

# COVID-19 Consumer Tracker

## April 2022

Published: April 2022  
Fieldwork Period: 1<sup>st</sup> – 7<sup>th</sup> April 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 April 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

# April 2022: Scorecard of Key Metrics

Key Metrics	April 2022	Change since March 2022
Perceptions of the Covid-19 situation: 'worst has passed'	38%	-19%*
Perceptions of the Covid-19 situation: 'things are going to stay the same')	41%	+12%*
Appetite for risk (average score out of 4)	3.0	-0.1
Confidence in ability to take UK overnight trip in April/May/June (% NET confident)	71% / 72% / 74%	No change / -1% / -2%
Confidence in ability to take overseas overnight trip in April/May/June (% NET confident)	57% / 56% / 58%	+5%* / +2% / -1%
Will take more UK trips in the next 12 months than past 12 months	34%	+3%
Will take more overseas trips in the next 12 months than past 12 months	22%	No Change
Proportion intending a UK overnight trip in next 12 months	60%	-1%
Proportion intending an overseas overnight trip in next 12 months	43%	-1%
Top 3 barriers to taking a UK overnight trip from April to June	1. Rising costs of living 2. Personal finances 3. Rising costs of holidays/leisure	Newly added 'Rising costs of living' goes to 1 <sup>st</sup> . UK weather drops out of top 3.
Top 3 barriers to taking an overseas overnight trip from April to June	1. Rising costs of living 2. Personal finances 3. Rising costs of overseas travel	Newly added 'Rising costs of living' goes to 1 <sup>st</sup> . Risk of quarantine drops out of top 3.

\* Represents a statistically significant change on previous wave



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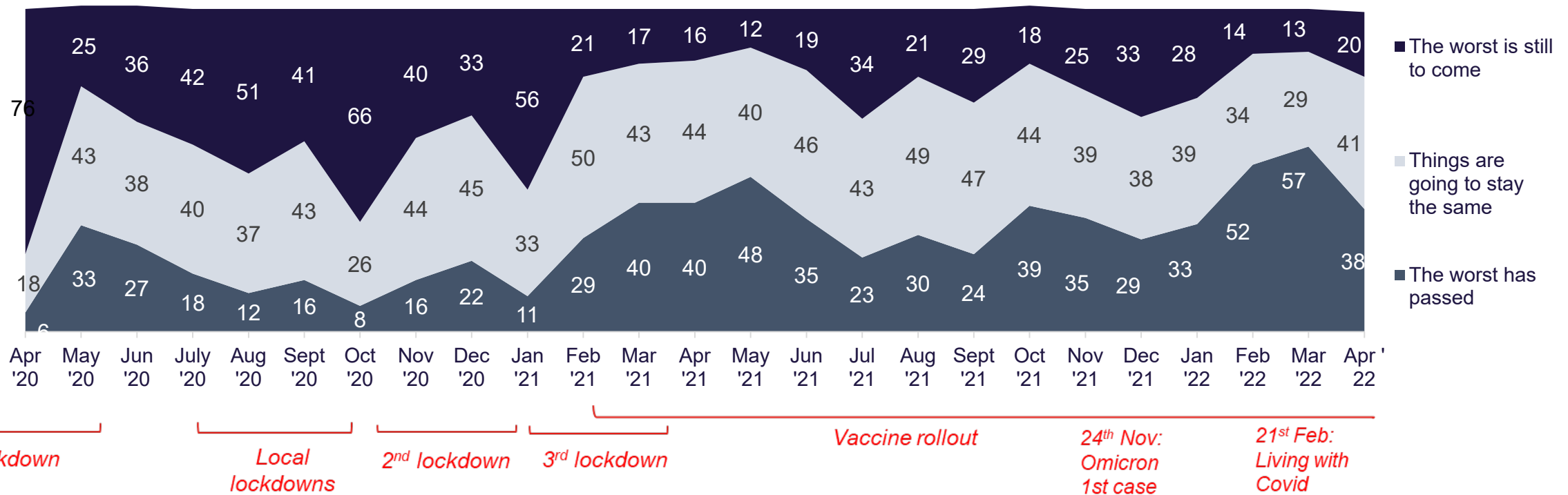
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# 1. Covid Impact on Attitudes to Travel

# Perceptions of the situation relating to COVID-19

From March to April, the proportion of those who think ‘the worst has passed’ has significantly declined from 57% to 38%, however, there is an increase in those who say that ‘things are going to stay the same’ (29% to 41%).

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

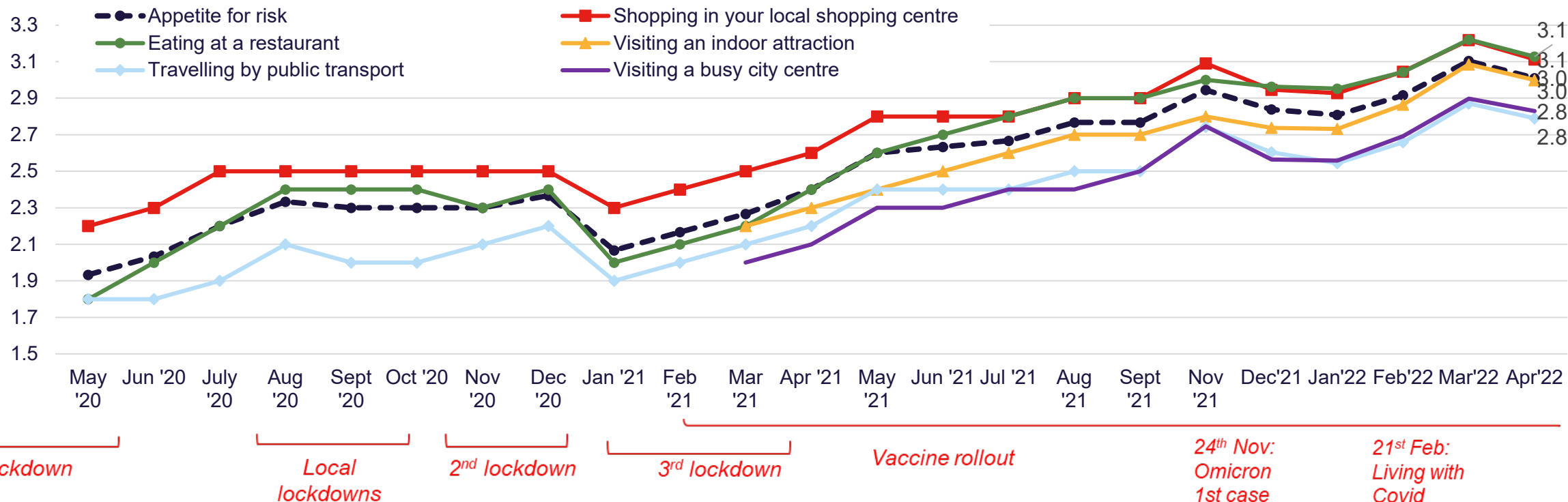


Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion?  
 Base: All respondents. April 2022 = 1,758 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750  
 Note: Fieldwork for each month took place at the start of each month – exact dates vary). October data is taken from BVA BDRC survey.

# Comfort levels with everyday activities

Compared to March, the 'appetite for risk' score has declined marginally by 0.1 to 3.0 (out of 4) in April 2022. This shift is apparent across all activities.

**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**

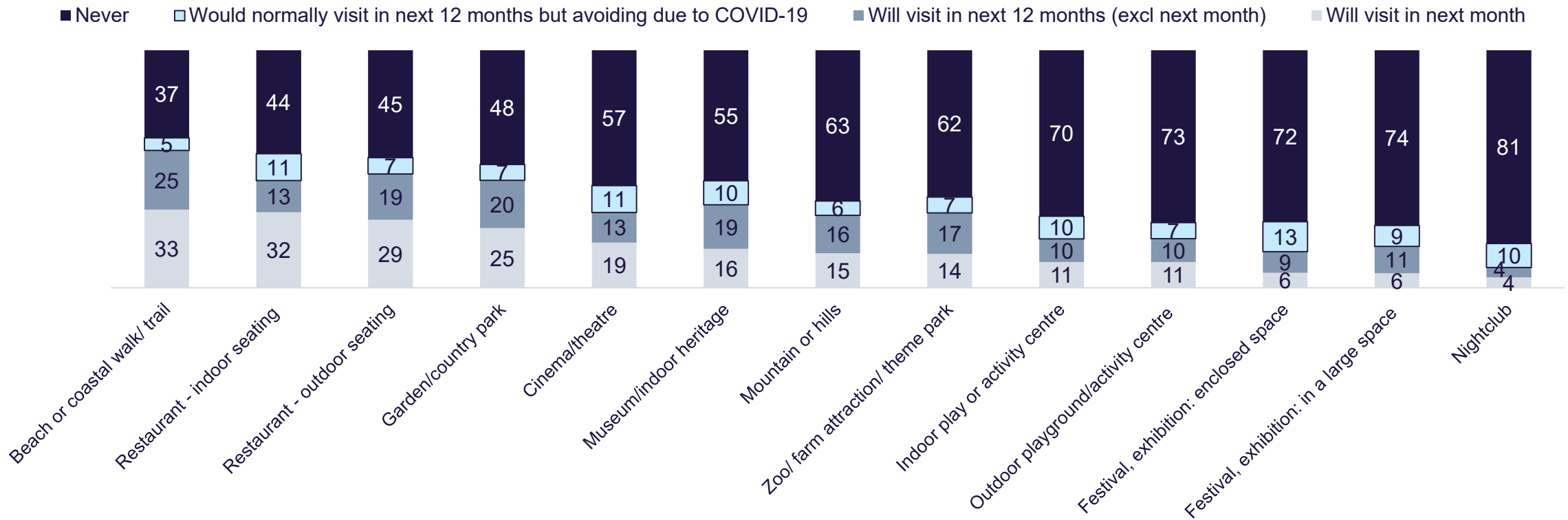


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?  
 Base: All respondents excluding those stating 'don't know' or who wouldn't do activity under any circumstances. Mean average based on those that gave a score of 1-4. April 2022 = 1,758 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

# Intention to visit leisure places in the UK

Out of the included places/venues, 'beach or coastal walk/trail' is the venue most likely to be visited in the next month (33% intending to do so). 'Festival/exhibitions in an enclosed space' is the venue most likely to be avoided in the next 12 months due to COVID-related reasons (13% stating this).

Figure 3. Intention to visit leisure venues, Percentage, April 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.)?

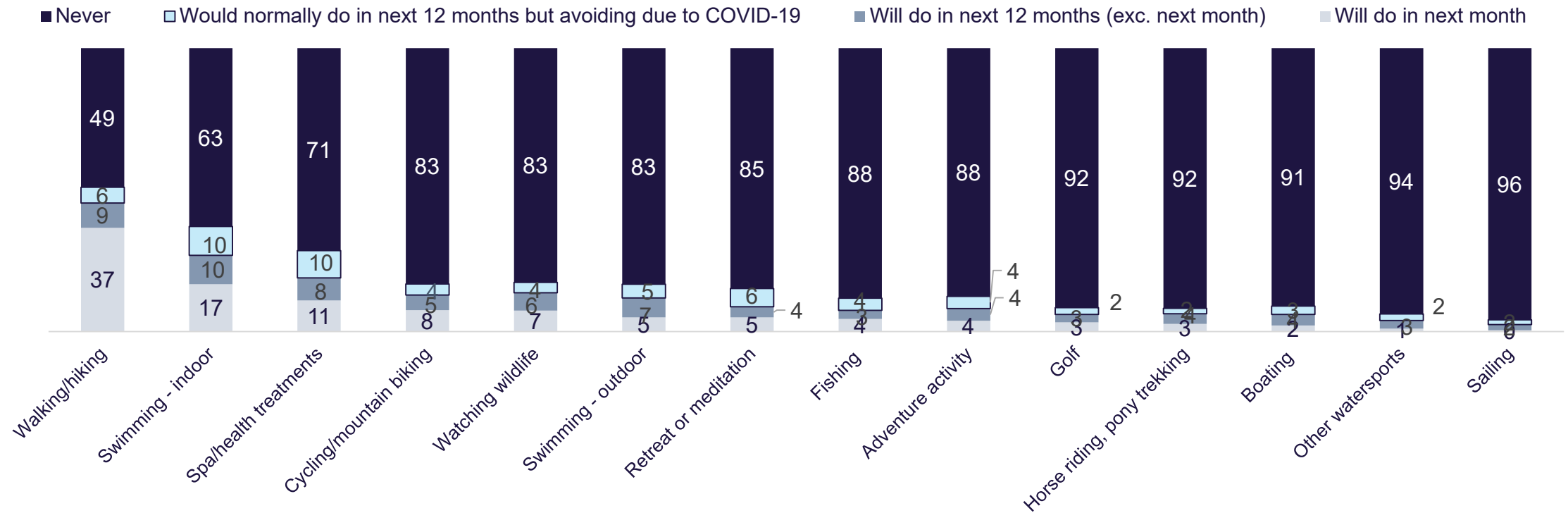
Base: All respondents. April 2022 = 1,758



# 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 activities most likely to be avoided due to COVID-19 (10% stating this for each).

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



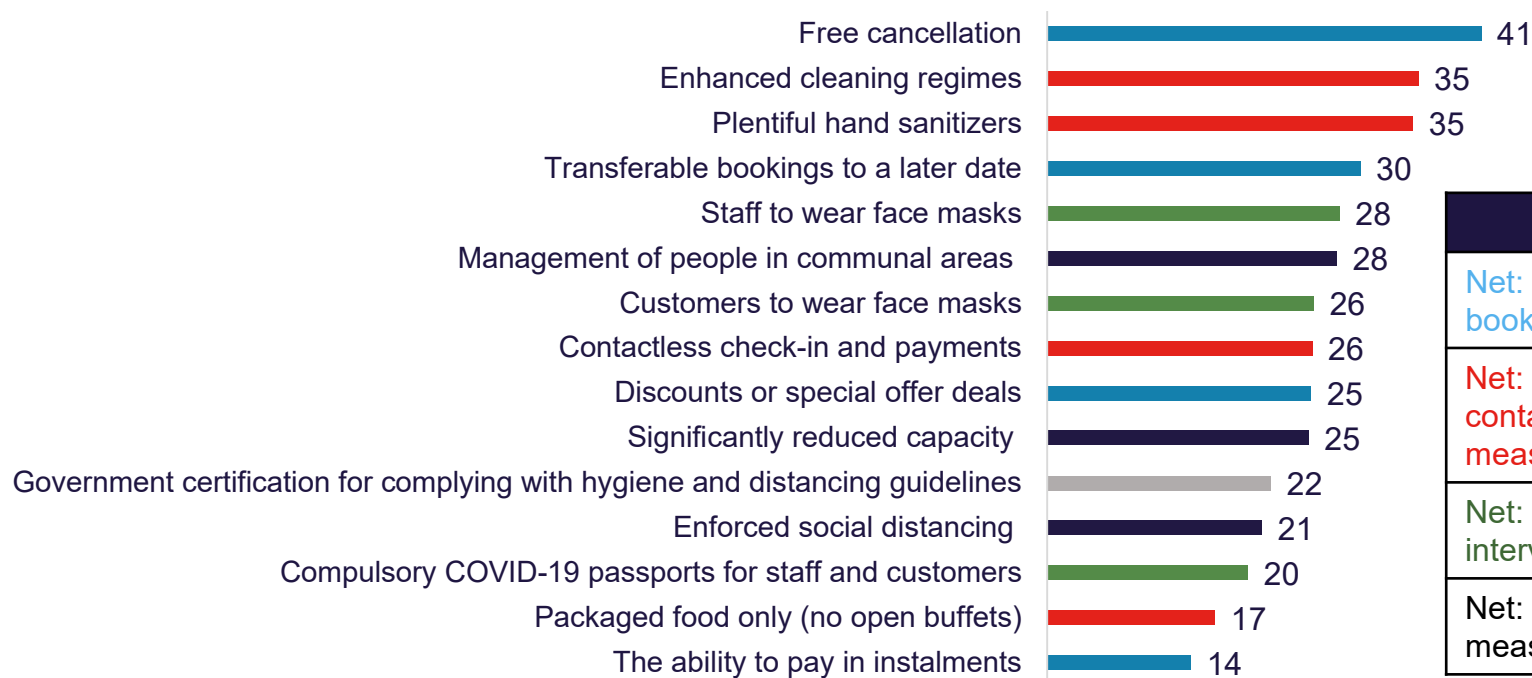
VB10a. Which, if any, of these types of activities are you likely to do in the UK in the next 12 months? VB10b. Which, if any, are you likely to do in the UK in the next month? Which, if any, would you normally do in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government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

Base: All respondents. April 2022 = 1,758

# 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 (41% stating this). This is followed by 'enhanced cleaning regimes' (35%) and 'plentiful hand sanitizers' (also 35%). Overall, there is indicative increase in the net figures, compared to the previous month.

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, April 2022, UK, Full list



	Nov	Dec	Jan	Feb	Mar	Apr
Net: Financial booking incentives	64%	63%	62%	63%	58%	59%
Net: Reduced contamination measures	61%	59%	60%	60%	53%	54%
Net: Guest/staff interventions	54%	59%	58%	53%	41%	43%
Net: Social distancing measures	57%	60%	57%	52%	45%	47%



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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 number of anticipated trips over the next 12 months compared to the past 12 months is broadly in line with previous months. In April, 34% said they would go on more domestic trips in the next 12 months, compared to the past 12 months.

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

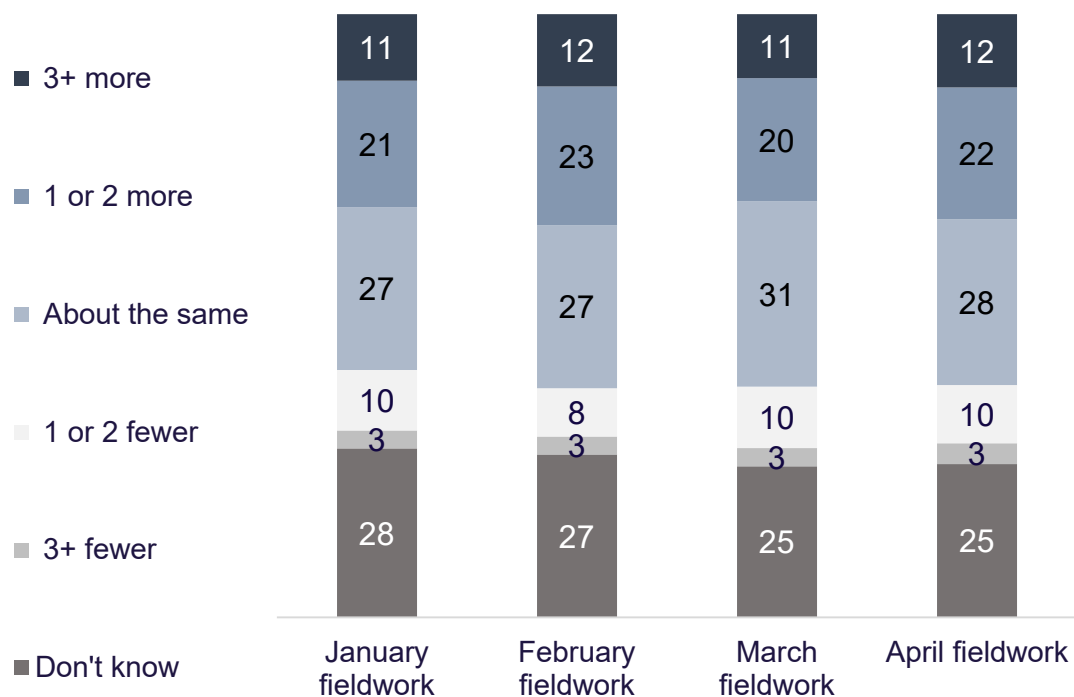
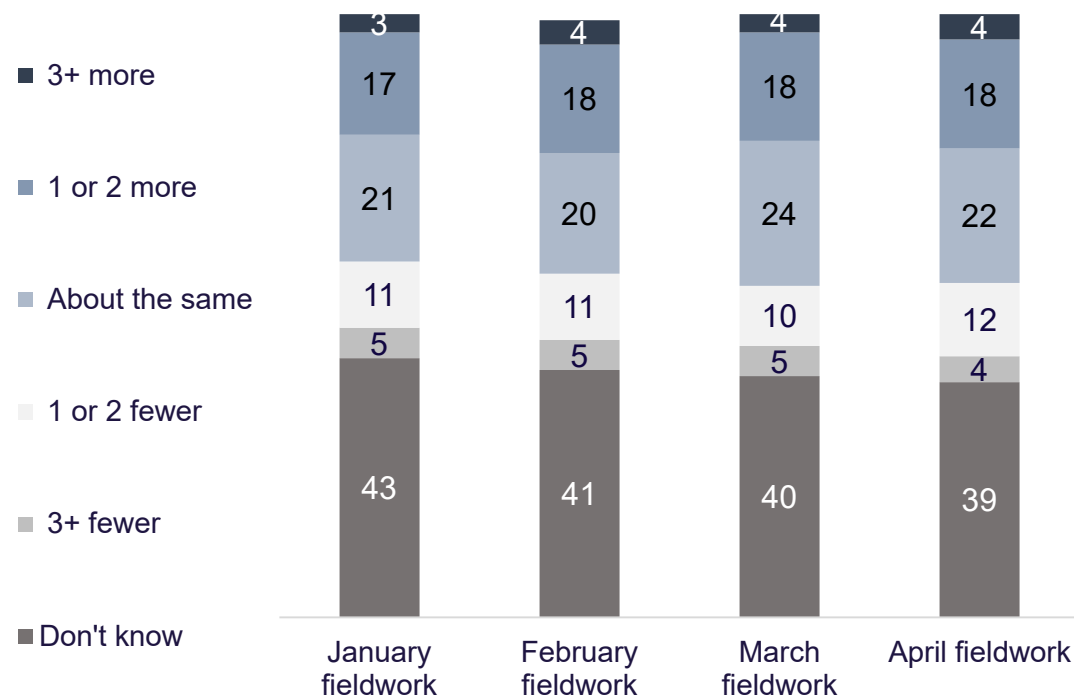


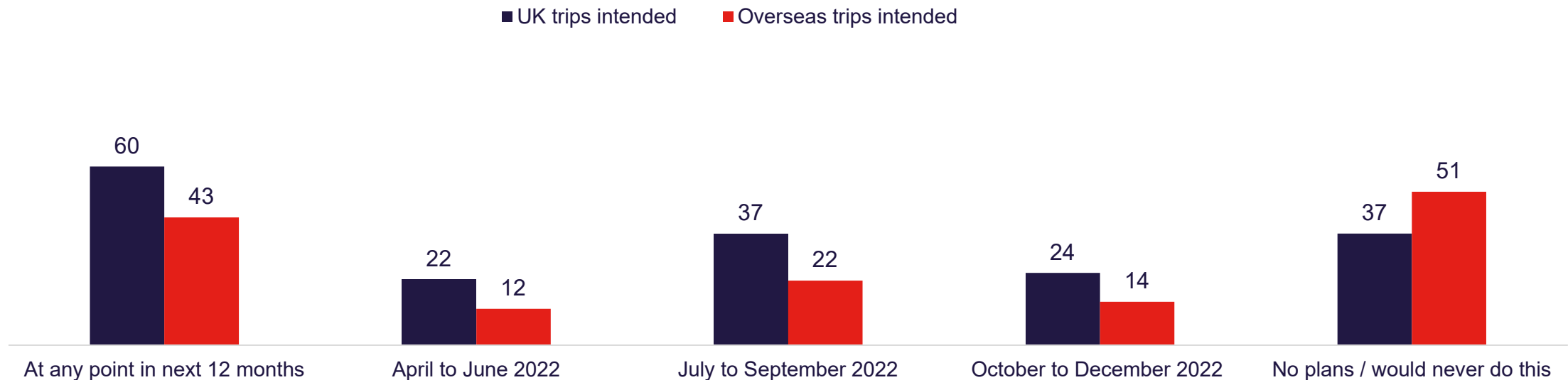
Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, April 2022, UK



# Overnight trips intentions

3 in 5 (60%) of UK adults plan on taking an overnight domestic trip in the next 12 months, significantly more than the 43% planning to take an overnight overseas trip in this period.

Figure 8a. Proportion anticipating going on any overnight UK and overseas trips, Percentage, April 2022, UK

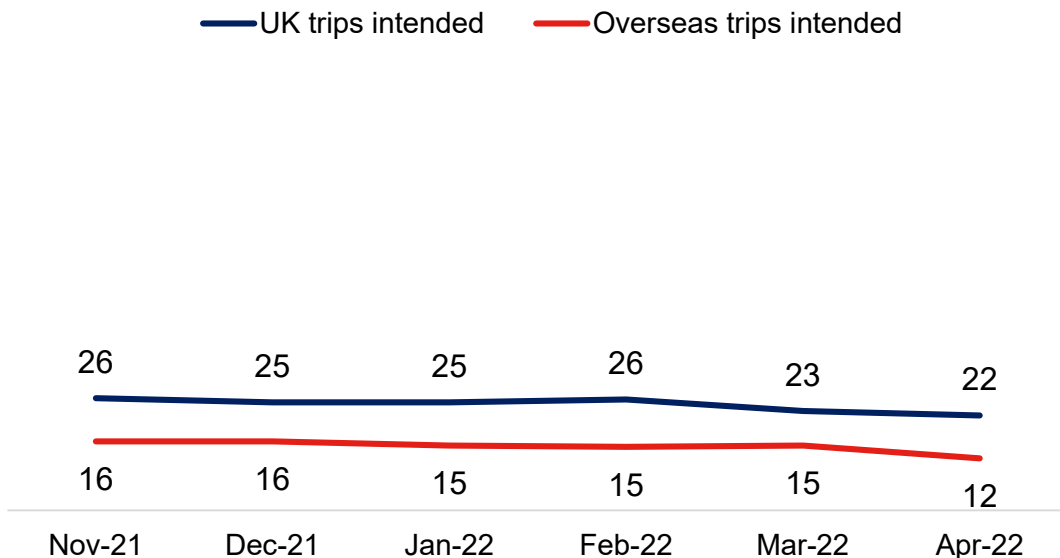


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are 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. April 2022 = 1,758 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

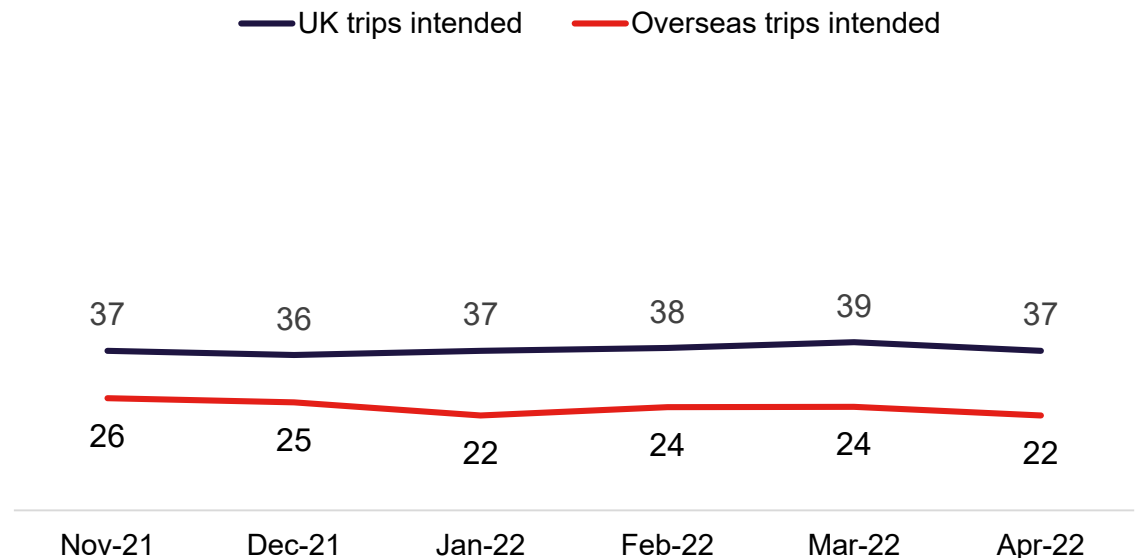
# Overnight trip intention trend – Apr-Jun'22 and Jul-Sep'22

The proportion of UK adults anticipating UK overnight trips is fairly stable for both Spring and Summer. Overseas trip intentions have declined this wave.

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



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

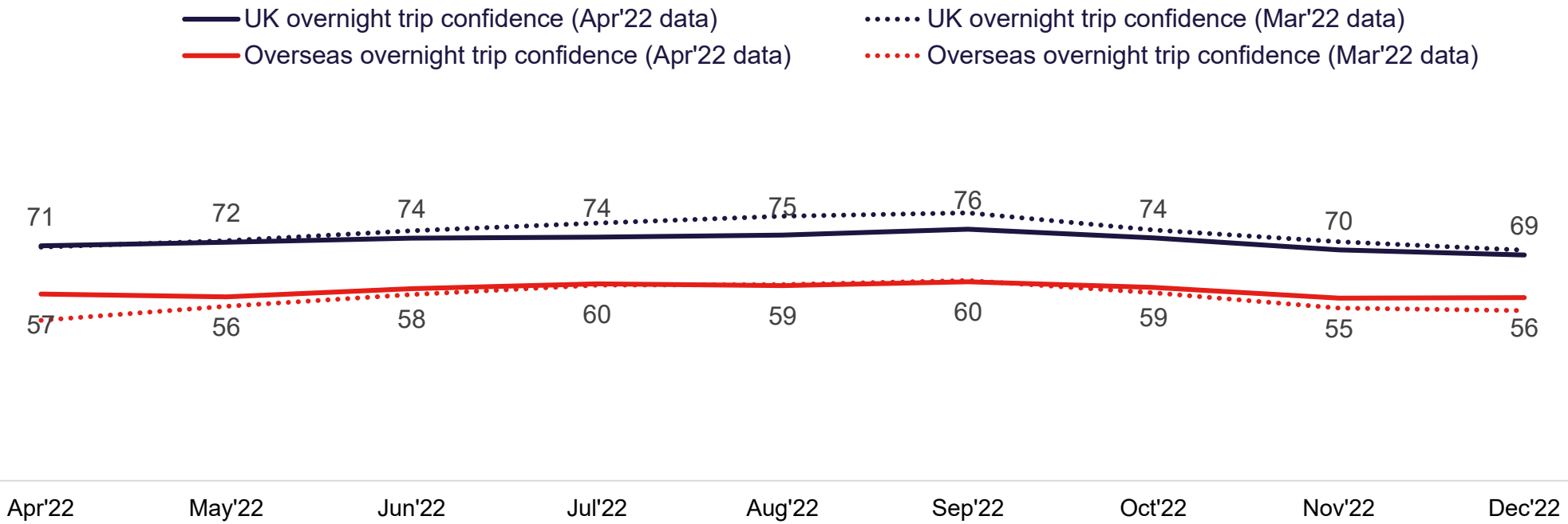


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are 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 April respondents. Apr-Jun 2022 UK overnight trips = 375 Overseas trips = 212; July-Sept 2022 UK overnight trips = 658 Overseas trips = 379 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

Confidence levels in April are broadly in line with those recorded in March, with domestic trip confidence being higher than confidence for overseas trips.

**Figure 9. Confidence in taking a UK and Overseas overnight trip across different time periods, NET Confident (Very confident + fairly confident) Percentage, March and April 2022, UK**



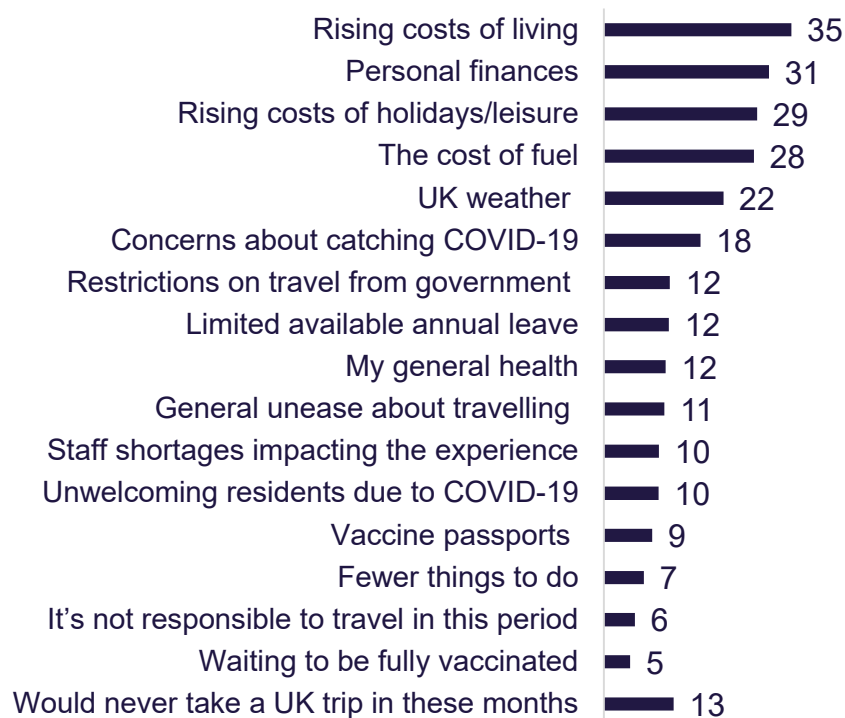
VB7a. We'd like you to imagine that you have booked a UK holiday or short break in each of the time periods listed below. How confident are you that you would be able to go on these UK trips in these months? VB7d. We'd like you to imagine that you have booked an overseas holiday or short break in each 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. March 2022 = 1,756, April 2022 = 1,758

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

'Rising costs of living' is the biggest perceived barrier to taking overnight UK trips between April and June (35% stating this), followed by 'personal finances' (31%) and 'rising costs of holidays/leisure' (29%). For overseas trips, 'rising costs of living' is also the main barrier to taking a trip (29% stating this), followed by 'personal finances' (27%).

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



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



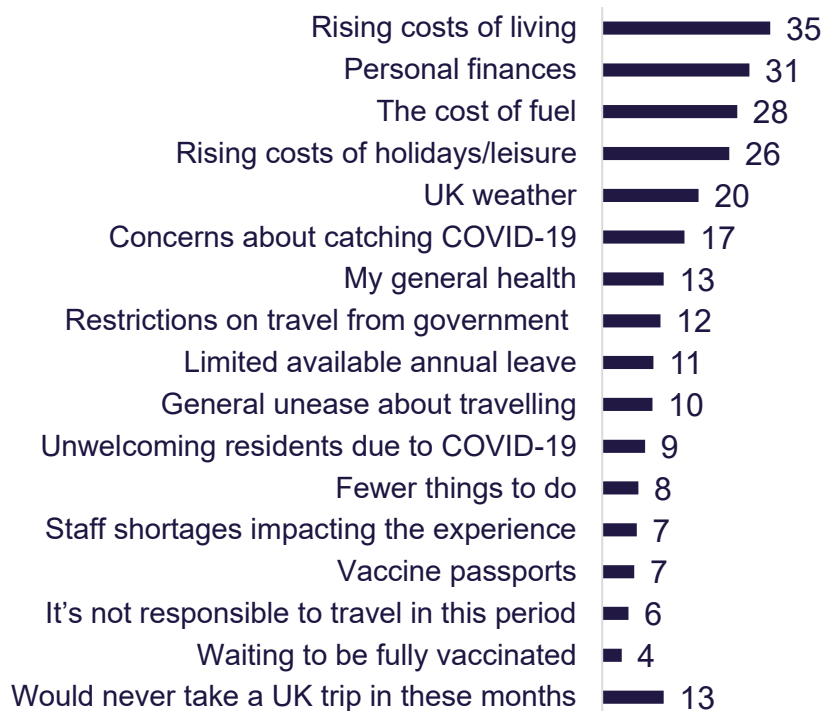
VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in April to June 2022? \*New codes 'rising costs of living' and 'the cost of fuel' added in April fieldwork. VB7e. Which, if any, of the following factors do you see as potential barriers to you taking an OVERSEAS short break or holiday in April to June 2022? \*New codes 'rising costs of living', 'the cost of fuel' and 'the war in Ukraine' added in April fieldwork. Base: All asked each question. April to June n=1175



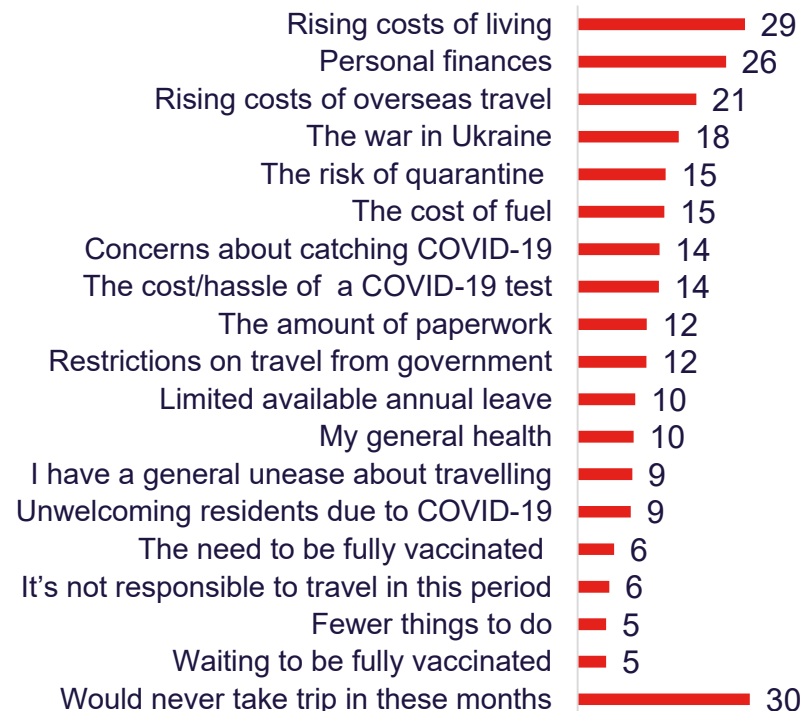
# Perceived barriers to taking overnight UK and Overseas trips between Jul'22 and Sep'22

Similarly to the April to June period, the main perceived barrier to taking an overnight trip in the UK and overseas in July to September is 'rising costs of living' (35% for UK and 29% for overseas). 'Personal finances' is the second biggest barrier during this period (31% for UK and 26% for overseas), with other cost-related factors close behind.

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



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

\*New codes 'rising costs of living' and 'the cost of fuel' added in April fieldwork. 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? \*New codes 'rising costs of living', 'the cost of fuel' and 'the war in Ukraine' added in April fieldwork Base: All asked each question Base: All asked each question. July to September n=1168

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

As a result of Covid-19, 23% 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' (21%) and 'avoiding destinations with lots of people' (19%).

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



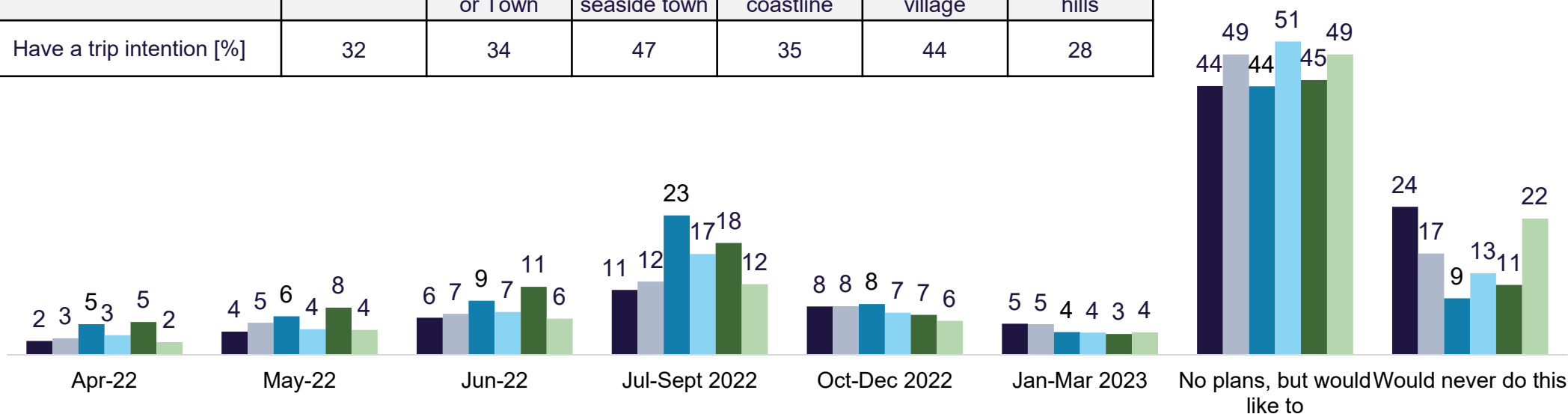
# All potential UK overnight trips intentions by destination

Overnight domestic trip intention peaks between July and September 2022, most notably for a ‘traditional coastal / seaside town’ – 23% planning on taking an overnight trip to this destination type in Summer.

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

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

Apr'22 – Apr'23	Large city	Smaller City or Town	Traditional coastal/ seaside town	Rural coastline	Countryside or village	Mountains or hills
Have a trip intention [%]	32	34	47	35	44	28





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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 UK and overseas trips in April have already been planned with around two thirds having already been booked. Overseas trips are more likely than domestic trips to be already planned or booked.

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

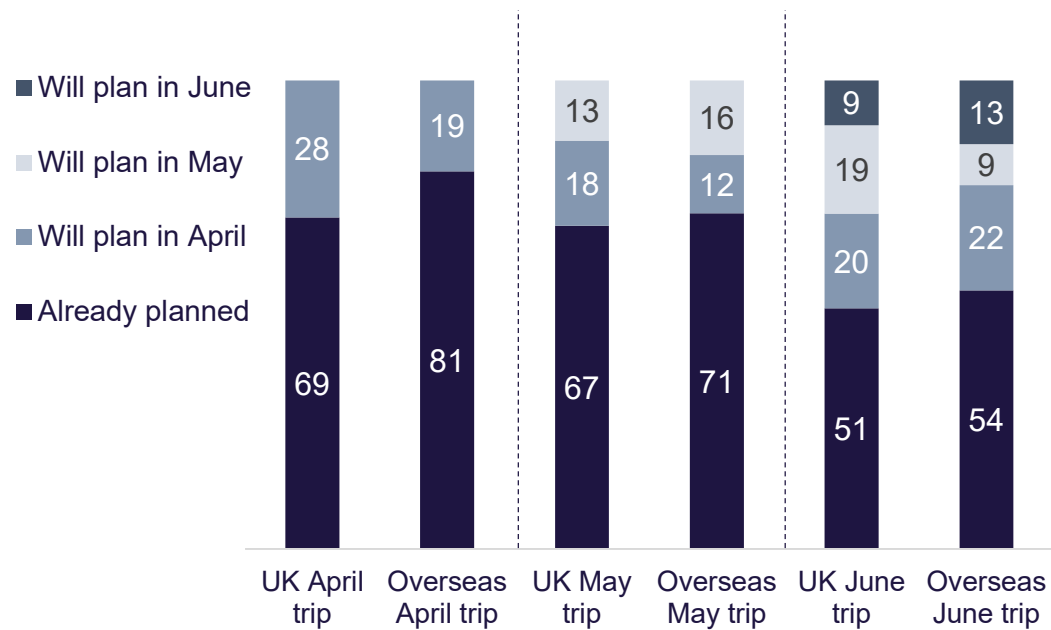
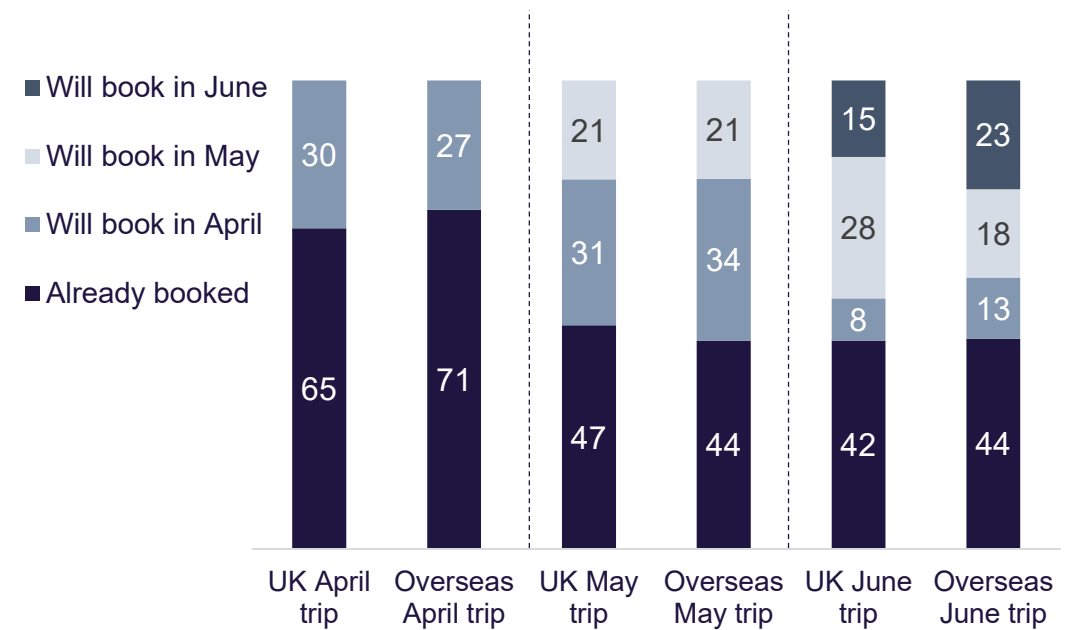


Figure 17. When anticipate **BOOKING** the next **April-June 2022** UK and overseas overnight trip, Percentage of those not yet booked these trips, April 2022, UK

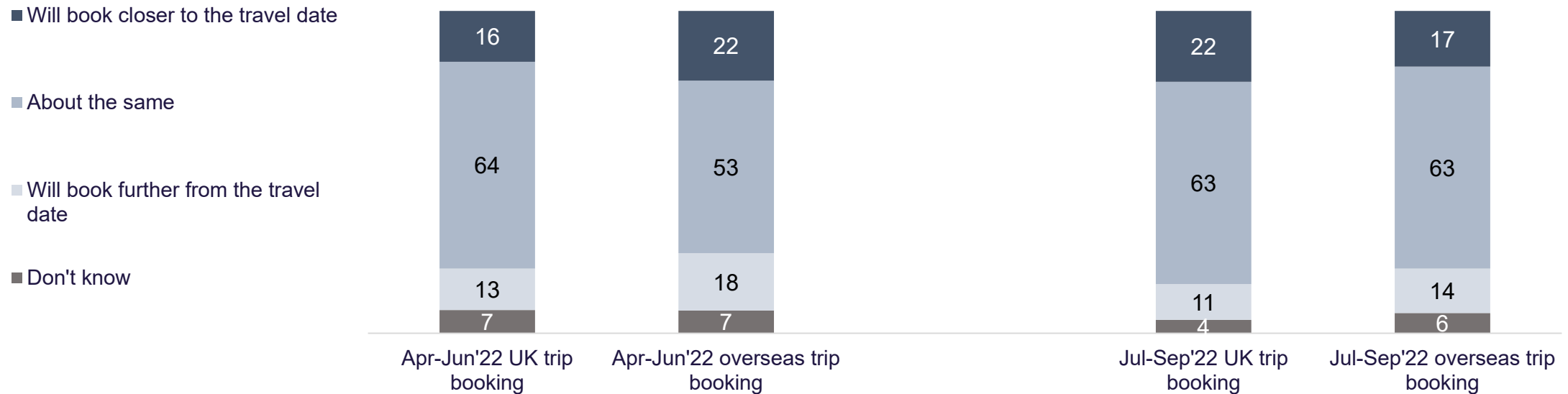


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip  
 Base: April UK trips n=136, April Overseas trips n=57; May UK trips n=119, May overseas trips n=78; June UK trips n=120, June overseas trips n=77.

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

The majority of next overnight trips in the periods Apr-Jun'22 and Jul-Sep'22 for both the UK and overseas are booked with similar lead times as pre-pandemic.

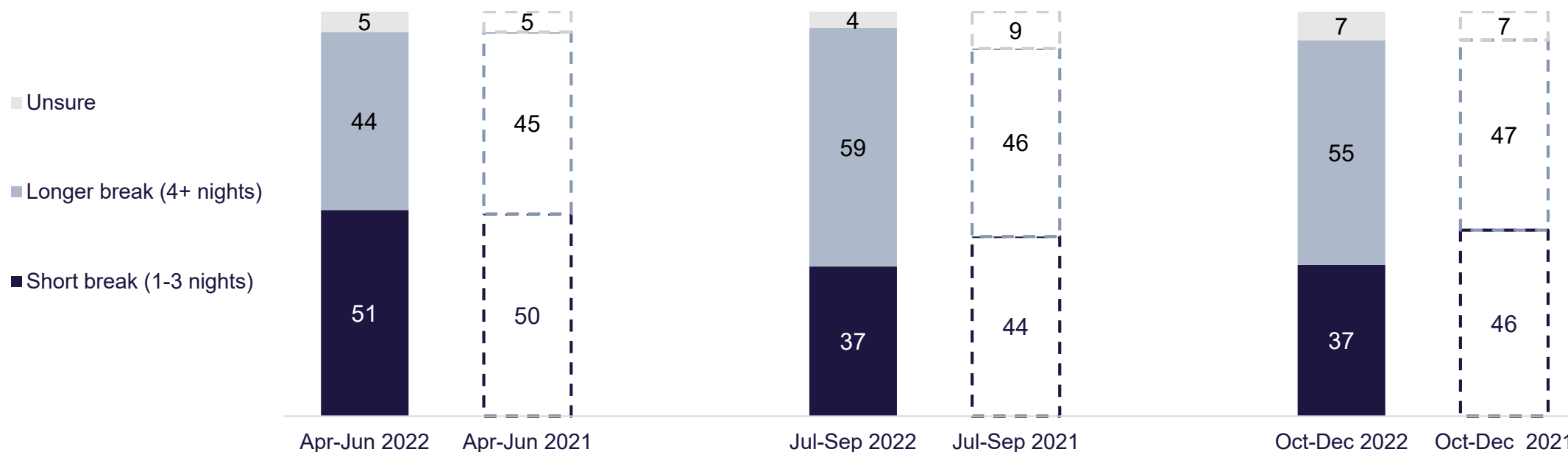
Figure 18. Anticipated booking lead times for Apr-Jun'22 and Jul-Sep'22 trips compared to before the pandemic, Percentage, April 2022, UK



# Duration of the next overnight trip in UK

UK overnight trips planned for Apr-Jun 2022 are more likely to be shorter than longer, while in Jul-Sep 2022 and Oct-Dec 2022, trips are more likely to be longer breaks.

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



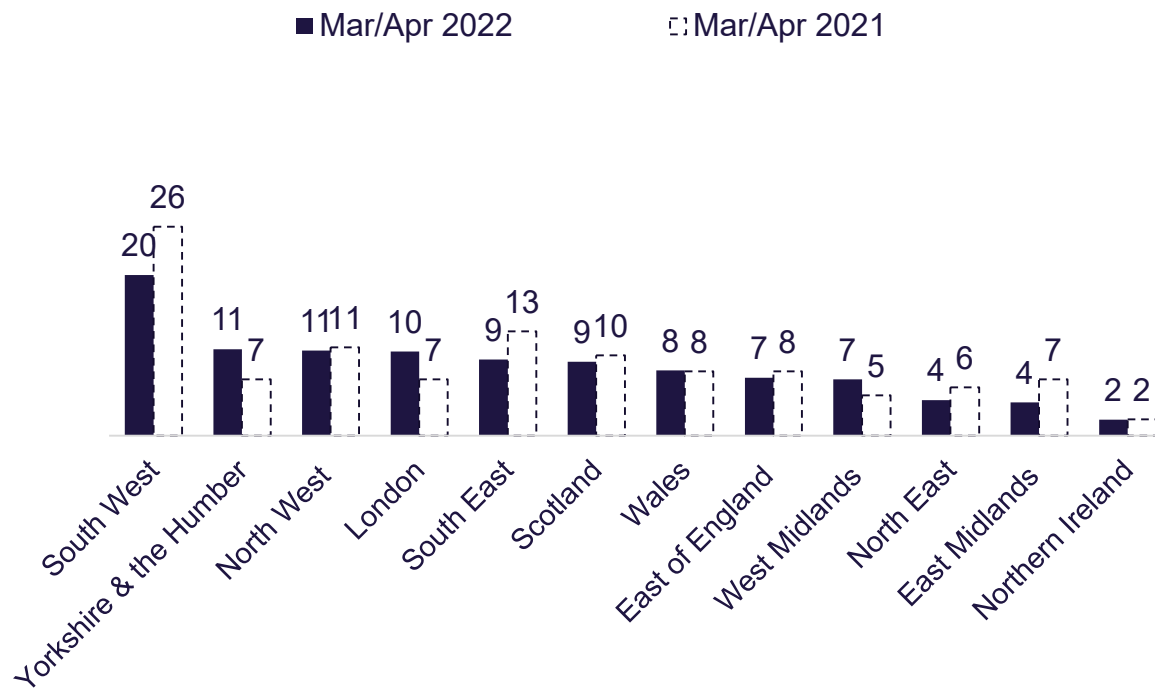
QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?

Base: All April 2022 respondents intending to take next holiday or short break in each time period: April to June 2022 n=375; July to September 2022 n=450. October to December 2022 n = 151; April to June 2021 n=225; July to September 2021 n=468; October to December 2021 n=148

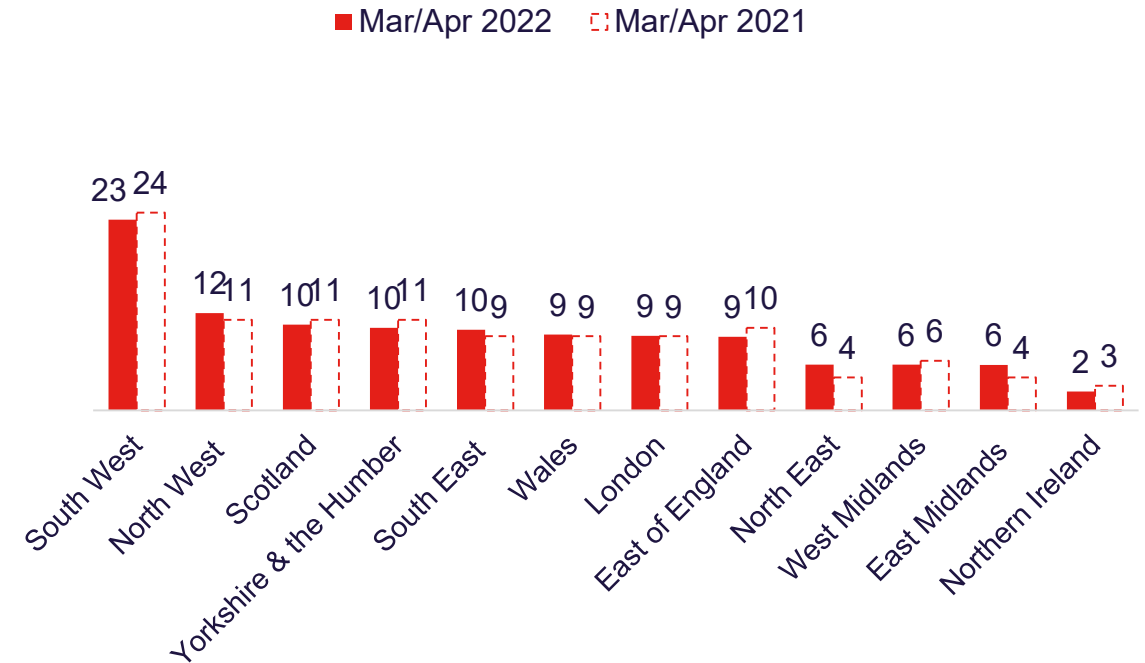
# Where planning on staying on the next overnight trip in the UK

The South West is the most preferred UK overnight destination for trips in April to June 2022 (20% of intenders planning a trip there), and it remains the top destination in July to September 2022 (23% intending to take a trip there).

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



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



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

Base: All March 2022 and April 2022 respondents planning on taking a holiday or short break in the UK between April to June 2022 n=746; July to September 2022 n = 854; March 2021 and April 2021 respondents: April to June 2021 n=, July to September 2021 n=

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'. Compared to data collected in March and April 2021, own car is less likely to be mentioned, while train is mentioned more now in March and April 2022.

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

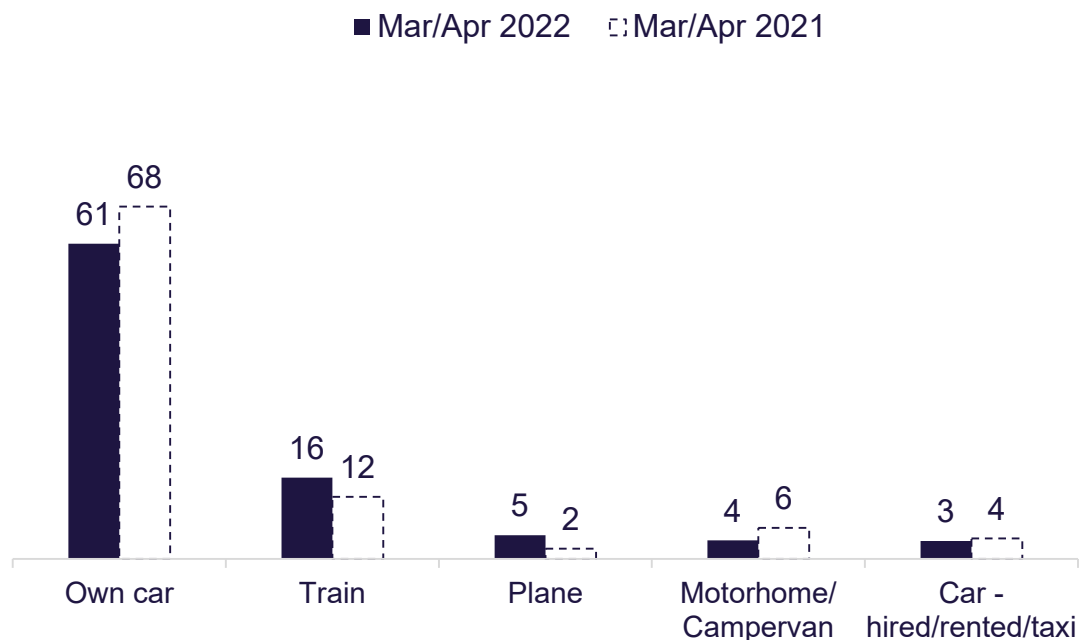
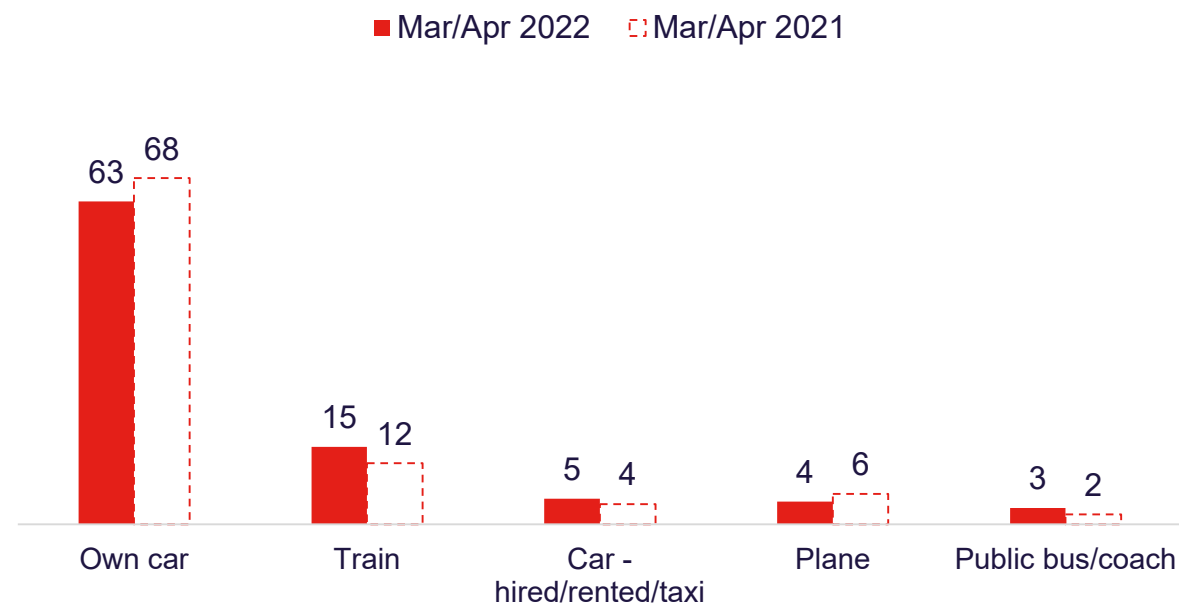


Figure 23. Top 5 main modes of travel to destination for trip in July to September 2022, Percentage, March 2022 and April 2022, UK



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

Base: All March 2022 and April 2022 respondents planning on taking a holiday or short break in the UK between April to June 2022 n=746; July to September 2022 n = 854;

March 2021 and April 2021 respondents: April to June 2021 n=462, July to September 2021 n=923

# 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', 'camping/caravan', and 'commercial rental'. 'Guest house / B&B / farm house' follows behind.

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

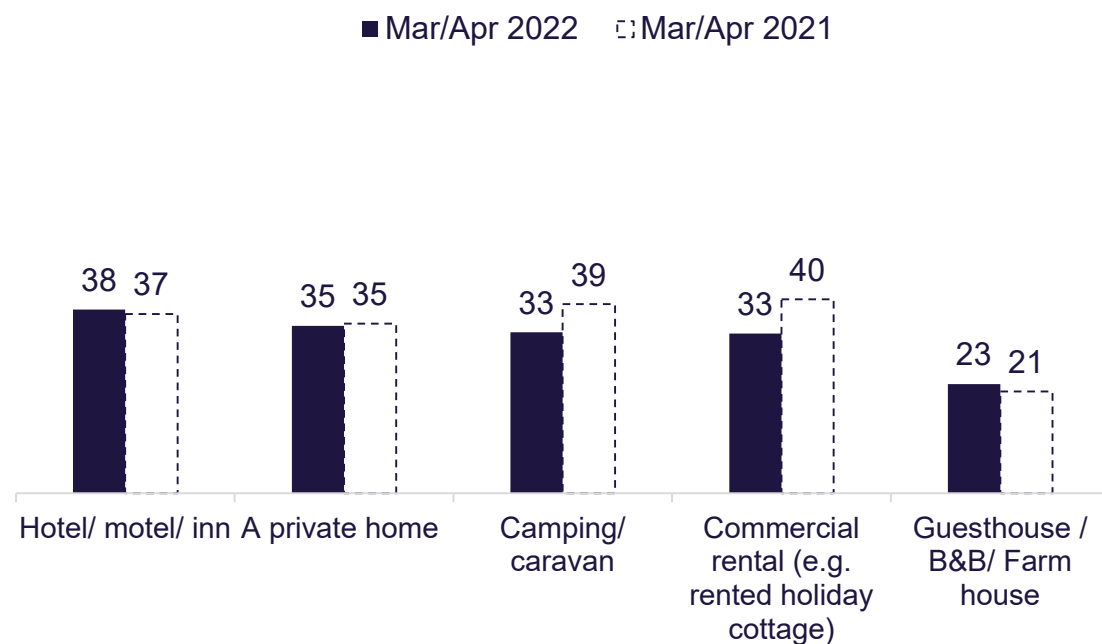
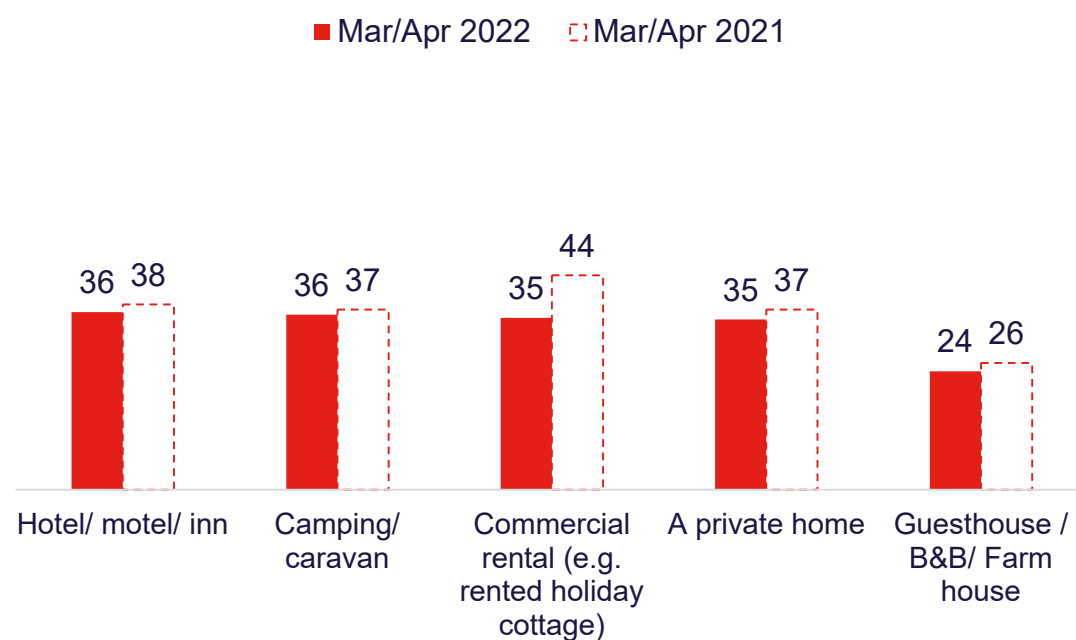


Figure 25. Accommodation planning on staying in on next UK overnight trip in July to September 2022, Net Percentage, March 2022 and April 2022, UK



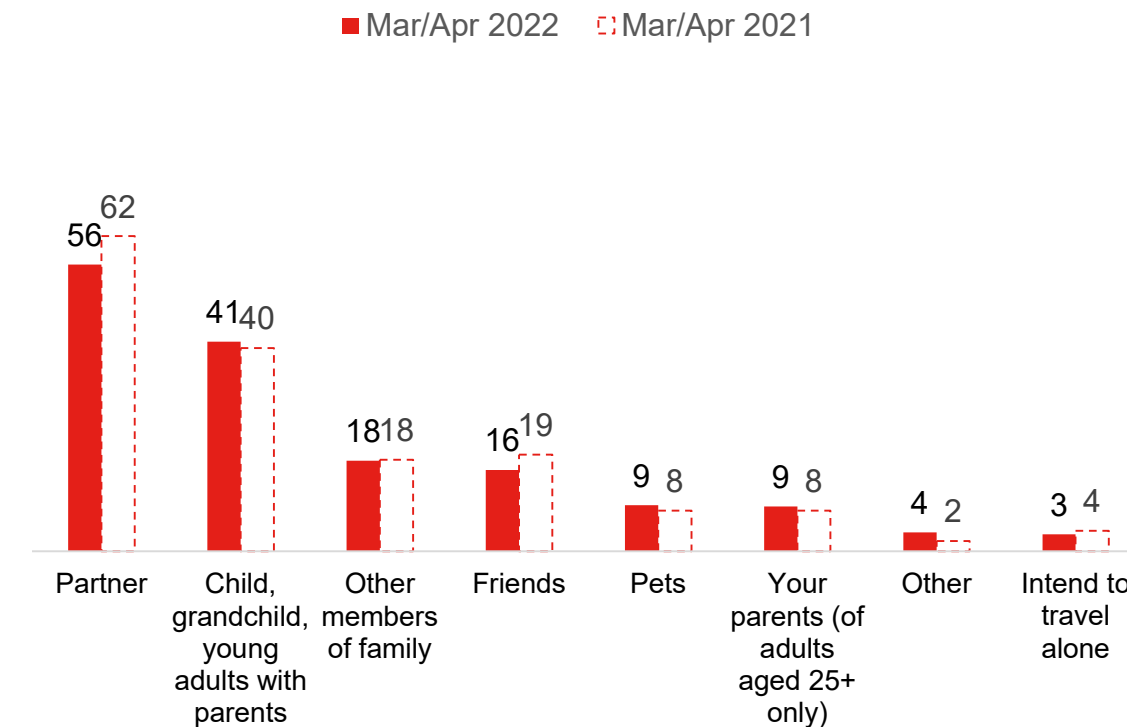
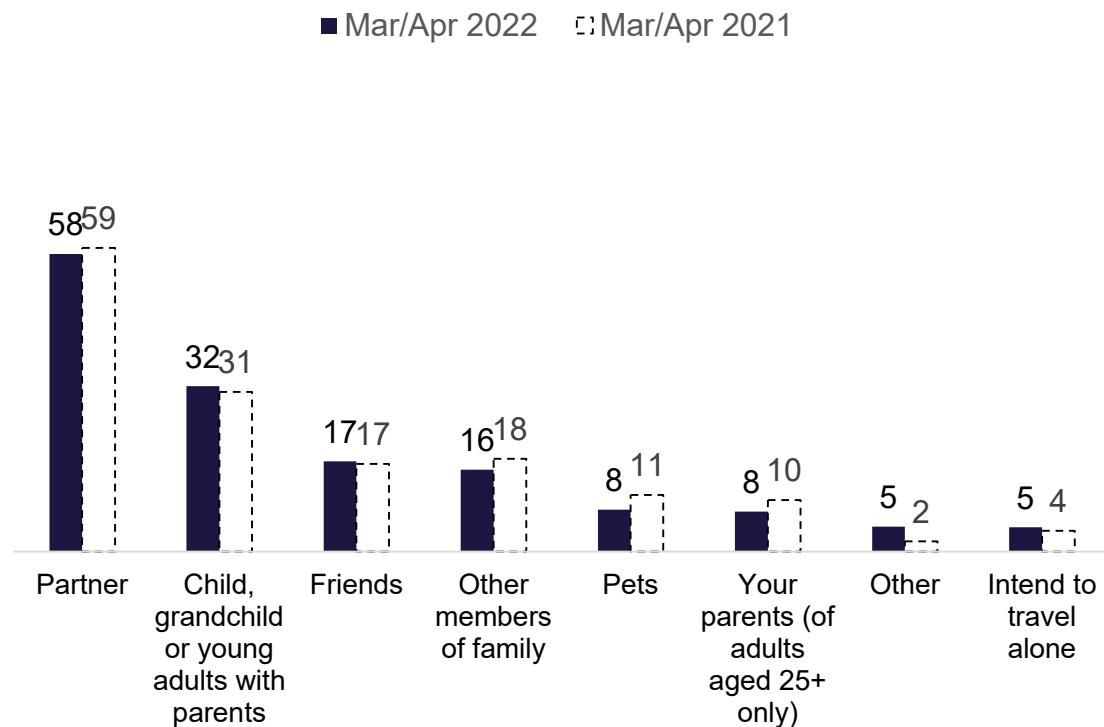
Base: VB6a. What type/s of accommodation do you expect to be staying in during your next UK holiday or short break in? All March 2022 and April 2022 respondents planning on taking a holiday or short break in the UK between April to June 2022 n=746; July to September 2022 n = 854; March 2021 and April 2021 respondents: April to June 2021 n=462, July to September 2021 n=923 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, March 2022 and April 2022, UK

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



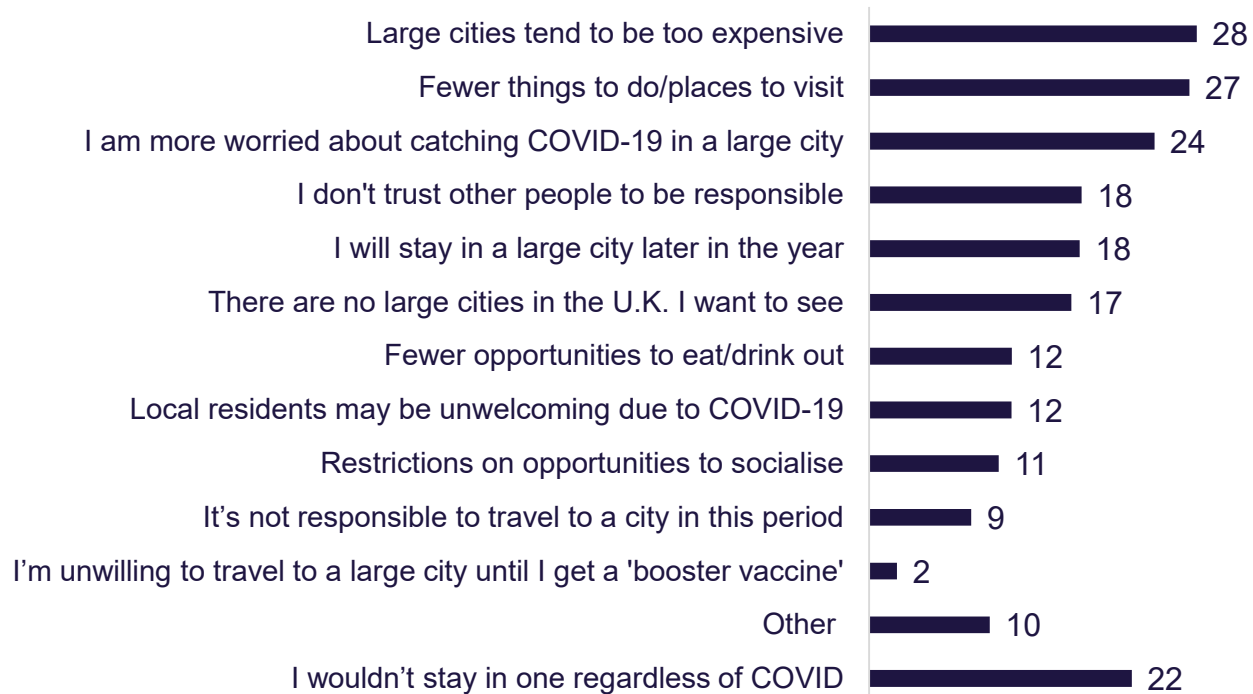
QVB4d. With whom are you likely to be spending your holiday?

Base: All March 2022 and April 2022 respondents planning on taking a holiday or short break in the UK between April to June 2022 n=746; July to September 2022 n = 854; March 2021 and April 2021 respondents: April to June 2021 n=462, July to September 2021 n=923 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' (28%) is the leading reason with 'fewer things to do/places to visit' (27%) close behind.

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

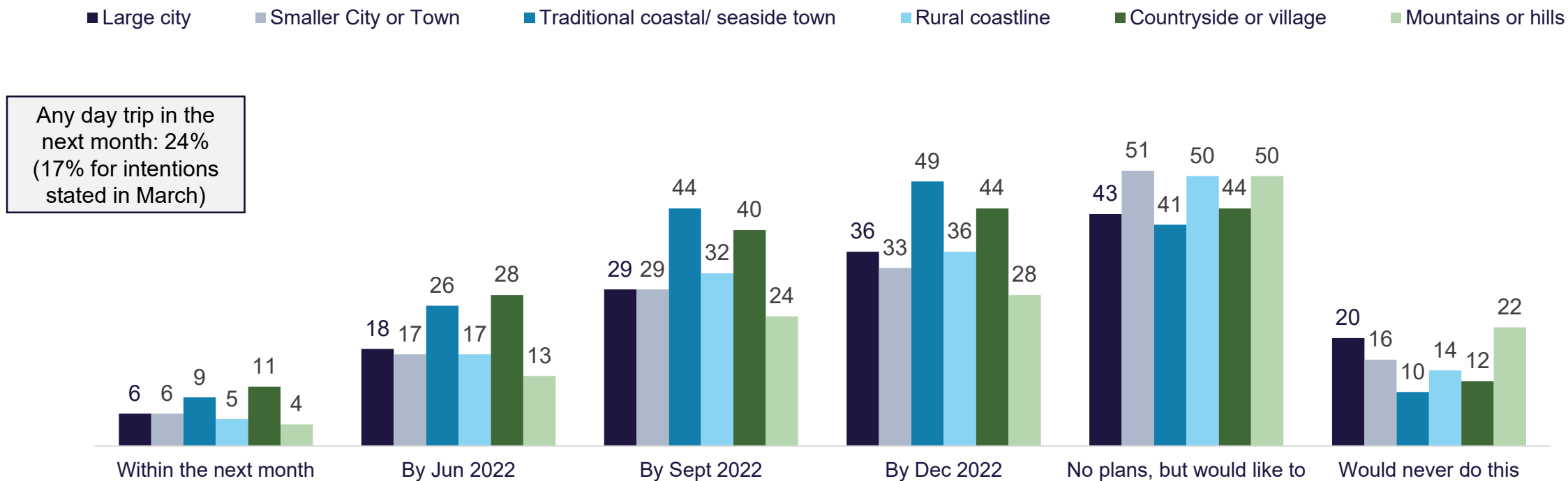


VB5b. You indicated you don't plan on staying in a large city during your next UK holiday or short break in April to June 2022. Why is this? Base: All April 2022 respondents that don't plan on staying in a city on their next UK trip between April and June n=302. Multiple choice question. Totals may exceed 100%

# UK day trip intention by destination type

24% of UK adults intend to take any type of day trip by the end of the month, a 7% increase on March 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 April 2022 and December 2022, Cumulative percentages, April 2022, UK





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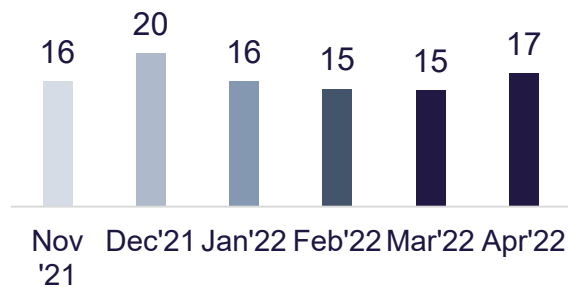
## 4. Overnight Business Trip Intentions

# Intentions for overnight business trips in the next three months

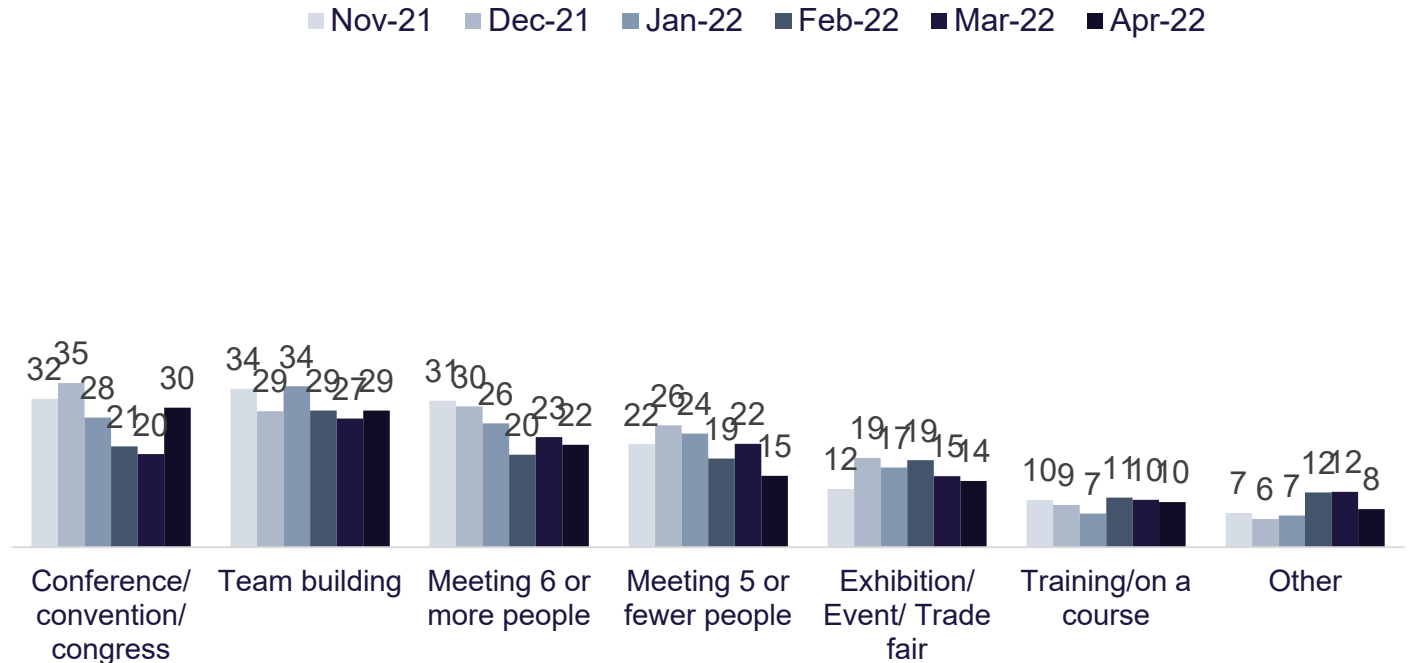
17% of UK adults in employment plan on taking an overnight business trip in the next 3 months (relatively consistent with the previous 5 waves). 'Conferences' are the leading reason for a business trip (at 30%), followed by 'team building' (at 29%).

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

81% of UK adults interviewed are in employment



**Figure 31. Reasons for taking an overnight business trip in next 3 months, Percentage, April 2022, 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: April respondents currently in employment n = 1359. All taking a business trip n=236



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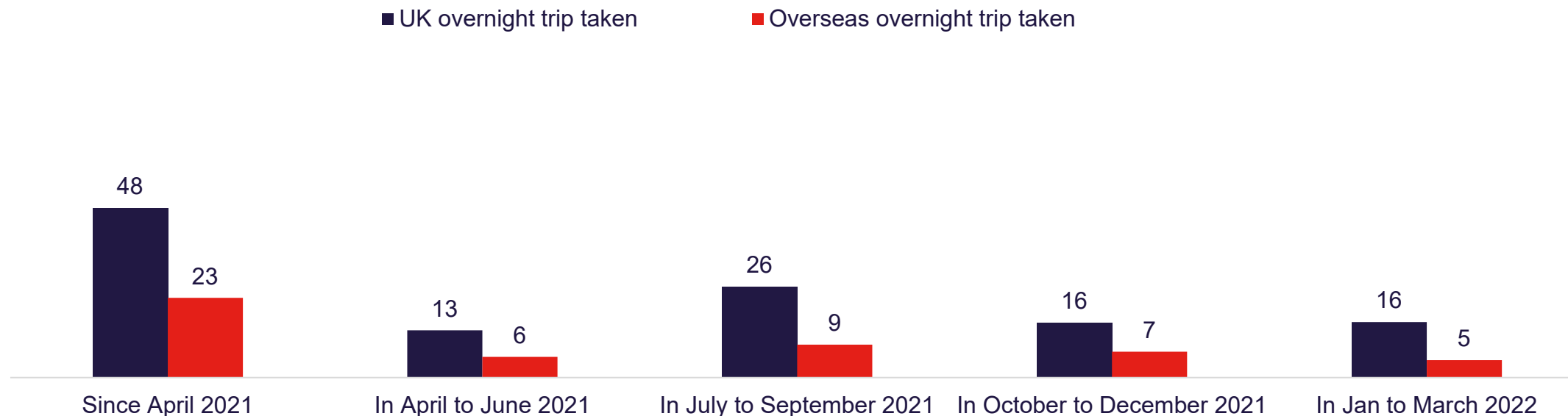
## 5. Past UK vs Overseas Trips



# Proportion taken a UK and overseas trip since April 2021

Just under half (48%) 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 (23%). Both types of trips are most likely to have been taken in July to September (domestic: 26% and overseas: 9%).

Figure 32. Proportion taken an overnight UK or overseas trip in below time period, Percentage, April 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. April 2022= 1,758

Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip

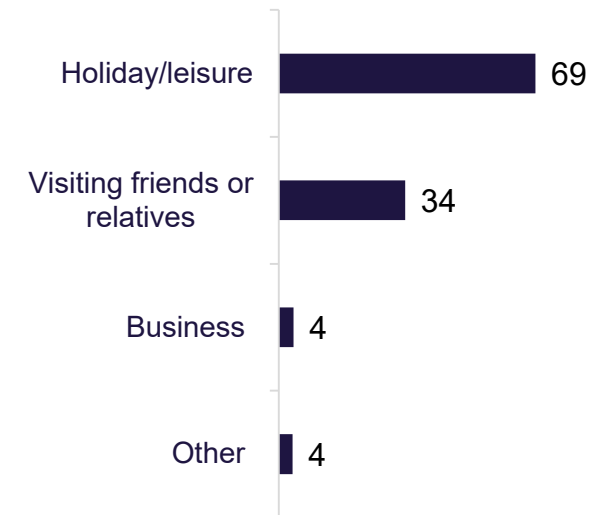
# Where stayed and purpose of last UK overnight trip

The South West of England was the most popular destination for trips since September 2021, 16% 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, April 2022, UK**



**Figure 34. Purpose of overnight UK trip taken since September, Percentage, April 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 April 2022 respondents that took an overnight trips since September n=610

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 and Master Data

# Methodology

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

