COVID-19 Consumer Profiling Report

Report 12

Published: 16th June 2022

Fieldwork Period: March to May 2022

UK Results

Introduction

VisitEngland, VisitScotland and Visit Wales have commissioned a monthly COVID-19 consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays both within the UK and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.

The survey addresses: the likelihood of UK residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken.

The tracker was conducted weekly for 13 consecutive weeks from May 2020 to August 2020, fortnightly from September 2020 to September 2021, and monthly from November 2021 onwards. Each wave is based on a UK nationally representative sample of c1,500 adults aged 16+, with a boost sample for Scotland and Wales.

The findings in this report are based on aggregating data from the March to May 2022 fieldwork. Fieldwork periods are as follows: March (1st to 7th March); April (1st to 7th April); May (3rd May to 9th May).

Definitions used within this report (2)

In Chapter 3, investigating the intent to visit towns and cities, the following definitions have been used:

- **City Intenders:** Summer Intenders planning on taking an overnight trip to a 'city or large town' in the Summer period
- **City non-Intenders:** Summer Intenders not planning on taking an overnight trip to a 'city or large town' in the Summer period

Chapter 4 looks at Summer intentions by destination region. All destination regions (below) have sufficient base sizes:

- North West
- North East
- Yorkshire and The Humber
- West Midlands
- East Midlands
- East of England
- London
- South East
- South West
- Scotland
- Wales

Definitions used within this report (1)

The report looks at trip Intenders with the following definitions:

1. **Summer Intenders:** UK adults who intend to take a domestic overnight trip between July and September 2022
2. **Summer Intenders – Not Yet Booked:** UK adults who intend to take a domestic overnight trip between July and September 2022 but have not yet booked their trip
3. **Autumn Intenders:** UK adults who intend to take a domestic overnight trip between October and December 2022
4. **Autumn Intenders – Not Yet Booked:** UK adults who intend to take a domestic overnight trip between October and December 2022 but have not yet booked their trip
5. **Non-Intenders:** UK adults who don't have any domestic overnight trips planned, but would consider it

Chapter 2 looks at the profile and behaviour of **Summer Intenders by destination type**. All individual destination types have sufficient base sizes among Summer Intenders to show each destination type's profile. Destinations types included:

- Traditional coastal/ seaside town
- Countryside or village
- Rural coastline
- Smaller city or town
- Large city
- Mountains or hills

Definitions used within this report (3)

Throughout the report, the following **accommodation definitions** are used:

- Hotel/Motel/Inn
- Guest house/B&B/Farmhouse
- Commercial rental: Rental holiday flat/apartment or Rented holiday home
- Private home: Second home/time share or friends/relative's home or in someone else's private home on a commercial basis (e.g. Airbnb)
- Caravan/Camping/Glamping: Touring caravan or campervan/motorhome or static caravan (owned / not owned) or tent or glamping/alternative
- Other accommodation: Hostel or other type of accommodation

To deliver clearer profiles, we also segment by life stage. Life stages are preferable to 'age' as they better describe someone's life situation. For the purpose of this report, we have used the following:

- **Pre-Nesters:** Aged 16-34 without children in household
- **Families:** Aged 16-64 with children in household
- **Older independents:** Aged 35-64 with no children in household
- **Retirement age:** Aged 65+.

1. Summer and Autumn Intenders Profile

Groups in focus

37% of UK adults are intending to take an overnight UK trip in summer, among these, 30% have already booked and planned their trip *(when asked in May)*.

Figure 1. Proportion anticipating going on any overnight UK trips, Percentage, May 2022, UK

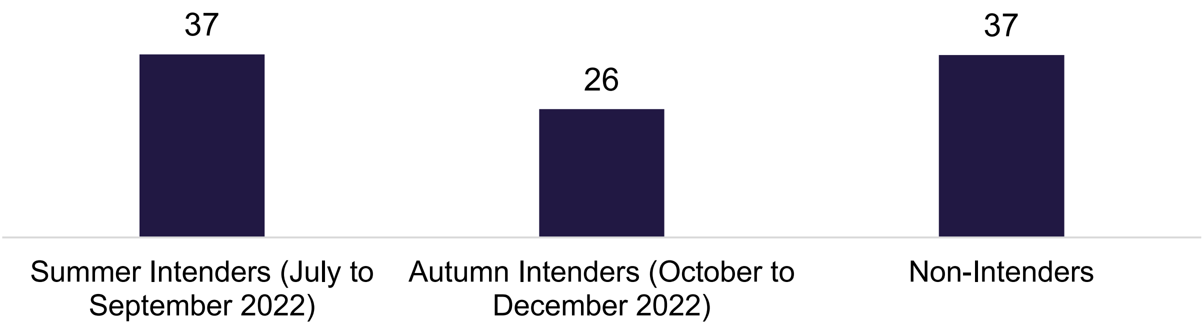
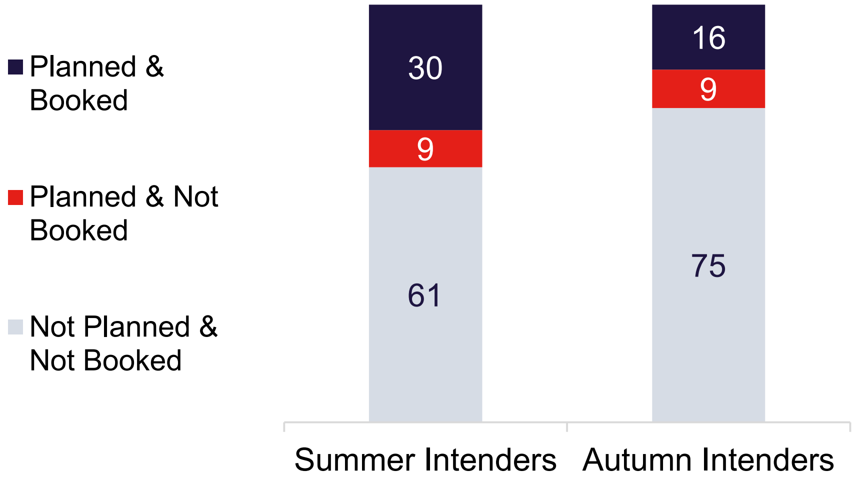


Figure 2. Proportion of Intenders that have already planned or booked their upcoming trip, Percentage, May 2022, UK

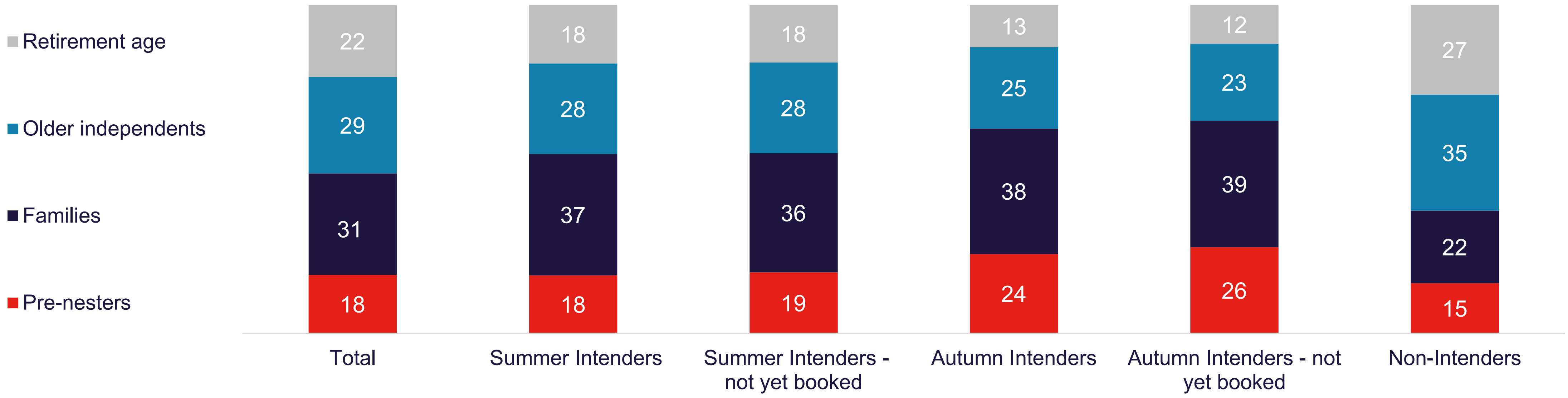


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are 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? Figure 1 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. Figure 2 Base: May only - Summer Intenders n=498; Summer Intenders n=173

Life stage by UK overnight trip intention

Compared to the total sample, Intenders are more likely to be Families. Older Independents and Retirees are less likely to be planning an overnight UK trip.

Figure 3. Life stage by UK overnight trip intention, Percentage, March to May, UK

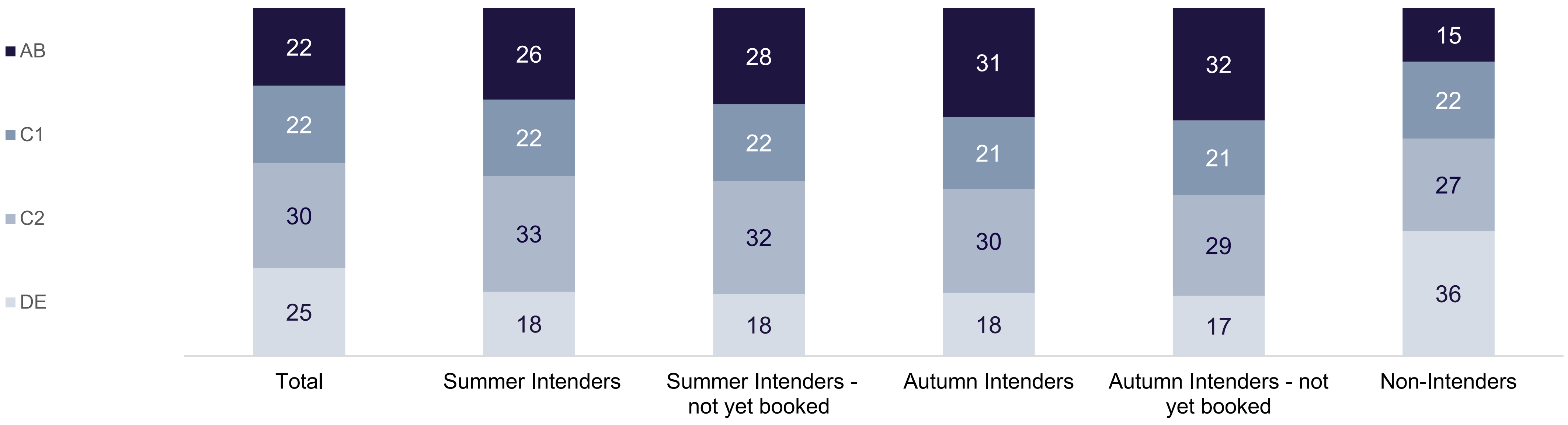


Source: Demographic questions. Life stage definitions: Pre-Nesters – aged 16-34 without children in household; Families – aged 16-64 with children in household; Older independents – aged 35-64 with no children in household; Retirement age – aged 65+.
Base: Total n=5,274 Summer Intenders n=1,352; Summer Intenders – not yet booked n=1,009; Autumn Intenders n=447; Autumn Intenders – not yet booked n=395; Non-Intenders n=1,613

Social grade by UK overnight trip intention

Both summer and autumn Intenders are more likely than average to be social grades AB (26% of summer and 31% for autumn Intenders). Non-Intenders are more likely to be social grades DE (36% vs 25% of total) .

Figure 4. Social grade by UK overnight trip intention, Percentage, March to May, UK

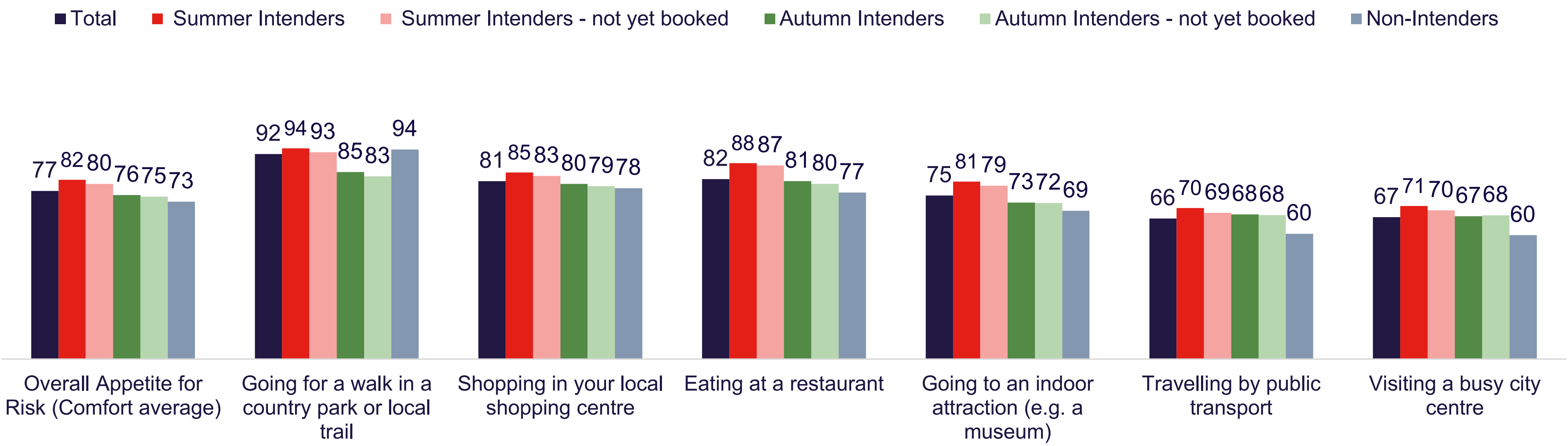


Source: Demographic questions. Base: Total n=5,274 Summer Intenders n=1,352; Summer Intenders – not yet booked n=1,009; Autumn Intenders n=447; Autumn Intenders – not yet booked n=395; Non-Intenders n=1,613

Appetite for Risk: by UK overnight trip intention

There is a strong link between level of comfort conducting everyday activities and intentions to take an overnight domestic trip in the short term – looking at summer Intenders, the overall 'appetite for risk score' is higher (82%) than the total (77%).

Figure 6. Level of comfort conducting a range of activities, NET very and fairly comfortable, Percentage, March to May, UK

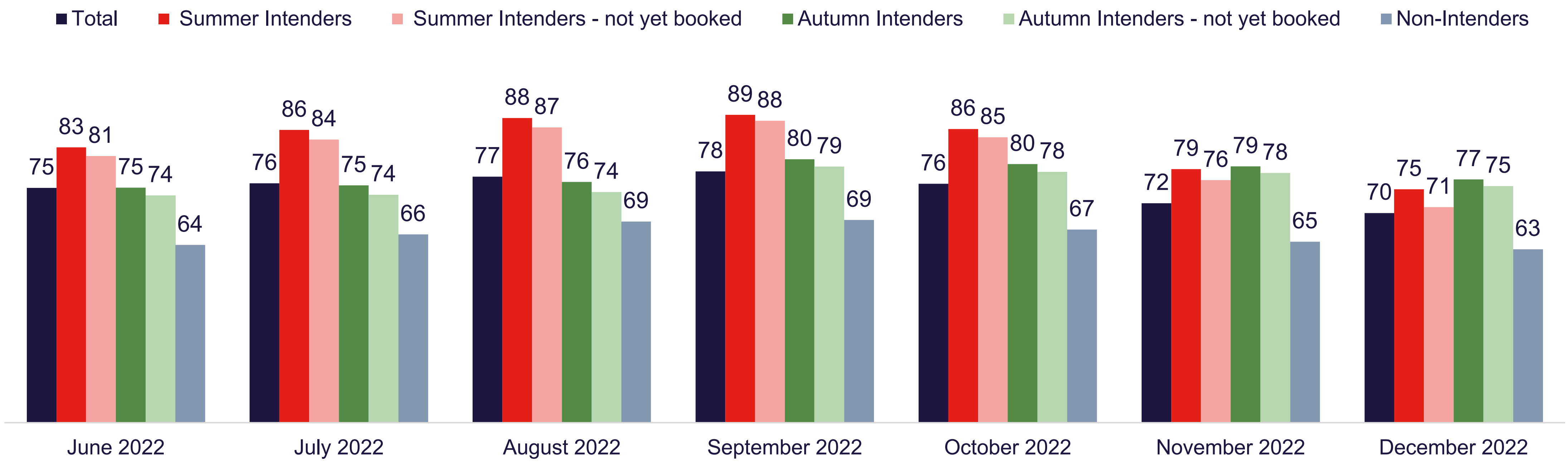


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: Total n=5,274 Summer Intenders n=1,352; Summer Intenders – not yet booked n=1,009; Autumn Intenders n=447; Autumn Intenders – not yet booked n=395; Non-Intenders n=1,613

Confidence in the ability to take a UK overnight trip: by UK overnight trip intention

The proportion of UK adults who are confident their trip would go ahead is higher among summer Intenders for trips between June and October, when compared to the total sample and all intender groups.

Figure 7. Confidence in the ability to take a UK short break or holiday across a range of different months, NET very and fairly confident, Percentage, March to May, UK

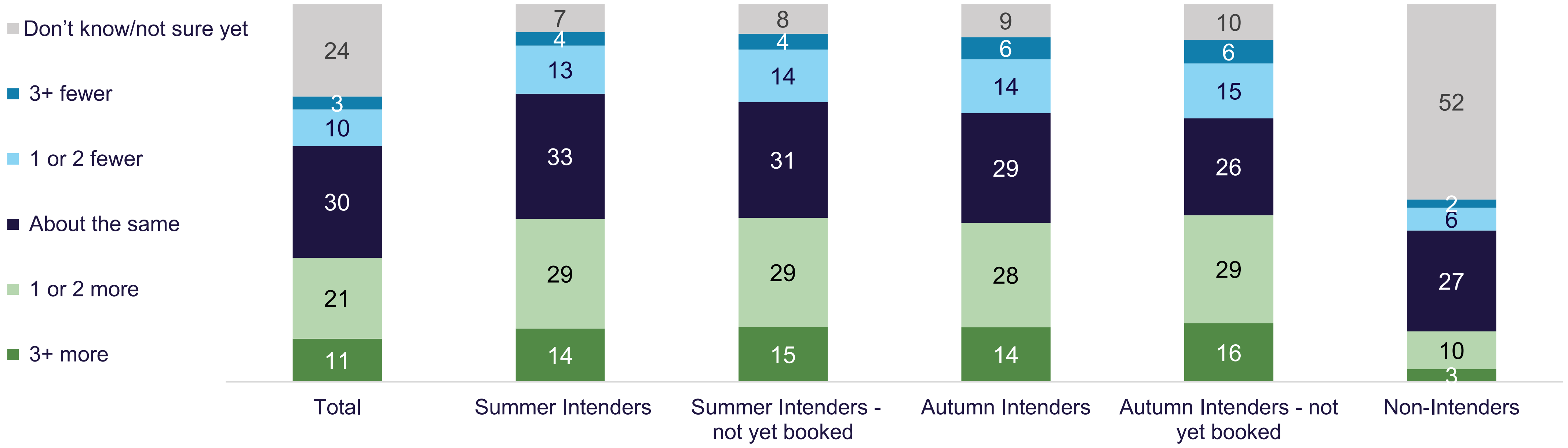


QVB7anew. We'd like you to imagine that you have booked a UK holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips? Base: Total n=5,274 Summer Intenders n=1,352; Summer Intenders – not yet booked n=1,009; Autumn Intenders n=447; Autumn Intenders – not yet booked n=395; Non-Intenders n=1,613

Number of intended UK trips in next 12 months vs past 12 months: by UK overnight trip intention

More than 2 in 5 summer Intenders and autumn Intenders are set to take more UK overnight trips in the next 12 months than they did in the past 12 months. Just over half of Non-Intenders are still unsure.

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

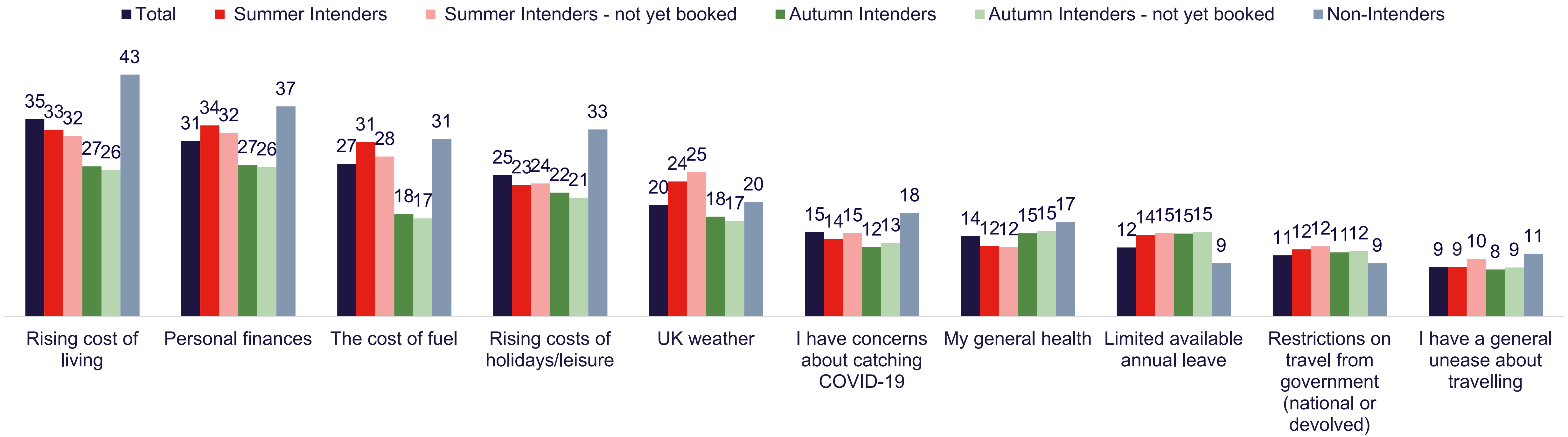


VB1a Thinking about the next 12 months, are you likely to take more, fewer or about the same number of UK and overseas holidays/short breaks as you took in the last 12 months? Base: Total n=5,274 Summer Intenders n=1,352; Summer Intenders – not yet booked n=1,009; Autumn Intenders n=447; Autumn Intenders – not yet booked n=395; Non-Intenders n=1,613

Perceived barriers to taking a summer overnight trip in the UK: by UK overnight trip intention

For all groups, the main barrier to taking a UK overnight trip in summer is the ‘rising cost of living’, followed by ’personal finances’. Non-Intenders are especially likely to see finances as a barrier, although they are also more likely to still have concerns about catching COVID.

Figure 9. Top 10 Barriers for taking an overnight UK trip in Summer 2022, Percentage Top 10, March to May, UK

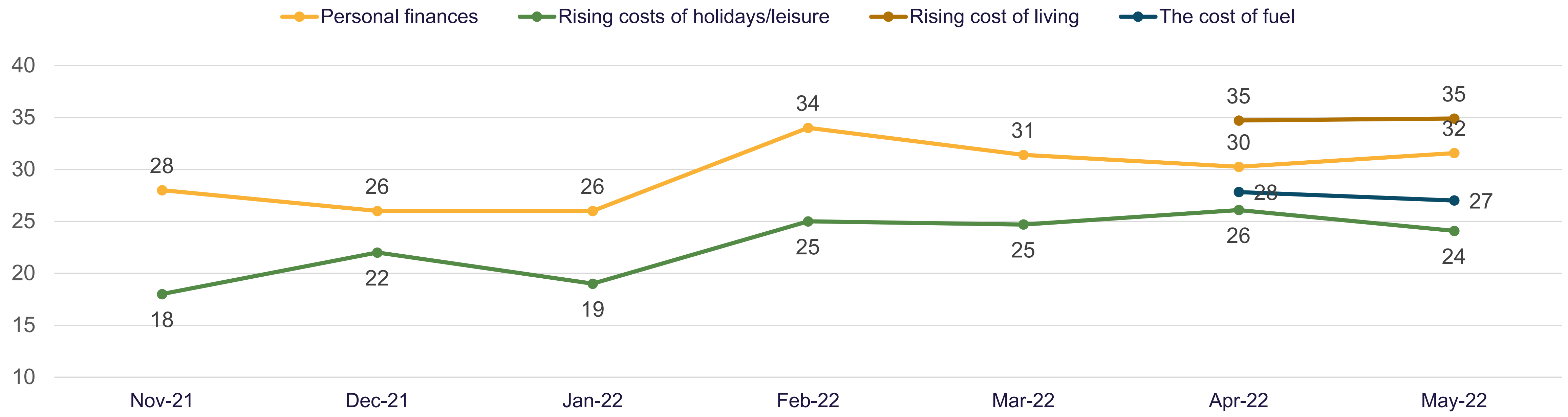


VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday between July to September 2022?
Base: Total n=2,343 Summer Intenders n=619; Summer Intenders – not yet booked n=453; Autumn Intenders n=223; Autumn Intenders – not yet booked n=197; Non-Intenders n=711

Trend of finance related barriers to taking a summer overnight trip in the UK

The concerns regarding 'personal finances' or 'rising costs of holidays/leisure' have been increasing from November 2021 to May 2022.

Figure 10. Perceived barriers to taking a UK short break or holiday in Summer, Wave-on-wave, Percentage, UK

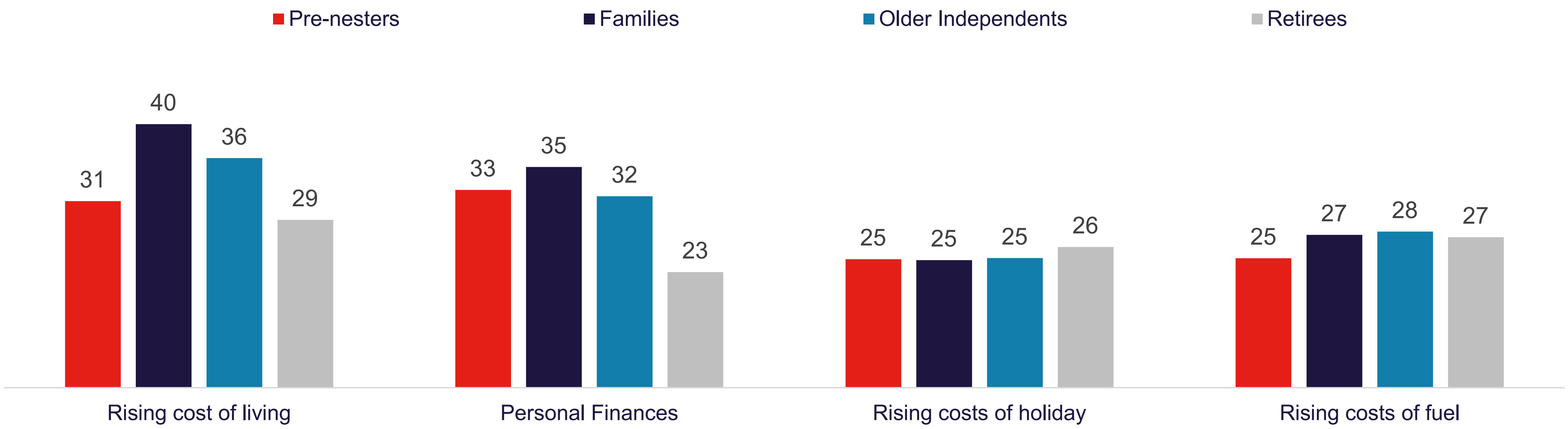


VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday between July to September 2022?
Base: c.875 respondents per wave *'Rising cost of living' and 'the cost of fuel' were added as new codes in April 2022.
Note: New answer options were added in April 2022

Finance related barriers to taking a summer overnight trip in the UK

Families are most likely to state ‘rising cost of living’ as a potential barrier to their domestic summer trip, while Retirees are least likely to state ‘personal finances’ as a potential barrier to their domestic summer trip.

Figure 11. Perceived financial barriers as a potential barrier to taking an overnight trip in the UK in Summer, Percentage, March to May, UK



VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday between July to September 2022?
Base: Mar-May fieldwork period; Pre-Nesters (225/174/122/164), Families (435/309/240/331); Older Independents (289/217/175/240); Retirees (139/157/113/125)
*Rising cost of living and rising cost of fuel were asked in April-May fieldwork period

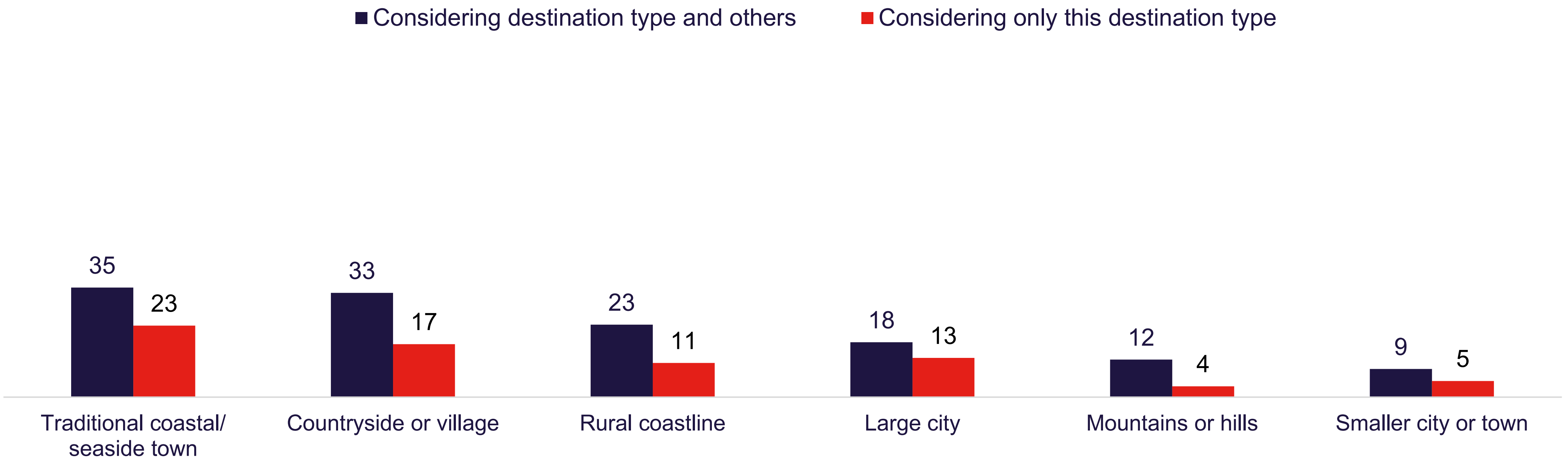
2. Summer Intenders

Profile by Destination Type

UK Summer Trip Destination Types

Summer trip Intenders are most likely to be planning on taking their visit to a ‘traditional coastal seaside town’ and ‘countryside or village’.

Figure 15. Main Destination Type of Intended Summer Trip, Percentage, March to May, UK



QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,352 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate to stay in more than one type of destination.

UK Summer Trip Destination Types: overlap

Some summer Intenders are planning to stay in more than one destination type. For example, 49% of those intending to stay in the mountains or hills, also plan to stay in a countryside or village.

Table 1. Destination types also considered for Summer Trips, Percentage, March to May, UK, (Read chart vertically)

Column %	Traditional coastal/ seaside town	Countryside or village	Rural coastline	Smaller city or town	Large city	Mountains or hills
Traditional coastal/ seaside town		22%	28%	17%	12%	25%
Countryside or village	21%		34%	21%	14%	49%
Rural coastline	18%	24%		14%	7%	31%
Smaller city or town	4%	6%	5%		8%	11%
Large city	6%	8%	5%	16%		10%
Mountains or hills	9%	18%	16%	14%	7%	

QVB5a. Which of the following best describes the main types of destinations you are likely to stay in during your UK trip?
Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,352 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate to go on more than one trip and/or stay in more than one type of destination.

Summer Traditional Seaside Town Intenders (35% share)

Summer Traditional Seaside Town Intenders are more likely than average to be travelling with children/young adults, to take longer breaks and to be staying in a ‘static caravan – not owned by you’.

Figure 16. Life Stage of Summer Intenders, Percentage, March to May, UK

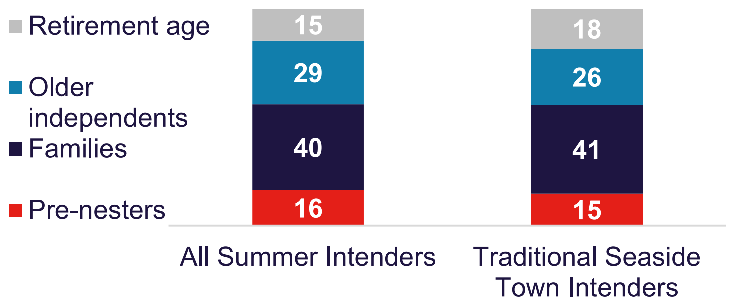


Figure 17. Average comfort level conducting everyday activities, NET very and fairly comfortable, March to May, UK

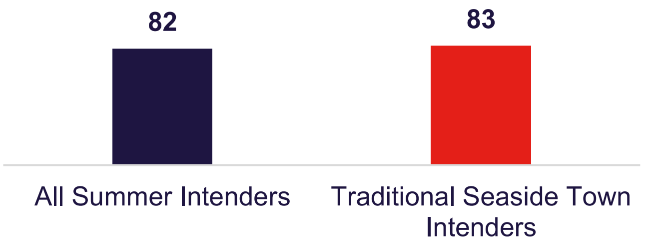


Figure 18. Trip Duration of Intended Summer Trip, Percentage, March to May, UK

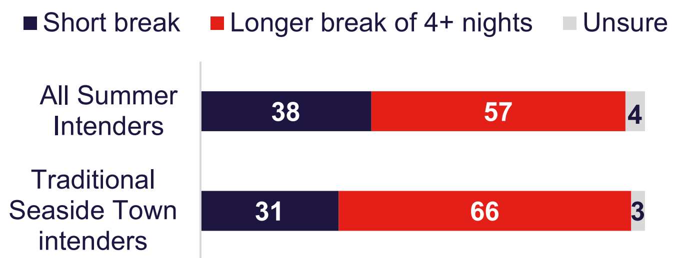


Figure 19. Trip Taker Party Make-up of Intended Summer Trip, Top 5, Percentage, March to May, UK

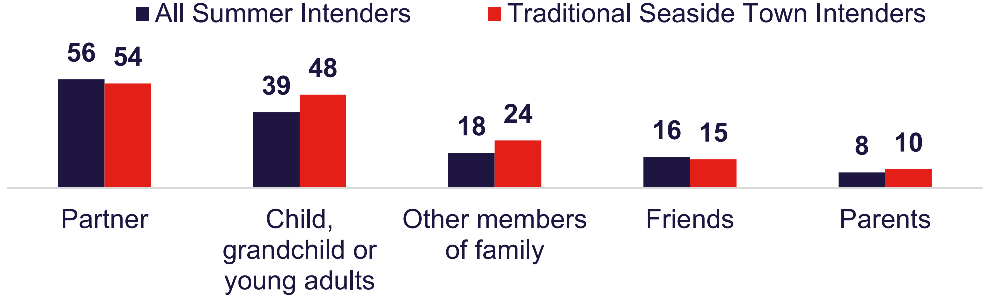
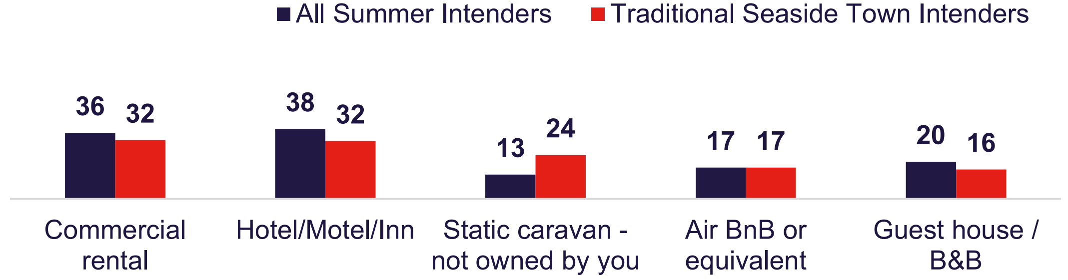


Figure 20. Accommodation Type of Intended Summer Trip, Top 5, Percentage, March to May, UK



Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,352; Base for life stage and comfort level chart: All Traditional Seaside/Town Intenders n=504 ; Base for all other charts: Only Traditional Seaside/Town Intenders n=313.

Summer Countryside or village Intenders (33% share)

Summer Countryside or Village Intenders are more likely than average to be Older Independents or Retirees, and to be staying in commercial rental accommodation.

Figure 21. Life Stage of Summer Intenders, Percentage, March to May, UK

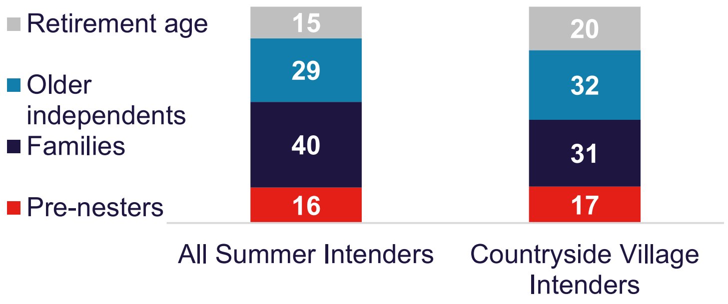


Figure 22. Average comfort level conducting everyday activities, NET very and fairly comfortable, March to May, UK

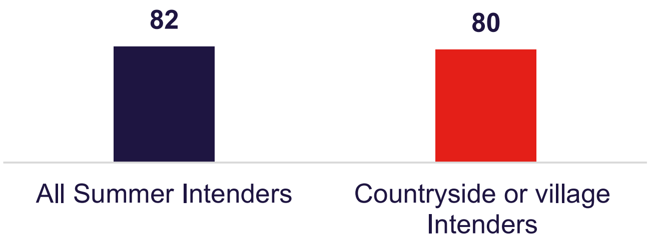


Figure 23. Trip Duration of Intended Summer Trip, Percentage, March to May, UK

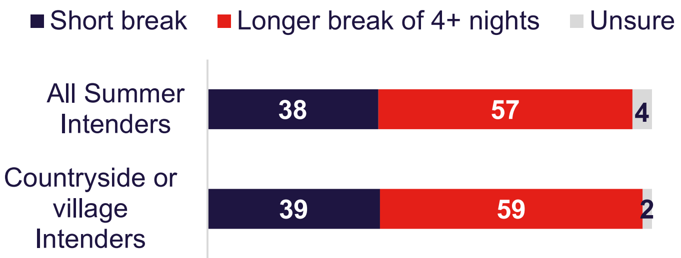


Figure 24. Trip Taker Party Make-up of Intended Summer Trip, Top 5, Percentage, March to May, UK

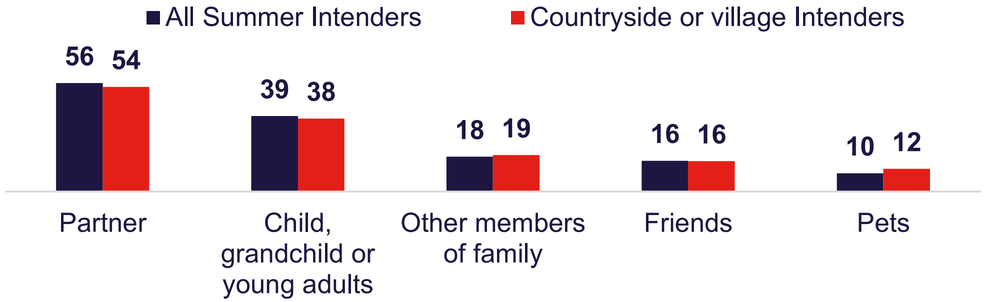
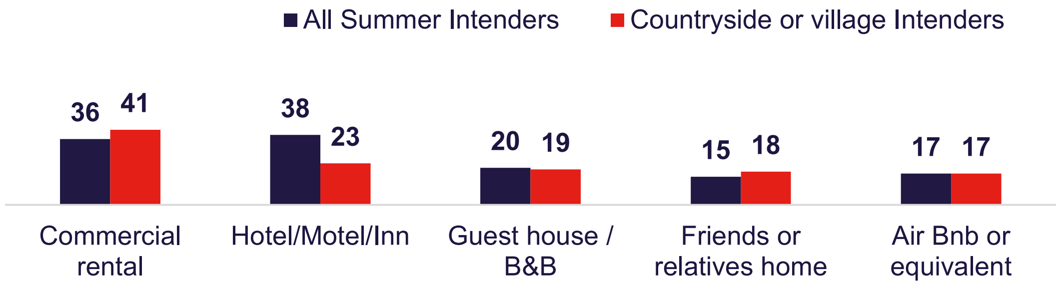


Figure 25. Accommodation Type of Intended Summer Trip, Top 5, Percentage, March to May, UK



Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,352; Base for life stage and comfort level chart: All Countryside or village Intenders n=433 ; Base for all other charts: Only Countryside or village Intenders n=211.

Summer Rural coastline Intenders (23% share)

Summer rural coastline Intenders are more likely than average to be Older Independents, to be taking a longer break, and to be travelling with their partner or with children, and to be staying in a rented caravan.

Figure 26. Life Stage of Summer Intenders, Percentage, March to May, UK

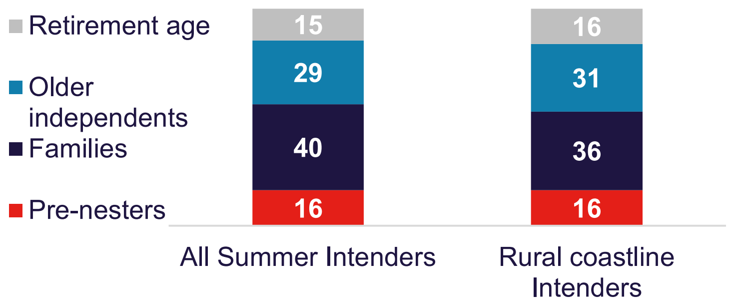


Figure 27. Average comfort level conducting everyday activities, NET very and fairly comfortable, March to May, UK

Figure 28. Trip Duration of Intended Summer Trip, Percentage, March to May, UK

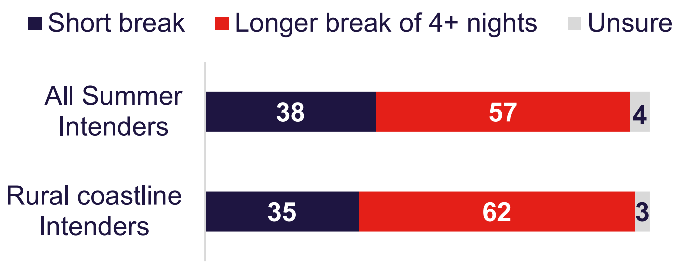


Figure 29. Trip Taker Party Make-up of Intended Summer Trip, Top 5, Percentage, March to May, UK

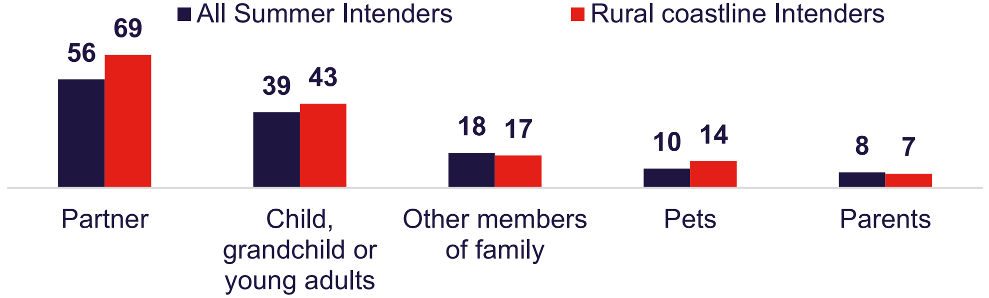
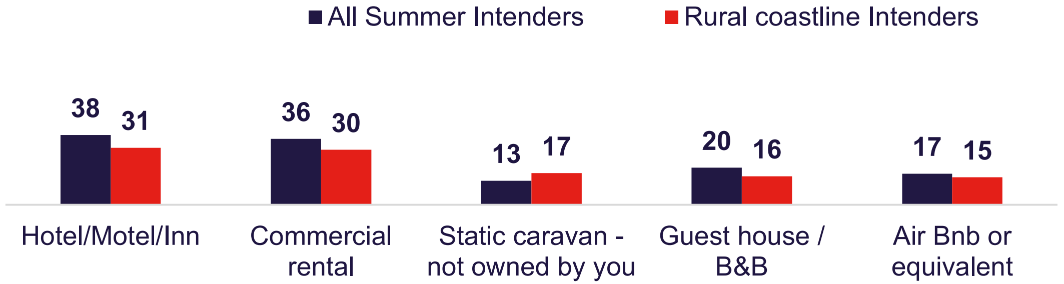


Figure 30. Accommodation Type of Intended Summer Trip, Top 5, Percentage, March to May, UK



Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,352; Base for life stage and comfort level chart: All Rural coastline Intenders n=318 ; Base for all other charts: Only Rural coastline Intenders n=140.

Summer Large city Intenders (18% share)

Summer Large City Intenders are more likely than average to be Pre-Nesters, to be travelling with friends, to be taking a short break and to be staying in a hotel/motel/inn or with friends/relatives.

Figure 31. Life Stage of Summer Intenders, Percentage, March to May, UK

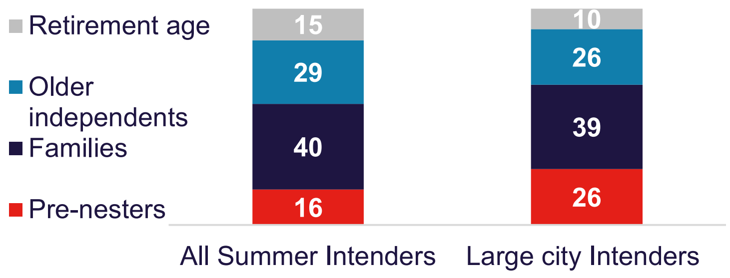


Figure 32. Average comfort level conducting everyday activities, NET very and fairly comfortable, March to May, UK

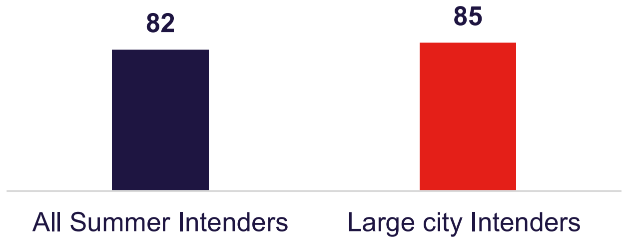


Figure 33. Trip Duration of Intended Summer Trip, Percentage, March to May, UK

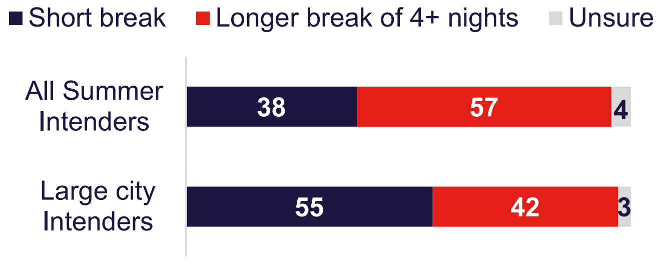


Figure 34. Trip Taker Party Make-up of Intended Summer Trip, Top 5, Percentage, March to May, UK

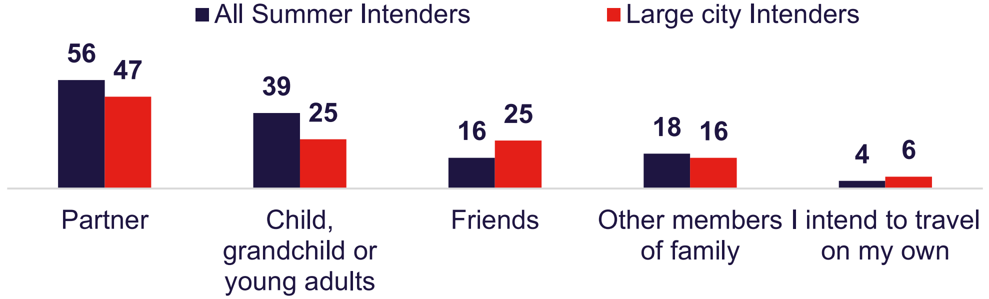
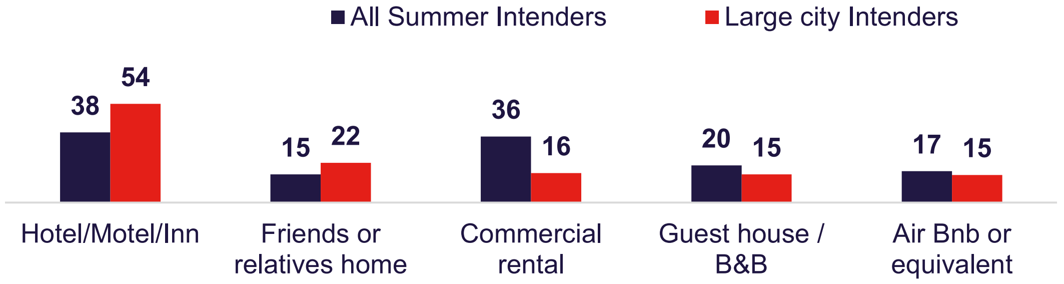


Figure 35. Accommodation Type of Intended Summer Trip, Top 5, Percentage, March to May, UK



Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,352; Base for life stage and comfort level chart: All Large city Intenders n=231 ; Base for all other charts: Only Large city Intenders n=175.

Summer Smaller city or town Intenders (9% share)

Summer Smaller City or Town Intenders are also more likely than average to be Pre-Nesters, on a short break and to be travelling with friends. They index above average on staying in a guest house/B&B and a friend's or relative's home.

Figure 36. Life Stage of Summer Intenders, Percentage, March to May, UK

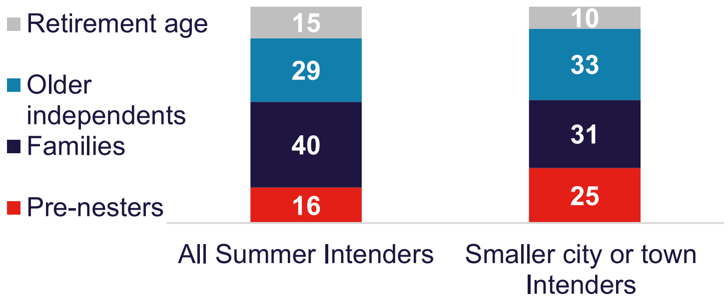


Figure 37. Average comfort level conducting everyday activities, NET very and fairly comfortable, March to May, UK

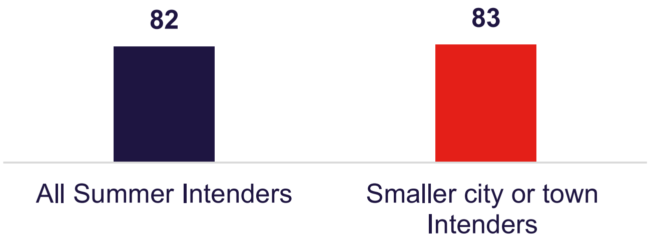


Figure 38. Trip Duration of Intended Summer Trip, Percentage, March to May, UK

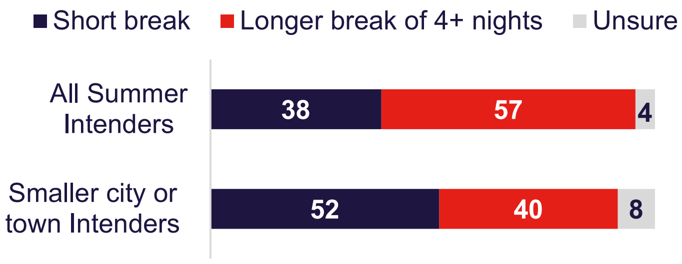


Figure 39. Trip Taker Party Make-up of Intended Summer Trip, Top 5, Percentage, March to May, UK

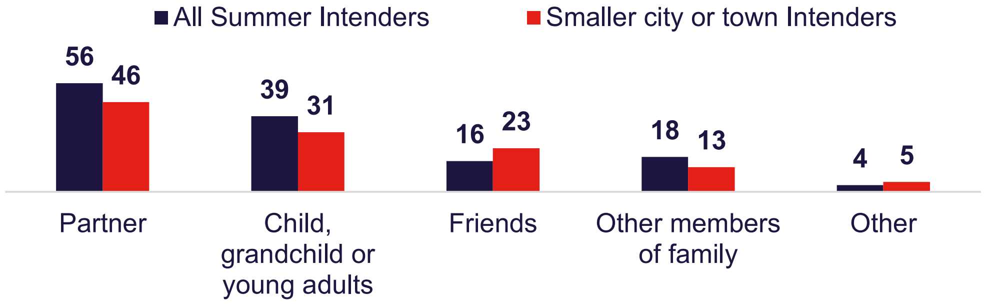
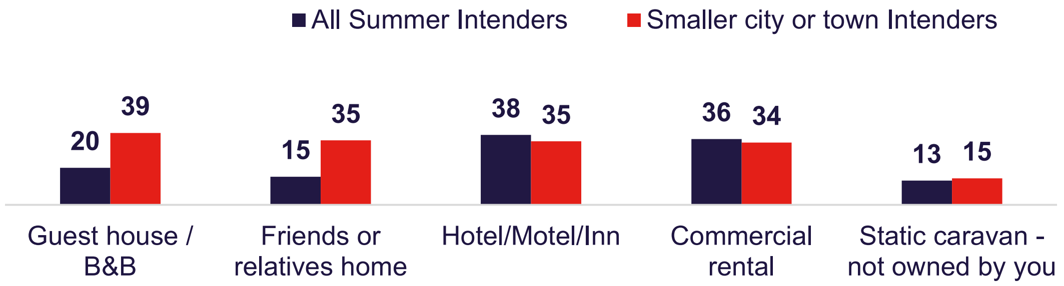


Figure 40. Accommodation Type of Intended Summer Trip, Top 5, Percentage, March to May, UK



Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,352; Base for life stage and comfort level chart: All Smaller city or town Intenders n=119 ; Base for all other charts: Only Smaller city or town Intenders n=67.

Summer Mountains or hills Intenders (12% share)

Summer Mountains or Hills Intenders are more likely than average to be Families or Pre-Nesters, travelling with pets and staying in commercial rental, a hotel/motel/inn, guest house/B&B, friends or relatives, or a hostel.

Figure 41. Life Stage of Summer Intenders, Percentage, March to May, UK

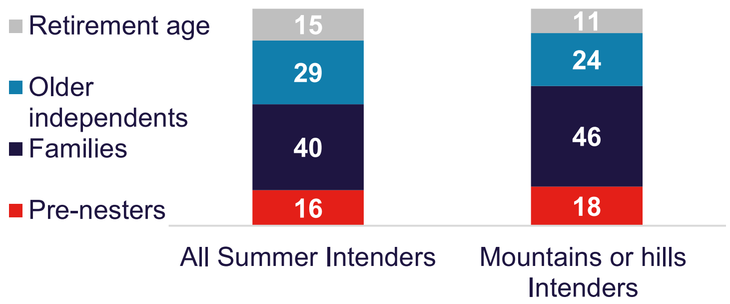


Figure 42. Average comfort level conducting everyday activities, NET very and fairly comfortable, March to May, UK

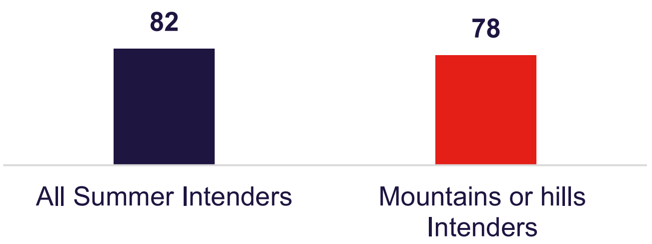


Figure 43. Trip Duration of Intended Summer Trip, Percentage, March to May, UK

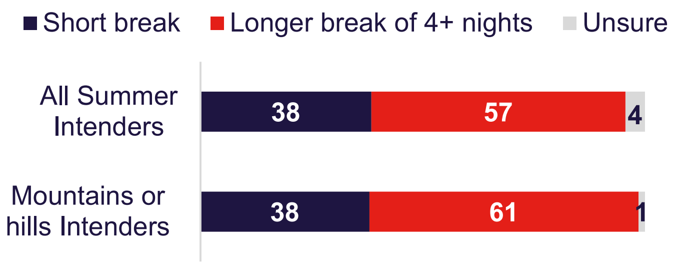


Figure 44. Trip Taker Party Make-up of Intended Summer Trip, Top 5, Percentage, March to May, UK

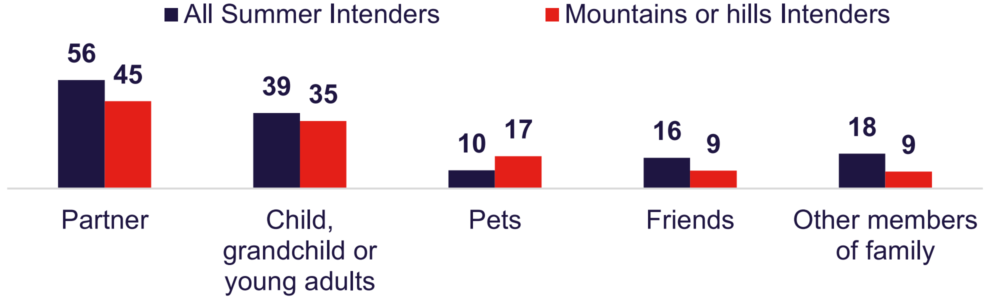
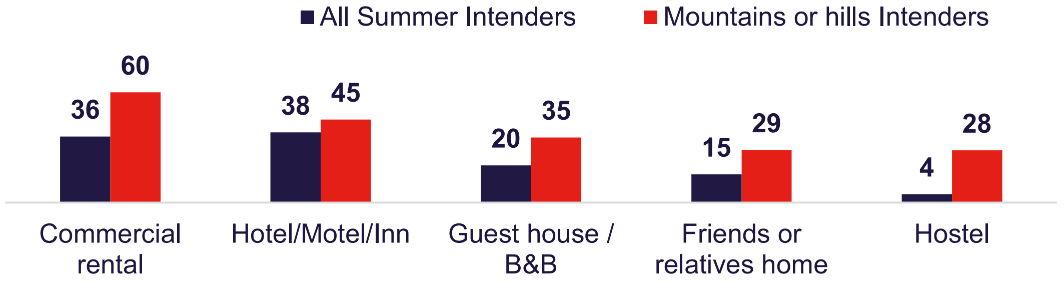


Figure 45. Accommodation Type of Intended Summer Trip, Top 5, Percentage, March to May, UK



Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,352; Base for life stage and comfort level chart: All Mountains or hills Intenders n=180 ; Base for all other charts: Only Mountains or hills Intenders n=51.

COVID-19 influence on choice of destination - among summer Intenders

When choosing a destination for their UK overnight trip in the summer period, 23% of UK adults say they will be 'travelling less because it's now more expensive'. They also plan to 'take UK trips at less busy times'.

Figure 46. COVID-19 influence on choice of destination/s for UK holidays and short breaks, Summer trip, Percentage, March to May 2022, UK, Full list

VB7cnew. How if at all would you say COVID-19 is influencing your choice of destination/s for UK holidays or short breaks?
Base: All respondents travelling in Summer n = 1,352

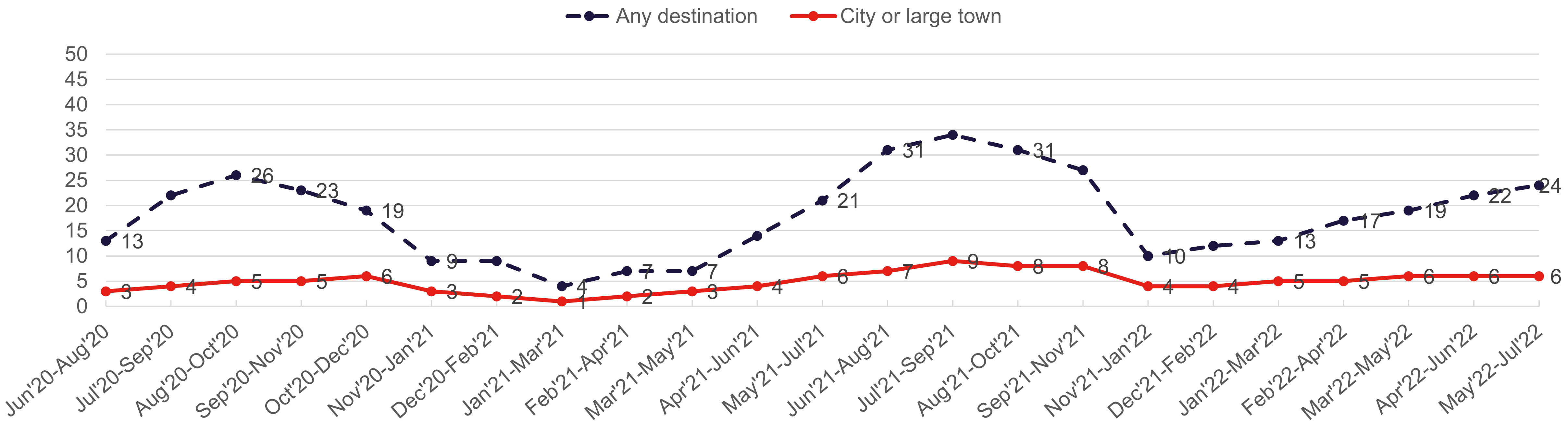
3. Summer Intenders

Focus on City or Large Town Intenders

Next 3 months overnight trip intention – trend by month for ‘city’ vs ‘any destination’

Next 3 months overnight trip intentions to any destination combined is clearly seasonal, peaking in summer. Cities as a next 3 months trip’s destination are slightly more level, contributing well to shoulder months.

Figure 47. Incidence of trips intended within next 3 months, Percentage wave-on-wave, UK

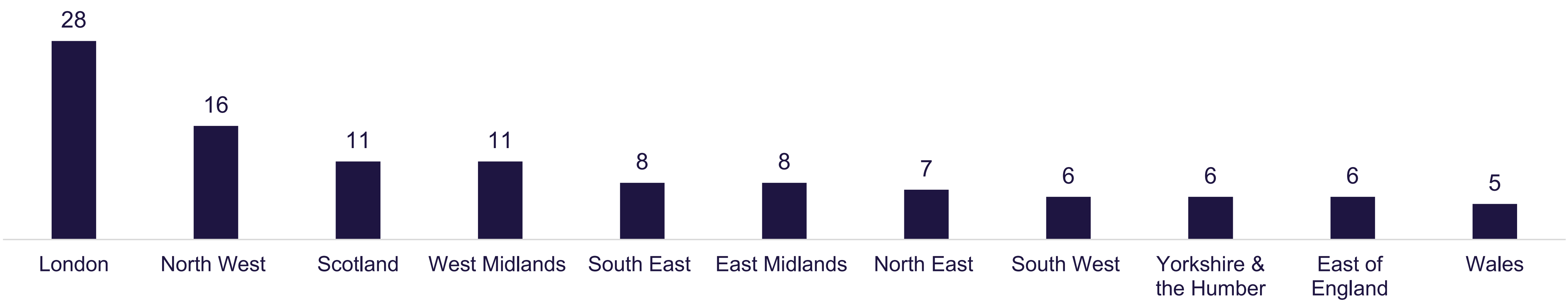


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All respondents n=c,1750 each wave
*No research was conducted during October 2021

Destination region of next UK overnight trip in a city or large town

For summer Intenders, London is the leading destination for ‘city or large town’ trips, followed by the North West of England.

Figure 48. Destination region of next UK overnight trip in a large city for <u>Summer Intenders</u>, Percentage, March to May, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK; Large City Intenders n=241
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

Demographics of summer City Intenders

Pre-Nesters and social grade C1 are more likely intending an overnight UK trip to a Large City in summer.

Figure 49. Life Stage of Summer Intenders, Percentage, March to May, UK

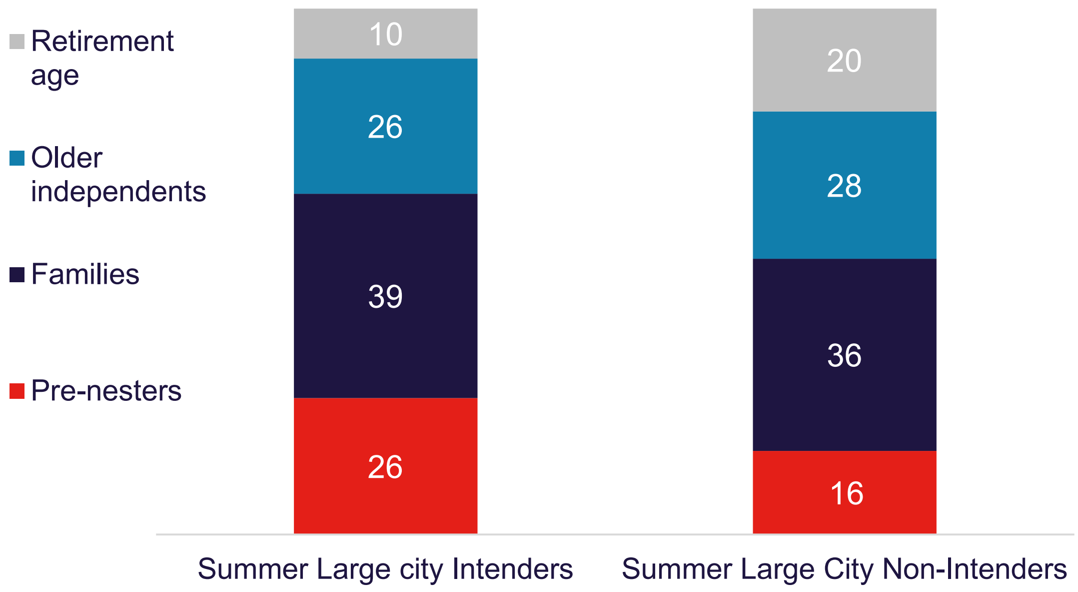
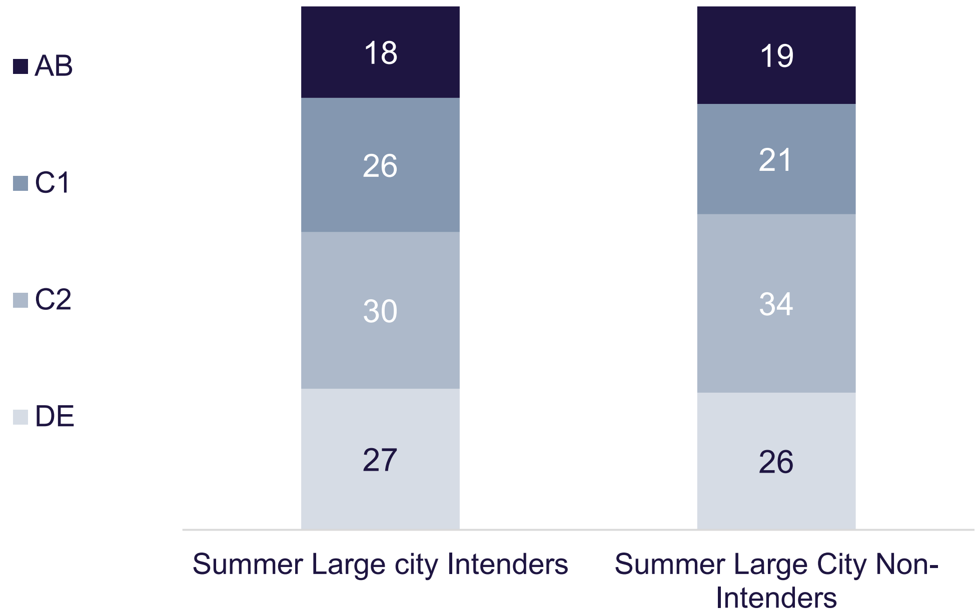


Figure 50. Social Grade of Summer Intenders, Percentage, March to May, UK



Source: Demographic questions. Base: City Intenders n=241; Non-City Intenders n=1,111

Level of comfort undertaking activities of summer City Intenders

Summer large city Intenders are more comfortable, than summer large city Non-Intenders, with a range of everyday activities, in particular with 'travelling by public transport' and 'going to a busy city centre'.

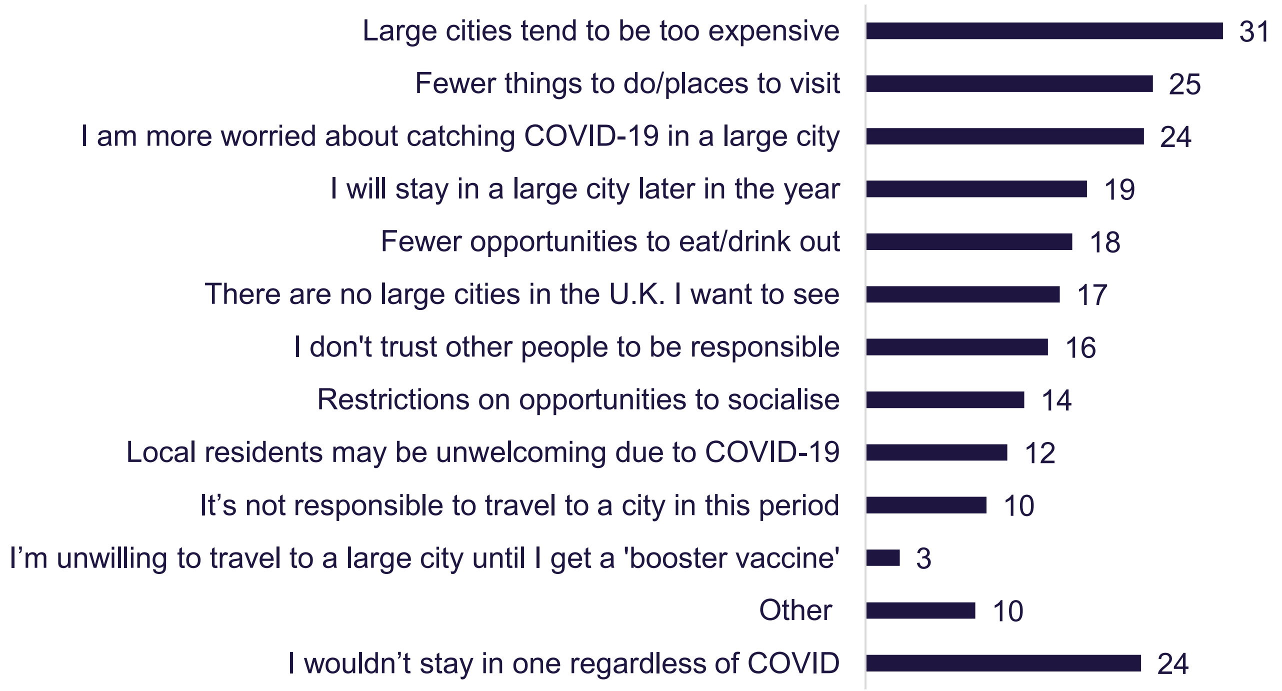
Figure 51. Level of comfort conducting activities, NET very and fairly comfortable, Percentage, March to May, UK

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: City Intenders n=241; Non-City Intenders n=1,111

Reasons for not taking a trip to a city in summer

Concerns about the fact that 'large cities tend to be too expensive' is the leading reason for not staying in a large city amongst summer Intenders, followed by 'fewer things to do/places to visit' and 'worries about catching COVID-19'.

Figure 52: Reasons for not staying in a large city amongst Summer Trip Intenders, Percentage, March to May, UK



VB5b. You indicated you don't plan on staying in a large city during your UK trip in <insert month>. Why is this? Base: All Summer Intenders not planning on staying in a large city. n=1,111

Reasons for not taking a trip to a city in summer – by life stage

‘Large cities tend to be too expensive’ is a ‘top 2 barrier’ to visiting a city for all life stages, along with ‘worried about catching COVID-19’ for the older independents and retirees.

Tables 2-5. Top 5 Reasons for not taking a trip to a large city in Summer – by life stage, Percentage, March to May, UK

Pre-Nesters	% of mentions
Large cities tend to be too expensive	38%
Fewer things to do/places to visit	28%
I will stay in a large city later in the year	27%
I wouldn’t stay in one regardless of COVID	26%
Fewer opportunities to eat/drink out	25%

Families	% of mentions
Large cities tend to be too expensive	31%
Fewer things to do/places to visit	27%
I wouldn’t stay in one regardless of COVID	25%
Fewer opportunities to eat/drink out	23%
I will stay in a large city later in the year	19%

Older Independents	% of mentions
I am more worried about catching COVID-19 in a large city	30%
Large cities tend to be too expensive	30%
Fewer things to do/places to visit	24%
I wouldn’t stay in one regardless of COVID	20%
Don’t trust other people to be responsible	20%

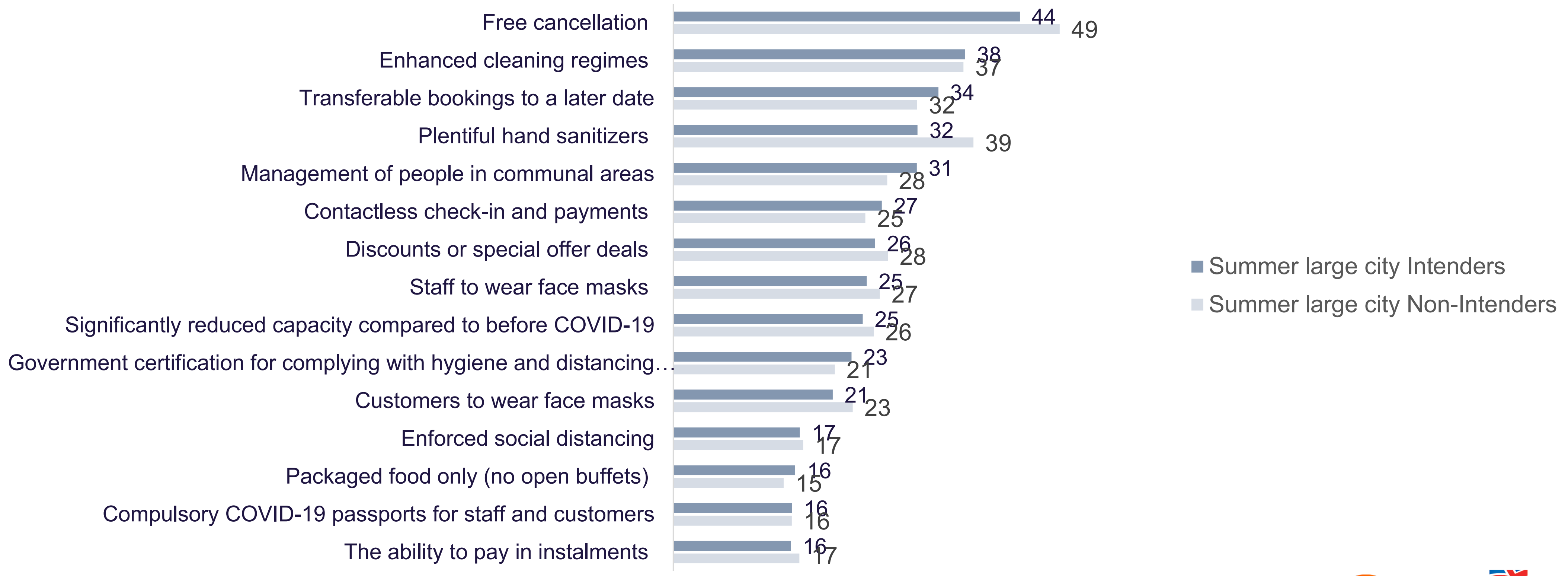
Retirees	% of mentions
Large cities tend to be too expensive	27%
I am more worried about catching COVID-19 in a large city	27%
I wouldn’t stay in one regardless of COVID	25%
There are no large cities I want to see	20%
Fewer things to do/places to visit	19%

VB5b. You indicated you don’t plan on staying in a large city during your UK trip in <insert month>. Why is this? Base: All Summer Intenders not confident in taking a Spring overnight UK trip in a large city. Pre-Nesters n=198; Families n=492; Older independents n=259; Retirees n=162

Required conditions for indoor leisure/ tourism providers

Overall, 'free cancellation' is the most important condition required by both City Intenders and City Non-Intenders. 'Plentiful hand sanitisers' is more important to City Non-Intenders.

Figure 53. Conditions that are essential for indoor tourism and leisure providers to have in place to visit them in the next few months, Required by Summer City Intenders and Non-Intenders, Percentage, March to May, UK



Q63. Which, if any, of the following conditions would be essential for indoor tourism and leisure providers (e.g. indoor visitor attractions, restaurants, hotels etc.) to have in place for you to visit/use them over the next few months? Base: City Intenders n=241; Non-City Intenders n=1,111

4. Summer Intenders

Profile by Destination Region

Destination regions for next summer short break or holiday

The South West of England is the leading destination for a summer overnight trip in the UK.

Figure 54. Next UK overnight trip destination region for Summer Intenders, Percentage, March to May, UK

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,352
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

Summer Intenders' life stage - by destination region

There are some notable variations in life stage representation by destination amongst summer Intenders – London Intenders are the most likely to be 'Pre-Nesters', the South West of England are the most likely to be 'Retirees'.

Figure 55. Life stage of Summer Intenders by destination region, Percentage, March to May, UK

Sources: demographic questions and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Summer England n=905; Scotland n=142; Wales n=102; South West of England n=229; London n=97; South East of England n=94; North West n=101; North East n =40* West Midlands = 42*, East Midlands = 35*, East of England n=73, Yorkshire = 90 *Small base size treat with caution.

Summer Intenders' social grade - by destination region

The South East of England and Wales are the destinations most likely to attract social grades C1, although there is minimal variation across other social grades.

Figure 56. Social grade of Summer Intenders by destination region, Percentage, March to May, UK

Social grade question and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK in Summer England n=905; Scotland n=142; Wales n=102; South West of England n=229; London n=97; South East of England n=94; North West n=101; North East n =40* West Midlands = 42*, East Midlands = 35*, East of England n=73, Yorkshire = 90 *Small base size treat with caution.

Summer Intenders' region of residence - by destination region

The table below illustrates the region of residence (in rows) for Intenders to each destination (in columns).

Table 6. Region of residence of Summer Intenders by destination region, Percentage, March to May, UK, (Read chart vertically)

Region of residence [down]	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
England	90%	57%	77%	95%	78%	95%	83%	82%	89%	90%	94%	92%
Scotland	4%	37%	2%	1%	11%	3%	4%	6%	7%	3%	3%	7%
Wales	4%	7%	21%	4%	8%	1%	4%	7%	4%	3%	3%	1%
South West of England	7%	4%	5%	13%	4%	7%	8%	6%	2%	0%	5%	2%
London	15%	4%	11%	16%	14%	17%	10%	2%	26%	30%	8%	6%
South East of England	15%	10%	7%	17%	6%	41%	7%	9%	8%	9%	13%	7%
North East	3%	10%	4%	2%	4%	1%	6%	11%	2%	0%	0%	6%
North West	10%	11%	20%	9%	13%	3%	25%	14%	10%	13%	3%	10%
West Midlands	11%	6%	16%	15%	15%	8%	2%	4%	30%	2%	9%	5%
East Midlands	9%	4%	2%	9%	6%	4%	8%	12%	5%	22%	14%	14%
East of England	11%	2%	8%	11%	7%	9%	6%	18%	3%	4%	33%	5%
Yorkshire & Humber	10%	5%	4%	3%	9%	5%	11%	6%	3%	10%	8%	36%

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK in Summer England n=905; Scotland n=142; Wales n=102; South West of England n=229; London n=97; South East of England n=94; North West n=101; North East n =40* West Midlands = 42*, East Midlands = 35*, East of England n=73, Yorkshire = 90
*Small base size treat with caution.

Summer Intenders’ trip destination type - by destination region

Destination type tends to reflect the destination region being considered, e.g. 68% of summer London Intenders are considering a trip to a Large City. This being said, there is some variation in the types of trips people intend to stay in areas such as Wales, and Yorkshire.

Table 7. Destination type of Summer trip by destination region, Percentage, March to May, UK, (Read chart vertically)

Destination type	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Traditional coastal/seaside town	34%	26%	40%	51%	7%	40%	29%	16%	8%	12%	46%	27%
Countryside or village	33%	36%	28%	31%	9%	33%	34%	39%	40%	46%	27%	44%
A city or large town	27%	32%	11%	10%	68%	19%	29%	34%	48%	25%	15%	17%
Rural coastline	19%	33%	33%	30%	7%	16%	23%	8%	2%	5%	26%	21%
Mountains or hills	9%	28%	15%	2%	14%	4%	15%	6%	5%	27%	4%	5%

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip? QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Summer England n=905; Scotland n=142; Wales n=102; South West of England n=229; London n=97; South East of England n=94; North West n=101; North East n =40* West Midlands = 42*, East Midlands = 35*, East of England n=73, Yorkshire = 90 *Small base size treat with caution.

Summer Intenders' trip taker party composition - by destination region

There are some differences by destination region in terms of who the Intenders plan to travel with, for example, 69% summer Intenders intending a trip to East Midlands are planning to go with a partner, and 44% of those intending to go to Wales are planning to go with their children.

Table 8. Trip taker party composition of Summer trip by destination region, Percentage, March to May, UK, (Read chart vertically)

Trip taker party composition	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Partner	55%	64%	57%	55%	42%	50%	52%	61%	55%	69%	62%	63%
Children or young adults (aged 16-24)	39%	38%	44%	41%	25%	37%	39%	28%	36%	35%	51%	39%
Friend/s	16%	10%	11%	13%	20%	20%	25%	15%	18%	17%	12%	11%
Other members of my family	18%	16%	30%	20%	14%	27%	9%	24%	7%	6%	21%	18%
Pets	10%	13%	9%	9%	8%	4%	9%	2%	6%	6%	18%	14%
With parents of older adults	8%	5%	10%	9%	5%	12%	10%	13%	9%	13%	9%	5%
Will travel alone	3%	7%	0%	4%	5%	3%	4%	0%	3%	3%	1%	1%
Other	4%	1%	4%	1%	5%	1%	1%	3%	3%	8%	4%	4%

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? And QVB4d. With whom are you likely to be spending your holiday? Base: All respondents planning on taking a holiday or short break in the UK in Summer England n=905; Scotland n=142; Wales n=102; South West of England n=229; London n=97; South East of England n=94; North West n=101; North East n =40* West Midlands = 42*, East Midlands = 35*, East of England n=73, Yorkshire = 90 *Small base size treat with caution.

Summer Intenders' trip accommodation type - by destination region

The North East of England and East Midlands' visitors are more likely to stay in 'commercial rental', while hotels are most chosen for overnight trips to London.

Table 9. Accommodation type of Summer trip by destination region, Percentage, March to May, UK, (Read chart vertically)

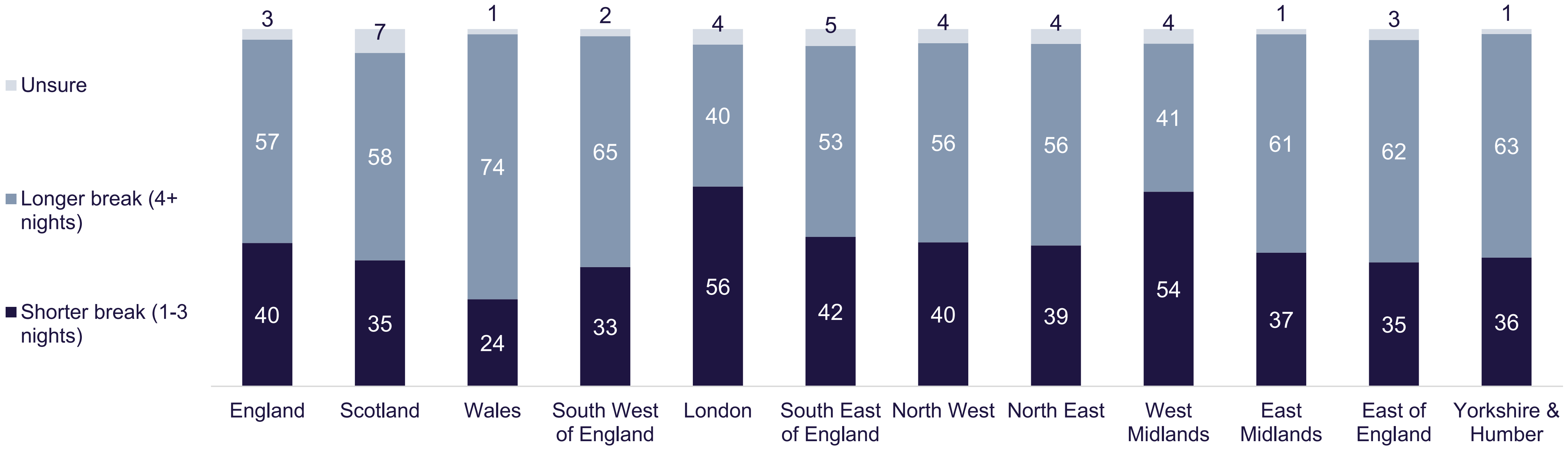
Accommodation type	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Private home	36%	32%	23%	33%	41%	39%	32%	31%	41%	31%	22%	25%
Commercial rental	38%	33%	27%	38%	35%	24%	28%	43%	32%	52%	45%	38%
Camping/ caravan	34%	33%	33%	32%	28%	33%	26%	25%	34%	31%	46%	32%
Hotel / Motel / Inn	36%	43%	26%	27%	57%	38%	42%	32%	39%	37%	27%	26%
Guesthouse / B&B / Farmhouse	23%	22%	17%	19%	16%	19%	17%	25%	27%	2%	27%	27%
Other	6%	1%	4%	4%	11%	2%	4%	6%	6%	9%	4%	2%

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>? And QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in the UK in Summer England n=905; Scotland n=142; Wales n=102; South West of England n=229; London n=97; South East of England n=94; North West n=101; North East n =40* West Midlands = 42*, East Midlands = 35*, East of England n=73, Yorkshire = 90 *Small base size treat with caution.

Summer Intenders' trip duration - by destination region

There is some variation in trip duration by destination. Wales and the South West of England are the most likely to be chosen for longer breaks, while London is most likely to generate shorter breaks.

Figure 57. Duration of Summer trip by destination region, Percentage, March to May, UK



	England	Scotland	Wales	South West of England	London	South East of England	North West	North East	West Midlands	East Midlands	East of England	Yorkshire & Humber
Unsure	3	7	1	2	4	5	4	4	4	1	3	1
Longer break (4+ nights)	57	58	74	65	40	53	56	56	41	61	62	63
Shorter break (1-3 nights)	40	35	24	33	56	42	40	39	54	37	35	36

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? Base: All respondents planning on taking a holiday or short break in the UK in Summer England n=905; Scotland n=142; Wales n=102; South West of England n=229; London n=97; South East of England n=94; North West n=101; North East n =40* West Midlands = 42*, East Midlands = 35*, East of England n=73, Yorkshire = 90 *Small base size treat with caution.

Methodology

Methodology outline

- The findings in this report are based on an online survey conducted amongst 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' in Wales and 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.

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.