COVID-19 Consumer Tracker

November 2021

Published: 17h November 2021

Fieldwork Period: 4th – 10th November 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.
- The survey addresses areas such as: current attitude to travel (incl. concerns around travel and reassurances needed from the tourism sector), intentions of UK residents to travel for day trips, short breaks and holidays, when they plan to book and when they plan to go on their trip, as well as the destination, type of location and accommodation of their intended trip.
- This tracker is based on a UK nationally representative sample of 1,500 adults aged 16+, with additional boosts for Scotland and Wales.
- Fieldwork tends to take place at the start of each month and this wave's fieldwork was conducted between 4th -10th November 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.

- **November 2021 to March 2022 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between November 2021 and March 2022
- **April to June 2022 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between April and June 2022

November 2021: Scorecard of Key Metrics

Key Metrics	November 2021	Change since September 2021
National mood (average score out of 10)	6.8	+0.2
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	35%	+11
Appetite for risk (average score out of 4)	2.9	+0.1
Confidence in ability to take UK overnight trip in November / December / January (% very confident)	27% / 22% / 22%	+10 / +4 / NA
Confidence in ability to take overseas overnight trip in November / December / January (% very confident)	16% / 14% / 14%	NA
Will take more UK trips in the next 12 months than past 12 months [%]	30%	NA
Will take more overseas trips in the next 12 months than past 12 months [%]	20%	NA
Proportion intending a UK overnight trip in next 12 months [%]	55%	NA
Proportion intending an overseas overnight trip in next 12 months [%]	41%	NA
Top 3 barriers to taking a UK overnight trip from November to March	1. UK weather 2. Personal finances 3. Concerns about catching COVID	NA
Top 3 barriers to taking an overseas overnight trip from November to March	1. The risk of quarantine 2. Personal finances 3. The cost/hassle of a COVID test	NA

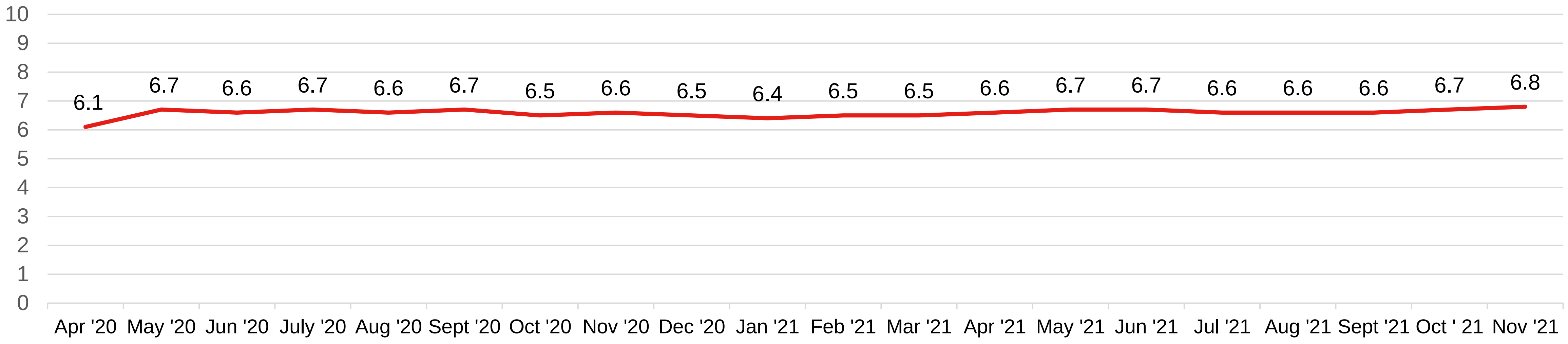
- Represents a significant change on previous wave
- ** Comparison not valid due to different time frames across waves
- NA – Not asked

1. Covid Impact on Attitudes to Travel

The Current Mood

The average mood of UK adults currently sits at 6.8 out of 10, marking the second consecutive month of growth and the highest score since the start of the research in April 2020.

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

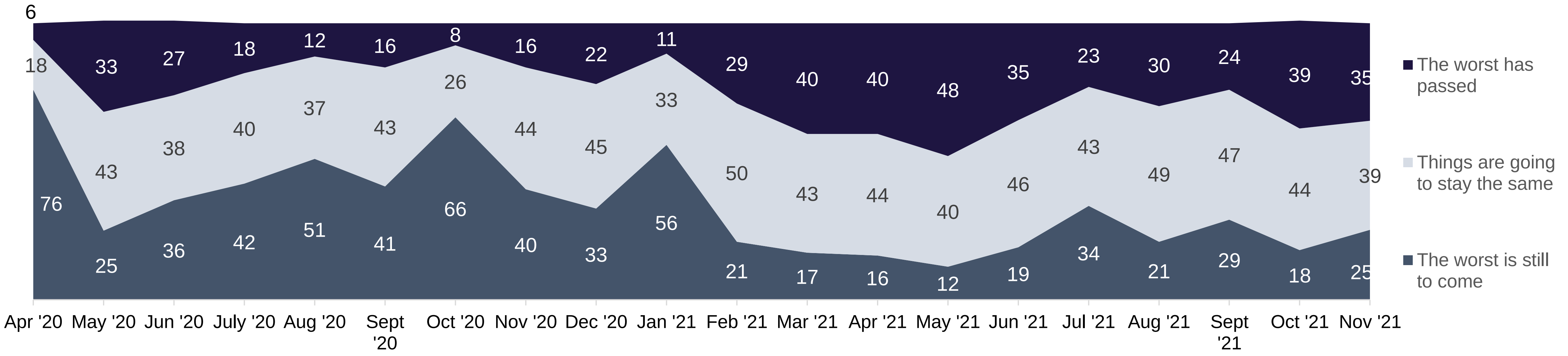


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. November 2021 = 1,758 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
Note: Fieldwork for each month took place at the start of each month – exact dates vary). October data is taken from BVA BDRC survey.

Perceptions of the situation relating to COVID-19

The perception of the current situation continues to be fairly positive, the UK public are significantly more likely to think that 'the worst has passed' (35%) than 'the worst is still to come' (25%) in relation to COVID-19.

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

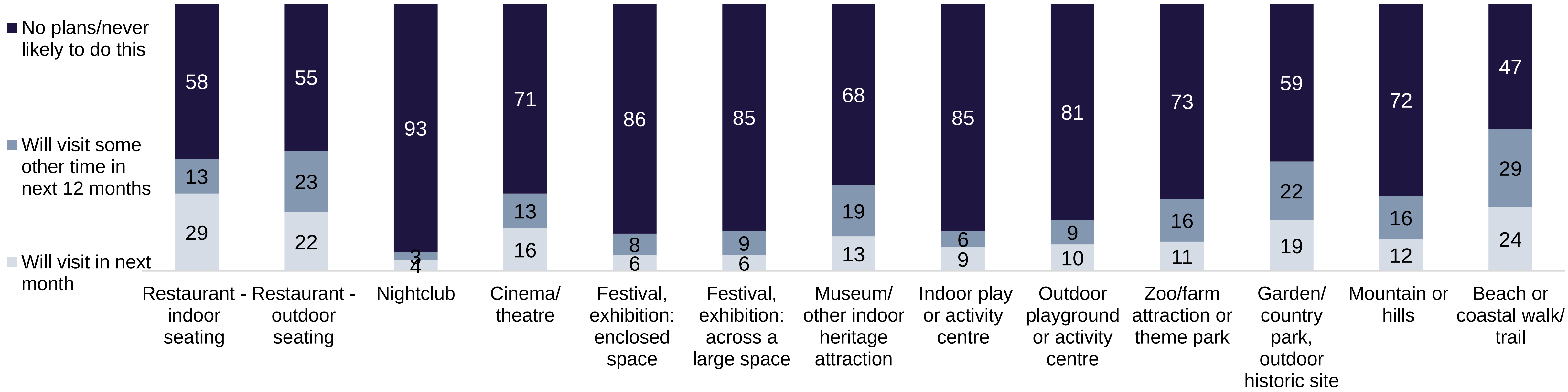


Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion?
Base: All respondents. November 2021 = 1,758 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
Note: Fieldwork for each month took place at the start of each month – exact dates vary). October data is taken from BVA BDRC survey.

Intention to visit leisure venues / locations in the UK

Of the leisure venues included, UK adults are most likely to visit ‘restaurants with indoor seating’ in the next month, 29% intending to do so. Of the outdoor areas included, ‘beach or coastal walk/trail’ is the most likely to be visited in the next month (24%).

Figure 3. Intention to visit leisure venues, Percentage, November 2021, UK

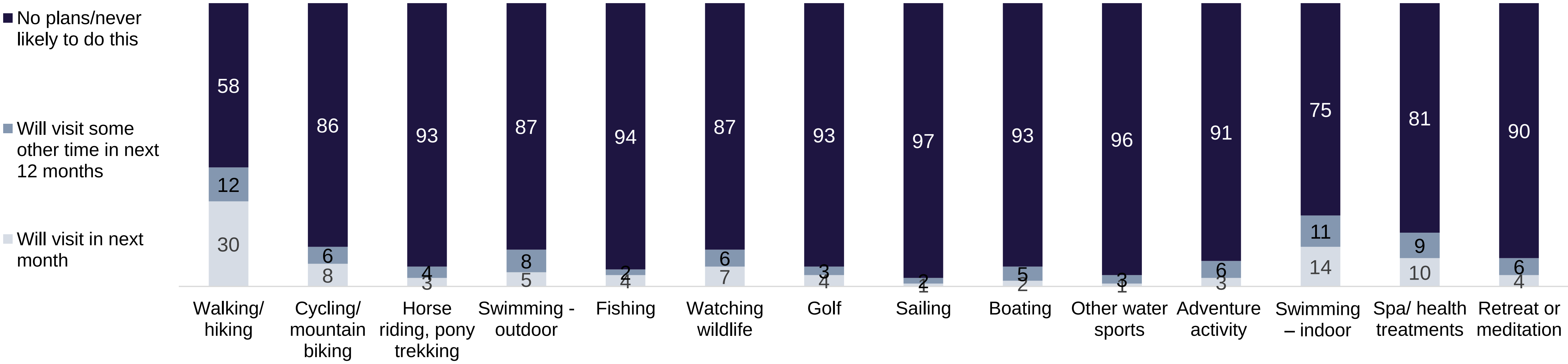


VB9a. Which, if any, of these types of places in the UK are you likely to visit in the next 12 months? VB9b. Which, if any, are you likely to visit in the UK in the next month? VB9c. And which, if any, are you never likely to visit in the UK?
Base: All respondents. November 2021 = 1,758

Intention to conduct leisure activities / locations in the UK

‘Walking/hiking’ is the activity the UK public are most likely to engage in the next month, 30% planning to do so. ‘Indoor swimming’ is the next most popular next month’s activity at 14%.

Figure 4. Intention to conduct leisure activities, Percentage, November 2021, UK

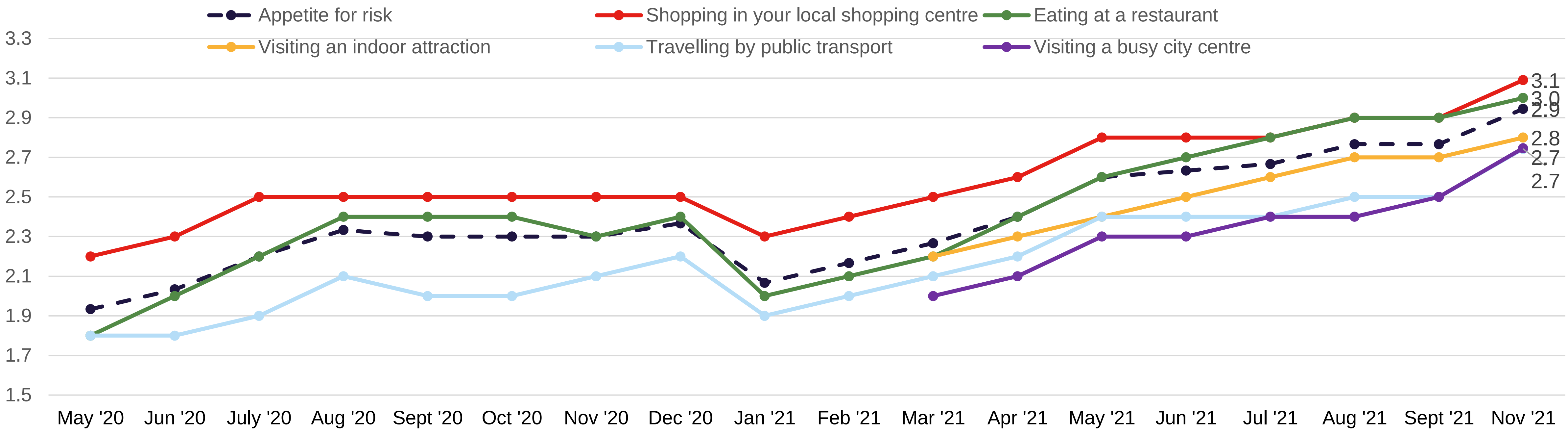


VB10a. Which, if any, of these types of activities are you likely to do in the UK in the next 12 months? VB10b. Which, if any, are you likely to do in the UK in the next month? VB9c. And which, if any, are you never likely to do in the UK?
Base: All respondents. November 2021 = 1,758

Comfort levels with everyday activities

‘Appetite for risk’ score is at its highest point (2.9 out of 4) since the research began in May 2020. Since September, the largest jumps in comfort were reported for ‘shopping in your local shopping centre’ (2.9 to 3.1), ‘travelling by public transport’ (2.5 to 2.7) , and ‘ visiting a busy city centre’ (2.5 to 2.7).

Figure 5. 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

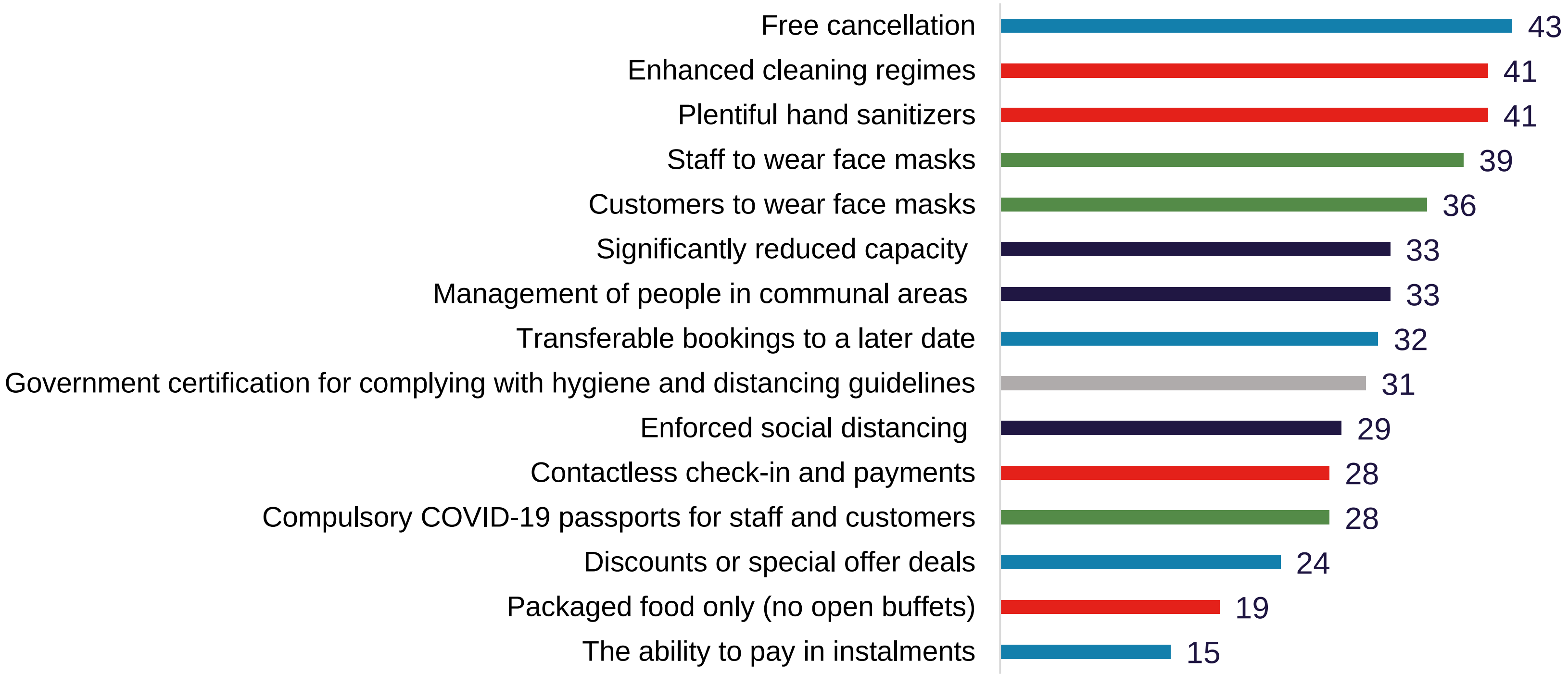


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents excluding those stating ‘don’t know’ or who wouldn’t do activity under any circumstances. Mean average based on those that gave a score of 1-4. November 2021 = 1,758 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
Note: These questions were not asked in October 2021

Required conditions for indoor leisure / tourism providers

'Free cancellation' is the leading condition that UK adults deem essential for indoor leisure and tourism providers to have in place to encourage a visit (43% stating this), followed by reduced contamination measures such as 'enhanced cleaning regimes' (41%) and 'plentiful hand sanitisers' (also 41%).

Figure 6. Conditions that are essential for indoor tourism and leisure providers to have in place to visit them in the next few months, Percentage, November '21, UK, Full list



Net: Reduced contamination measures 65%

Net: Financial booking incentives 64%

Net: Guest/staff interventions 61%

Net: Social distancing measures 57%

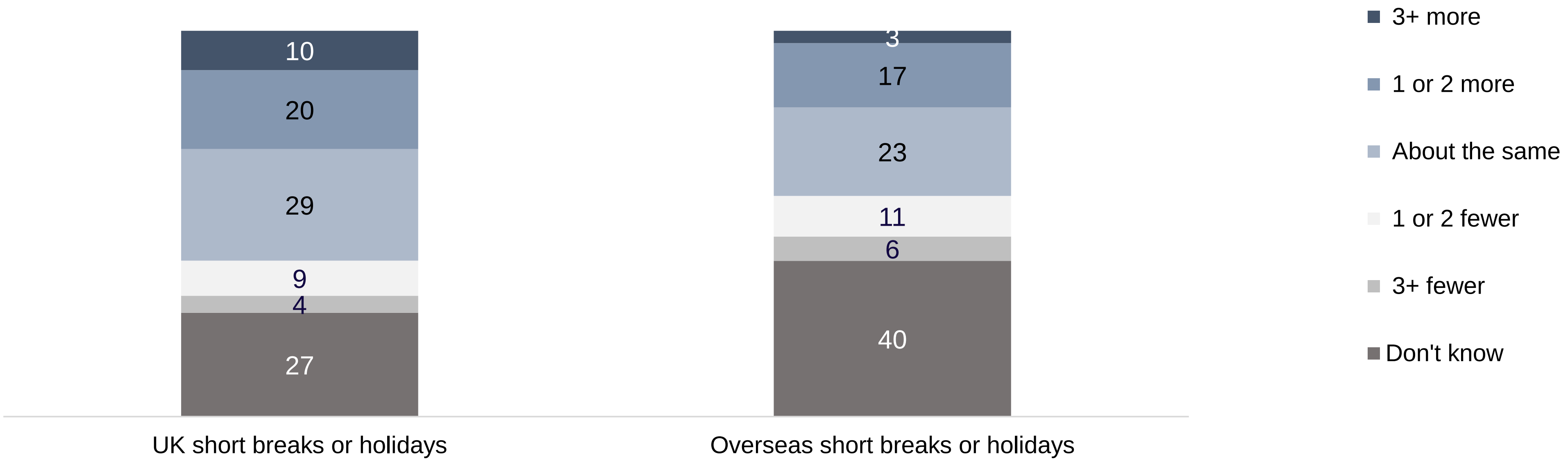
Q63. Which, if any, of the following conditions would be essential for indoor tourism and leisure providers (e.g. indoor visitor attractions, restaurants, hotels etc.) to have in place for you to visit/use them over the next few months? Base: All respondents. November 2021 = 1,762

2. Trip Intentions: UK and overseas

Anticipated number of UK and overseas trips in next 12 months compared to last 12 months

While there is overall a positive expectation of more trips in the next 12 months compared to the past 12 months, the projection is better for domestic overnight trips (30% anticipate more trips) than overseas (only 20% anticipate more trips).

Figure 7. Number of UK and overseas overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, November 2021, UK

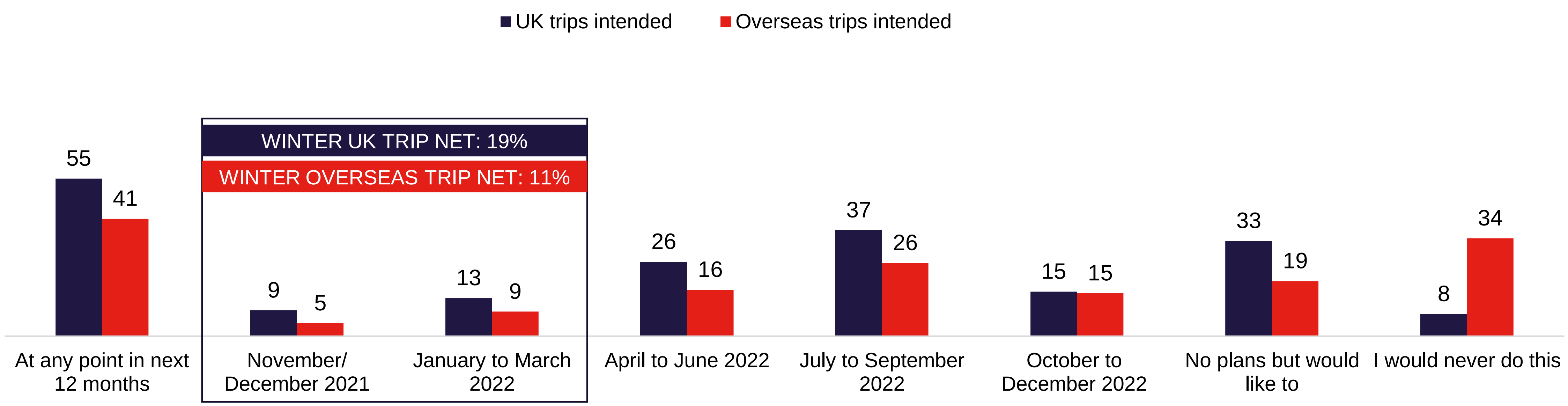


VB1a Thinking about the next 12 months, are you likely to take more, fewer or about the same number of UK and overseas holidays/short breaks as you took in the last 12 months? Base: All respondents. November 2021 = 1,758

When anticipate taking overnight trips in the UK

Over half (55%) of the UK public plan on taking an overnight domestic trip in the next 12 months (by the end of October 2022), significantly more than the 41% planning to take an overnight overseas trip in this period.

Figure 8. Proportion anticipating going on any overnight UK and overseas trips, Percentage, November 2021, 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? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All respondents. November 2021 = 1,758
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Anticipated planning and booking time for UK and overseas overnight trips

3 in 10 (30%) UK adults intending to take an overnight UK trip between January and March have already planned it, with 1 in 8 (12%) having already booked it. Booking and planning patterns are broadly similar for intended UK and overseas trips

Figure 9. When anticipate PLANNING the next January-March 2022 UK and overseas overnight trip, Percentage, November 2021, UK

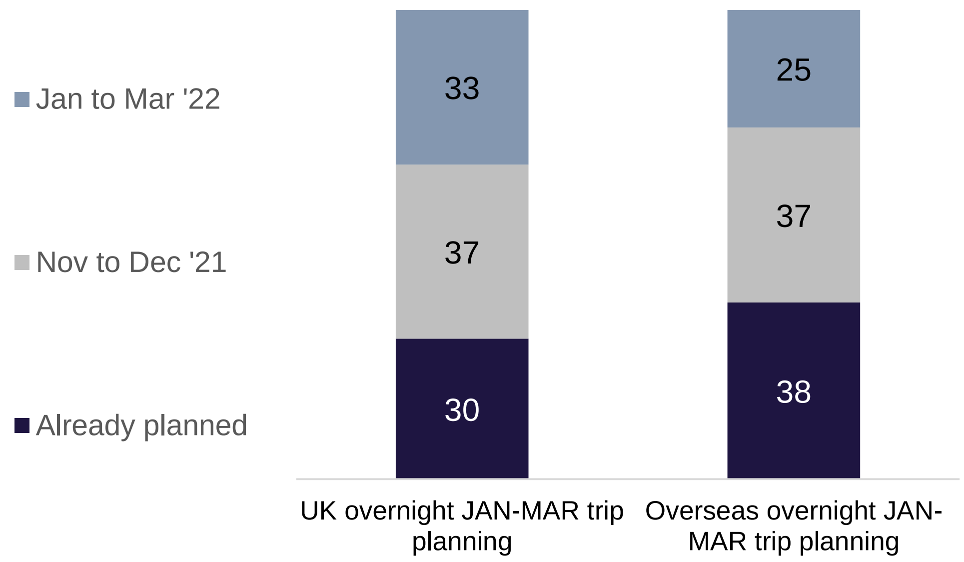
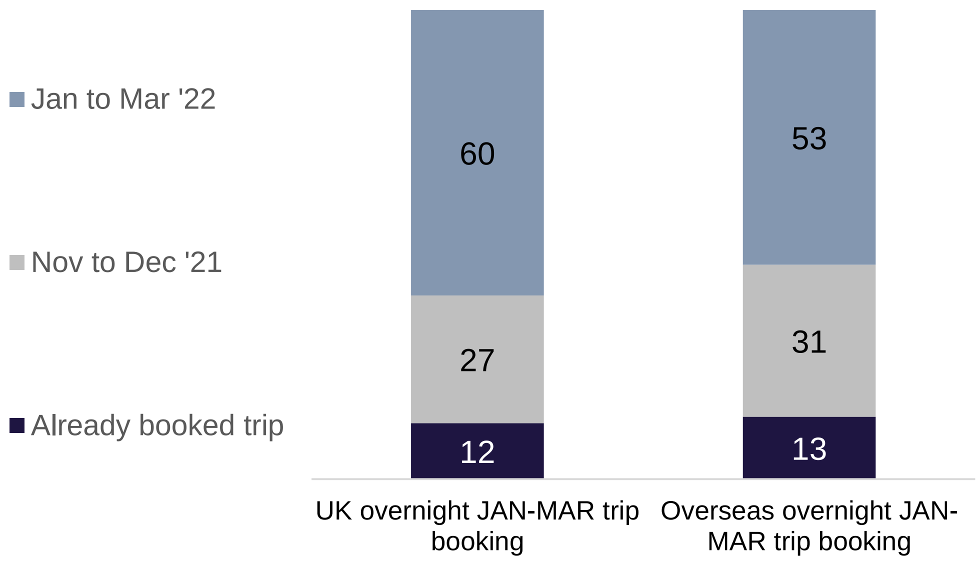


Figure 10. When anticipate BOOKING the next January-March 2022 UK and overseas overnight trip, Percentage, November 2021, UK

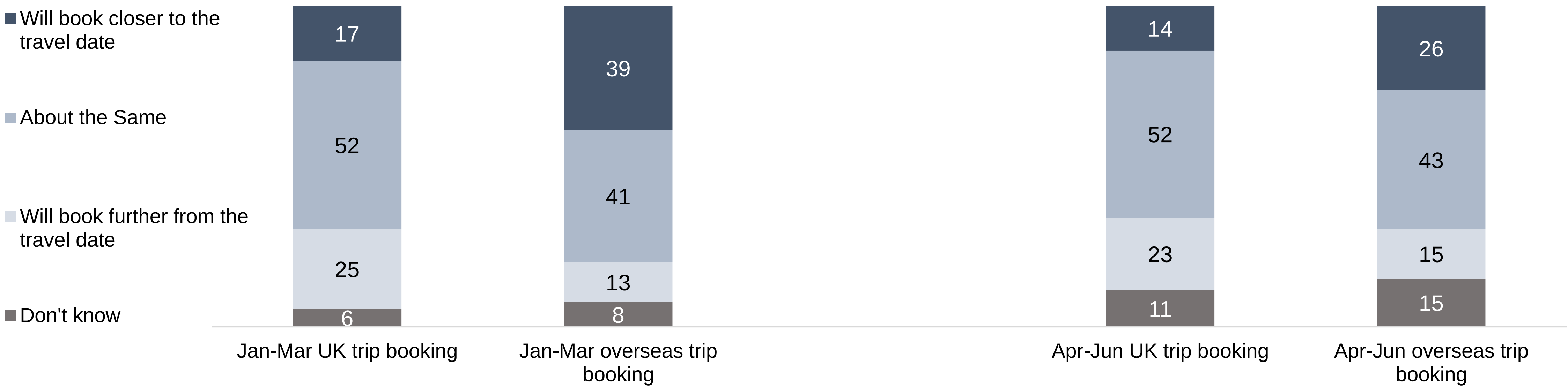


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip
Base: Jan-Mar 2022 UK trip intenders n=178; Jan-Mar 2022 overseas trip intenders n=130;

Planning and booking lead times for spring and summer trips

The attitude to booking trips is slowly returning to pre-pandemics patterns, as only 17% of UK trip intenders say they are likely to book closer to the travel date of their Jan-Mar ‘22 trip and 77% say they would book with the same, or even longer, lead time as pre-pandemics.

Figure 11. Anticipated booking lead times for spring and summer 2022 trips compared to before the pandemic, Percentage, November 2021 UK

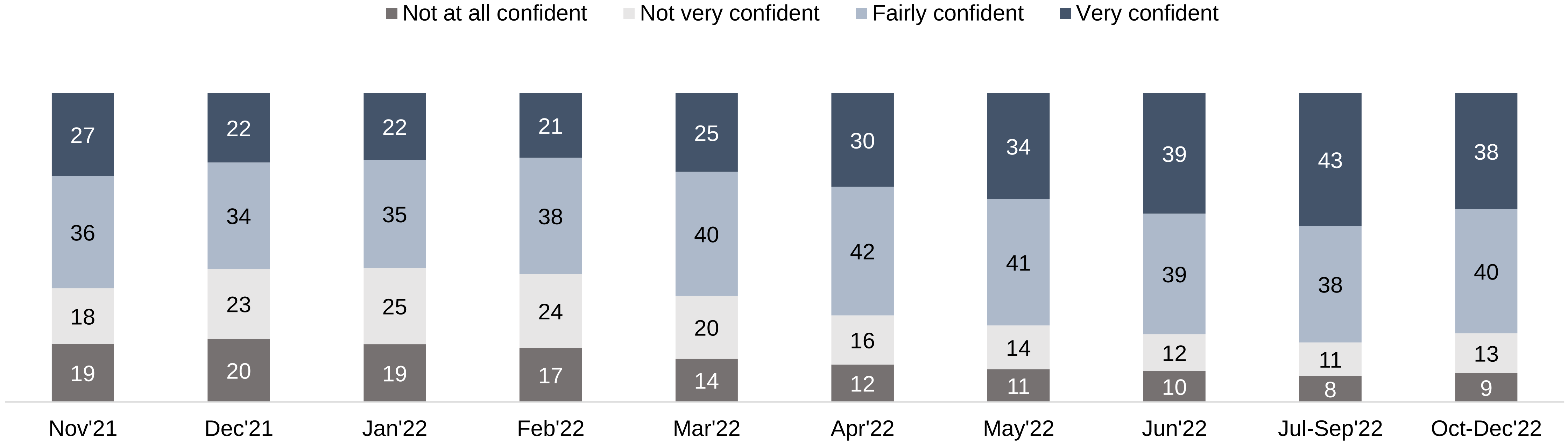


V2e. Compared to before the pandemic, when are you likely to book your UK and overseas trips?
Base: Jan-Mar 2022 UK trip intenders n=178; Jan-Mar 2022 overseas trip intenders n=130; Apr-Jun 2022 UK trip intenders n=286; Apr-Jun 2022 overseas trip intenders n=206
*Lead times are based on trips that have not yet been booked.

Confidence in the ability to take overnight UK trips

In the next three months, over half are very/fairly confident to be able to go on their trip. However, the confidence is improving looking further ahead, as there is a clear seasonal pattern of winter months showing lower confidence levels.

Figure 12. Confidence in taking a UK overnight trip across different time periods, Percentage, November 2021, UK



VB7a. We'd like you to imagine that you have booked a UK holiday or short break in each of the time periods listed below. How confident are you that you would be able to go on these UK trips in these months?
Base: All respondents. November 2021 = 1,758

Perceived barriers to taking overnight UK trips

The main perceived barrier to taking an overnight trip in the UK between November and March is 'UK weather' (27% stating this), followed by 'personal finances' (also 27%). 23% would never take an overnight UK trip in this time period.
Between April and June next year, 'personal finances' is the leading barrier (at 28%), significantly ahead of other options.

Figure 13. Barriers for taking an overnight UK trip in November 2021 to March 2022, Percentage, November 2021, UK

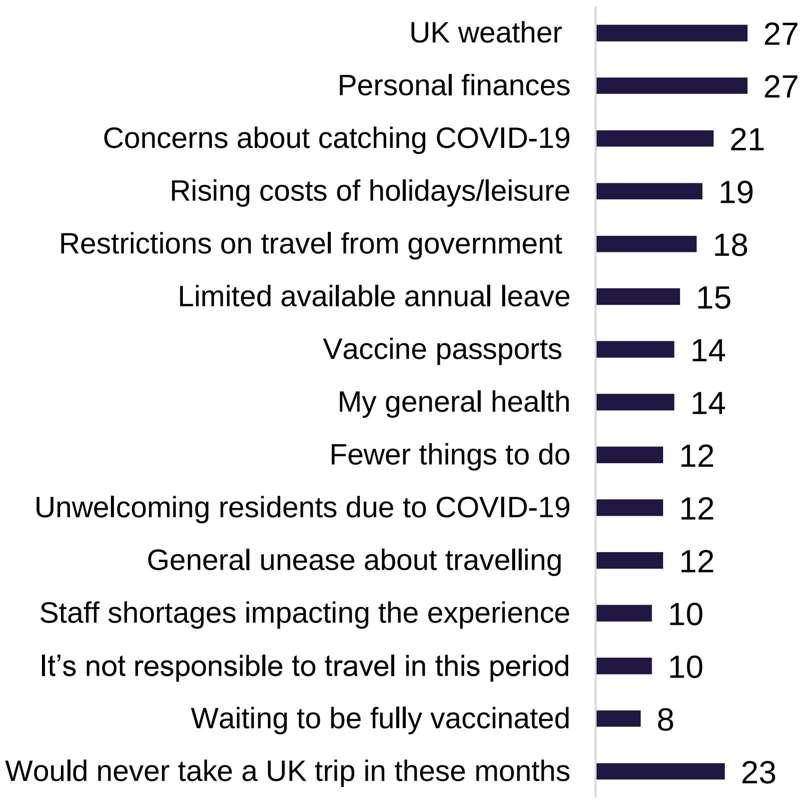


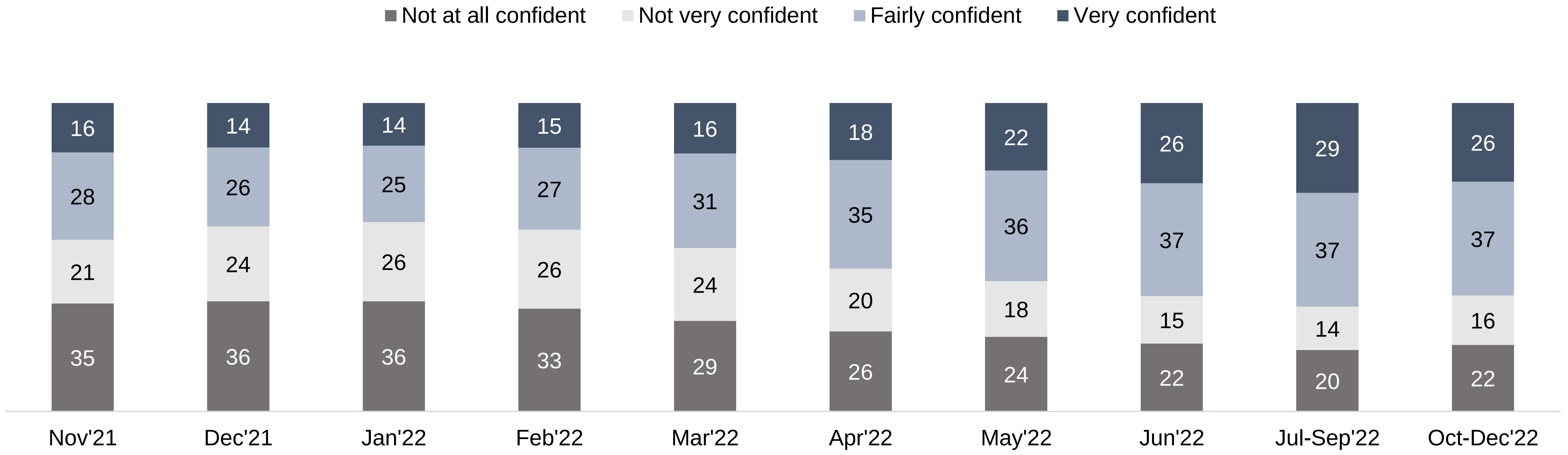
Figure 14. Barriers for taking an overnight UK trip April to June 2022, Percentage, November 2021, UK

VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in <INSERT TIME FRAME BELOW>? Base: All asked each question. November to March n=1,469; April to June n=875

Confidence in the ability to take overseas overnight trips

Overseas confidence follows a similar seasonal pattern to UK confidence. However, the confidence in their ability to take overnight overseas trips is significantly lower than their confidence in taking UK trips.

Figure 15. Confidence in taking an overseas overnight trip across different time periods, Percentage, November 2021, UK



VB7a. We'd like you to imagine that you have booked an overseas holiday or short break in each of the time periods listed below.
How confident are you that you would be able to go on these UK trips in these months?
Base: All respondents. November 2021 = 1,758

Perceived barriers to taking overseas overnight trips

‘The risk of quarantine’ is perceived as the biggest barrier to taking overseas trips between November and March, and April to June (24% and 23% stating this respectively). ‘Personal finances’ also feature highly, as does ‘the cost/hassle of taking a COVID-19 test’.

Figure 16. Barriers for taking an overnight UK trip in November 2021 to March 2022, Percentage, November 2021, UK

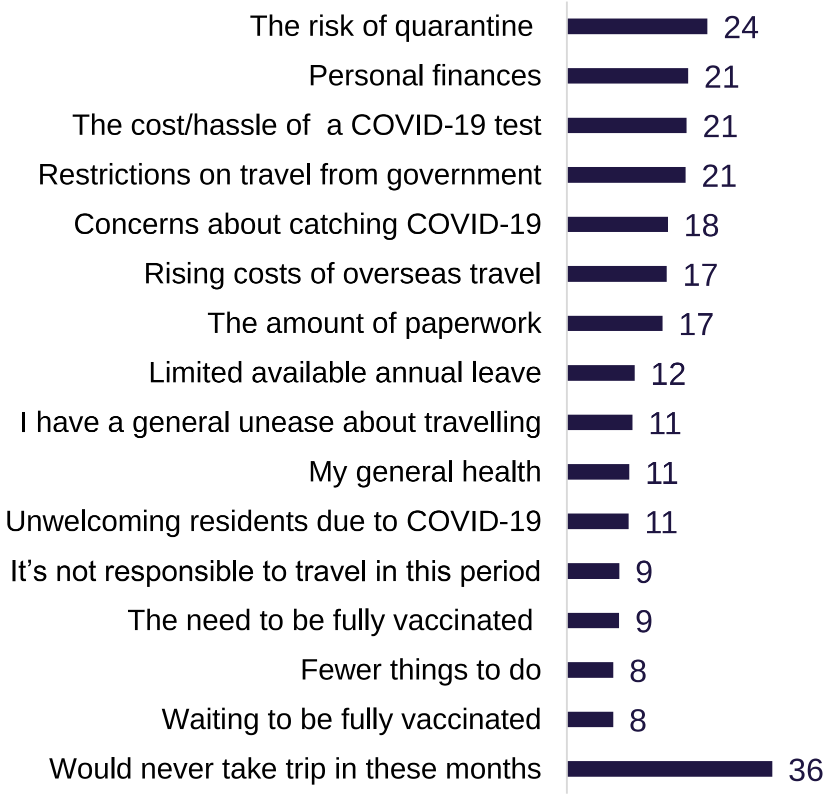
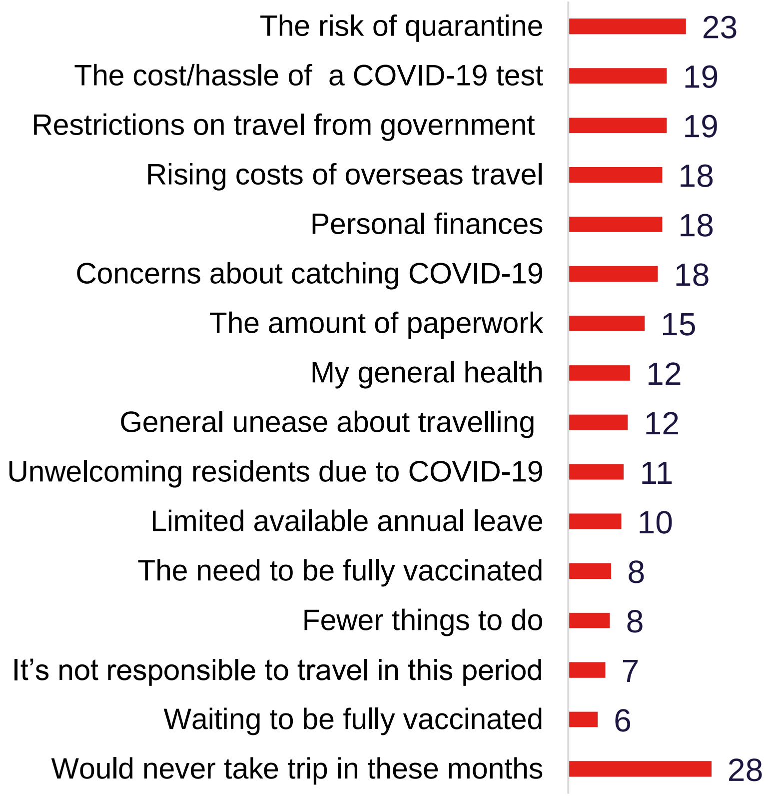


Figure 17. Barriers for taking an overnight UK trip April to June 2022, Percentage, November 2021, UK



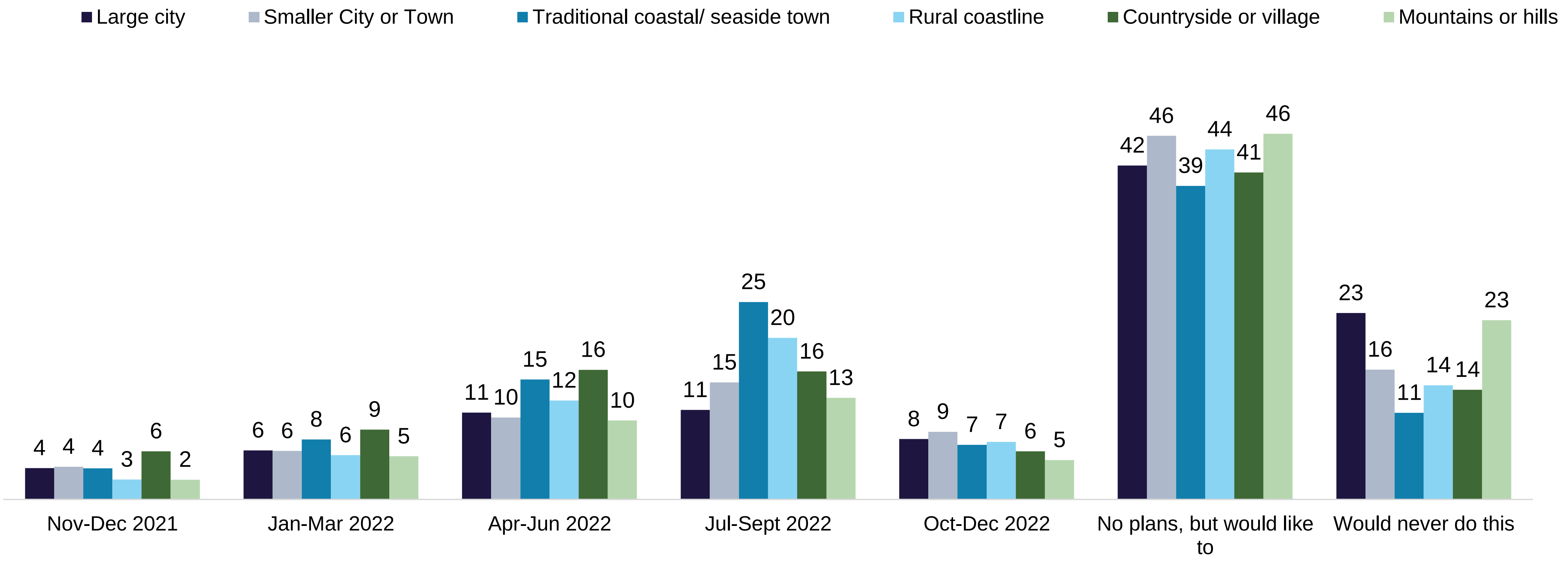
VB7e. Which, if any, of the following factors do you see as potential barriers to you taking an OVERSEAS short break or holiday in? Base: All asked each question. November to March n=1,469; April to June n=875

3. Next Domestic Trip - Overnight and Day Trips

UK overnight trip intention by destination type

Overnight domestic trip intention generally peaks in July to September 2022, particularly for destinations such as a ‘traditional coastal/seaside town’ and ‘rural coastline’ – 25% and 20% planning on taking a trip to these destination types respectively. ‘Large city’ overnight trips are as likely to happen in April to June 2022, as they are in July to September 2022, although do not rise above 11% in any period.

Figure 18. Overnight trip intention in next year by destination type, Percentage, November 2021, UK

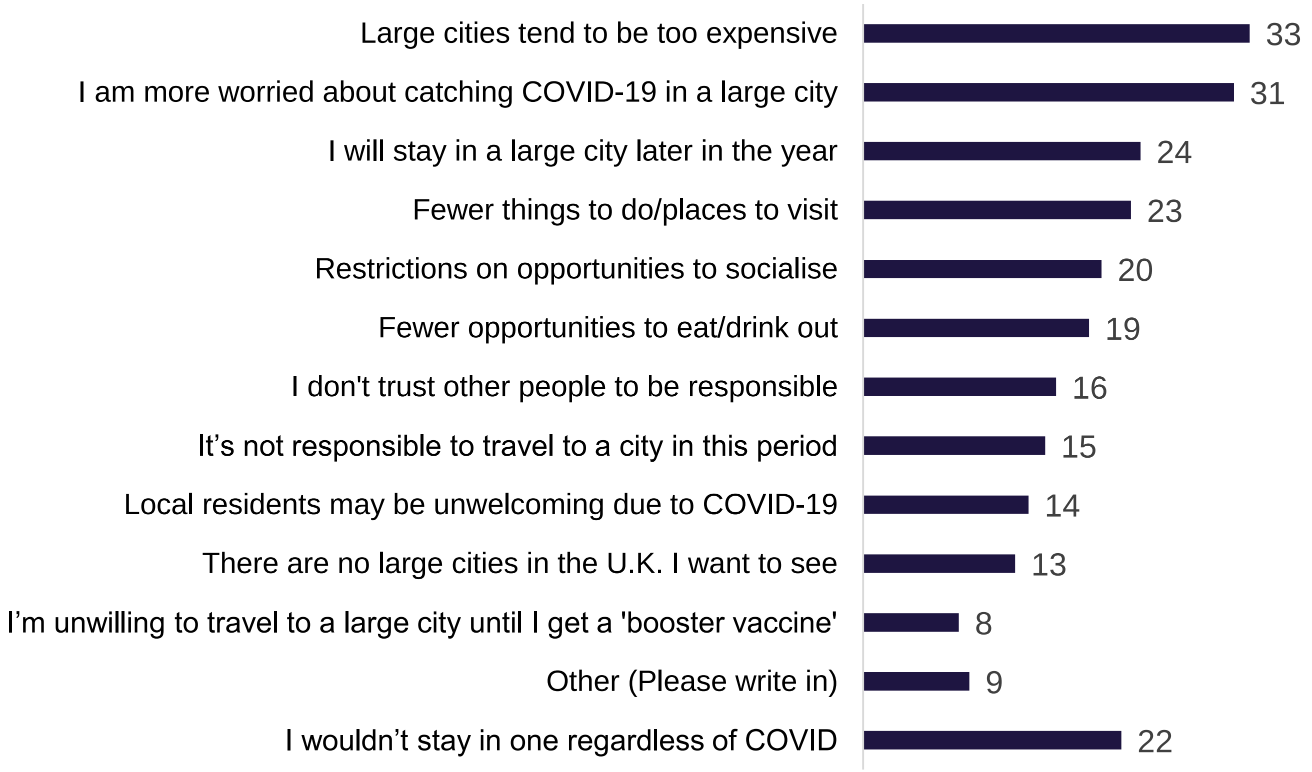


VB6g. Now thinking of all potential overnight trips (not just the next one), when, if at all, are you likely to take a UK holiday or short break to the following types of places? November 2021 = 1,758

Reasons for not staying in a city

Of the intenders not planning on visiting a large city, ‘they tend to be too expensive’ is the leading reason at 33%, followed closely by ‘I am more worried about catching COVID-19 in a large city’ at 31%.

Figure 19: Reasons for not staying in a city amongst November to April intenders, Percentage, November, UK

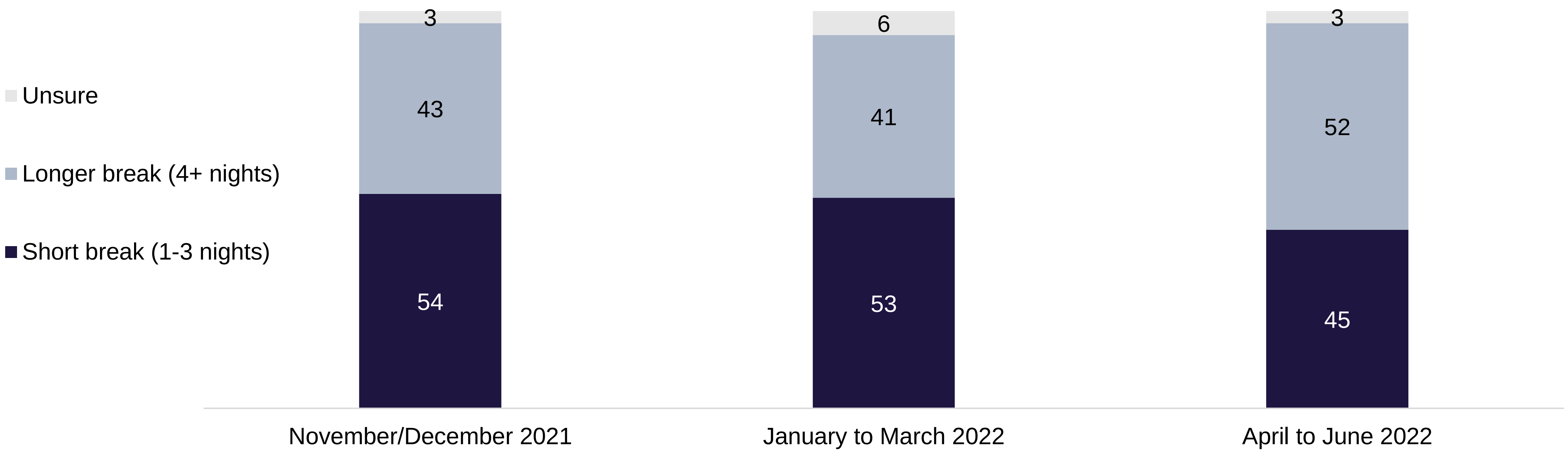


VB5b. You indicated you don’t plan on staying in a large city during your next UK holiday or short break in <INSERT MONTH FROM VB2A>. Why is this? Base: All November 2021 respondents that don’t plan on staying in a city on their next UK trip between November and April n=470
Multiple choice question. Totals may exceed 100%

Duration of next overnight trip in UK

Overnight UK trips planned for November to December 2021 and January to March 2022 are more likely to be short breaks than longer breaks of 4+ nights. Between April to June 2022, longer trips are more dominant.

Figure 20. Length of next UK holiday or short break by time period, Percentage, November 2021, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All November 2021 respondents intending to take next holiday or short break in each time period: November/December 2021 n=157; January to March 2022 n=178; April to June 2022 n=286

Where planning on staying on next overnight trip in UK

The South West of England is the preferred UK overnight destination for trips between November and March (15% of intenders planning a trip there), and April to June (17% planning a trip there). However, the gap with other destinations is minimal.

Figure 21. Where planning on staying on next UK overnight trip in November 2021 to March 2022, Percentage, November 2021, UK

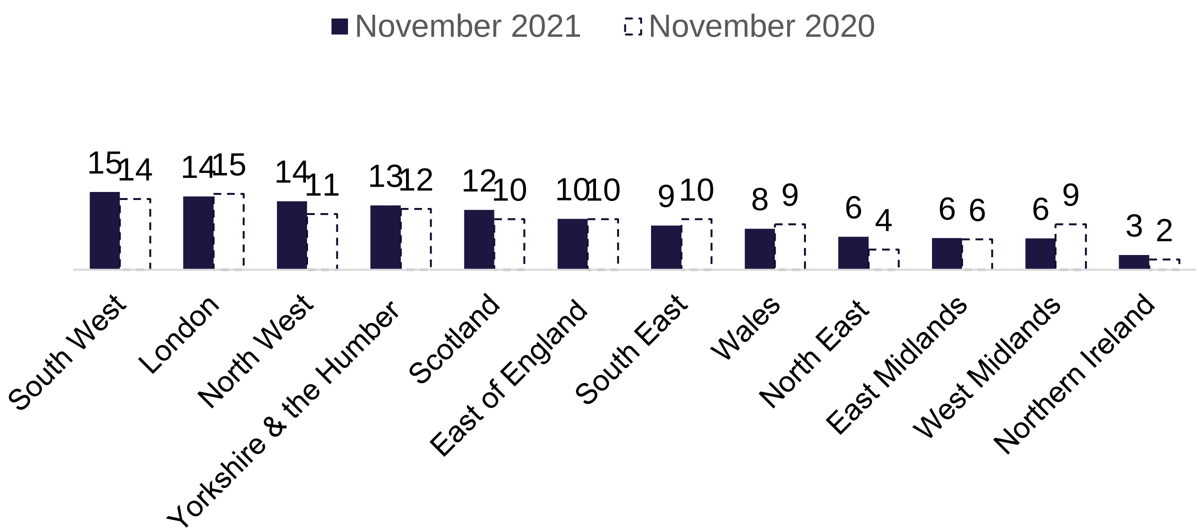
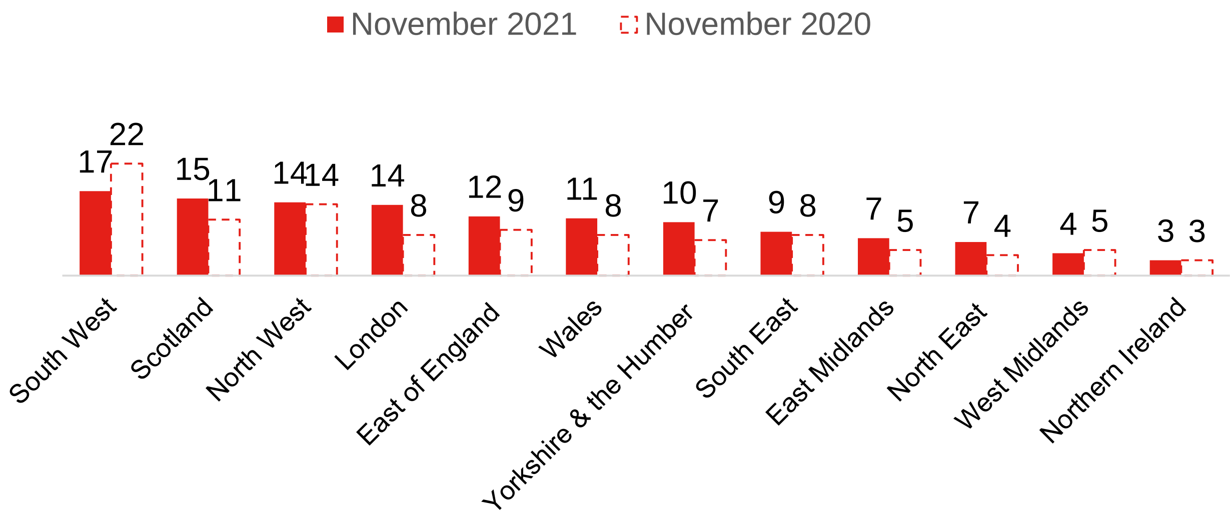


Figure 22. Where planning on staying on next UK overnight trip in April to June 2022, Percentage, November 2021, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All November 2021 respondents planning on taking a holiday or short break in the UK between November 2021 to March 2022 n=335; April to June 2022 n=286; November 2020 respondents: November to March 2020 n=283; April to June n=246
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

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 accounting for over half of intenders, followed by ‘train’ and ‘plane’.

Figure 23. Top 5 main modes of travel to destination for trip in November 2021 to March 2022, Percentage, November 2021, UK

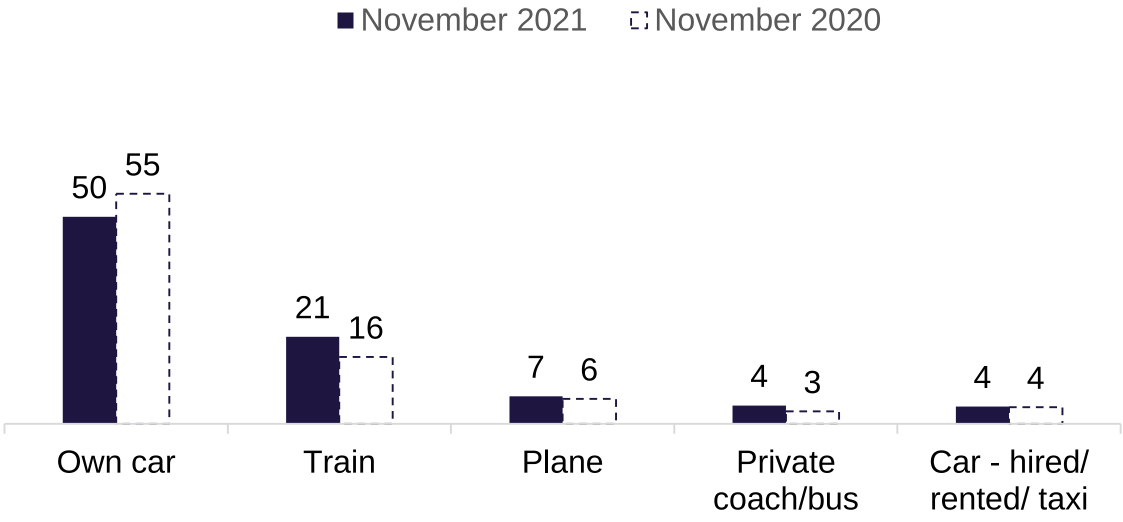
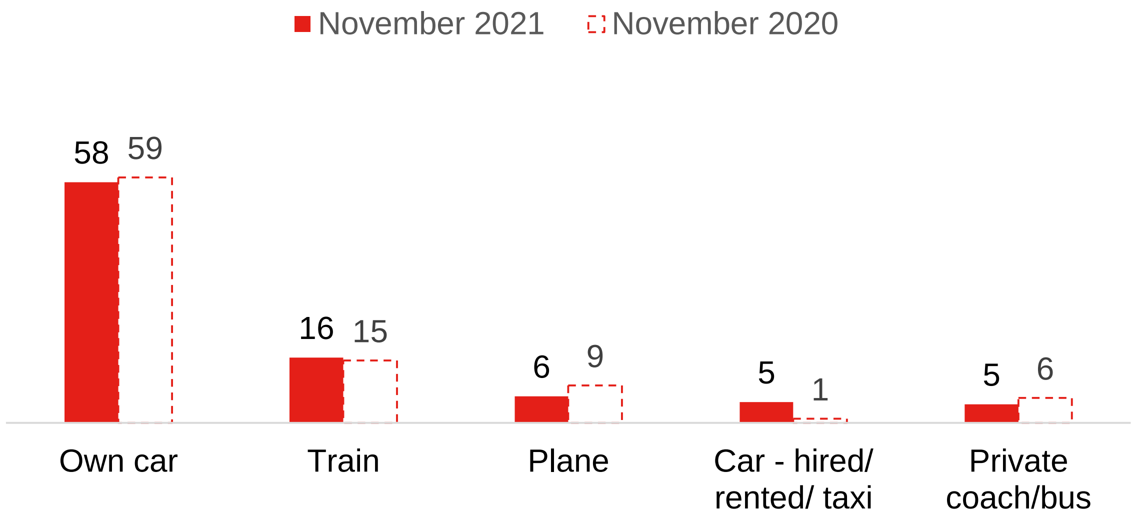


Figure 24. Top 5 main modes of travel to destination for trip in April to June 2022, Percentage, November 2021 UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All November 2021 respondents planning on taking a holiday or short break in the UK between November 2021 to March 2022 n=335; April to June 2022 n=286
November 2020 respondents: November to March 2020 n=283; April to June n=246

Accommodation type for next overnight trip in UK

'Hotel/motel/inn' is the leading accommodation category across both time periods – at 44% between November and March, and 43% between April and June. However, there is minimal separation with a range of other accommodation types.

Figure 25. Accommodation planning on staying in on next UK overnight trip in November 2021 to March 2022, Net Percentage, November 2021

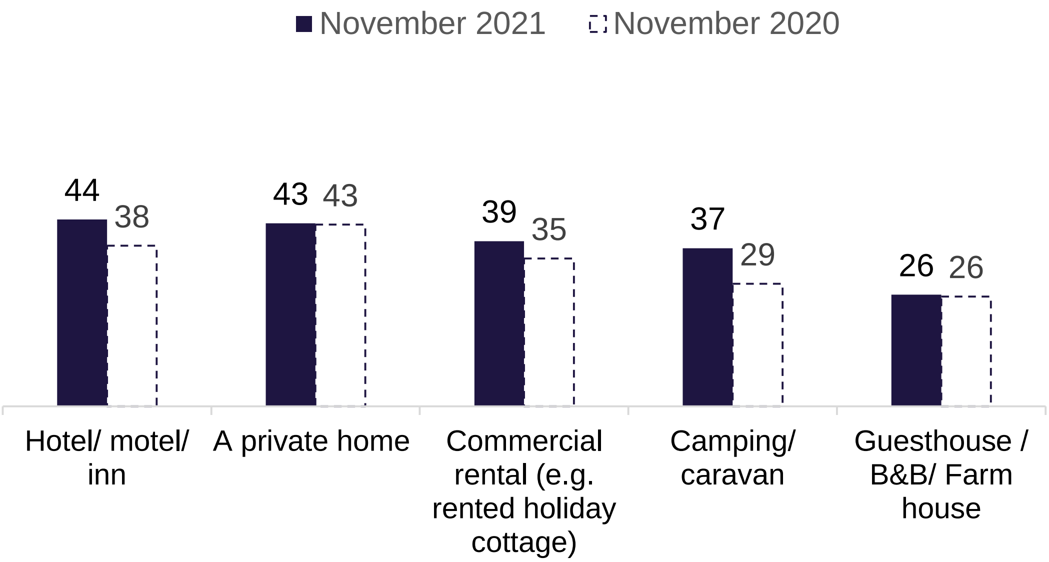
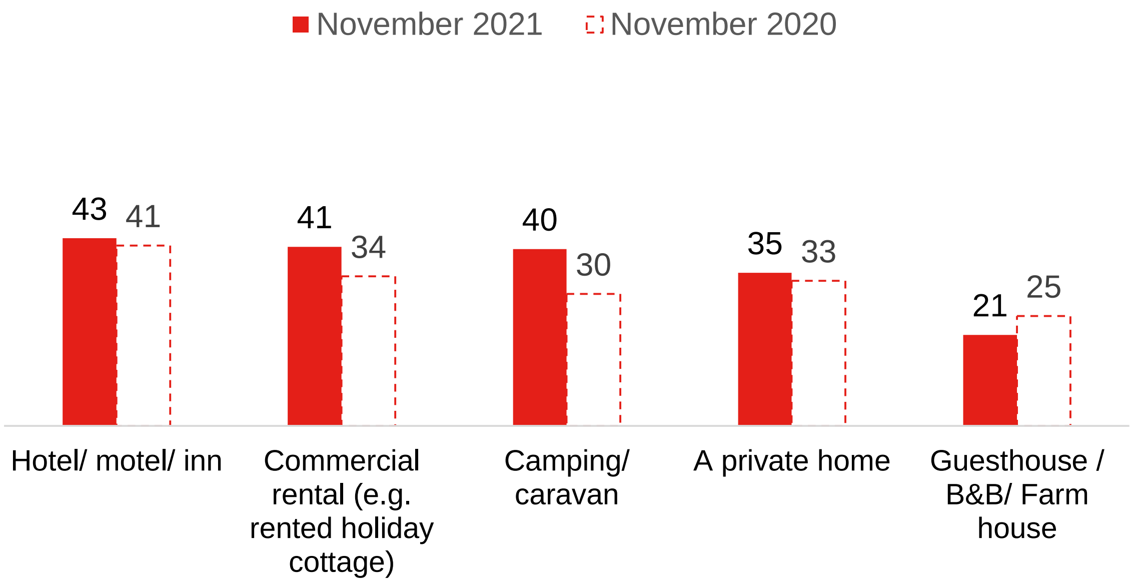


Figure 26. Accommodation planning on staying in on next UK overnight trip in April to June 2022, Net Percentage, November 2021



QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All November 2021 respondents planning on taking a holiday or short break in the UK between November 2021 to March 2022 n=335; April to June 2022 n=286
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.
November 2020 respondents: November to March 2020 n=283; April to June n=246

Visitor party make-up for next overnight trip in UK

'Partner' is the leading visitor party member for both time periods, followed by 'child, grandchild or young adult with parent', and 'friends'.

Figure 27. Visitor party make-up for trips taken from November 2021 to March 2022, Percentage, November 2021

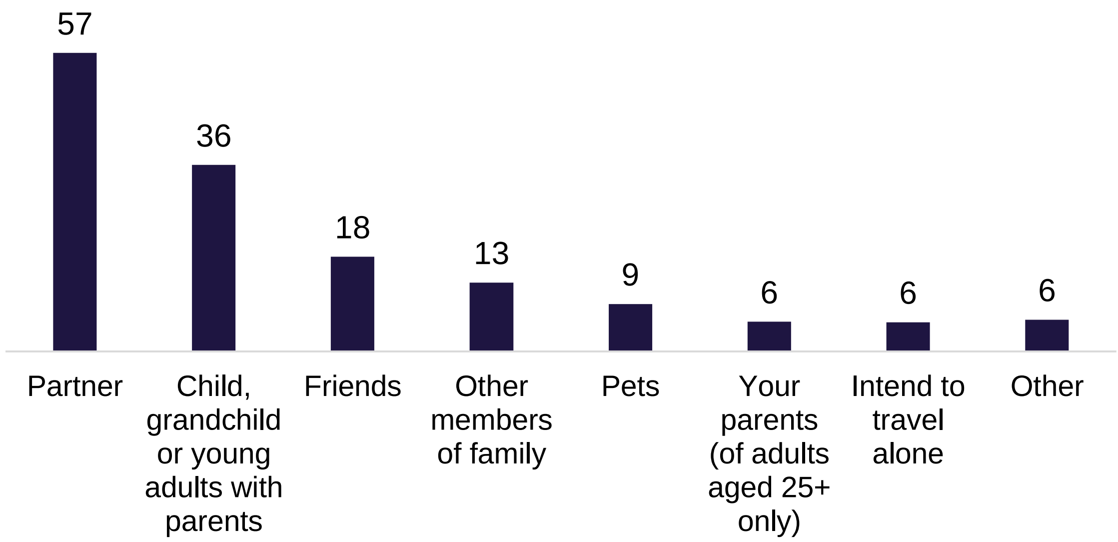
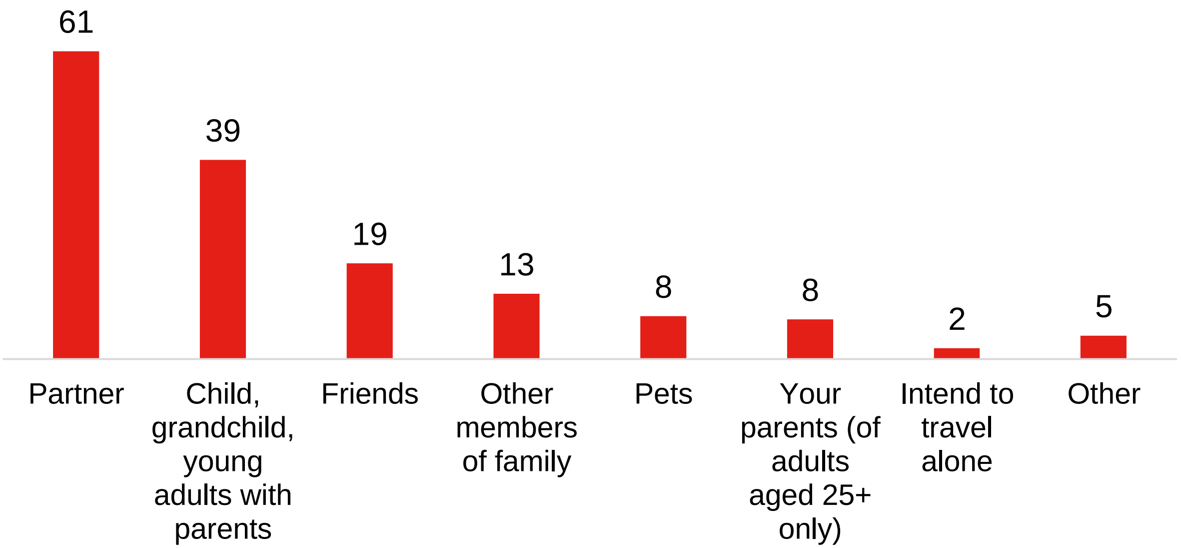


Figure 28. Visitor party make-up for trips taken from April to June 2022, Percentage, November 2021

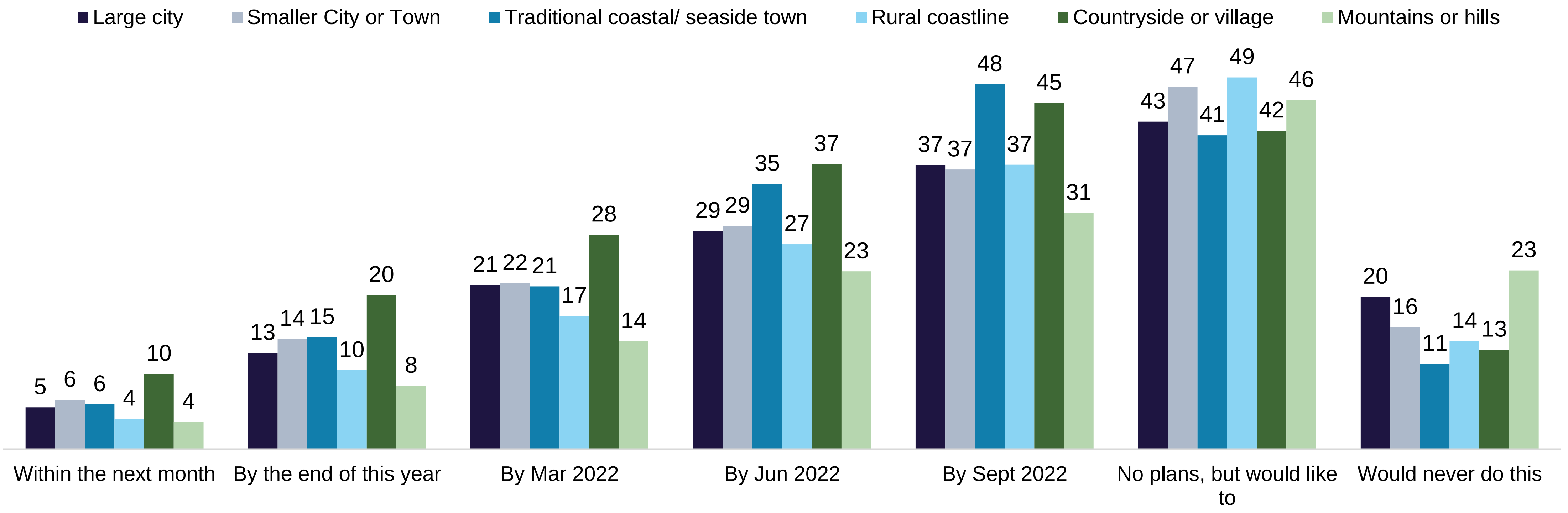


QVB4d. With whom are you likely to be spending your holiday?
Base: All November 2021 respondents planning on taking a holiday or short break in the UK between November 2021 to March 2022 n=335; April to June 2022 n=286
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate a range of party types.

Next UK day trip intention by destination type

'Countryside or village' is the destination type most likely to generate a day trip in all time periods up to June '22, with 1 in 10 UK adults planning to take a day trip there in the next month. In summer months, 'traditional coastal/ seaside town' picks up.

Figure 29. Next UK day trip intention between November 2021 and September 2022, Cumulative percentages, November 2021, UK



QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? November 2021 = 1,758

4. Overnight Business Trip Intentions

Intentions for overnight business trips in the next three months

16% of UK adults in employment plan on taking an overnight business trip in the next 3 months. ‘Team building’, ‘conference/conventions/congress’ and ‘a meeting of 6 or more people’ are the leading reasons for taking one.

Figure 30. Proportion anticipating an overnight business trip in next 3 months, Percentage, November 2021, UK adults in employment

81% of UK adults are in employment

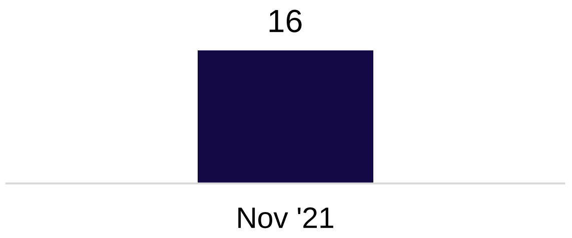
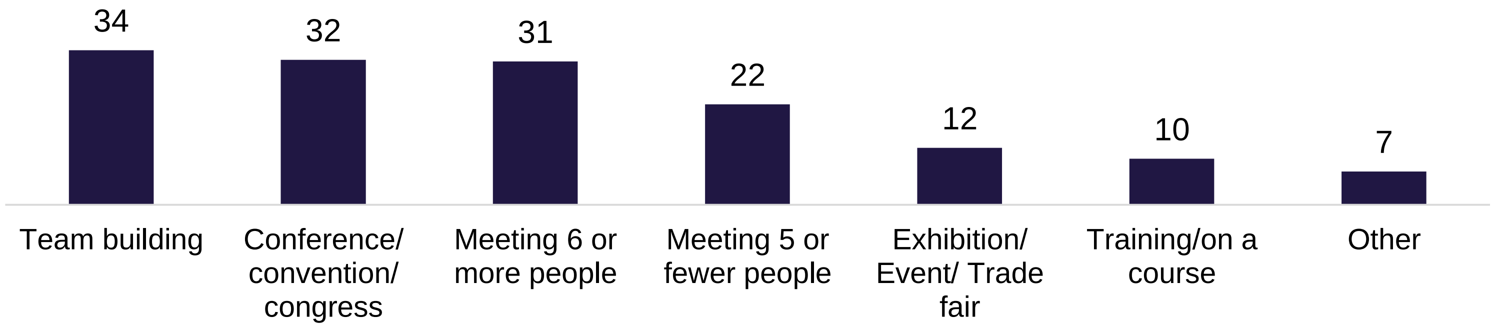


Figure 31. Reasons for taking an overnight business trip in next 3 months, Percentage, November 2021, UK adults in employment planning a trip



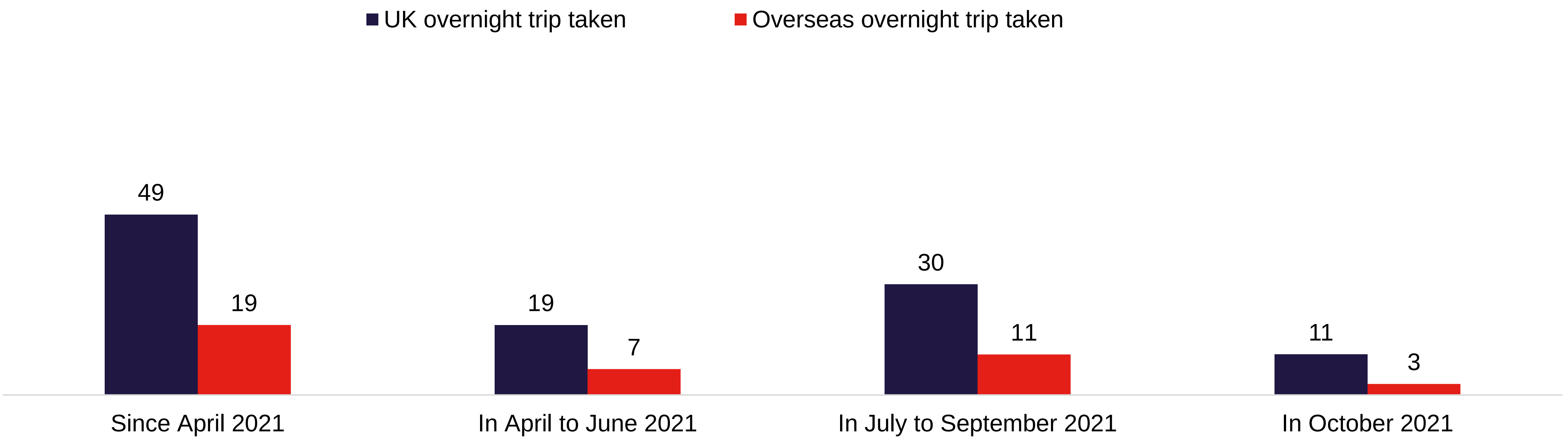
VB14a. Now looking ahead again, are you intending to take any overnight business trips in the UK in the next three months? Please only answer yes if the overnight business trips are not a feature of your job. For example, if you are a long-distance lorry driver, airline crew or delivery service, an overnight stay would be a feature of the job so you would answer ‘no’. Please also answer ‘no’ if your only overnight business trip is a regular trip to your main place of work (e.g. a weekly or monthly trip to your office).Multiple choice question. Totals may exceed 100% as some respondents anticipate more than one business reason.
VB14b: What would be the main reason for this overnight business trip? Base: November respondents currently in employment n = 1333. All taking a business trip n=234

5. Past UK vs Overseas Trips

Proportion taken a UK and overseas trip since April 2021

Nearly half (49%) of UK adults have taken an overnight UK trip since April, more than twice as many as have taken an overseas overnight trip in that period. Both types of trips are most likely to have been taken between July and September.

Figure 32. Proportion taken an overnight UK or overseas trip in below time period, Percentage, November 2021, UK



VB13a/v. Now reflecting on your recent behaviour, have you taken an overnight short break or holiday in the UK/overseas since the start of April 2021?
VB13a2/g. In which of these months have you taken an overnight short break or holiday in the UK since the start of April 2021?
Base: All respondents. November 2021 = 1,758
Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip

Where stayed and purpose of last UK overnight trip

The South West of England was the most popular destination for trips since September, 18% of trip takers having gone there. Holiday / leisure was the most dominant purpose.

Figure 33. Destination of overnight trips taken in UK since September 2021, Percentage, November 2021, UK

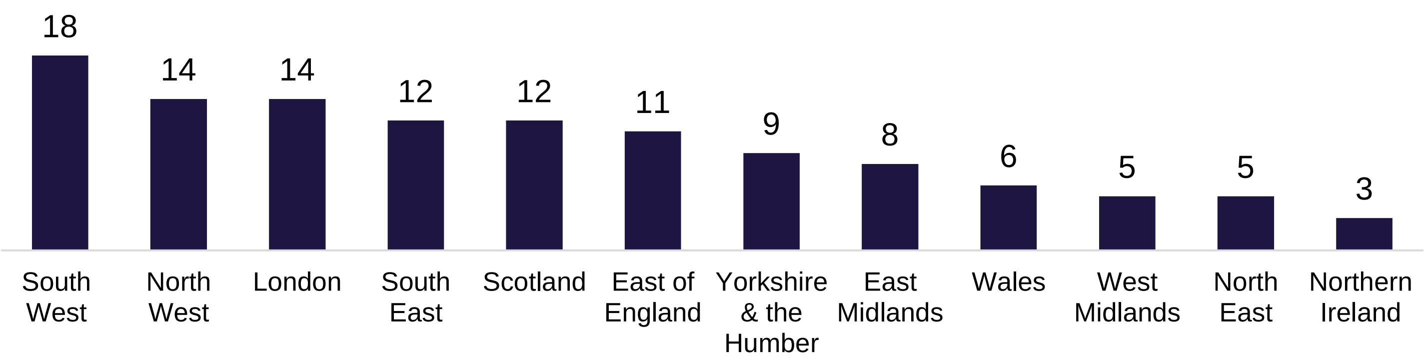
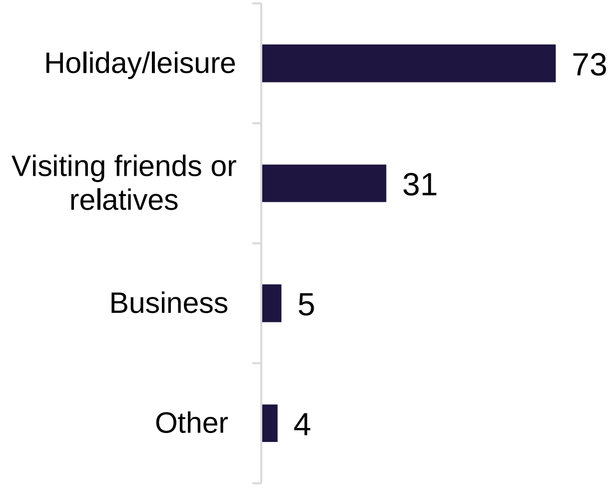


Figure 34. Purpose of overnight UK trip taken since September, Percentage, November 2021, UK



VB13c. Where in the UK did you stay on your most recent trip in <INSERT MOST RECENT MONTH>? VB13e. And which of the following best describe the purpose/s of your most recent trip in <INSERT MOST RECENT MONTH >?
Base: All November 2021 respondents that took an overnight trips between July and August n=316; Since September n=358
Note: Multiple choice questions. Totals may exceed 100% as some respondents stayed in more than one location or travelled for more than one purpose

Methodology

Methodology

- This report presents findings from the November 2021 wave of the COVID-19 consumer sentiment tracker, with comparisons to previous months where appropriate.
- The survey is conducted online, among a sample of the UK adult population.
- In the first stage, a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then 'boosted' for Wales and Scotland to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the UK overall and within each nation.
- November 2021 fieldwork was conducted between 4-10 November 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.