

COVID-19 Consumer Tracker

May 2022

Published: May 2022
Fieldwork Period: 3rd – 9th May 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 3rd – 9th May 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.

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

May 2022: Scorecard of Key Metrics

Key Metrics	May 2022	Change since April 2022
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	51%	+13%*
Appetite for risk (average score out of 4)	3.1	+0.1
Confidence in ability to take UK overnight trip in May/June (% NET confident)	74% / 75%	+2% / +1%
Confidence in ability to take overseas overnight trip in May/June (% NET confident)	58% / 58%	+1% / 0%
Will take more UK trips in the next 12 months than past 12 months [%]	33%	-1%
Will take more overseas trips in the next 12 months than past 12 months [%]	23%	+1%
Proportion intending a UK overnight trip in next 12 months [%]	59%	-1%
Proportion intending an overseas overnight trip in next 12 months [%]	44%	+1%
Top 3 barriers to taking a UK overnight trip from May to June	1. Rising costs of living 2. Personal finances 3. The cost of fuel	Cost of fuel rises to top 3 barrier
Top 3 barriers to taking an overseas overnight trip from May to June	1. Rising costs of living 2. Personal finances 3. Rising costs of overseas travel	No new changes

* Represents a statistically significant change on previous wave



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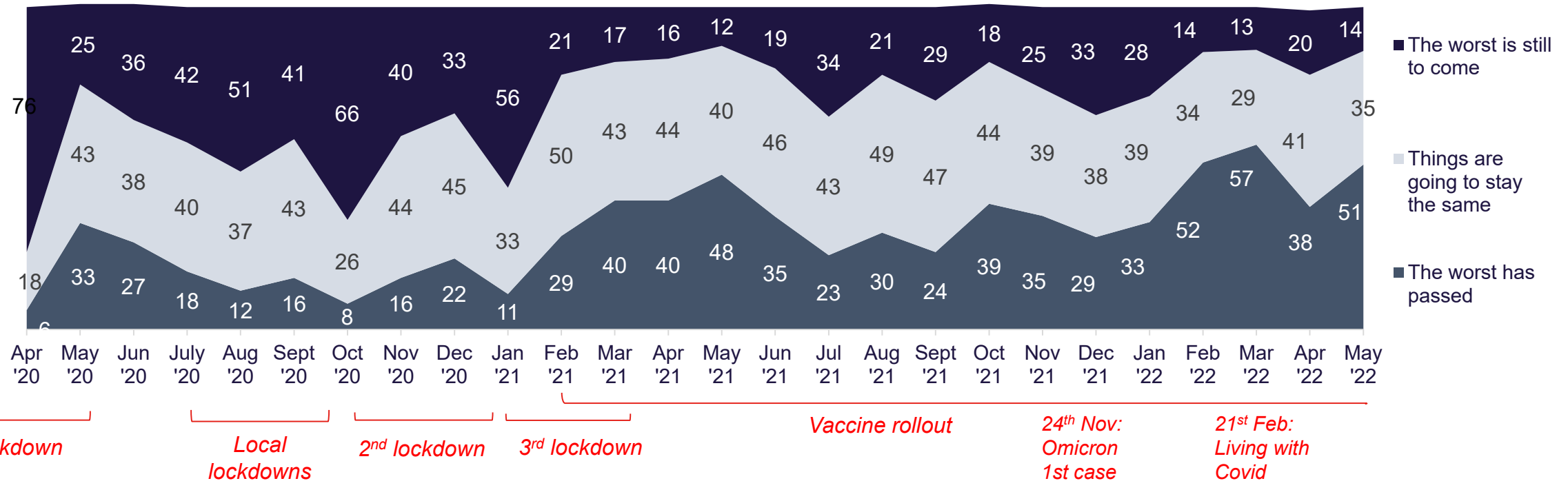
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1. Covid Impact on Attitudes to Travel

Perceptions of the situation relating to COVID-19

From April to May, the proportion of those who think 'the worst has passed' has significantly increased from 38% to 51%.

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

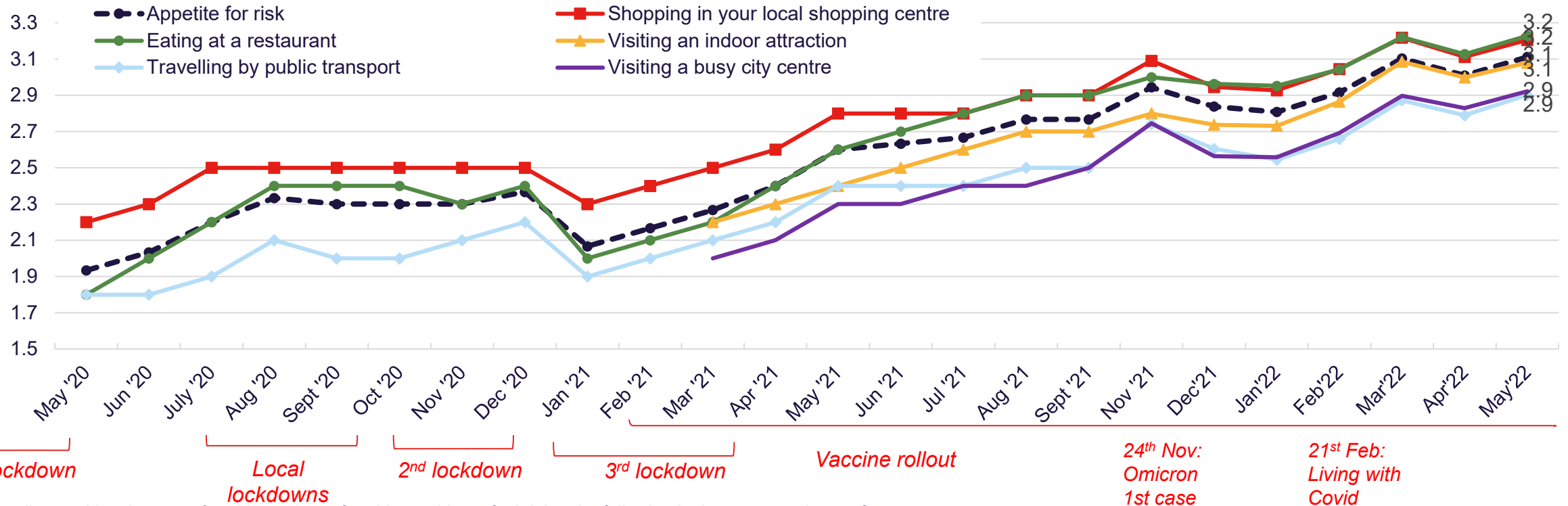


Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion?
 Base: All respondents. May 2022 = 1,760 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
 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

After a drop in April, comfort levels with all 'everyday activities' have returned to the levels reported in March – the highest since the start of the pandemic.

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

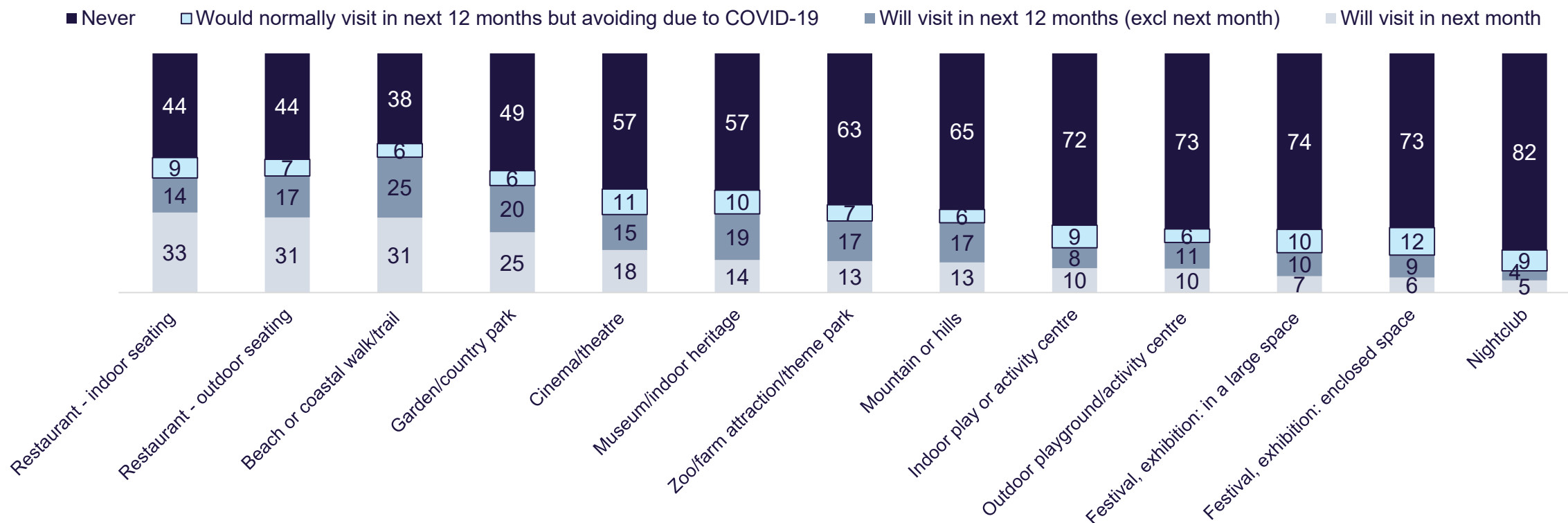


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
 Base: All respondents excluding those stating 'don't know' or who wouldn't do activity under any circumstances. Mean average based on those that gave a score of 1-4. May 2022 = 1,760 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/venue types, 'restaurant – indoor seating' is the venue type most likely to be visited in the next month (33% intending to do so). 'Festivals/exhibitions in an enclosed space' is the venue type most likely to be avoided in the next 12 months due to COVID-related reasons (12% stating this).

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



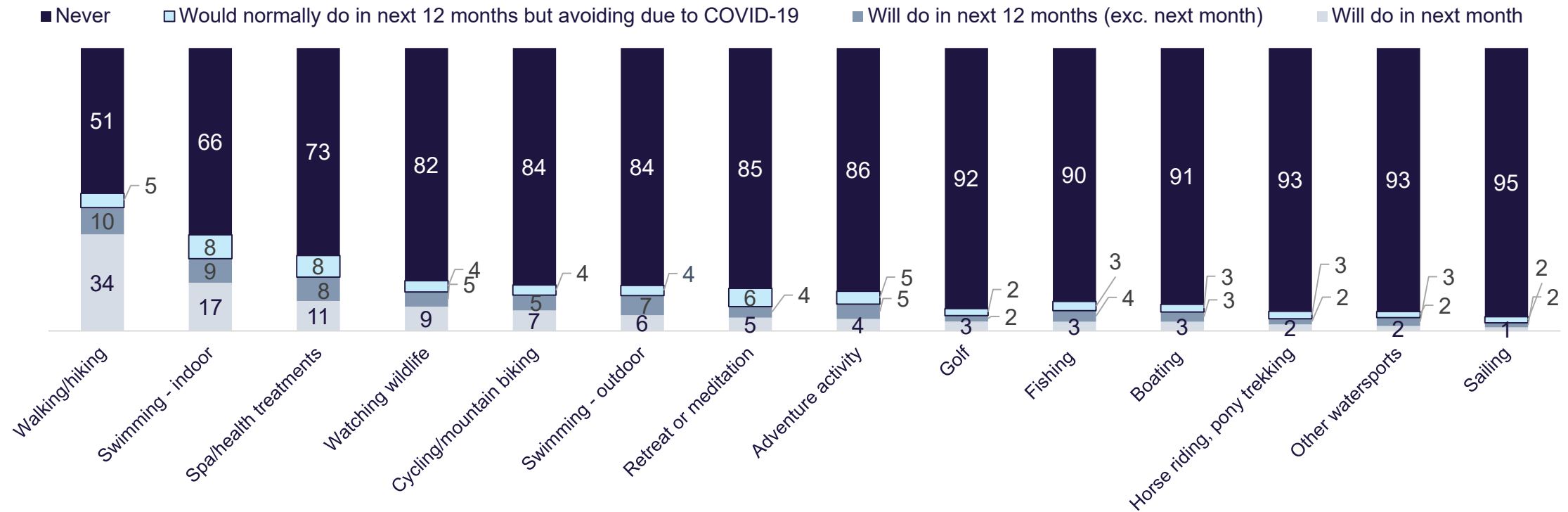
VB9a. Which, if any, of these types of places in the UK are you likely to visit in the next 12 months? VB9b. Which, if any, are you likely to visit in the UK in the next month? VB9c. Which, if any, would you normally visit in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government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

Base: All respondents. May 2022 = 1,760

Intention to conduct leisure activities in the UK

Out of the activities included, 'walking/hiking' is the activity UK adults are most likely to do in the next month (at 34%). 'Indoor swimming' and 'spa/health treatments' are the activities most likely to be avoided due to COVID-19 (8% stating this for each).

Figure 4. Intention to conduct leisure activities, Percentage, May 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. May 2022 = 1,760

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 (38% stating this, *however, this has declined from 41% in April*). This is followed by ‘enhanced cleaning regimes’ (35%) and ‘plentiful hand sanitizers’ (34%).

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, May 2022, UK, Full list



	Dec	Jan	Feb	Mar	Apr	May
Net: Financial booking incentives	63%	62%	63%	58%	59%	58%
Net: Reduced contamination measures	59%	60%	60%	53%	54%	55%
Net: Guest/staff interventions	59%	58%	53%	41%	43%	38%
Net: Social distancing measures	60%	57%	52%	45%	47%	44%



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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

In May, 33% said they would go on more domestic trips and 23% on more overseas trips in the next 12 months compared to the past 12 months. The proportion of those undecided is falling, while more are saying they would go on 'about the same' number of trips.

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

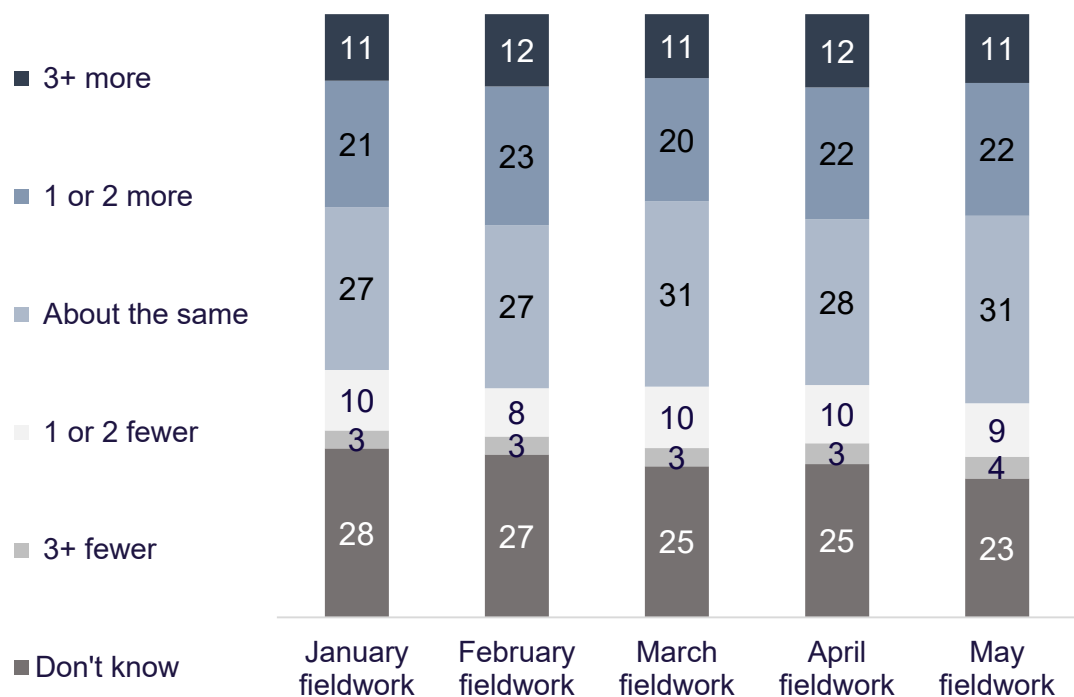
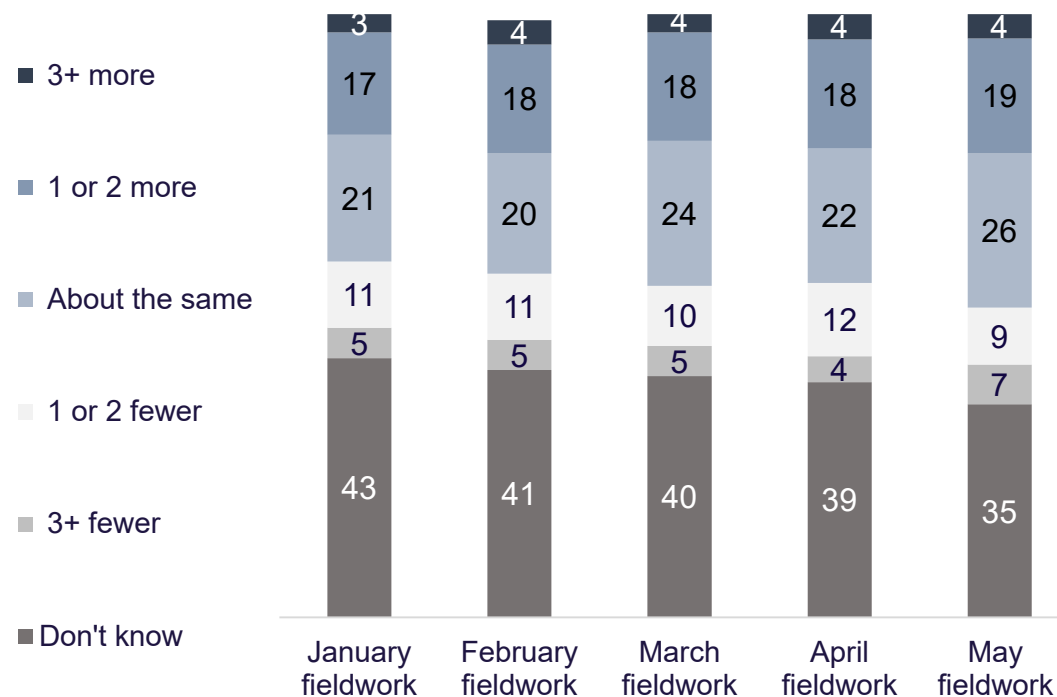


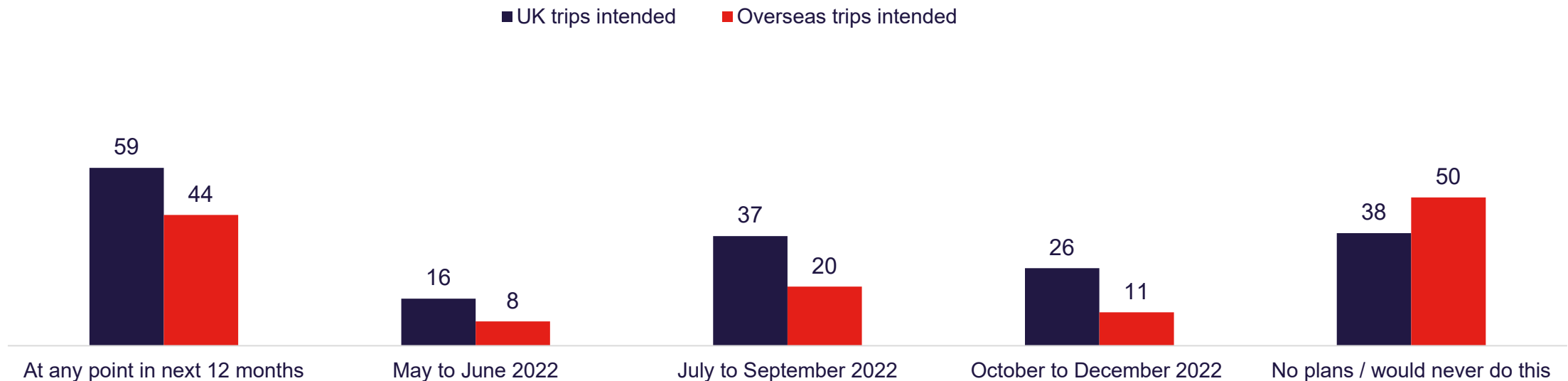
Figure 8. Number of Overseas overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, May 2022, UK



Overnight trips intentions

3 in 5 (59%) 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. Most of these trips are expected to take place between July and September 2022.

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

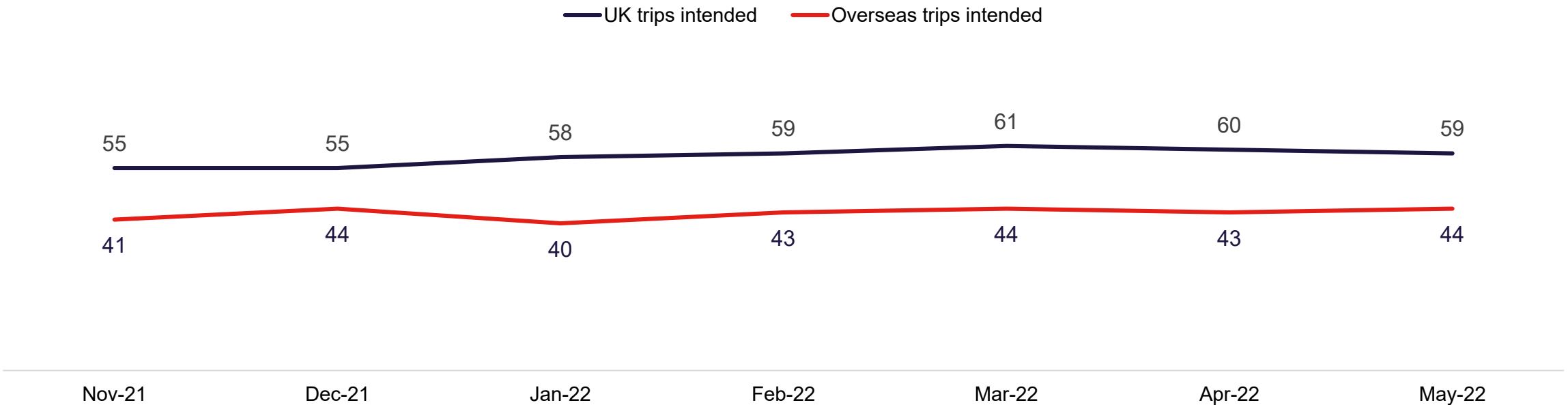


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are 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. May 2022 = 1,760 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Overnight trip intention trend

Looking at the next 12 months, the proportion of UK adults anticipating a UK overnight trip has increased slightly since November 2021, while overseas trip intentions are relatively stable.

Figure 8c. Proportion anticipating going on any overnight UK and overseas trips, next 12 months, Percentage, Wave-on-wave, May 2022, UK

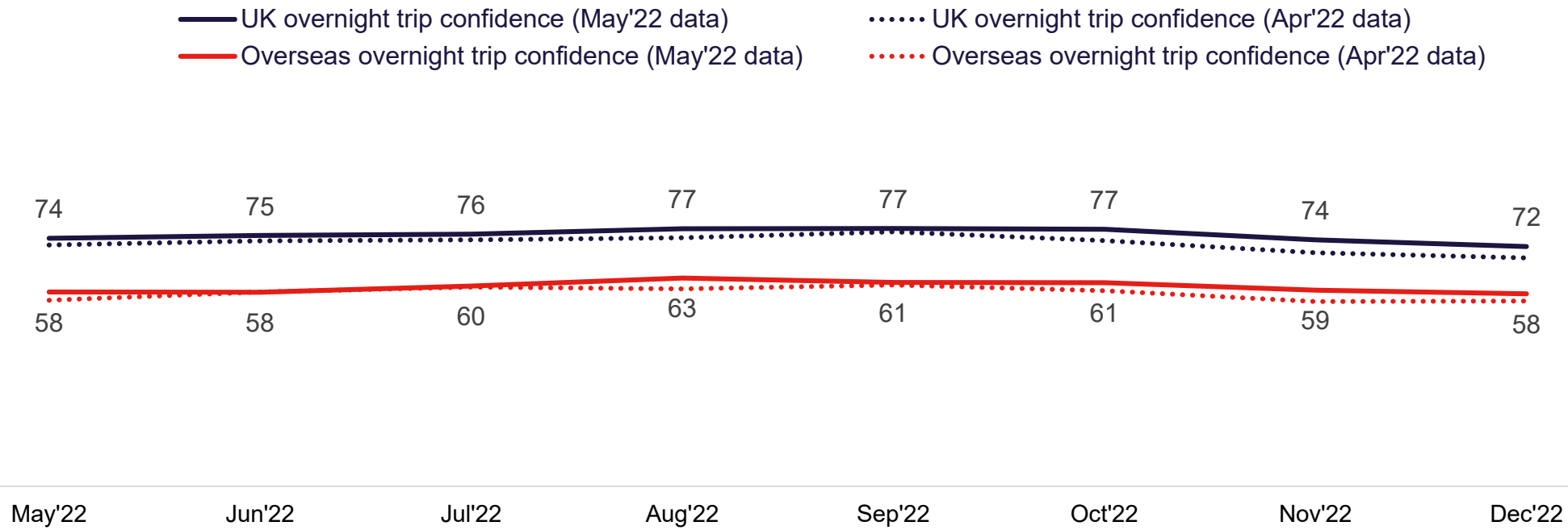


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are 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 May respondents. Next 12 months UK overnight trips = 1,061 Overseas trips = 778. Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods. *May 2022 fieldwork no longer has April figures so caution on the drop

Confidence in the ability to take an overnight trip

Overnight trip confidence levels in May are broadly in line with those recorded in April, with c.75% confident that a domestic trip would go ahead and c.60% being confident that an overseas trip would go ahead.

Figure 9. Confidence in taking a UK and Overseas overnight trip across different time periods, NET Confident (Very confident + fairly confident) Percentage, April and May 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. April 2022 = 1,758, May 2022 = 1,760.

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

'Rising cost of living' is the biggest perceived barrier to taking overnight UK trips between May and June (33% stating this), followed by 'personal finances' (30%) and 'the cost of fuel' (26%). At a net level, 'financial barriers' were stated by 54% for domestic trips and 45% for overseas trips.

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

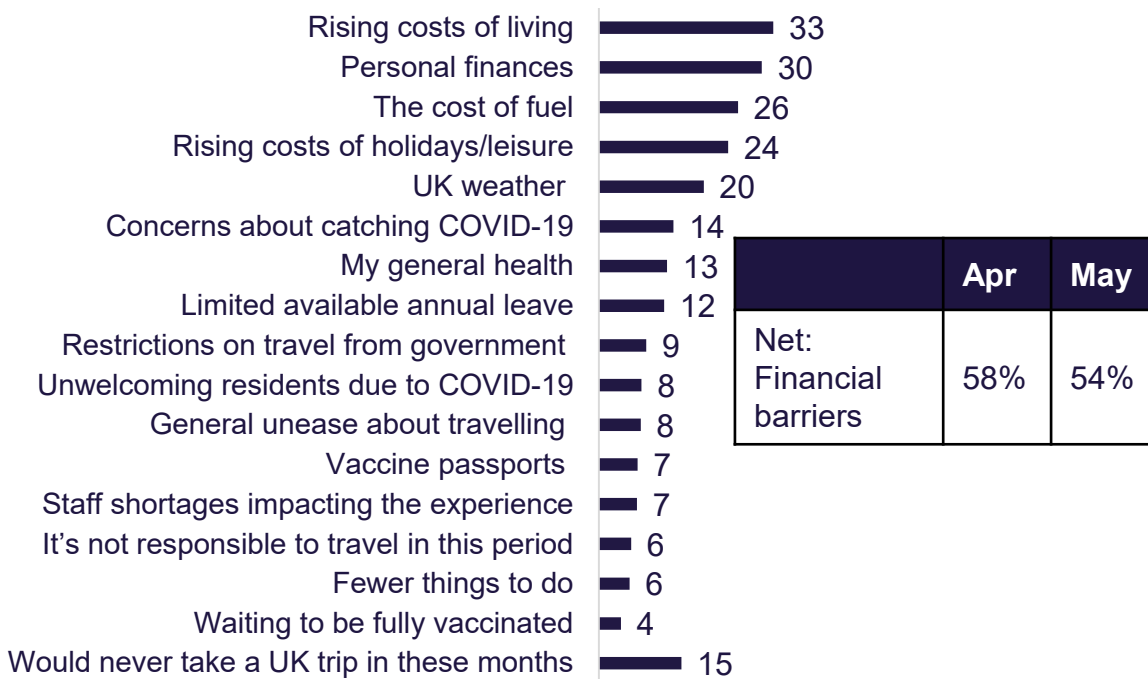


Figure 12. Barriers for taking an overnight OVERSEAS trip May to June 2022, Percentage, May 2022, UK



VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in May 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 May 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. May to June n=1170

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

Similar to the May to June trips, the main perceived barrier to taking an overnight trip in the UK and overseas in July to September is 'rising cost of living' (35% for UK and 28% for overseas). 'Personal finances' is the second biggest barrier during this period (32% for UK and 27% 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, May 2022, UK

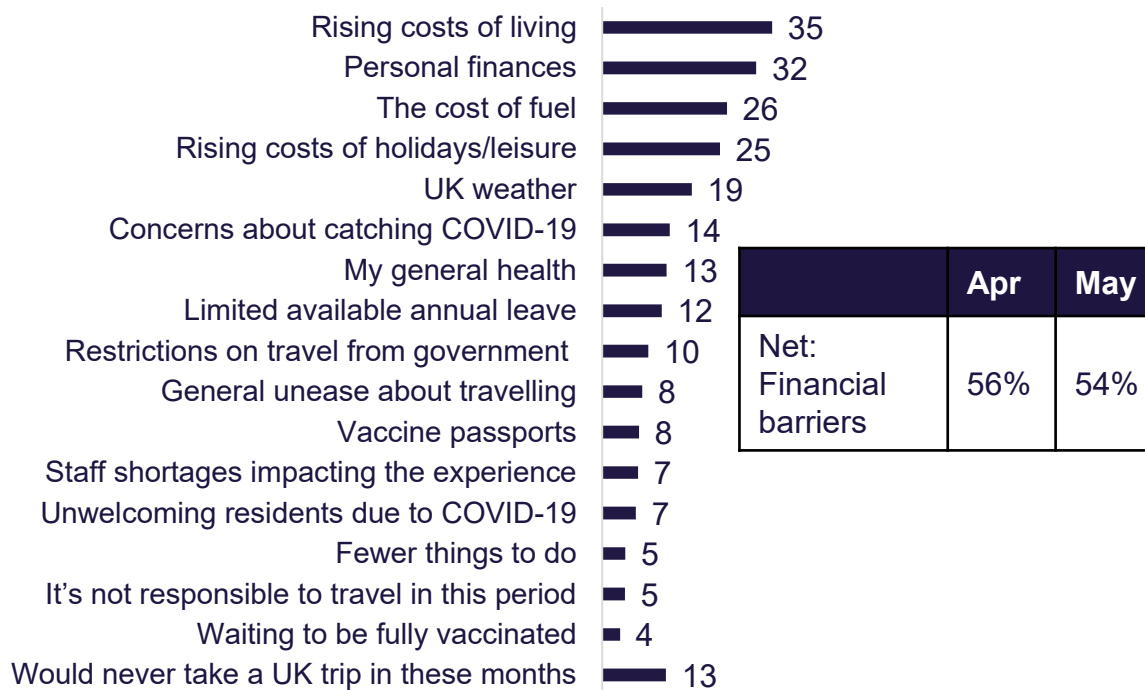


Figure 14. Barriers for taking an overnight OVERSEAS trip in July 2022 to September 2022, Percentage, May 2022, UK



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=1175

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' (20%). 31% say it would have no influence on their choice of destination (*increase from April: 25%*).

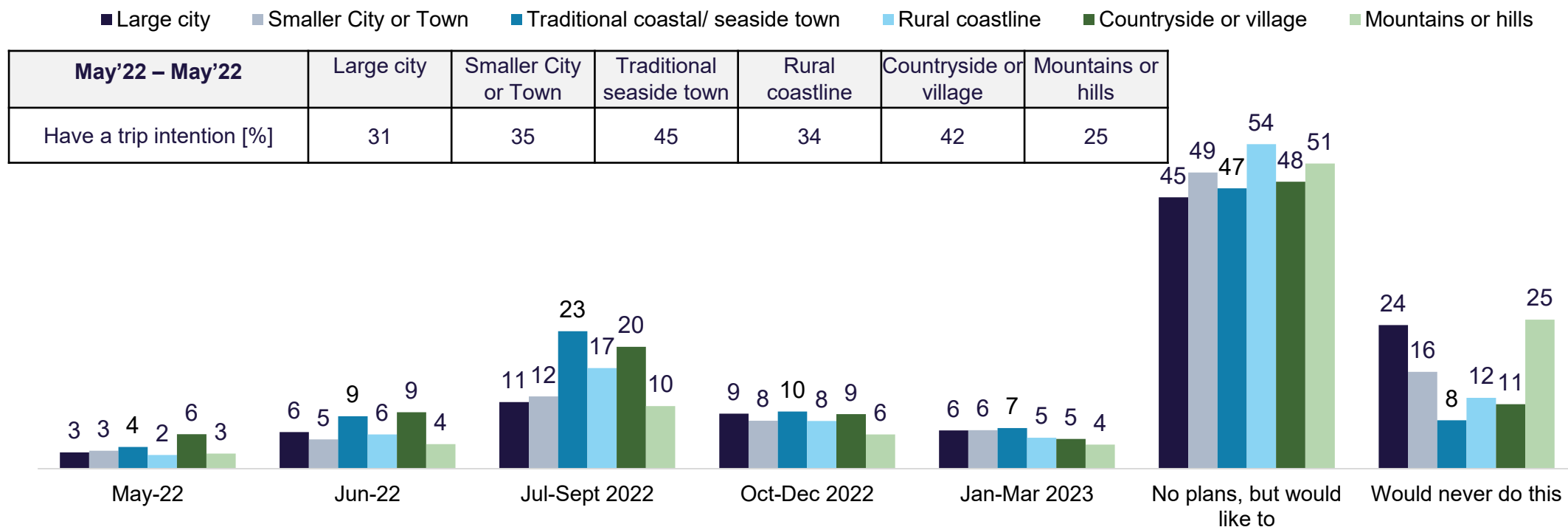
Figure 15a. COVID-19 influence on choice of destination/s for UK holidays and short breaks, Percentage, May 2022, UK, Full list



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 this period.

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





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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 May trips have already been planned and booked. Almost half of June domestic trips are still to be booked.

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

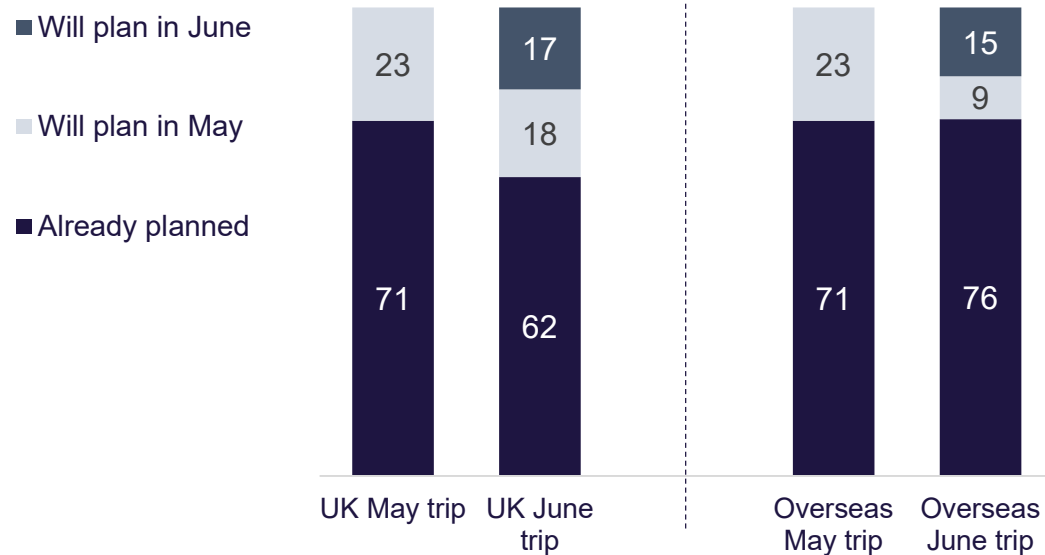
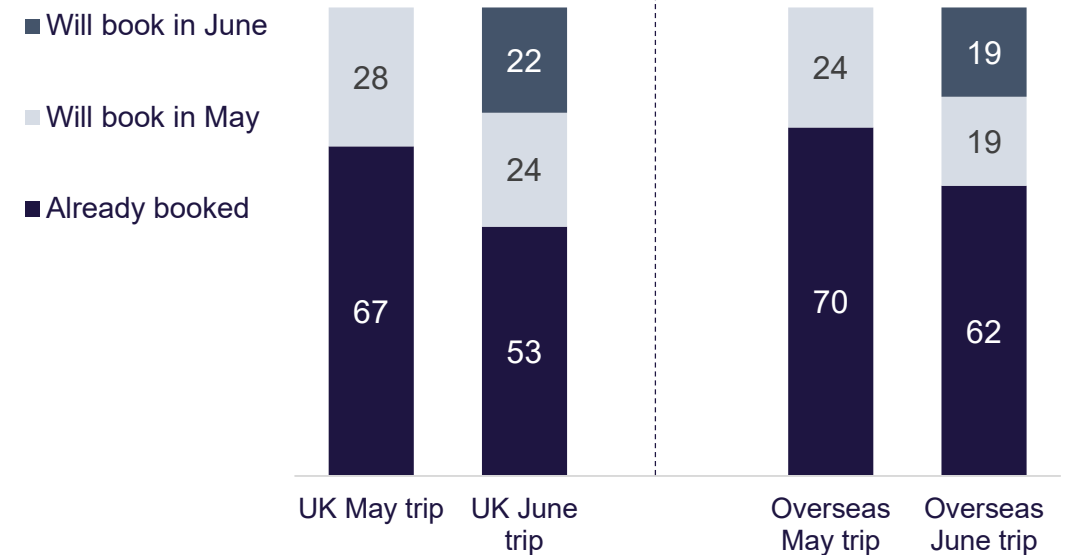


Figure 17. When anticipate **BOOKING** the next **May-June 2022** UK and overseas overnight trip, Percentage of those not yet booked these trips, May 2022, UK

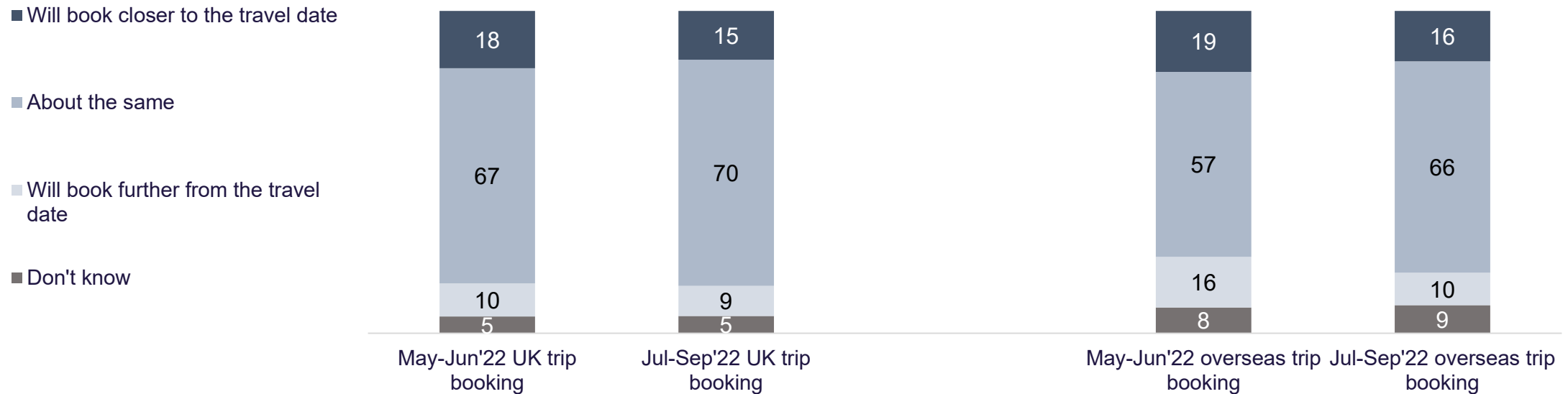


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip
 Base: May UK trips n=127, May overseas trips n=65; June UK trips n=151, June overseas trips n=72.

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

An increasing number of overnight trips in the periods May-Jun'22 and Jul-Sep'22 for both overseas and the UK are booked (or are likely to be booked) with similar lead times to before the pandemic.

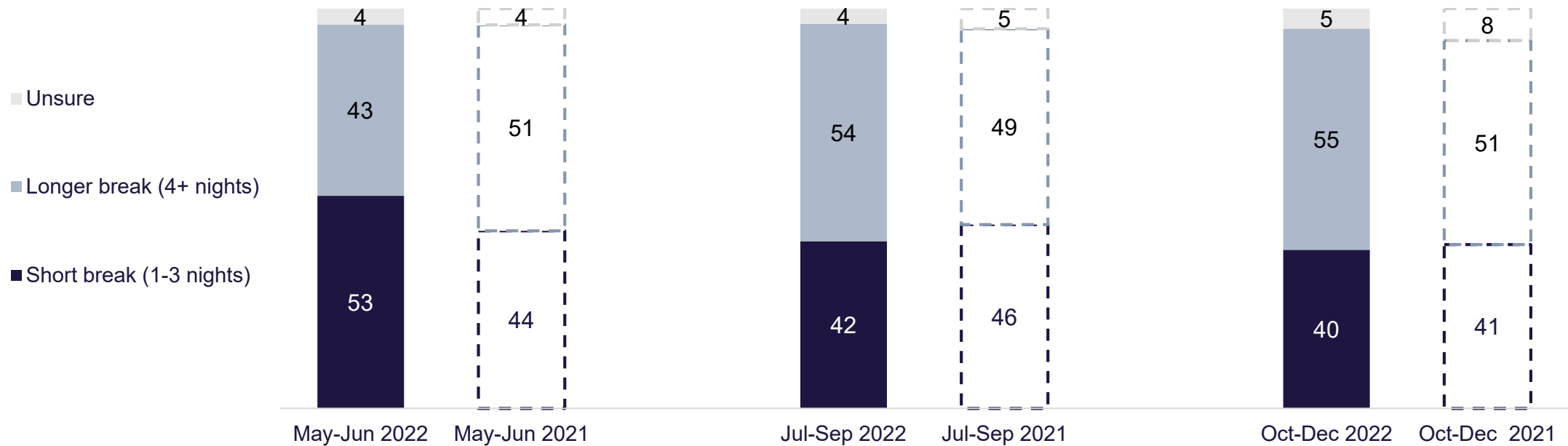
Figure 18. Anticipated booking lead times for May-Jun'22 and Jul-Sep'22 trips compared to before the pandemic, Percentage, May 2022, UK



Duration of the next overnight trip in UK

UK overnight trips planned for May-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 (4+ nights). Notably, domestic trips from July onwards are likely to be longer than in the equivalent period in 2021.

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



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

Base: All May 2022 respondents intending to take next holiday or short break in each time period: May to June 2022 n=278; July to September 2022 n=498.

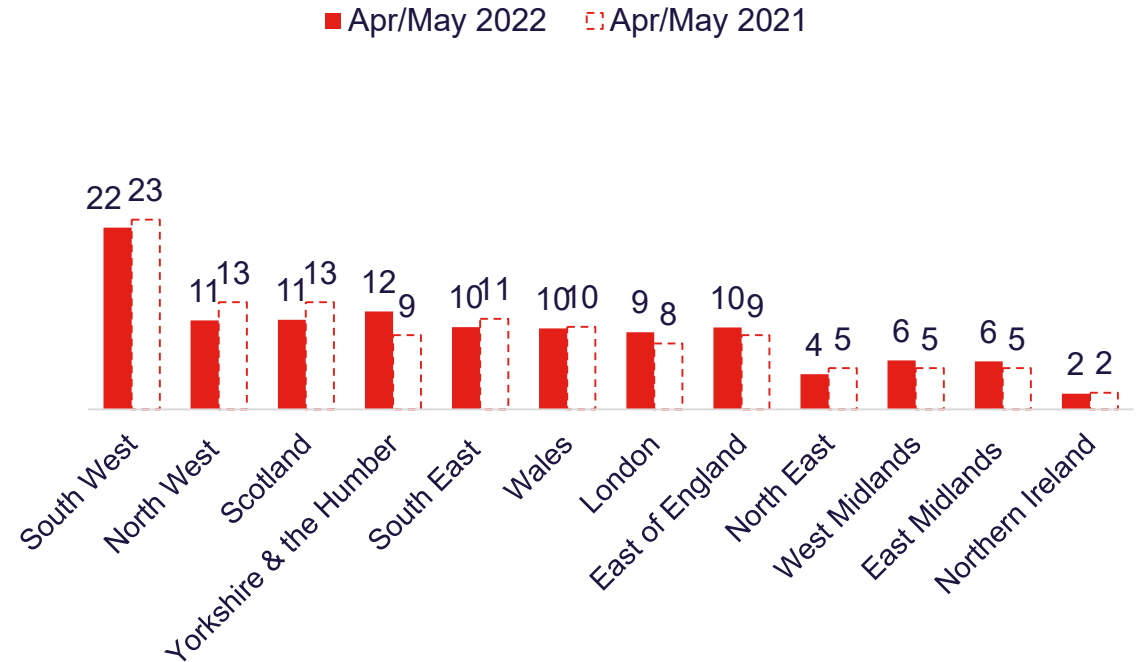
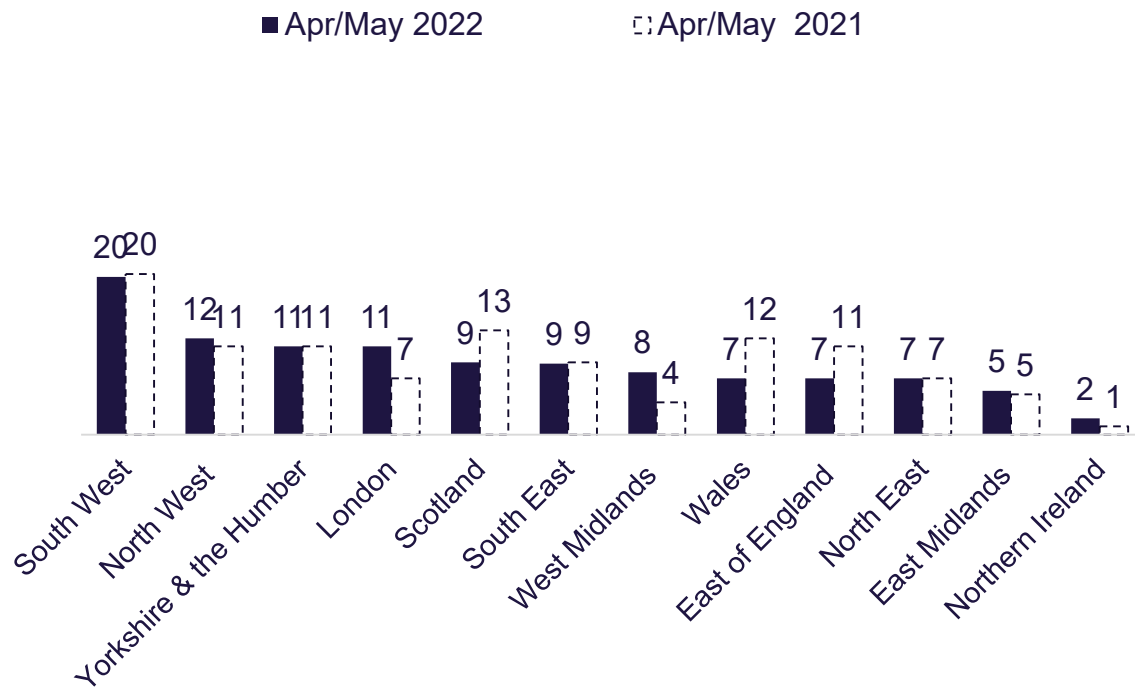
October to December 2022 n = 173; May to June 2021 n=431; July to September 2021 n=896; October to December 2021 n=315

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

The South West is the most preferred UK overnight destination for trips between May and June 2022 (20% of intenders planning a trip there), and it remains the top destination between July and September 2022 (22% intending to take a trip there).

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

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



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

Base: All April 2022 and May 2022 respondents planning on taking a holiday or short break in the UK between May to June 2022 n=517; July to September 2022 n = 948; April 2021 and May 2021 respondents: April to June 2021 n=451, July to September 2021 n=896

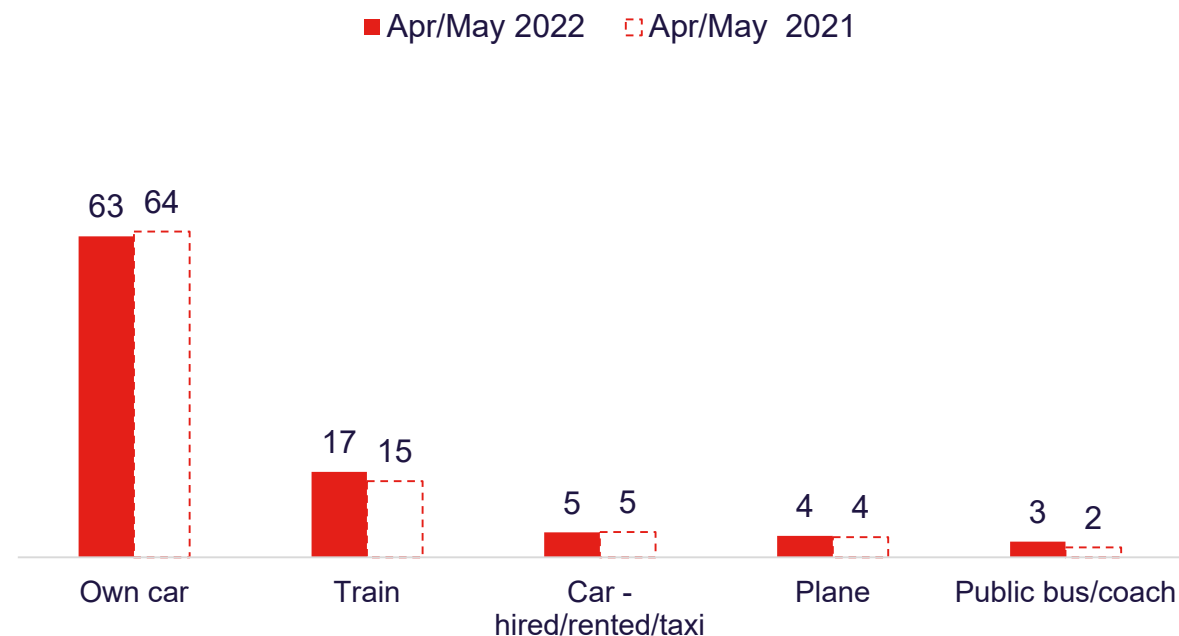
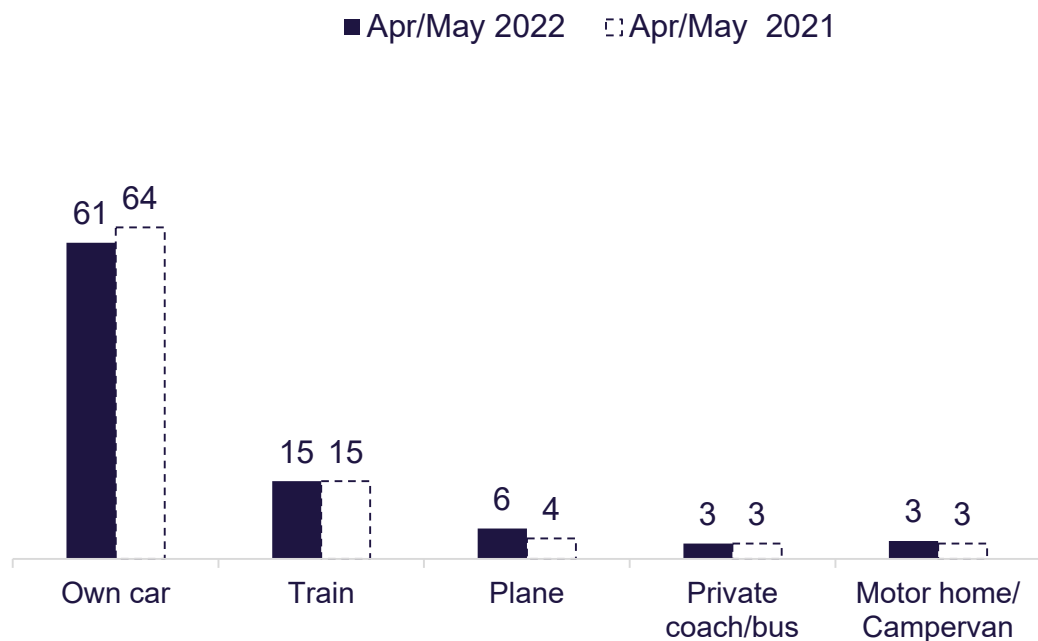
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

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' between May and June, and 'car-hired' between July and September. These are in line with levels seen in 2021.

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

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



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

Base: All April 2022 and May 2022 respondents planning on taking a holiday or short break in the UK between May to June 2022 n=517; July to September 2022 n = 948; April 2021 and May 2021 respondents: May to June 2021 n=451, July to September 2021 n=896

Accommodation type for the next overnight trip in the UK

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

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

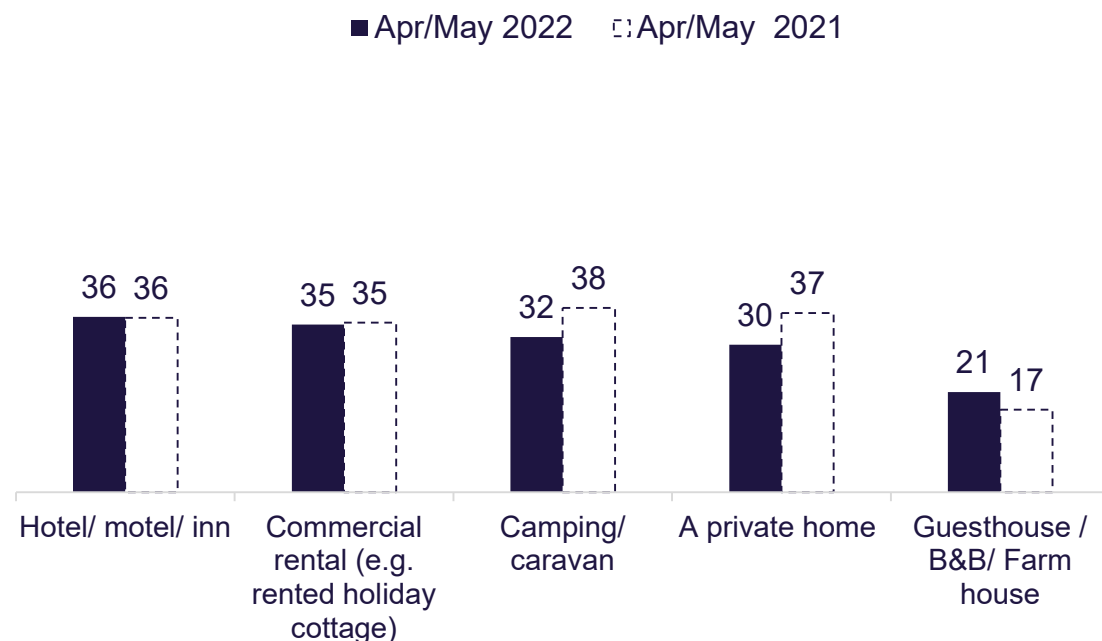
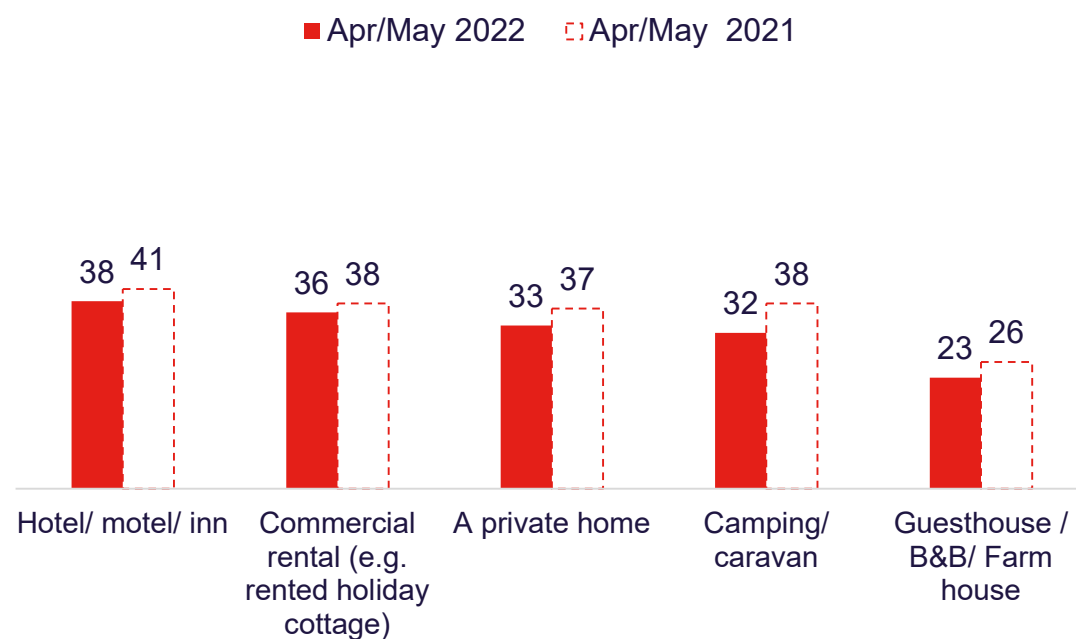


Figure 25. Accommodation planning on staying in on next UK overnight trip in July to September 2022, Net Percentage, April 2022 and May 2022, UK



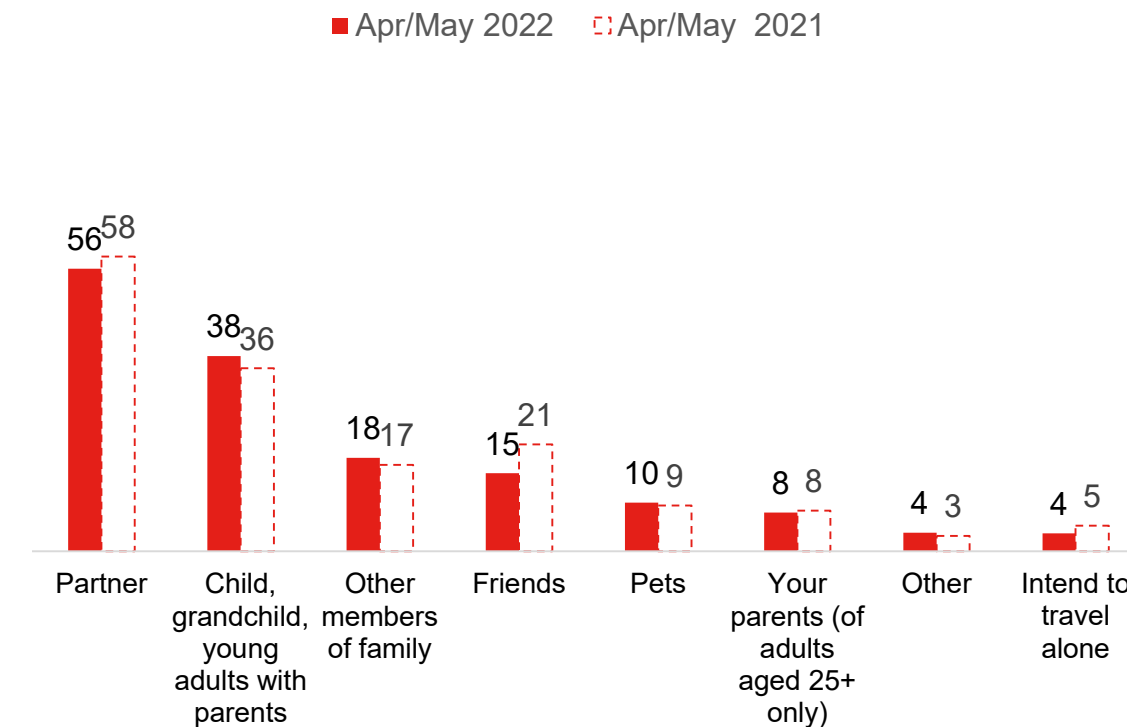
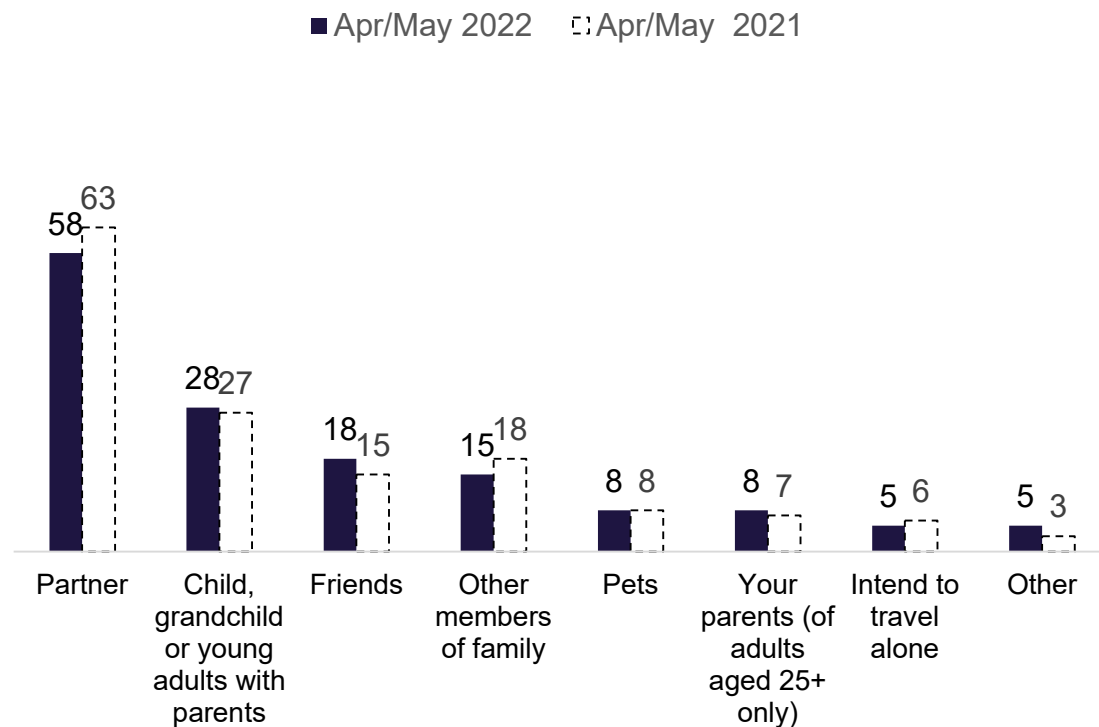
Base: VB6a. What type/s of accommodation do you expect to be staying in during your next UK holiday or short break in? Base: All April 2022 and May 2022 respondents planning on taking a holiday or short break in the UK between May to June 2022 n=517; July to September 2022 n = 948; April 2021 and May 2021 respondents: May to June 2021 n=451, July to September 2021 n=896

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 May to June 2022, Percentage, April 2022 and May 2022, UK

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



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

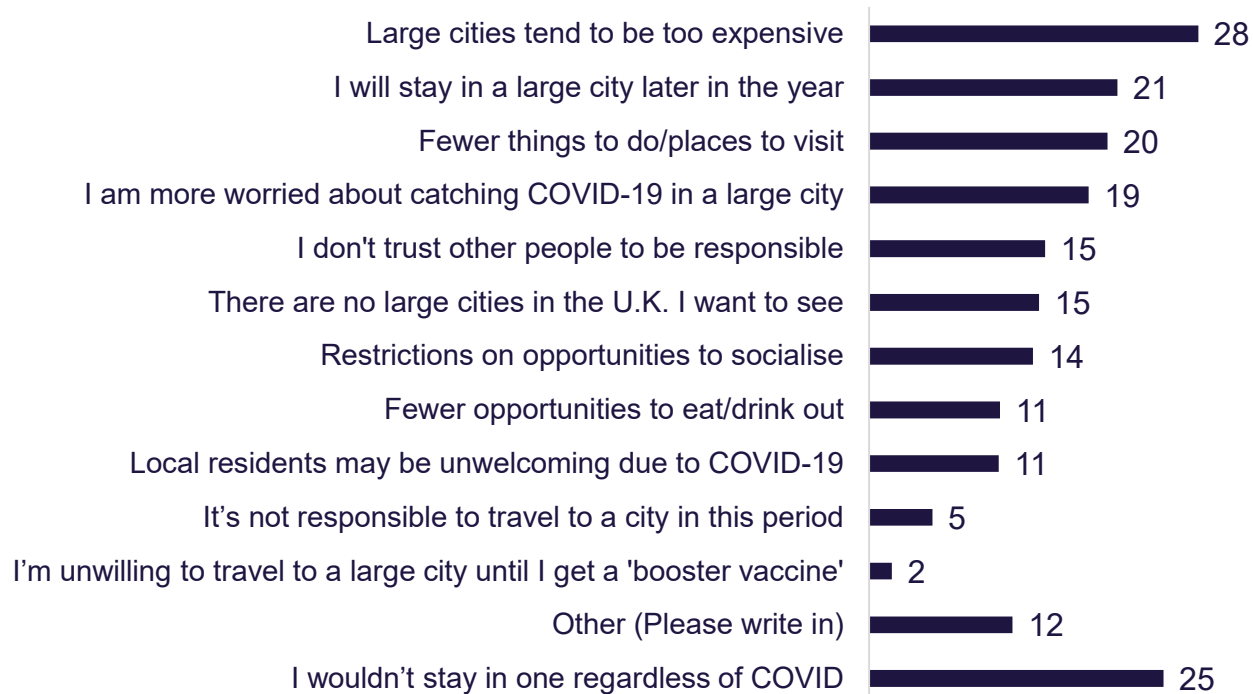
Base: All April 2022 and May 2022 respondents planning on taking a holiday or short break in the UK between May to June 2022 n=517; July to September 2022 n = 948; April 2021 and May 2021 respondents: May to June 2021 n=451, July to September 2021 n=896

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 May to June 2022 Intenders not planning on visiting a large city, 'large cities tend to be too expensive' (28%) is the leading reason for not doing so.

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

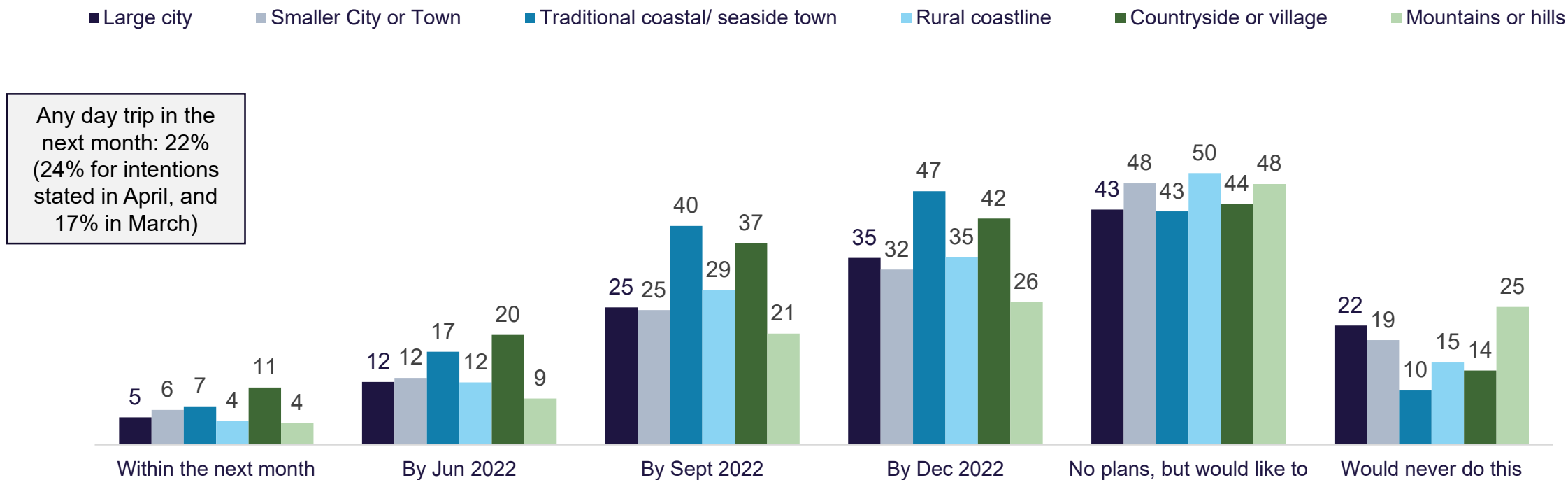


VB5b. You indicated you don't plan on staying in a large city during your next UK holiday or short break in May to June 2022. Why is this? Base: All May 2022 respondents that don't plan on staying in a city on their next UK trip between May and June n=411. Multiple choice question. Totals may exceed 100%

UK day trip intention by destination type

22% of UK adults intend to take any type of day trip by the end of the month, a similar proportion to April. '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 May 2022 and December 2022, Cumulative percentages, May 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). 'Meeting 6 or more people' is the leading reason for taking one (at 30%), followed by 'team building' (at 27%)

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

81% of UK adults interviewed are in employment

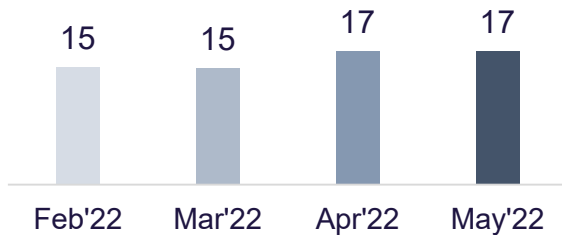
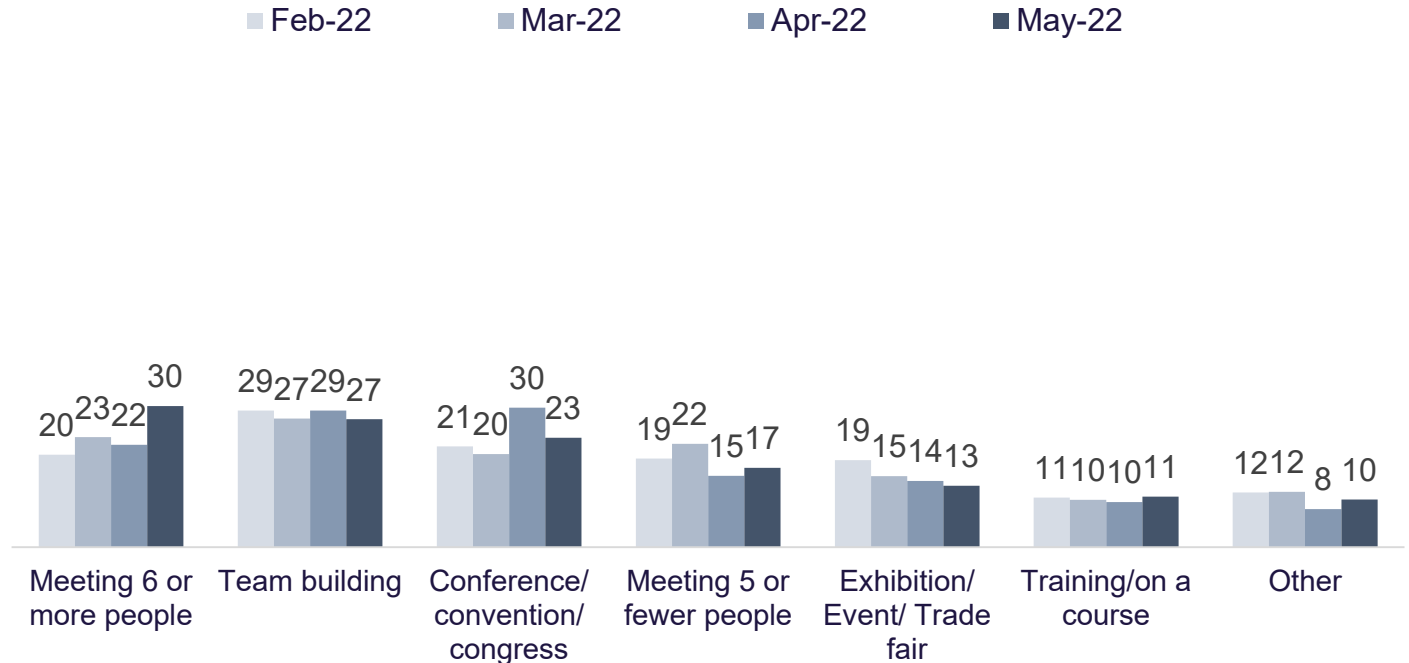


Figure 31. Reasons for taking an overnight business trip in next 3 months, Percentage, May 2022, UK adults in employment planning a trip



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: May respondents currently in employment n = 1,347. All taking a business trip n=242



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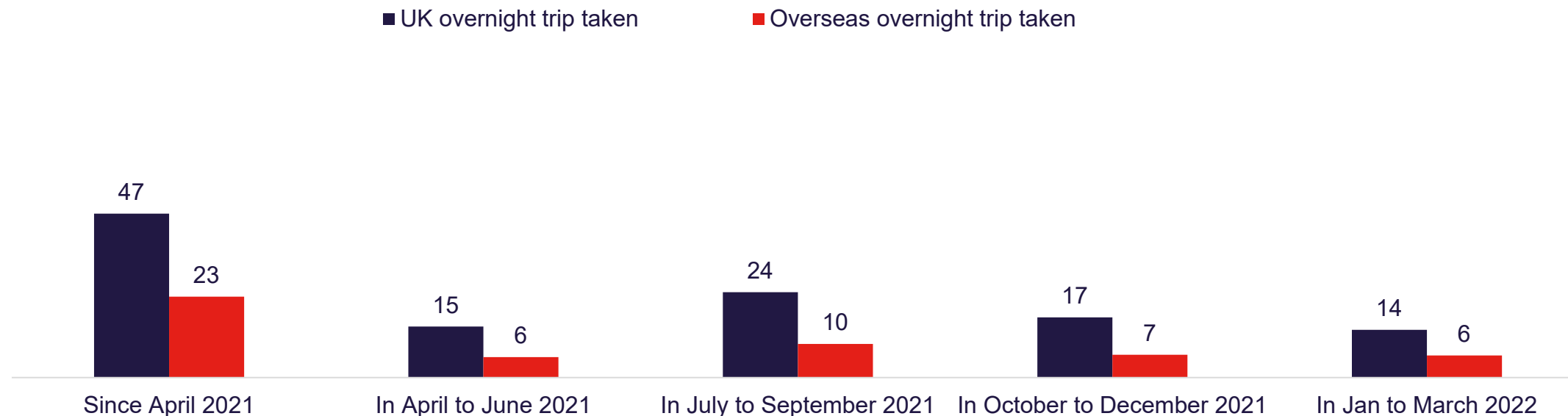
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5. Past UK vs Overseas Trips

Proportion taken a UK and overseas trip since April 2021

Just under half (47%) 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 2021 (domestic: 24% and overseas: 10%).

Figure 32. Proportion taken an overnight UK or overseas trip in below time period, Percentage, May 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. May 2022= 1,760

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

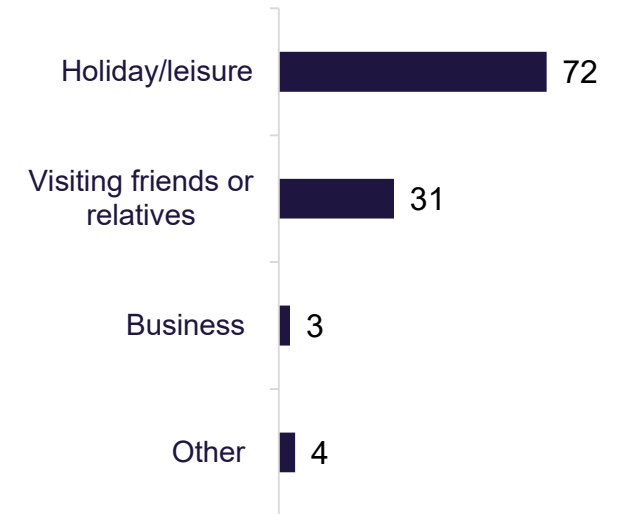
Where stayed and purpose of last UK overnight trip

The South West of England was the most popular destination for trips since September 2021, 17% of trip takers having stayed there. Holiday / leisure was the most dominant purpose for overnight UK trips (72% having taken trips for this reason).

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



Figure 34. Purpose of overnight UK trip taken since September, Percentage, May 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 May 2022 respondents that took an overnight trips since September n=676

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 May 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.
- May 2022 fieldwork was conducted between 3-9 May 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.

