

COVID-19 Consumer Tracker

March 2022

Published: 15th March 2022
Fieldwork Period: 1st – 7th March 2022

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 1st – 7th March 2022.
- 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.

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

March 2022: Scorecard of Key Metrics

Key Metrics	March 2022	Change since February 2022
National mood (average score out of 10)	6.6	No change
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	57%	+5*
Appetite for risk (average score out of 4)	3.1	+0.2
Confidence in ability to take UK overnight trip in April/May/June (% NET confident)	71% / 73% / 76%	+1 / +1 / +1
Confidence in ability to take overseas overnight trip in April/May/June (% NET confident)	52% / 54% / 59%	+3 / +1 / +2
Will take more UK trips in the next 12 months than past 12 months [%]	31%	-4
Will take more overseas trips in the next 12 months than past 12 months [%]	22%	+2
Proportion intending a UK overnight trip in next 12 months [%]	61%	+2
Proportion intending an overseas overnight trip in next 12 months [%]	44%	+1
Top 3 barriers to taking a UK overnight trip from April to June	1. Personal finances 2. UK weather 3. Rising costs of holidays/leisure	UK weather now ranked 2nd (previously 3rd)
Top 3 barriers to taking an overseas overnight trip from April to June	1. Personal finances 2. Rising costs 3. Risk of quarantine	Rising costs of overseas travel now ranked 2nd (previously 3rd)

* Represents a statistically significant change on previous wave



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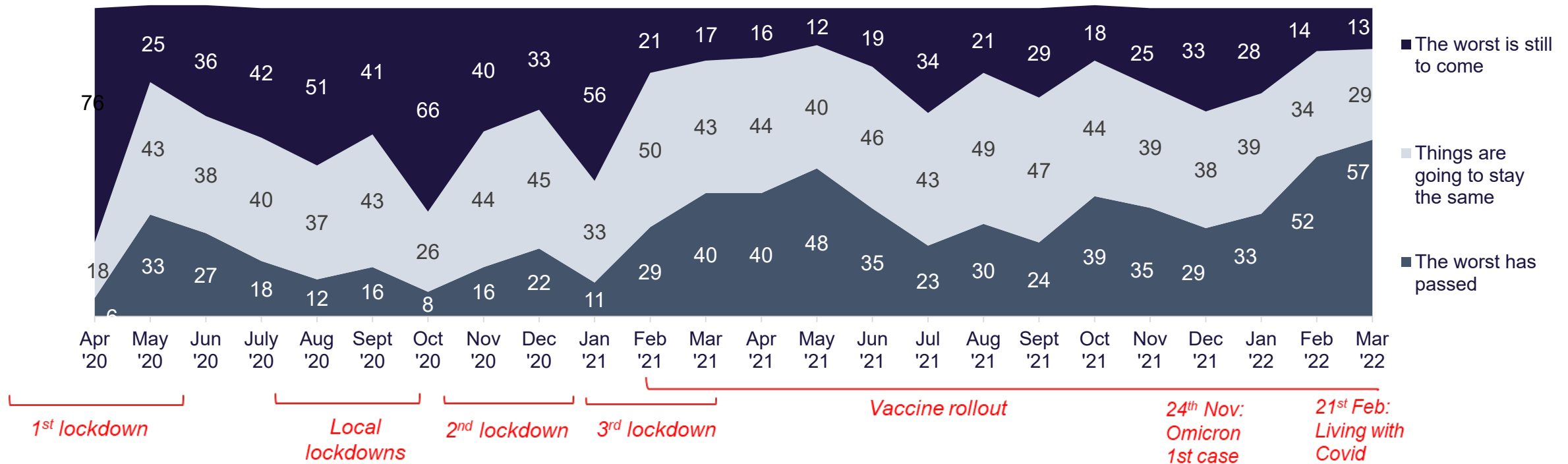
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1. Covid Impact on Attitudes to Travel

Perceptions of the situation relating to COVID-19

The perception of the current situation in relation to COVID-19 has improved since February 2022. The proportion of those who think 'the worst has passed' (57%) continues to rise.

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

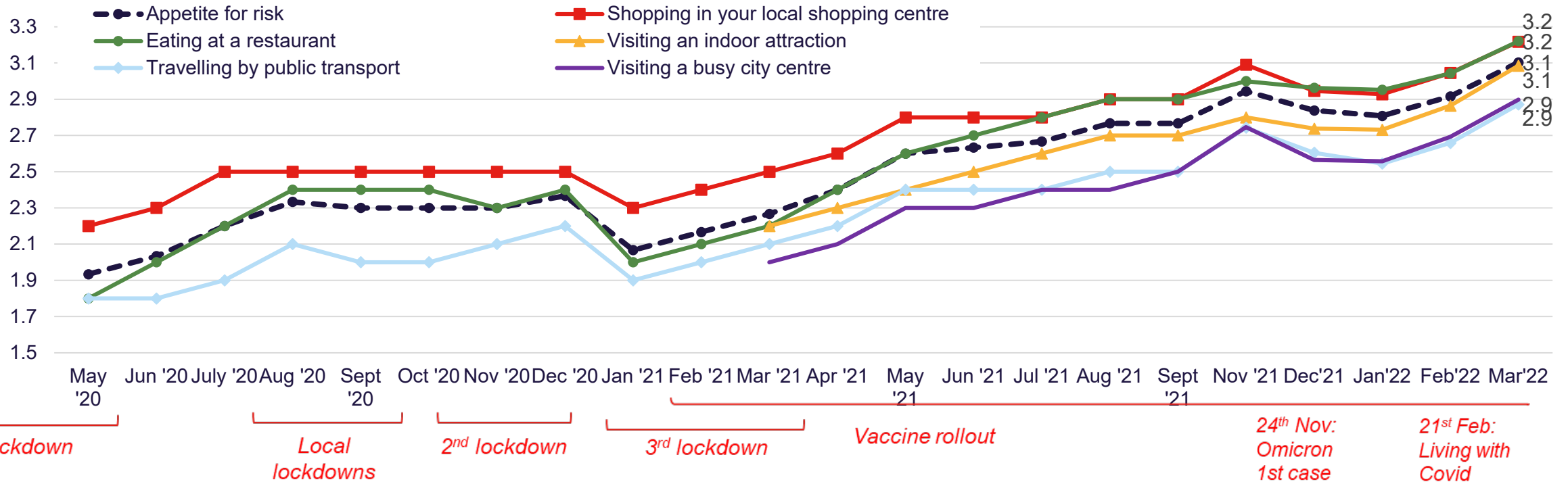


Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion?
 Base: All respondents. March 2022 = 1,756 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
 Note: Fieldwork for each month took place at the start of each month – exact dates vary). October data is taken from BVA BDRC survey.

Comfort levels with everyday activities

The 'appetite for risk' score has increased from 2.9 (out of 4) in February 2022 to 3.1 in March. Comfort levels have increased for all activities measured.

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

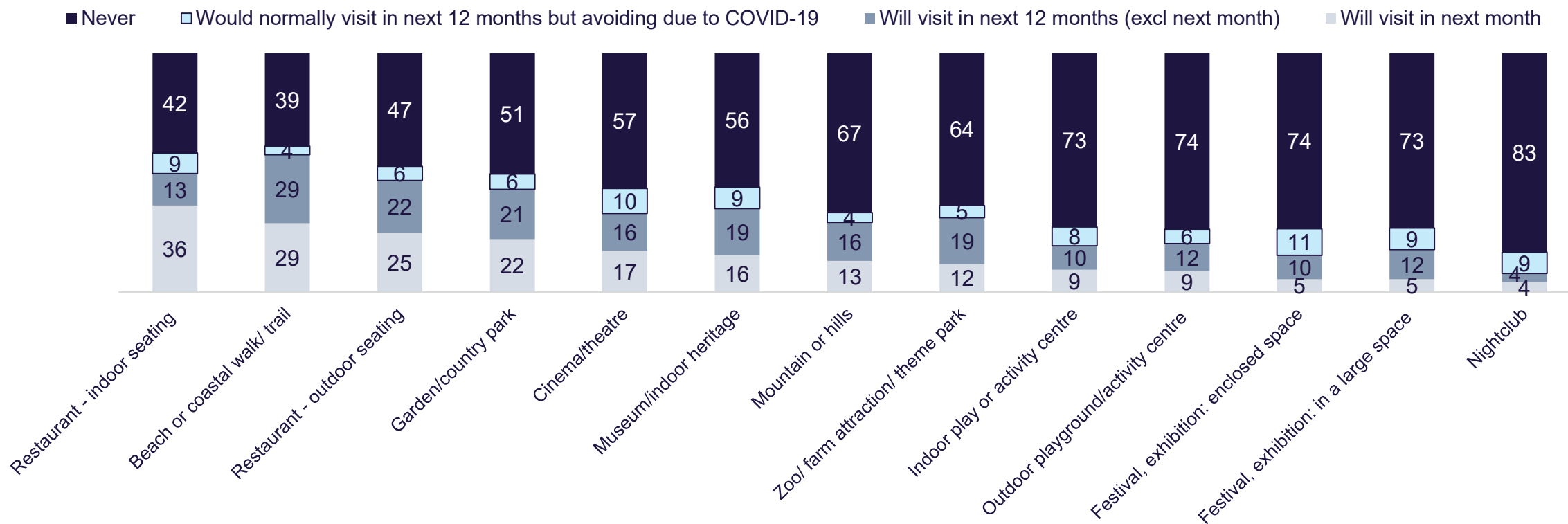


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
 Base: All respondents excluding those stating 'don't know' or who wouldn't do activity under any circumstances. Mean average based on those that gave a score of 1-4. March 2022 = 1,756 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

Intention to visit leisure places in the UK

Out of the included places/venues, 'restaurant with indoor seating' is the venue most likely to be visited in the next month (36% intending to do so). 'Cinema/theatre' and 'festival/exhibitions in an enclosed space' are the venues most likely to be avoided in the next 12 months due to COVID-related reasons (10% and 11% stating this).

Figure 3. Intention to visit leisure venues, Percentage, March 2022, UK



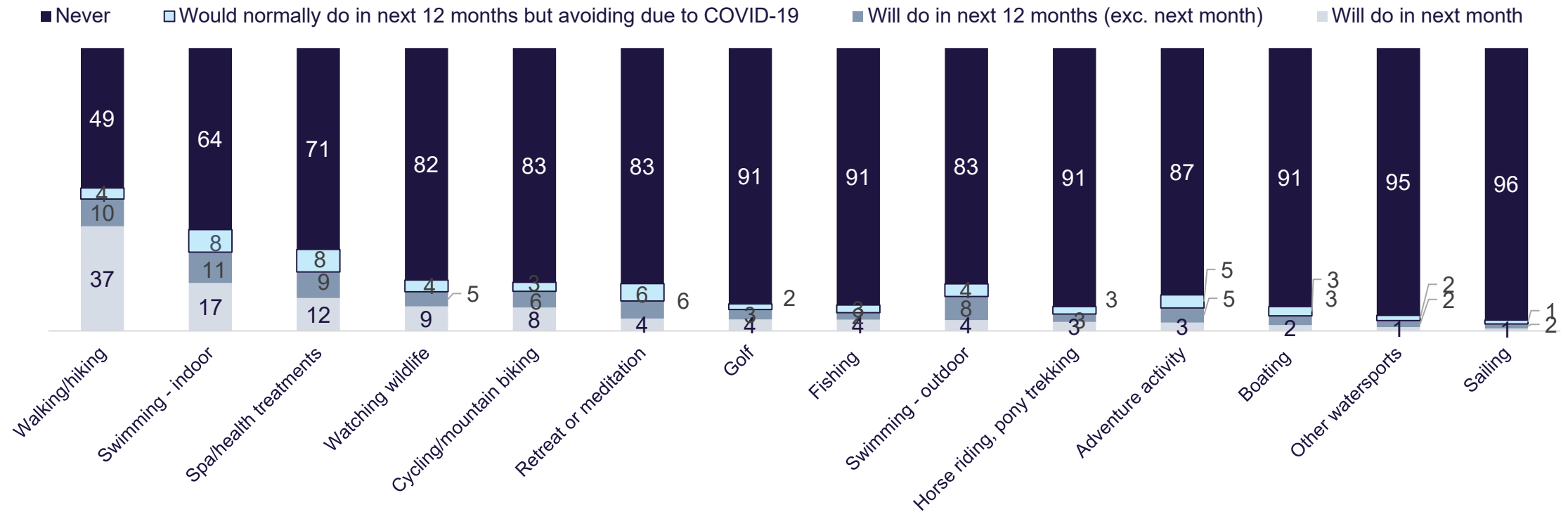
VB9a. Which, if any, of these types of places in the UK are you likely to visit in the next 12 months? VB9b. Which, if any, are you likely to visit in the UK in the next month? VB9c. Which, if any, would you normally visit in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government restrictions, the risk of catching COVID-19 etc.)?

Base: All respondents. March 2022 = 1,756

Intention to conduct leisure activities in the UK

Out of the activities included, 'walking/hiking' is the activity respondents are most likely to do in the next month (at 37%). 'Indoor swimming' and 'spa/health treatments' are the activity most likely to be avoided due to COVID-19 (8% stating this for each).

Figure 4. Intention to conduct leisure activities, Percentage, March 2022, UK



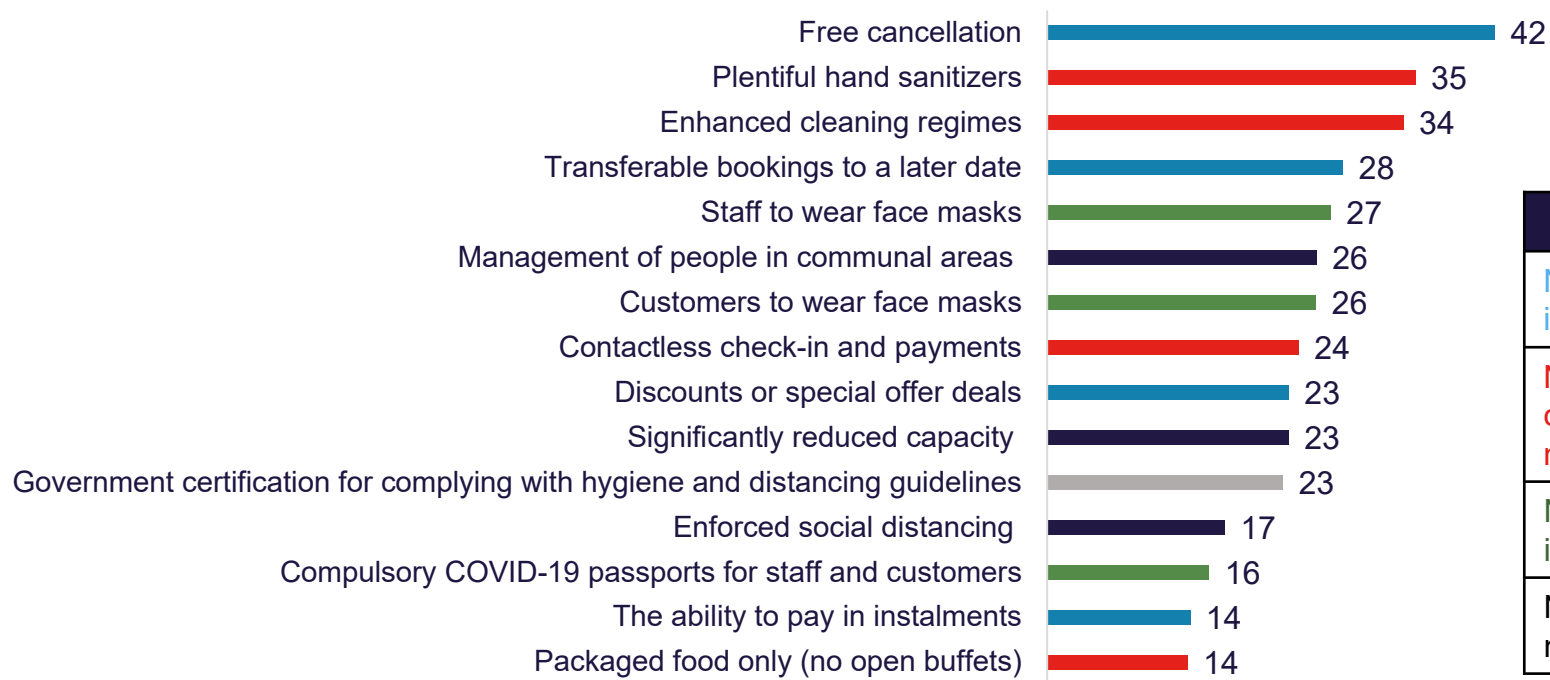
VB10a. Which, if any, of these types of activities are you likely to do in the UK in the next 12 months? VB10b. Which, if any, are you likely to do in the UK in the next month? Which, if any, would you normally do in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government restrictions, the risk of catching COVID-19 etc.)?

Base: All respondents. March 2022 = 1,756

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 (42% stating this). This is followed by ‘plentiful hand sanitizers’ (35%) and ‘enhanced cleaning regimes’ (34%). Overall, the net figures have declined compared to previous months.

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, March 2022, UK, Full list



	Nov	Dec	Jan	Feb	Mar
Net: Financial booking incentives	64%	63%	62%	63%	58%
Net: Reduced contamination measures	61%	59%	60%	60%	53%
Net: Guest/staff interventions	54%	59%	58%	53%	41%
Net: Social distancing measures	57%	60%	57%	52%	45%



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2. Trip Intentions: UK and overseas

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

The trend of increasing number of anticipated trips over the next 12 months compared to the past 12 months continues, with 31% expecting more UK trips and 22% expecting more overseas trips.

Figure 7. Number of UK overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, March 2022, UK

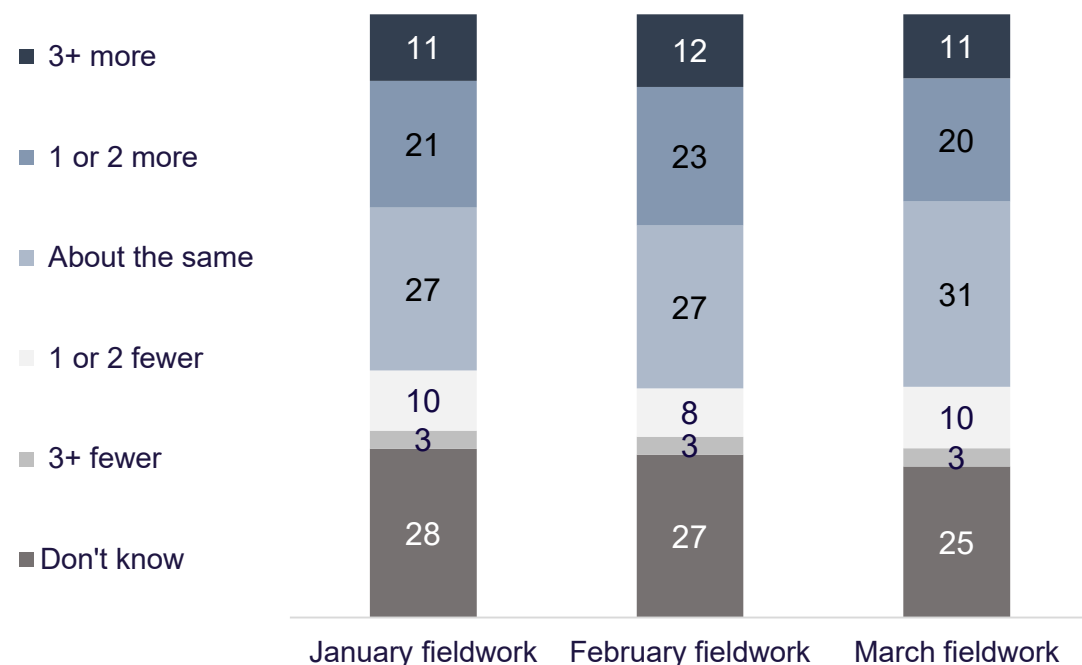
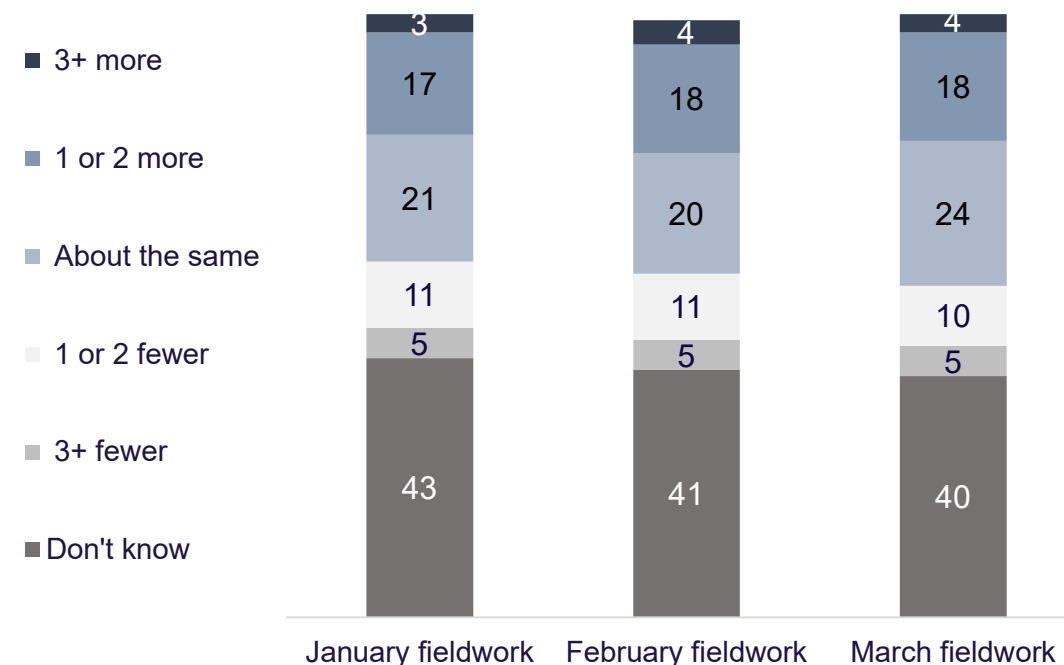


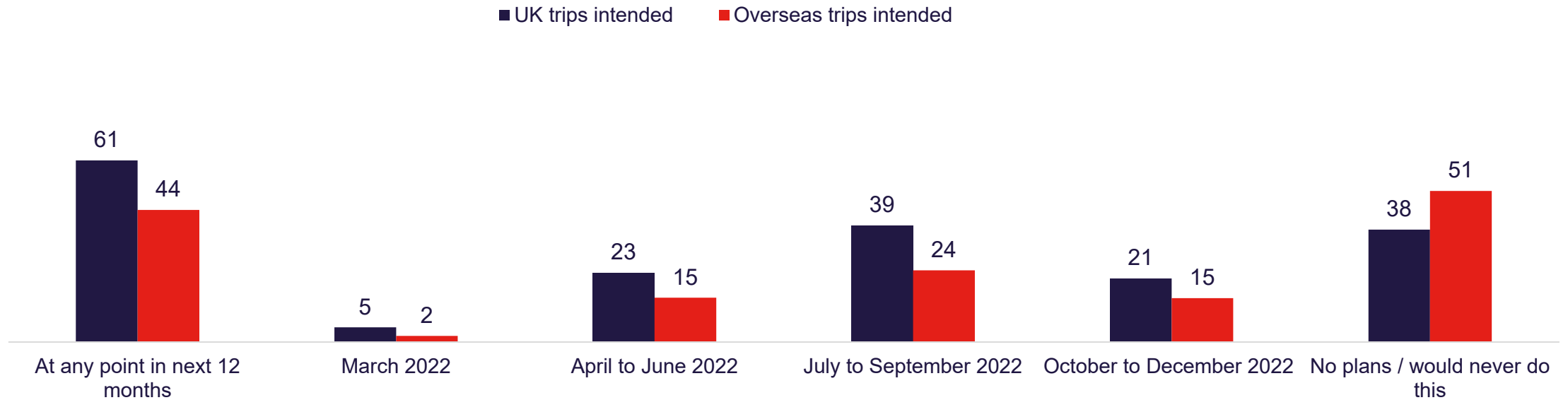
Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, March 2022, UK



Overnight trips intentions

3 in 5 (61%) of UK adults plan on taking an overnight domestic trip in the next 12 months, significantly more than the 44% planning to take an overnight overseas trip in this period.

Figure 8a. Proportion anticipating going on any overnight UK and overseas trips, Percentage, March 2022, 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. March 2022 = 1,756 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Overnight trip intention trend – Apr-Jun'22 and Jul-Sep'22

The proportions of UK adults anticipating UK / overseas overnight trips are fairly stable for both Spring and Summer, with anticipations being better for domestic trips.

Figure 8b. Proportion anticipating going on any overnight UK and overseas trips, April-June 2022, Percentage, Wave-on-wave, March 2022, UK

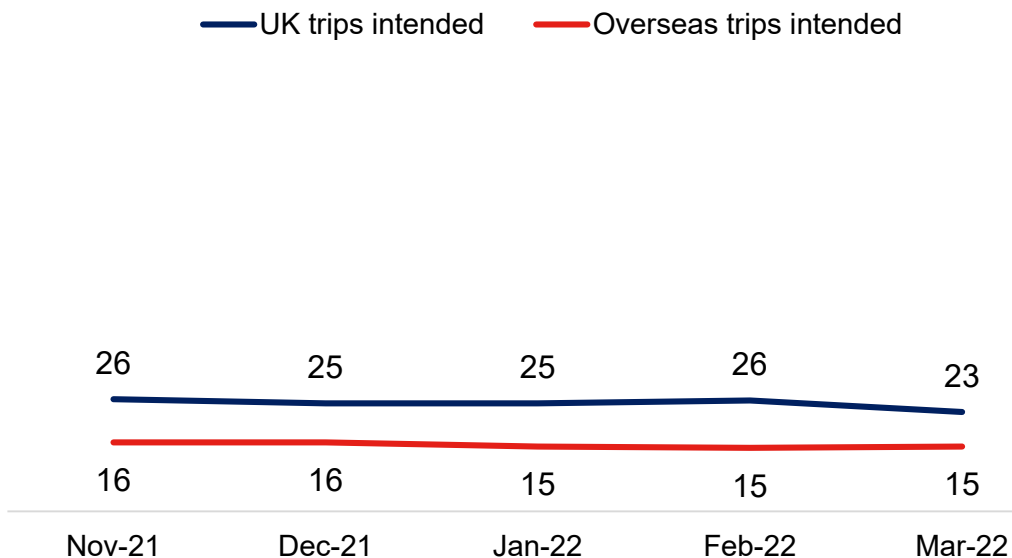
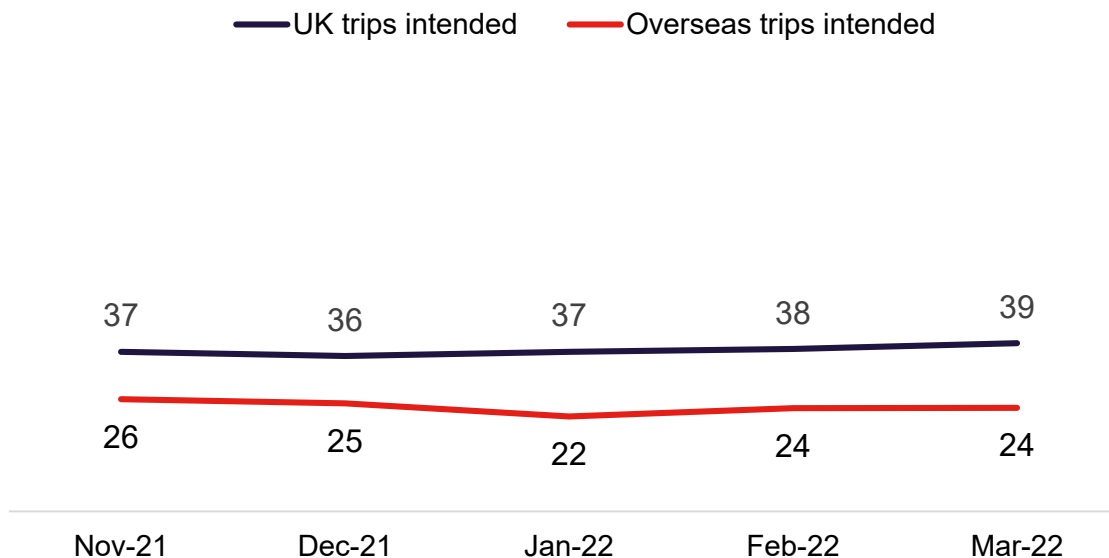


Figure 8c. Proportion anticipating going on any overnight UK and overseas trips, July-September 2022, Percentage, Wave-on-wave, March 2022, UK

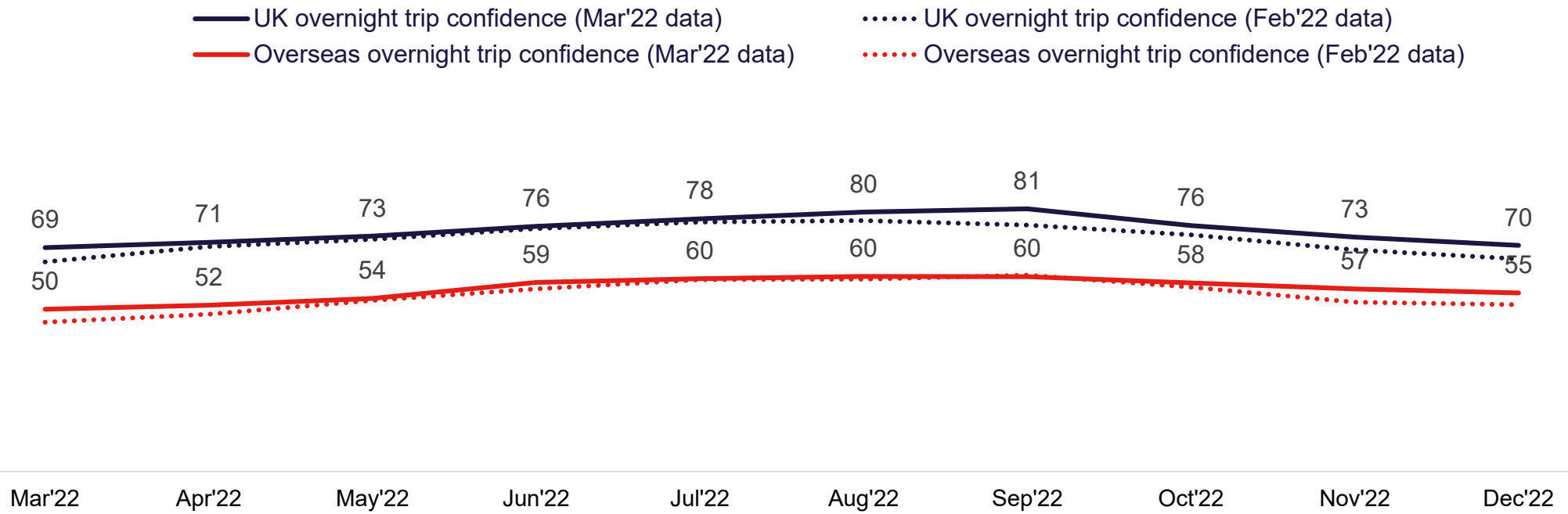


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are 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 March respondents. Apr-Jun 2022 UK overnight trips = 408 Overseas trips = 221; July-Sept 2022 UK overnight trips = 646 Overseas trips = 386 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Confidence in the ability to take an overnight trip

In March, confidence levels are broadly in line with those recorded in February. Confidence for overseas trips is lower than for UK trips, although the highest confidence for both domestic and overseas is during July to September 2022.

Figure 9. Confidence in taking a UK and Overseas overnight trip across different time periods, NET Confident (Very confident + fairly confident) Percentage, February and March 2022, 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? VB7d. 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. February 2022 = 1,756, March 2022 = 1,756

Perceived barriers to taking overnight UK and Overseas trips between Apr'22 and Jun'22

'Personal finances' are perceived to be the biggest barrier to taking overnight UK trips in April to June (31% stating this), followed by 'UK weather' (29%). For overseas trips, 'personal finances' is also the main barrier to taking a trip (25% stating this), followed by 'rising costs of overseas travel' (19%).

Figure 11. Barriers for taking an overnight UK trip April to June 2022, Percentage, March 2022, UK

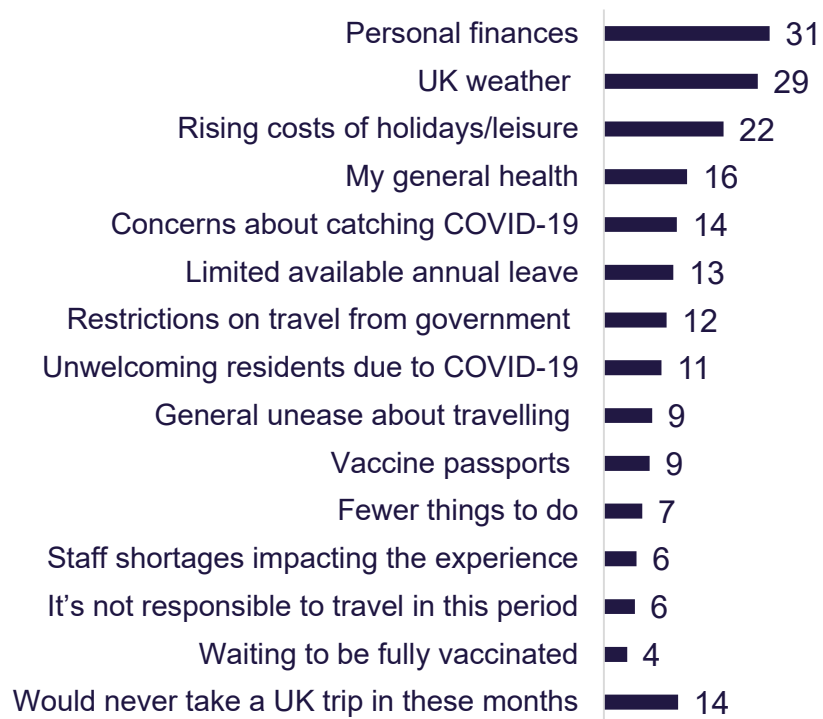
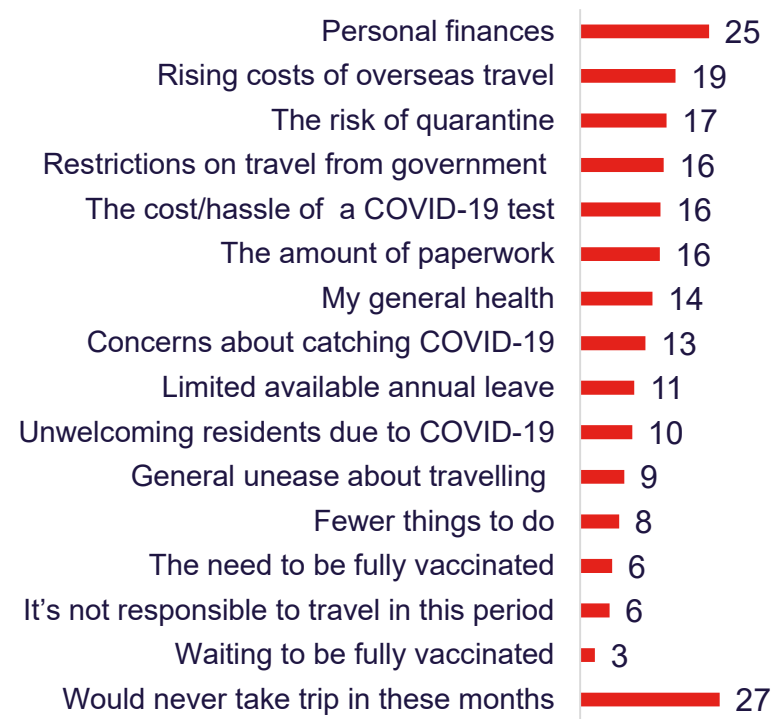


Figure 12. Barriers for taking an overnight OVERSEAS trip April to June 2022, Percentage, March 2022, UK



VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in April to June 2022? VB7e. Which, if any, of the following factors do you see as potential barriers to you taking an OVERSEAS short break or holiday in April to June 2022? Base: All asked each question. April to June n=876

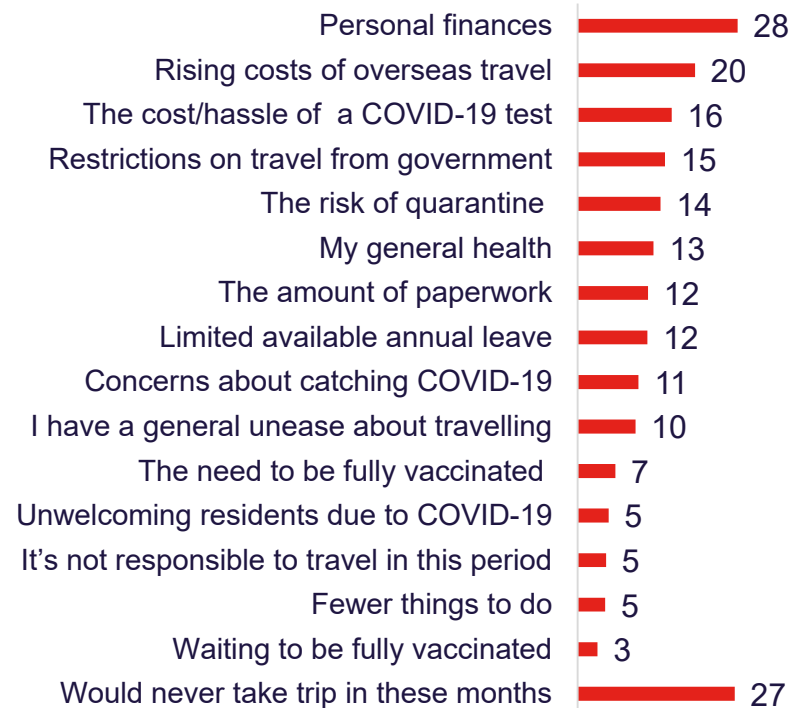
Perceived barriers to taking overnight UK and Overseas trips between Jul'22 and Sep'22

Similarly to April to June period, the main perceived barrier to taking an overnight trip in the UK and overseas in July to September period is 'personal finances' (31% for UK and 28% for overseas). 'Rising costs of holidays/ overseas travel' is the second biggest barrier during this period (24% for UK and 20% for overseas).

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



Figure 14. Barriers for taking an overnight OVERSEAS trip in July 2022 to September 2022, Percentage, March 2022, 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 July to September 2022?

VB7e. Which, if any, of the following factors do you see as potential barriers to you taking an OVERSEAS short break or holiday in July to

September? Base: All asked each question Base: All asked each question. July to September n=879

COVID-19 influence on choice of destination - among next 12 months trip intenders

As a result of Covid-19, 18% of UK adults say they will 'travel less because it is now more expensive' when choosing a destination for their UK overnight trip in the next 12 months. Close behind this, UK adults expect to 'take UK holidays at less busy times' (17%) and are 'more worried about trips not going ahead' (16%).

Figure 15a. COVID-19 influence on choice of destination/s for UK holidays and short breaks, Percentage, March 2022, UK, Full list



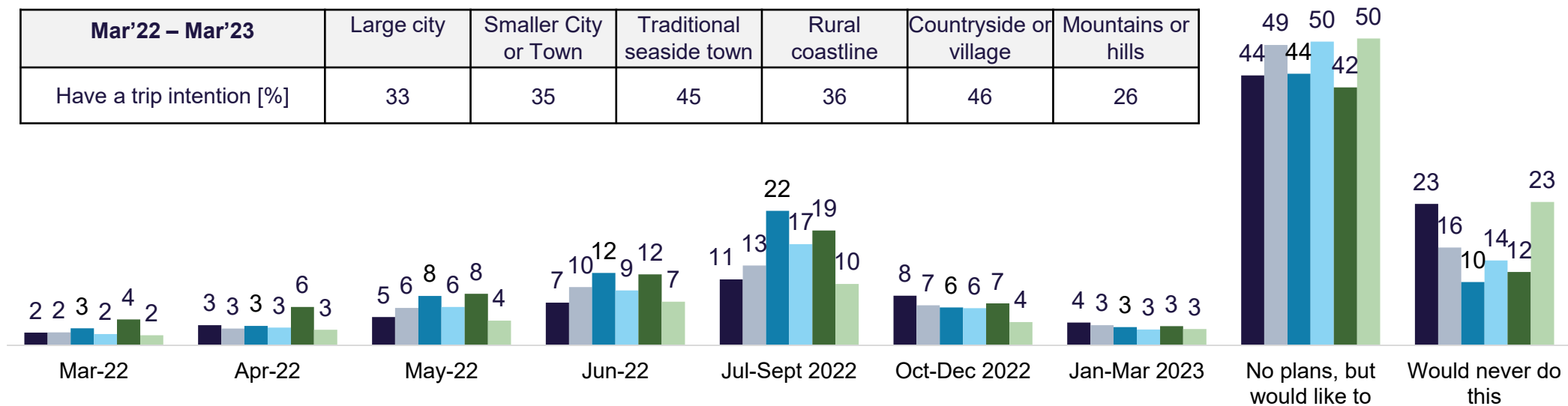
All potential UK overnight trips intentions by destination

Overnight domestic trip intention peaks in July to September 2022, most notably for a 'traditional coastal / seaside town', 22% planning on taking an overnight trip to this destination type in Summer.

Figure 15b. Overnight trips intentions in next year by destination type, Percentage, March 2022, UK

■ Large city
 ■ Smaller City or Town
 ■ Traditional coastal/ seaside town
 ■ Rural coastline
 ■ Countryside or village
 ■ Mountains or hills

Mar'22 – Mar'23	Large city	Smaller City or Town	Traditional seaside town	Rural coastline	Countryside or village	Mountains or hills
Have a trip intention [%]	33	35	45	36	46	26





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3. Next Domestic Trip - Overnight and Day Trips

Planning and booking time for next UK / overseas overnight trips

The majority of April UK and overseas trips have already been planned, with more than half having already been booked. Overseas trips are more likely than domestic, to be planned or booked already.

Figure 16. When anticipate **PLANNING** the next **April-June 2022** UK and overseas overnight trip, Percentage of those not yet booked these trips, March 2022, UK

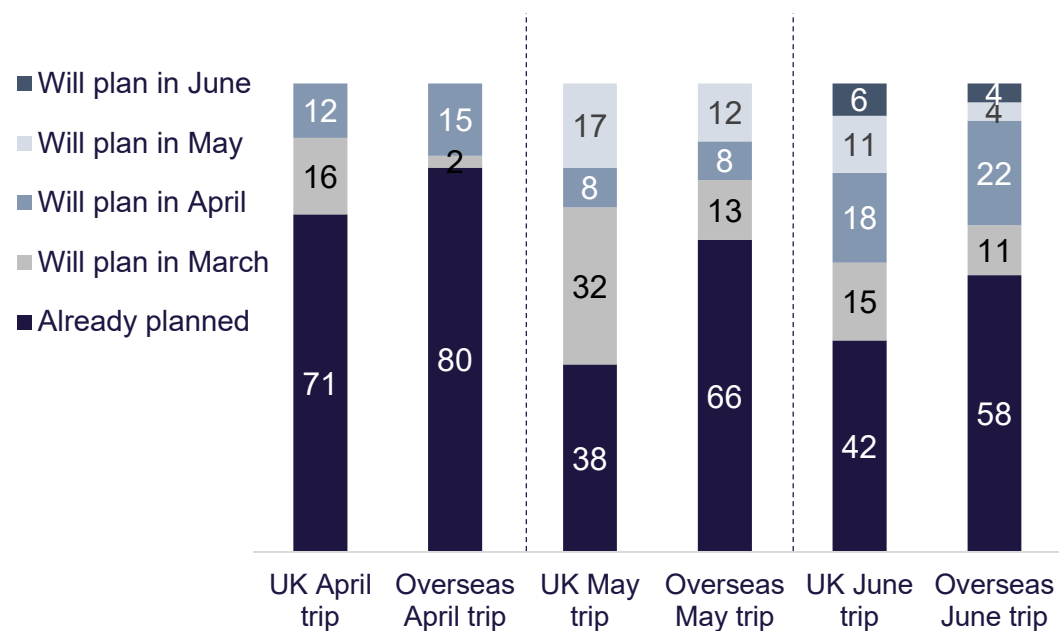
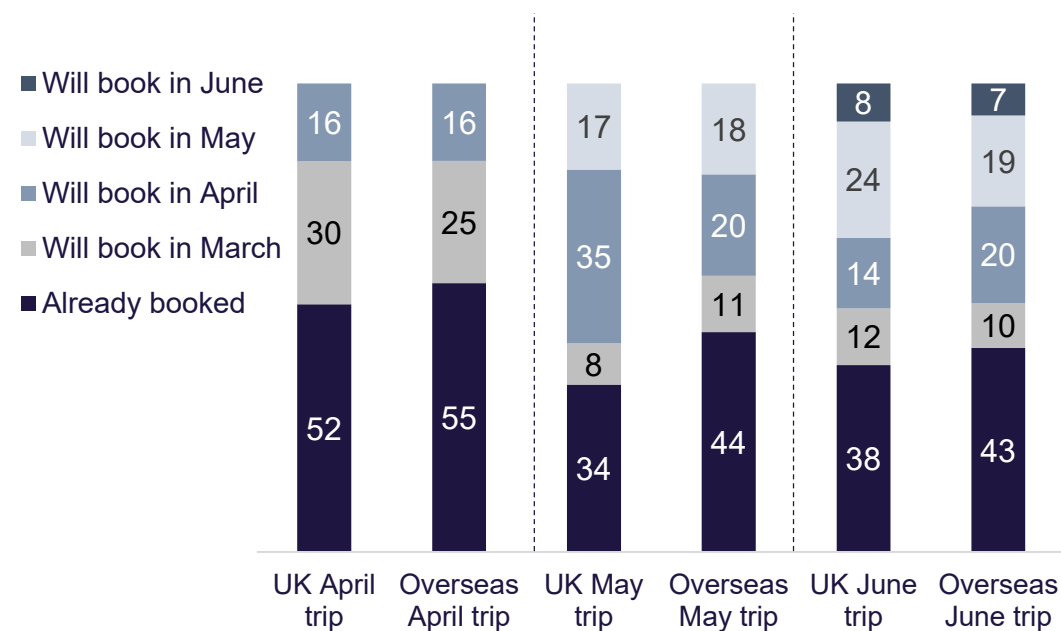


Figure 17. When anticipate **BOOKING** the next **April-June 2022** UK and overseas overnight trip, Percentage of those not yet booked these trips, March 2022, UK



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

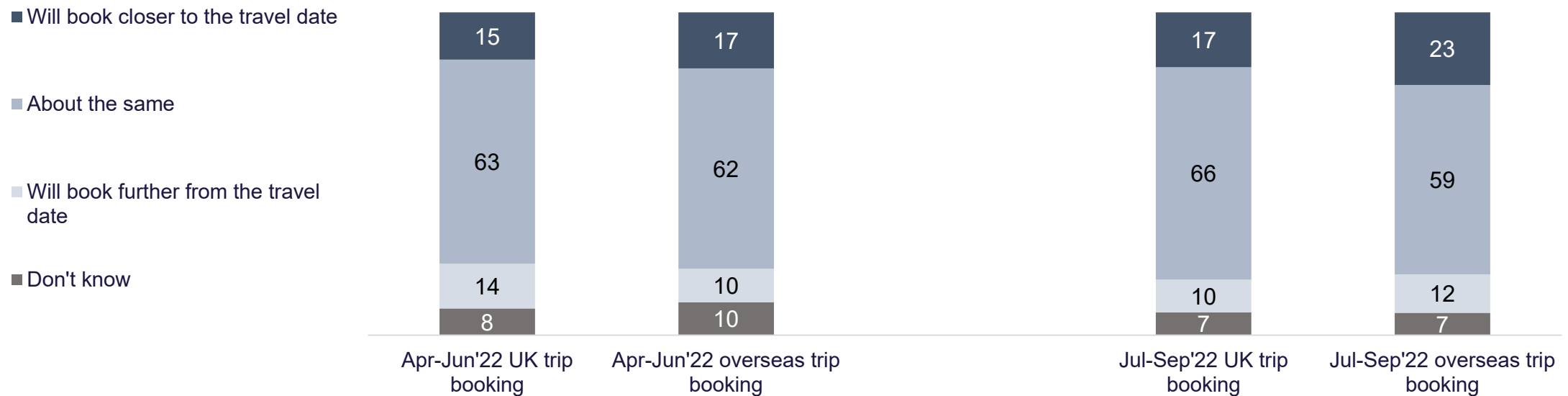
Base: April UK trips n=123, April Overseas trips n=51; May UK trips n=119, May overseas trips n=67; June UK trips n=129, June overseas trips n=92.

*Low base size

Booking lead times for the next overnight trips, vs pre-pandemic

Around two thirds of the next overnight trips in the periods April to June 2022 and July to September 2022 for both overseas and the UK are booked with similar lead times as pre-pandemics.

Figure 18. Anticipated booking lead times for Apr-Jun'22 and Jul-Sep'22 trips compared to before the pandemic, Percentage, March 2022, UK

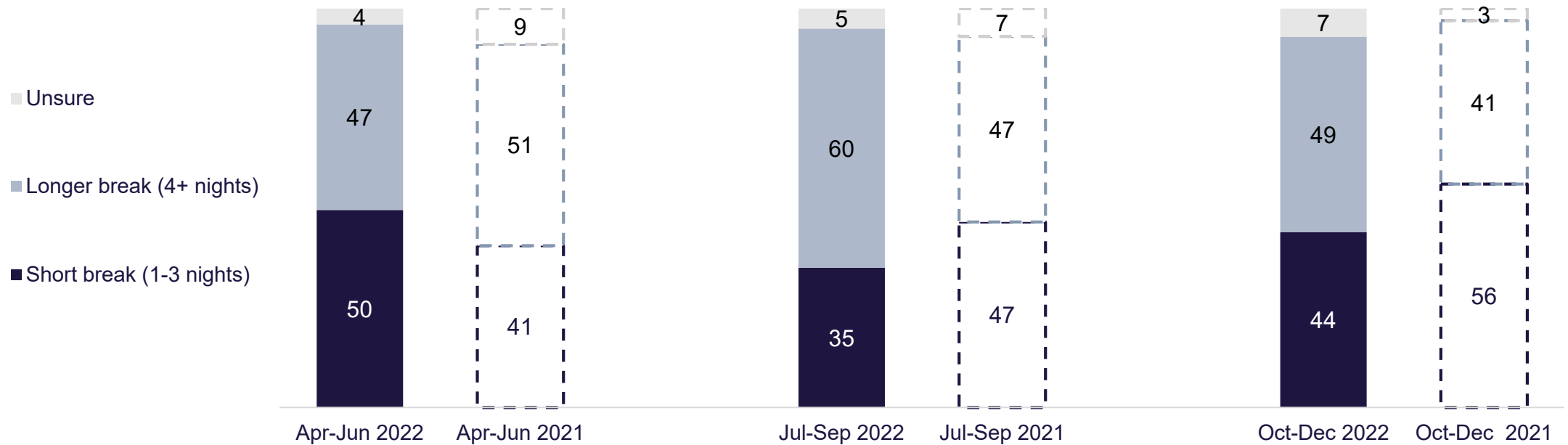


VB2f/h. Roughly how much time is there likely to be between you booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2(III)> and the first day of your trip? V2e/g. Compared to before the pandemic, when are you likely to book your UK/overseas trips? *Lead times are based on trips that have not yet been booked
 Base : Apr-Jun 2022 UK trip intenders n=371; Apr-Jun 2022 overseas trip intenders n=210, Jul-Sep 2022 UK trip intenders n=404; Jul-Sep 2022 overseas trip intenders n=87

Duration of the next overnight trip in UK

UK overnight trips planned for April to June 2022 show similar proportions of short breaks and longer breaks, while in July to September 2022, the trips are more likely to be longer breaks.

Figure 19. Length of next UK holiday or short break by time period, Percentage, March 2022, UK



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

Base: All March 2022 respondents intending to take next holiday or short break in each time period: April to June 2022 n=371; July to September 2022 n=404.

October to December 2022 n = 123; April to June 2021 n=233; July to September 2021 n=492; October to December 2021 n = 130

Where planning on staying on the next overnight trip in the UK

The South West is the most preferred UK overnight destination for trips in April to June 2022 (18% of intenders planning a trip there), and this remains the top destination in July to September 2022 (22% intending to take a trip there).

Figure 20. Where planning on staying on next UK overnight trip in April to June 2022, Percentage, February 2022 and March 2022, UK

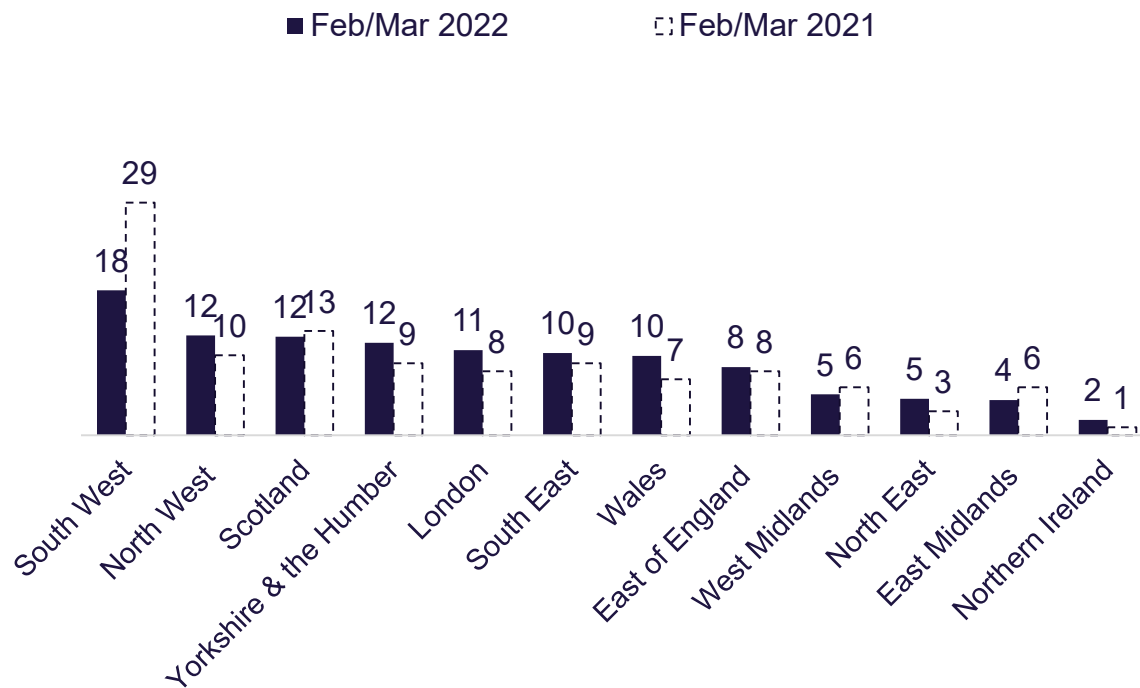
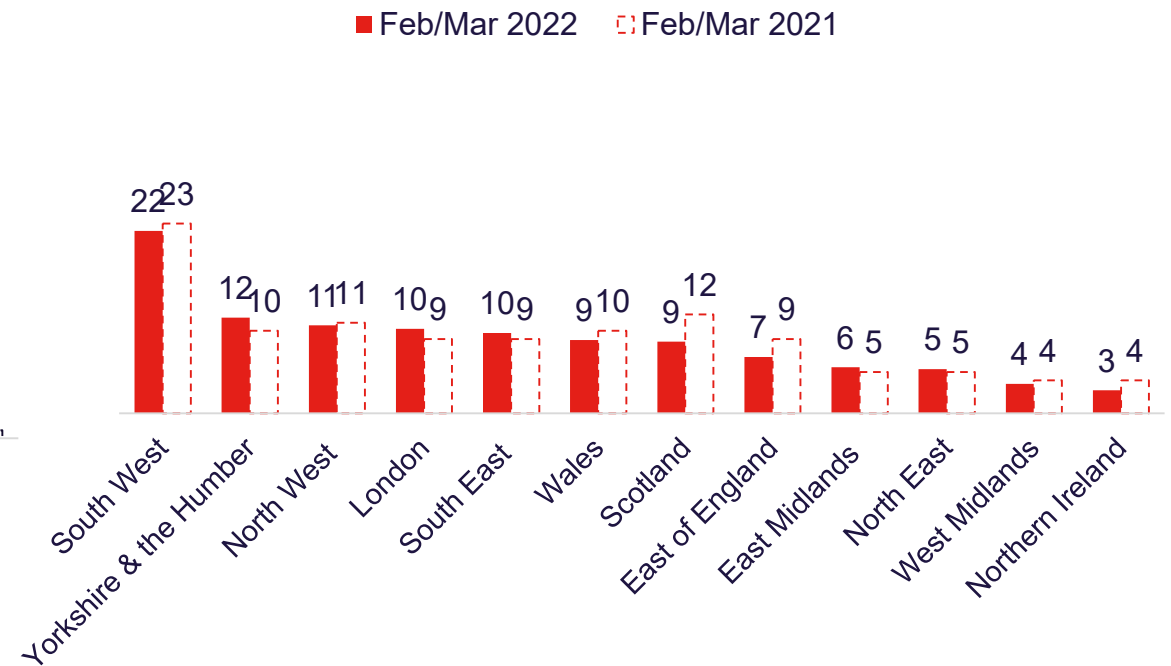


Figure 21. Where planning on staying on next UK overnight trip in July to September 2022, Percentage, February 2022 and March 2022, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <insert month>?

Base: All February and March 2022 respondents planning on taking a holiday or short break in the UK between April to June 2022 n=743; July to September 2022 n = 804; February and March 2021 respondents: April to June 2021 n=442, July to September 2021 n=837

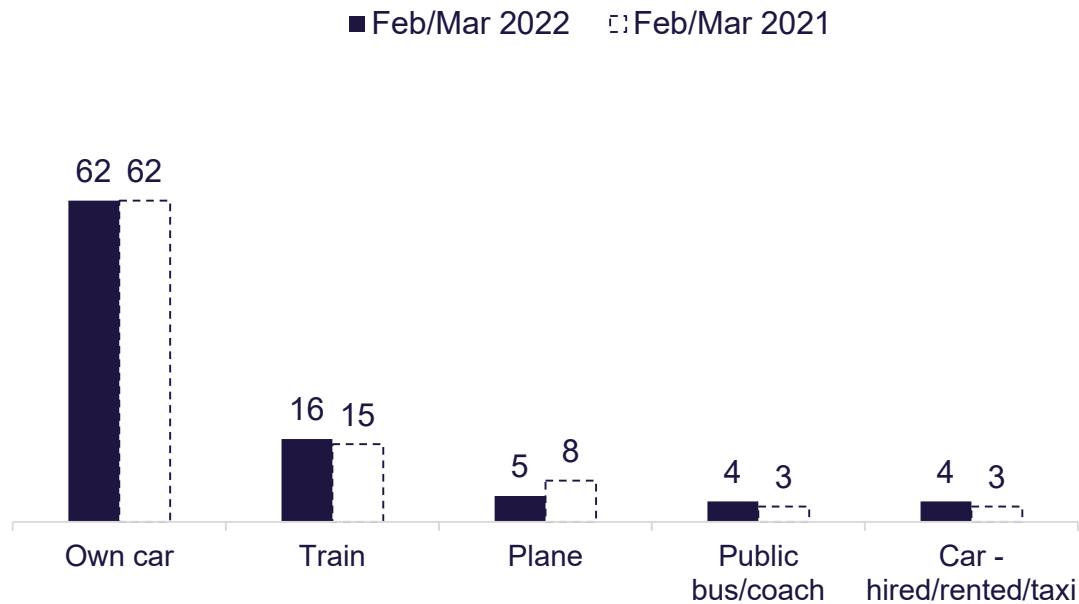
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

Main mode of transport for the next overnight trip in the UK

Across both time periods, 'own car' is by far the leading main mode of transport for travelling to an overnight destination, followed by 'train' and 'plane'.

Figure 22. Top 5 main modes of travel to destination for trip in April to June 2022, Percentage, February 2022 and March 2022, UK

Figure 23. Top 5 main modes of travel to destination for trip in July to September 2022, Percentage, February 2022 and March 2022, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?

Base: All February and March 2022 respondents planning on taking a holiday or short break in the UK between April to June 2022 n=743; July to September 2022 n = 804;

February and March 2021 respondents: April to June 2021 n=442, July to September 2021 n=837

Accommodation type for the next overnight trip in the UK

For the next overnight trip in April to June 2022, as well as for trips in July to September 2022, there are four leading types of accommodation with similar proportions: 'a hotel/motel/inn', 'a private home', 'commercial rental' and 'camping/caravan'. 'Guest house / B&B / farm house' follow as less popular.

Figure 24. Accommodation planning on staying in on next UK overnight trip in April to June 2022, Net Percentage, February 2022 and March 2022, UK

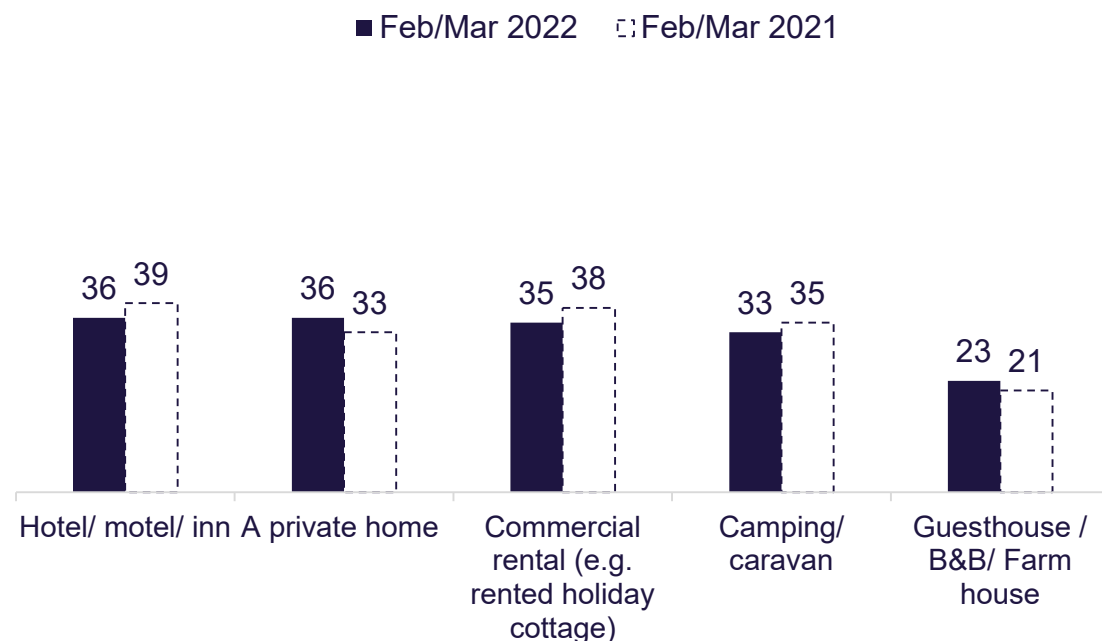
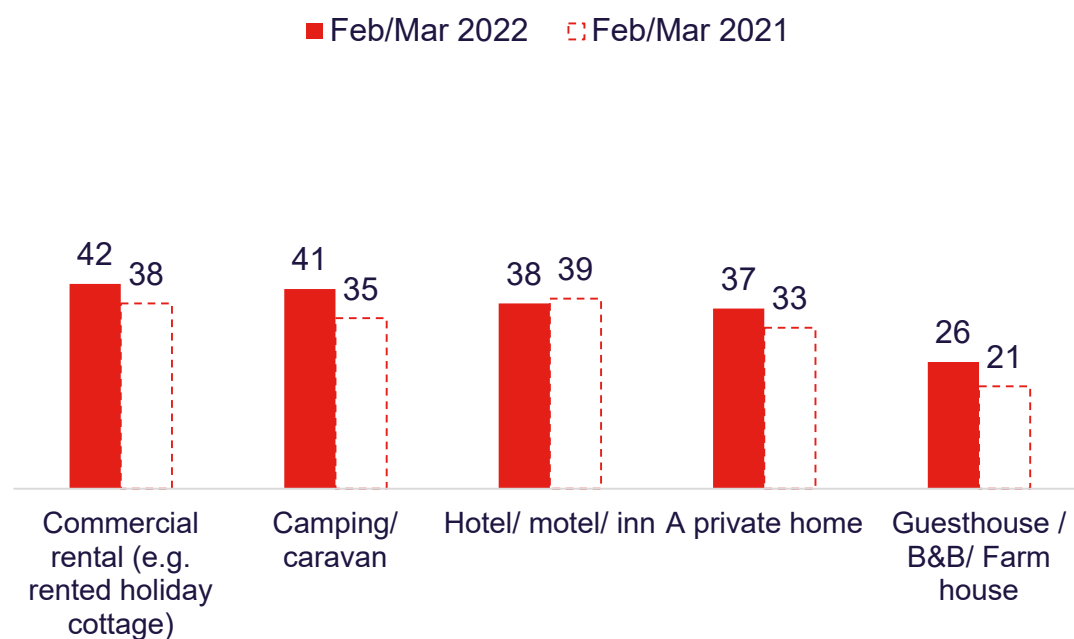


Figure 25. Accommodation planning on staying in on next UK overnight trip in July to September 2022, Net Percentage, February 2022 and March 2022, UK



Base: VB6a. What type/s of accommodation do you expect to be staying in during your next UK holiday or short break in? All February and March 2022 respondents planning on taking a holiday or short break in the UK between April to June 2022 n=743; July to September 2022 n = 804; February and March 2021 respondents: April to June 2021 n=442, July to September 2021 n=837 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation

Visitor party make-up for the next overnight trip in the UK

‘Partner’ is the leading visitor party member for both time periods, followed by ‘child, grandchild or young adult with parents’ – the latter, significantly higher between July and September.

Figure 26. Visitor party make-up for trips taken from April to June 2022, Percentage, February 2022 and March 2022, UK

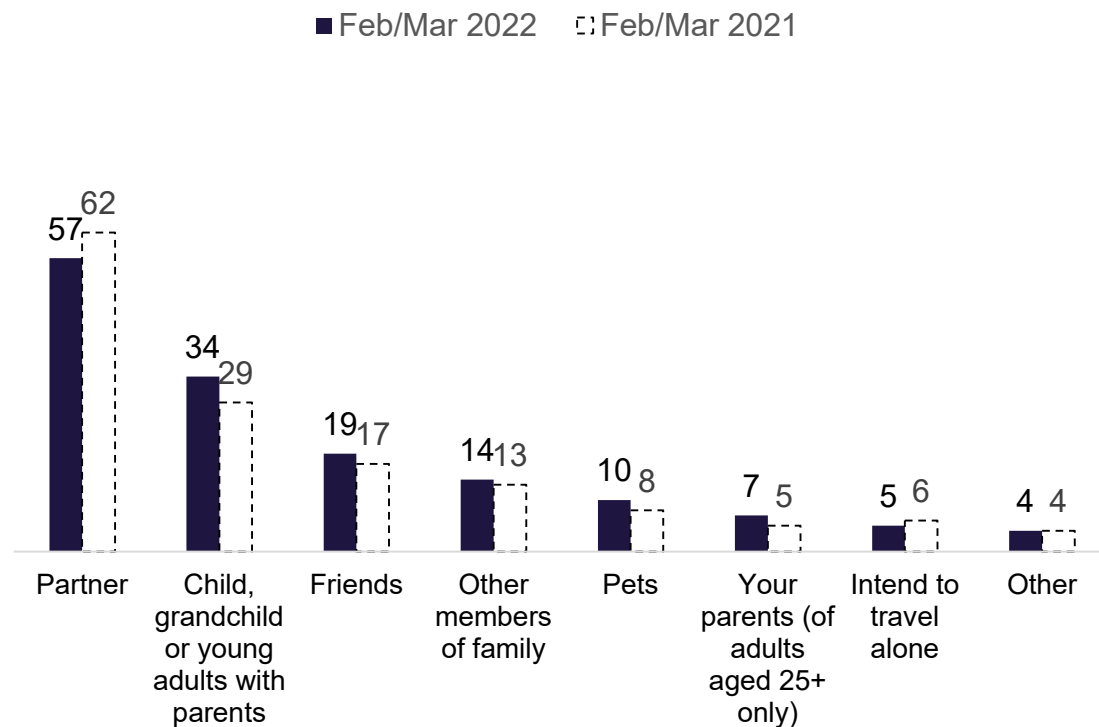
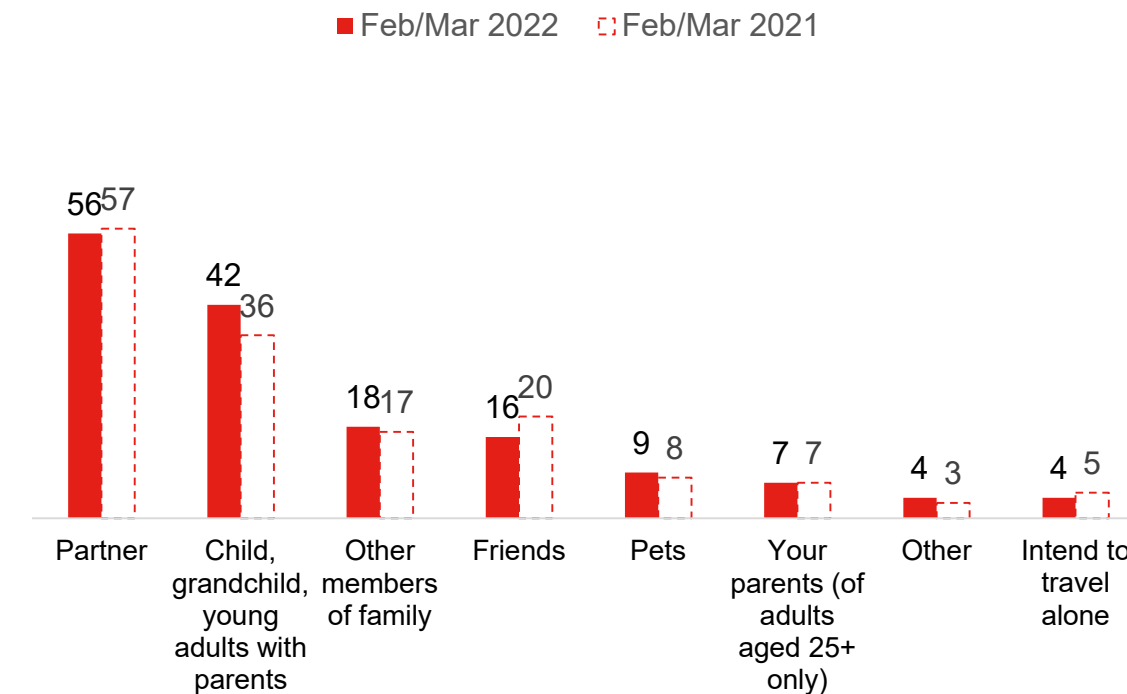


Figure 27. Visitor party make-up for trips taken from July to September 2022, Percentage, February 2022 and March 2022, UK



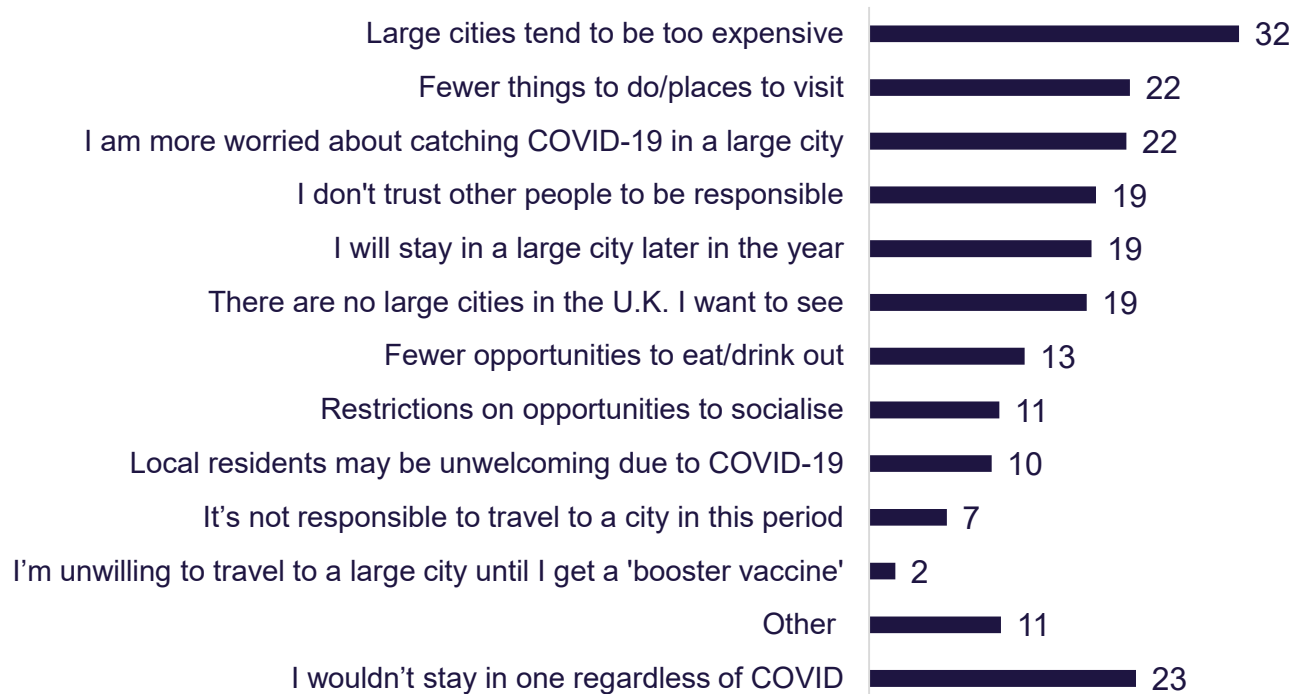
QVB4d. With whom are you likely to be spending your holiday?

Base: All February and March 2022 respondents planning on taking a holiday or short break in the UK between April to June 2022 n=743; July to September 2022 n = 804; February and March 2021 respondents: April to June 2021 n=442, July to September 2021 n=837 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate a range of party types.

Reasons for not staying in a city on the next UK trip

Among April to June 2022 Intenders not planning on visiting a large city, 'large cities tend to be too expensive' (32%) is the leading reason, significantly ahead of 'fewer things to do/places to visit' (22%) and 'I am worried about catching COVID-19' (22%).

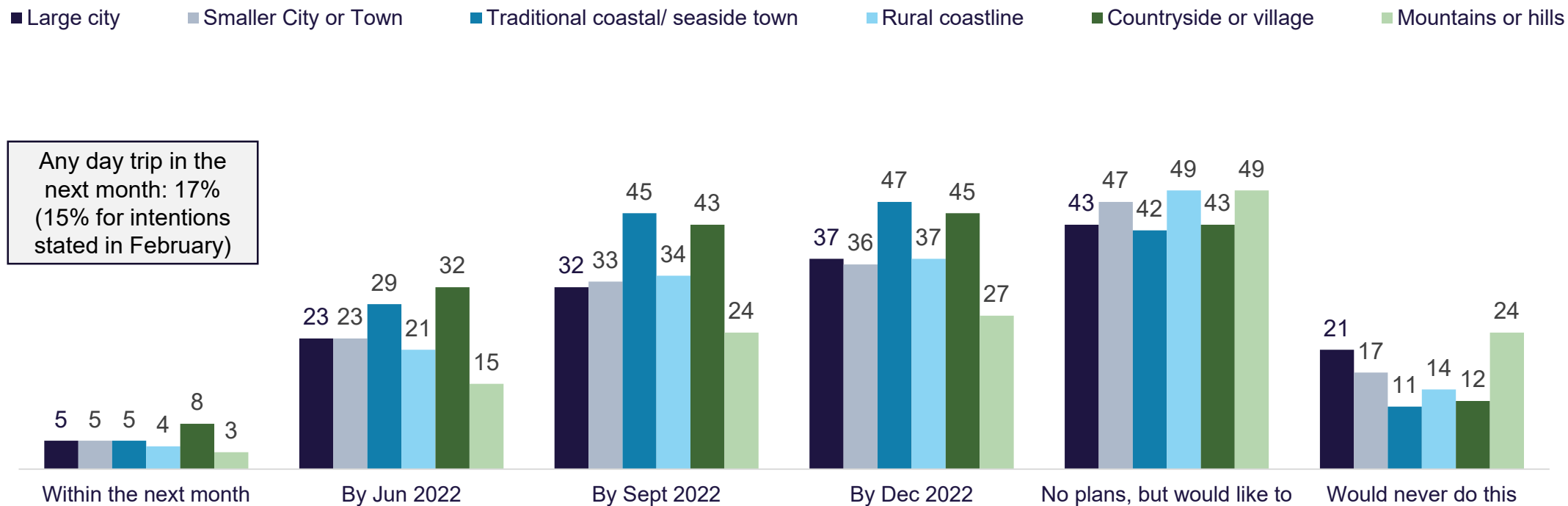
Figure 28: Reasons for not staying in a city amongst April to June intenders, Percentage, March 2022, UK



UK day trip intention by destination type

17% of UK adults intend to take any type of day trip by the end of the month, a slight rise on February intention. 'Countryside or village' is the destination type most likely to generate a day trip by June 2022, while 'traditional coastal/seaside town' is more popular by the end of September.

Figure 29. Next UK day trip intention between March 2022 and December 2022, Cumulative percentages, March 2022, UK





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4. Overnight Business Trip Intentions

Intentions for overnight business trips in the next three months

15% of UK adults in employment plan on taking an overnight business trip in the next 3 months (relatively consistent with the last few waves). 'Team building' is the leading reason for taking one (at 27%).

Figure 30. Proportion anticipating an overnight business trip in next 3 months, Percentage, March 2022, UK adults in employment

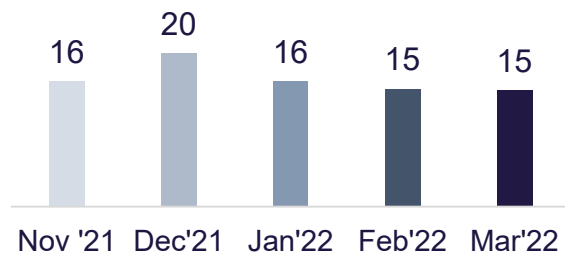
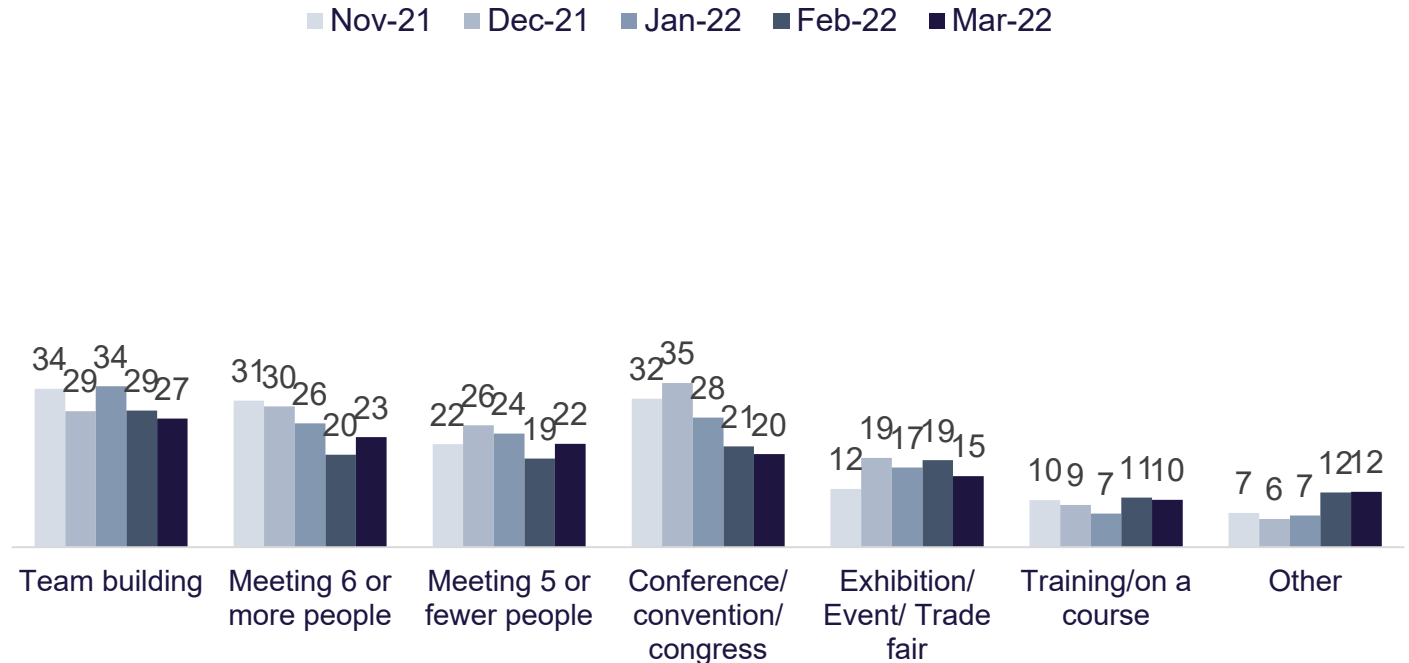


Figure 31. Reasons for taking an overnight business trip in next 3 months, Percentage, March 2022, UK adults in employment planning a trip



80% of UK adults interviewed are in employment

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: March respondents currently in employment n = 1247. All taking a business trip n=200



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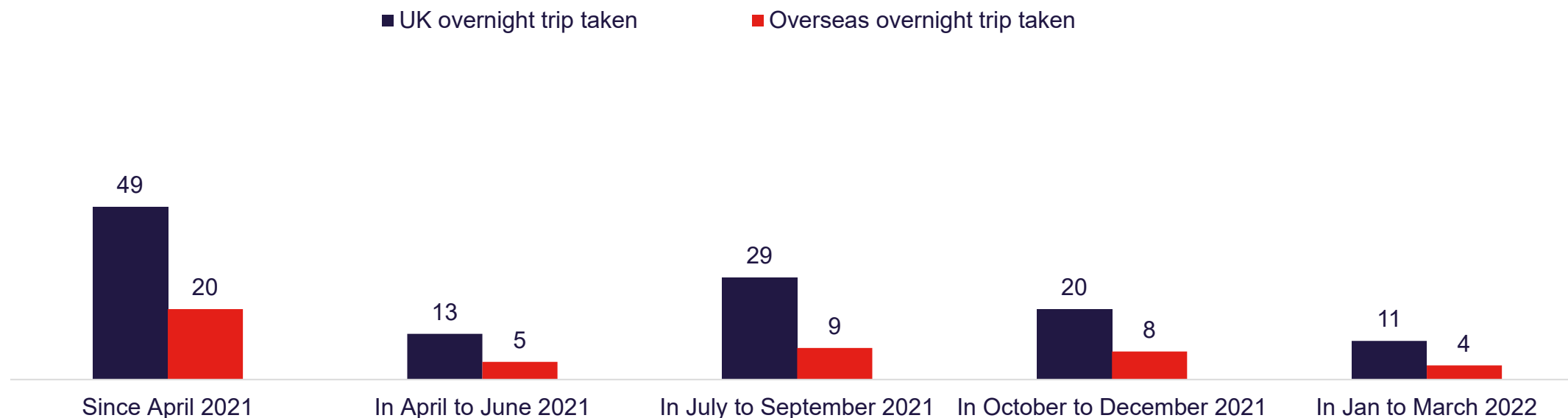
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5. Past UK vs Overseas Trips

Proportion taken a UK and overseas trip since April 2021

Just under half (49%) of UK adults have taken an overnight UK trip since April 2021, more than twice as many as have taken an overseas overnight trip in that period (20%). Both types of trips are most likely to have been taken in July to September (29% and 9% respectively).

Figure 32. Proportion taken an overnight UK or overseas trip in below time period, Percentage, March 2022, 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. March 2022= 1,756

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 2021, 18% of trip takers having stayed there. Holiday / leisure was the most dominant purpose for overnight UK trips (69% having taken trips for this reason).

Figure 33. Destination of overnight trips taken in UK since September 2021, Percentage, March 2022, UK

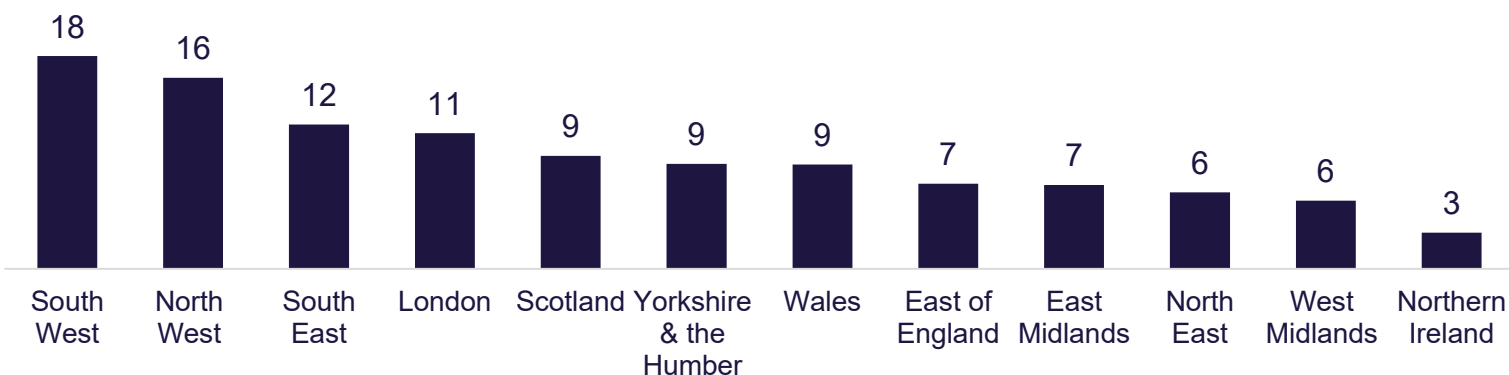
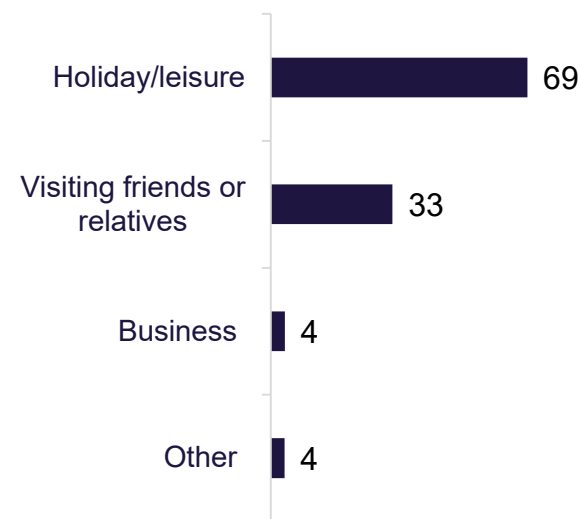


Figure 34. Purpose of overnight UK trip taken since September, Percentage, March 2022, UK



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 March 2022 respondents that took an overnight trips since September n=587

Note: Multiple choice questions. Totals may exceed 100% as some respondents stayed in more than one location or travelled for more than one purpose



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Methodology

Methodology

- This report presents findings from the March 2022 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.
- March 2022 fieldwork was conducted between 1-7 March 2022.

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.

