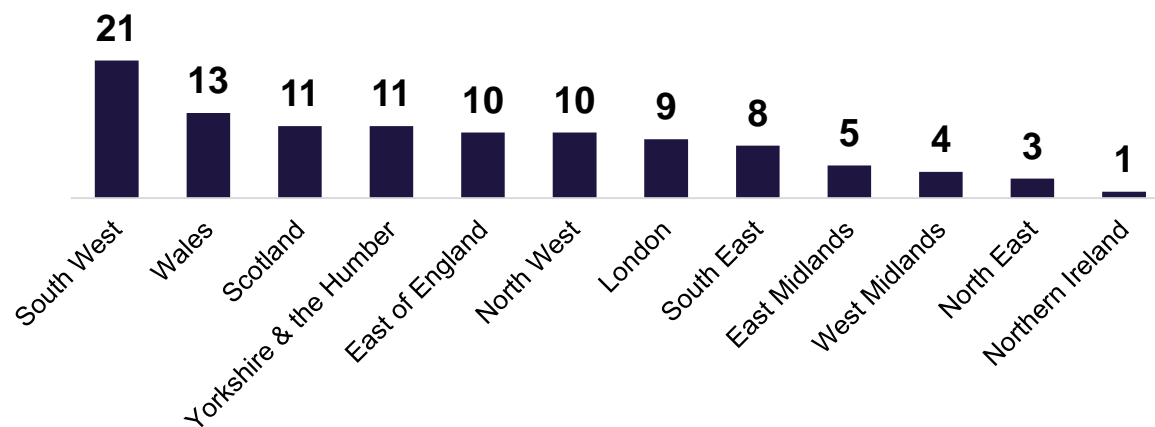
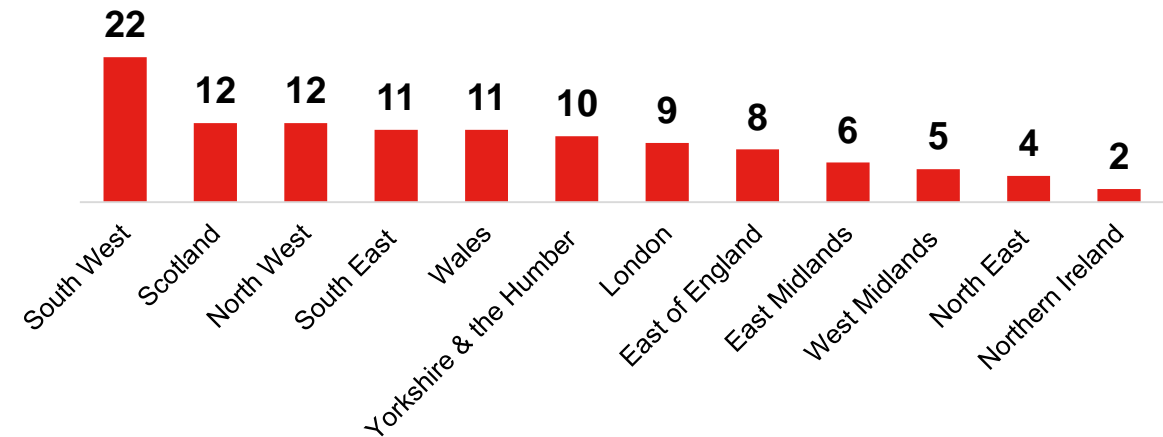


Figure 22. Where planning on staying on next UK overnight trip in Summer, Percentage Waves 30 and 31, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All Waves 30 and 31 respondents planning on taking a holiday or short break in the UK for Spring (May to June) n=452; Summer (July to September) n=889

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

- Nearly 2 in 5 (37%) spring intenders are likely to stay in a 'traditional coastal seaside town', some 8 points ahead of 'countryside or village' (29%). The other destinations types are significantly behind with broadly similar shares.
- For summer trips, the rank order is unchanged, although rural coastlines are likely to receive a higher share of visitors.

Figure 23. Main type of destination for trip in spring, percentage Waves 30 and 31, UK

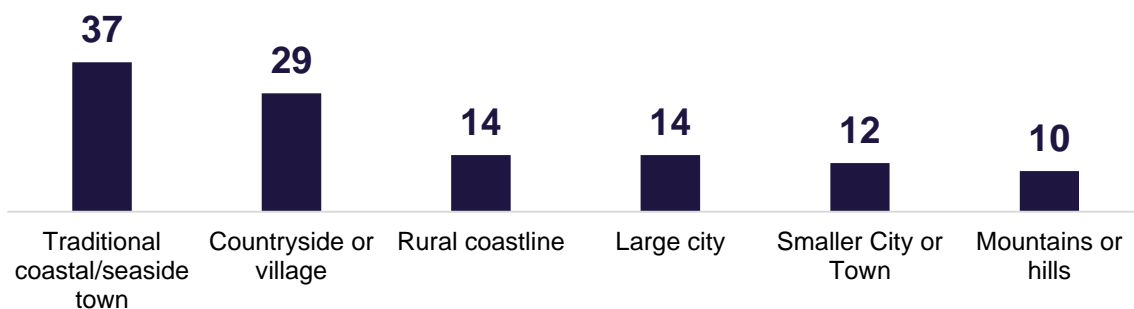
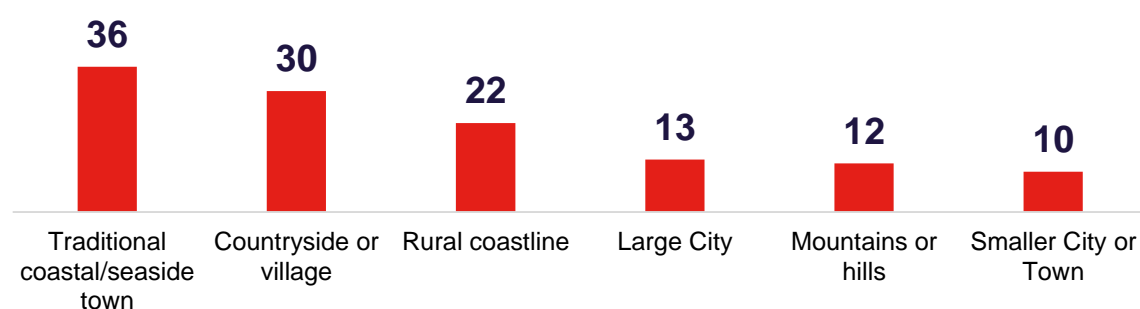


Figure 24. Main type of destination for trip in summer, percentage Waves 30 and 31, UK



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 30 and 31 respondents planning on taking a holiday or short break in the UK for Spring (May to June) n=452; Summer (July to September) n=889

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

- Consistent with Wave 30, 'camping/caravan' is the leading accommodation choice amongst spring intenders, although only marginally ahead of a 'hotel/motel/inn', with 'a private home' and 'commercial rental' also close behind.
- 'Commercial rental' is the leading choice amongst summer intenders, marginally ahead of 'camping/caravan', 'a private home' and 'a hotel/motel/inn'.

Figure 25. Accommodation planning on staying in on next UK overnight trip in spring, net percentage Waves 30 and 31

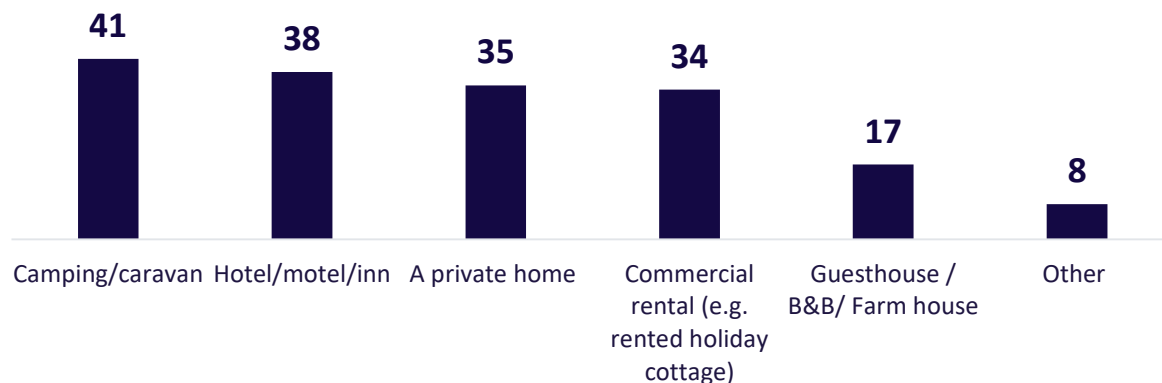
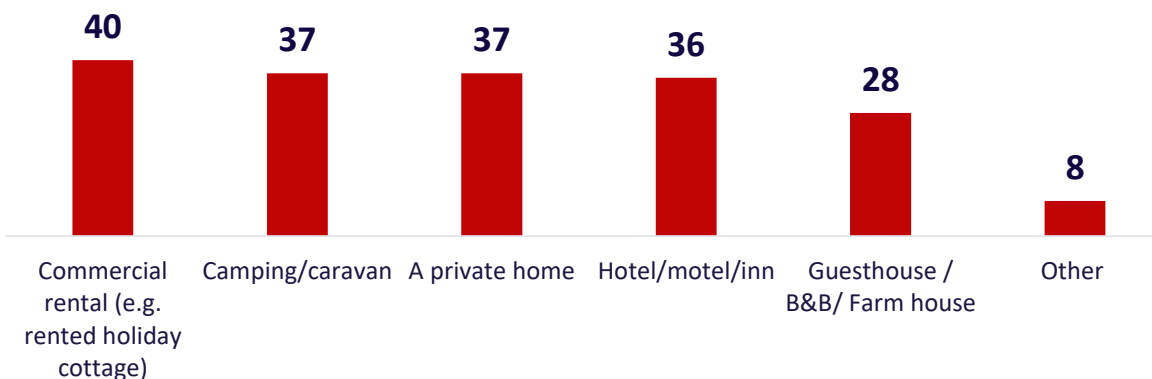


Figure 26. Accommodation planning on staying in on next UK overnight trip in summer, net percentage Waves 30 and 31



QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?

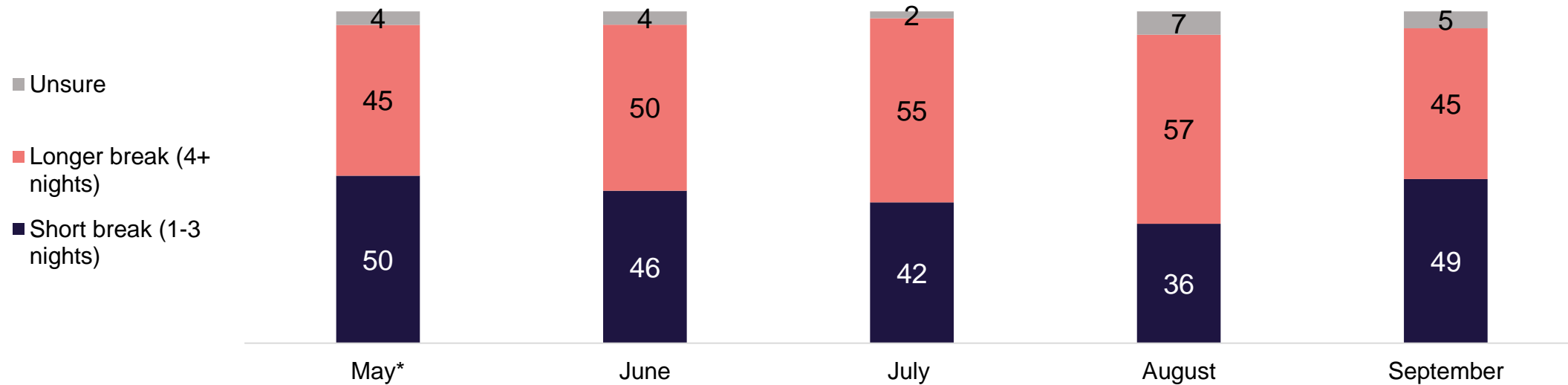
Base: All Waves 30 and 31 respondents planning on taking a holiday or short break in the UK for Spring (May to June) n=452; Summer (July to September) n=889

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 in the spring (May and June) are relatively evenly split between short breaks and longer breaks of 4+ nights. Longer breaks are significantly more likely in July and August, with an even split in September.

Figure 27. Length of next UK holiday or short break by time period, percentage Waves 30 and 31, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?

Base: All Wave 30 and 30 respondents intending to take next holiday or short break in each time period: May n=208, June n=244, July n=284, August n=337, September n=268

Main mode of transport for next overnight trip in UK

- Across both time periods, 'own car' is by far the leading main mode of transport for travelling to an overnight destination, with 68% stating this for spring trips and 65% 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 31, UK

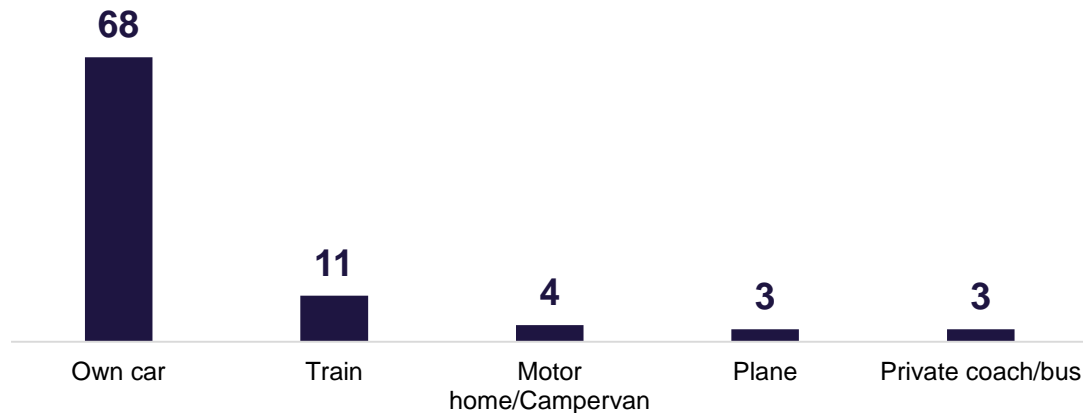
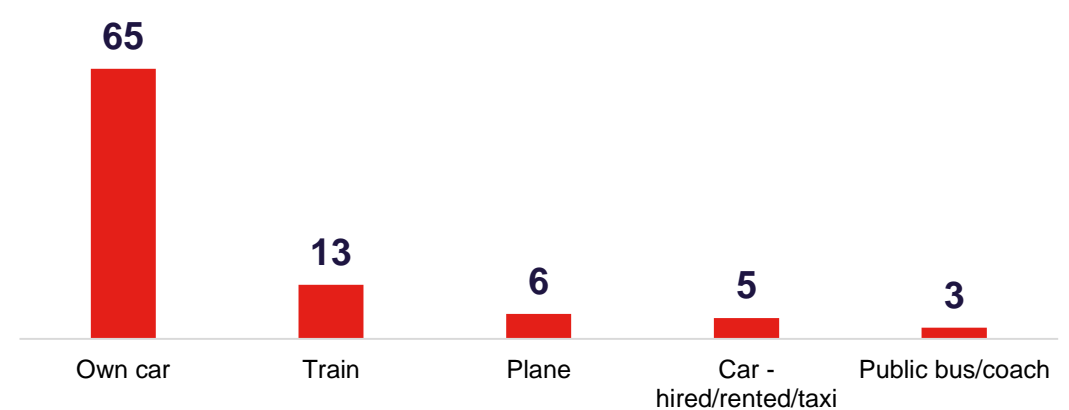


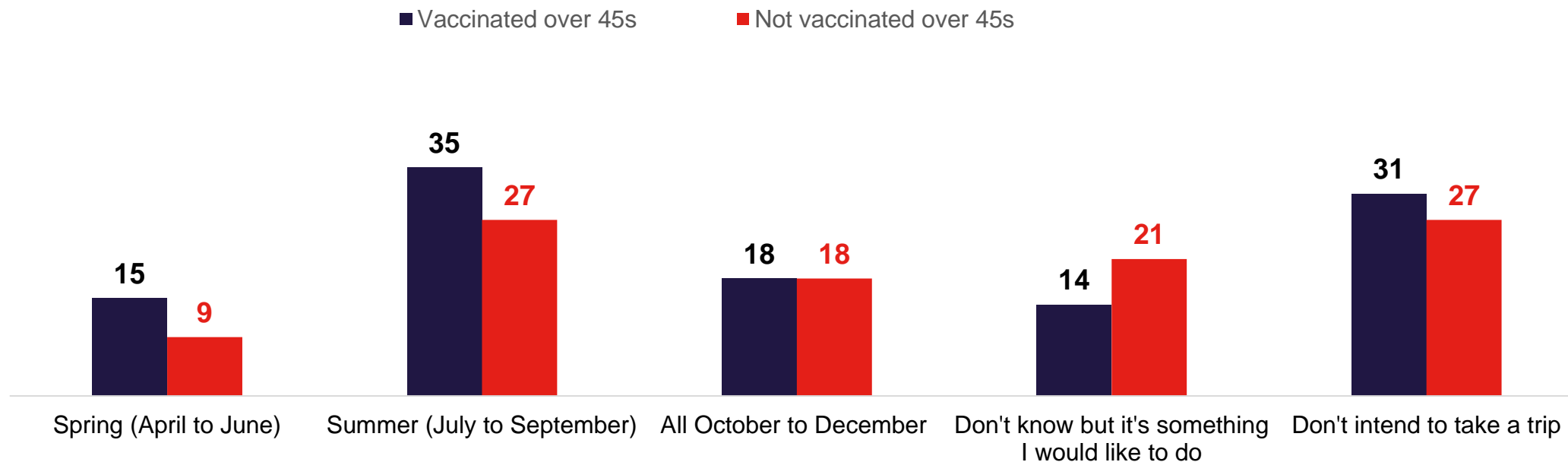
Figure 29. Top 5 main modes of travel to destination for trip in summer, percentage, Wave 31, UK



Vaccine impact on domestic overnight trip intent

- U.K. adults aged over 45 and who claim to have had at least one dose of a Covid-19 vaccine exhibit a greater likelihood to take either spring or summer overnight trips than over 45s that have *not* been vaccinated.
- Trip intent later in the year (between October and December) is the same regardless of vaccination status among this age group.

Figure 30. Proportion anticipating going on any overnight UK trip by vaccine status, Percentage Wave 31, UK

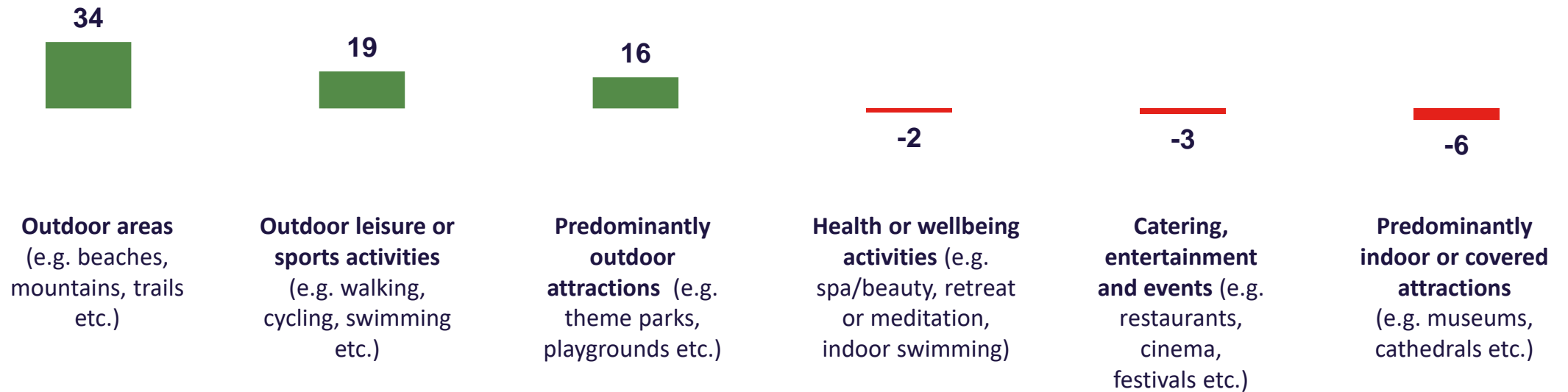


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All vaccinated respondents aged 45+ n=694; Non-vaccinated respondents aged over 45 n=150
 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Leisure activity engagement in the next few months

- Engagement levels for outdoor areas remains largely unchanged this wave and characterised by being likely to attract more visitors than normal over the next few months.
- Intended engagement with indoor activities and areas continues to improve (although still remaining in net negative territory).

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 31, UK





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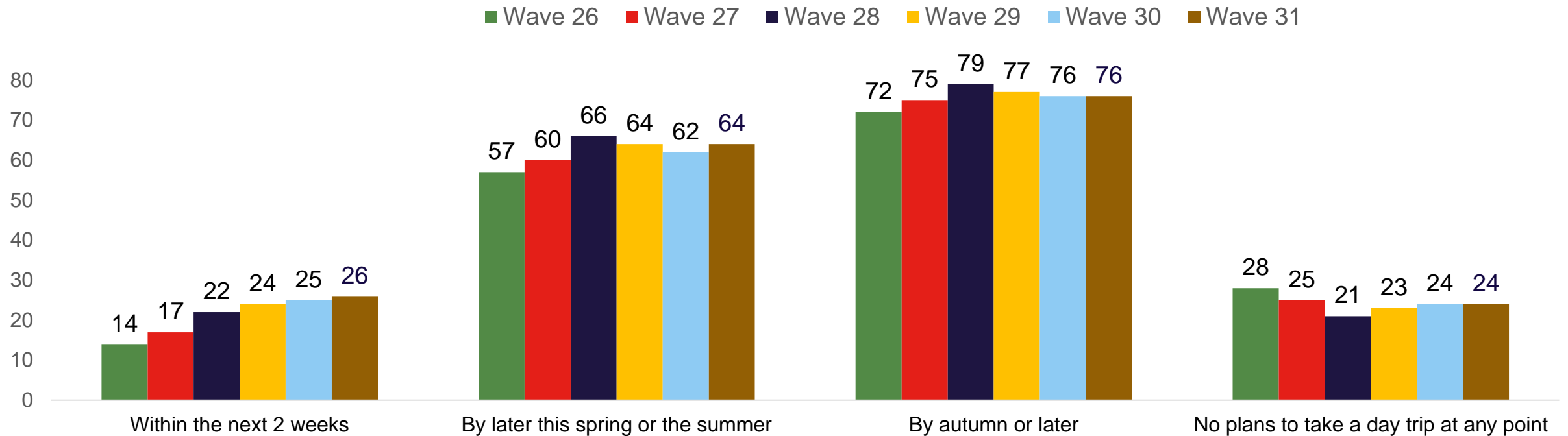
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3. Day Trip Intentions

Day trip intention overall

- The likelihood to take day trips continues to increase in the short term with 26% of adults anticipating doing so in the next 2 weeks.
- Medium and longer-term day trip intention remains relatively consistent with previous waves.

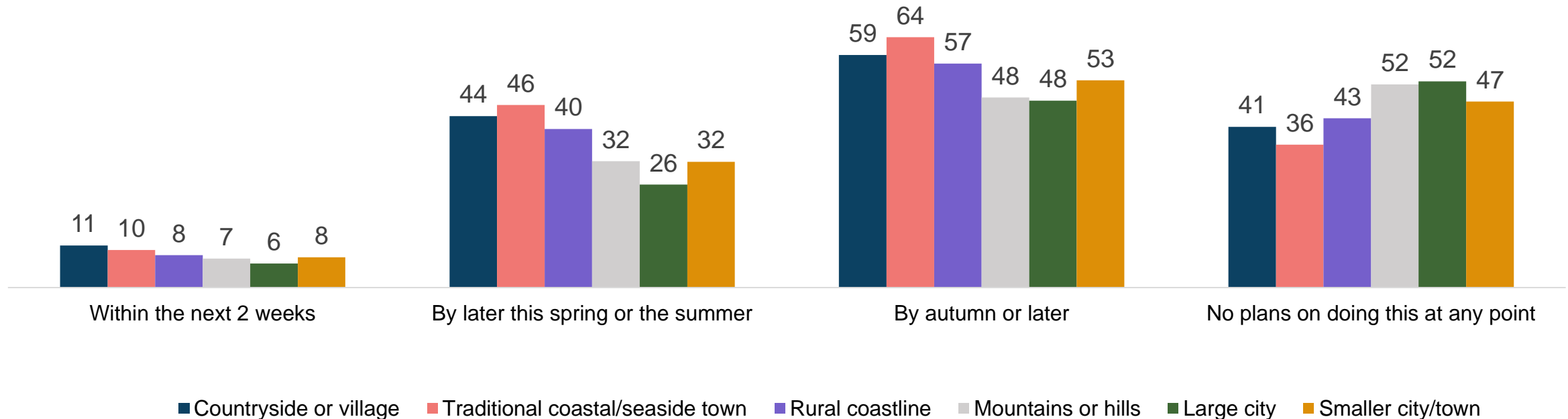
Figure 32. Likelihood to take any day trip, percentage wave-on-wave, UK



Day trip intention by destination type

- The destinations of choice for day trippers are more likely to be rural or coastal in nature.
- Day trips to large cities or smaller cities/towns by the autumn continue to index the lowest out of all destination types.

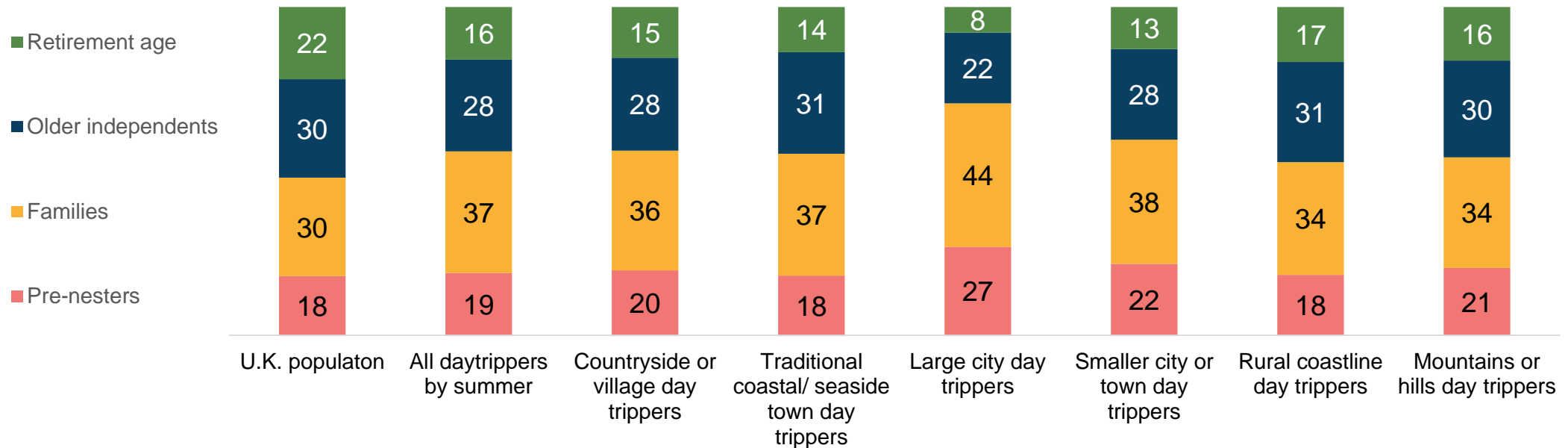
Figure 33. Likelihood to take a day trip by destination type, percentage, Wave 31, UK



Life stage of day trip intenders

- Overall, day trippers have higher representation amongst pre-nesters and families compared to the UK adult population.
- The skew towards the younger life stages is most apparent among those citing a preference to visiting a large city.

Figure 34. Breakdown of day trip intenders* by life stage, percentage, Wave 31, 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 31 respondents: *All day trippers within the next 2 weeks/early spring summer n=1128; All day-trippers Countryside or village day trippers n=762; Traditional coastal/ seaside town day trippers n=817 Large city day trippers n=487 Smaller city or town day trippers n=585 Rural coastline day trippers n=703 Mountains or hills day trippers n=582



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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 then weighted to make the sample representative of the U.K. overall and within each nation.
- This report presents findings from Wave 31 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-30 where appropriate. Wave 31 fieldwork was conducted between 17th and 21st May 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.

