COVID-19 Consumer Tracker

Wave 17

Fieldwork Period: 12 to 16 October

U.K. Results

VisitBritain BVA BDRC

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 U.K. 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 U.K. residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken and the type of reassurances they're seeking from the sector.
- This tracker is based on a U.K. nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales.
- 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 whether they have, or intend to, take an overnight domestic trip. For ease of reference, the time periods have been given seasonal labels, although we appreciate these may not necessarily correspond with meteorological definitions.

- **Autumn Intenders:** Adults resident in the UK who said they *intended* to take an overnight domestic trip during either September or October.
- **Autumn trip-takers:** Adults resident in the UK who claim to *have taken* an overnight domestic trip, for any purpose, during September or October.
- **Autumn holiday-takers:** Adults resident in the UK who claim to *have taken* an overnight domestic trip for the purpose of a holiday (i.e. not for primarily visiting friends or relatives, going away on business or travelling for any other reason) during September or October.
- **Early Winter Intenders:** Adults resident in the UK who expect to take a domestic overnight trip sometime between October 2020 and December 2020.
- **Late winter Intenders:** Adults resident in the UK who expect to take a domestic overnight trip sometime between January 2021 and March 2021.

Note: The data for Autumn Intenders is taken from waves 10-13 of this research programme, which covered fieldwork dates between 20 July – 14 August.

Fieldwork Periods

Project Period	Fieldwork Period	Project Period	Fieldwork Period
Wave 1	18 – 22 May	Wave 13	10 – 14 August
Wave 2	25 – 29 May	Wave 14	31 August – 4 September
Wave 3	1 – 5 June	Wave 15	14 – 18 September
Wave 4	8 – 12 June	Wave 16	28 September – 2 October
Wave 5	15 – 19 June	Wave 17	12 – 16 October
Wave 6	22 – 26 June	Wave 18	
Wave 7	29 June – 3 July	Wave 19	
Wave 8	6 – 10 July	Wave 20	
Wave 9	13 – 17 July	Wave 21	
Wave 10	20 – 24 July	Wave 22	
Wave 11	27 – 31 July	Wave 23	
Wave 12	3 – 7 August	Wave 24	

Wave 17: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

*** Represents a significant change on previous Wave**

Key Metrics	Wave 16	Wave 17	Wave Shift
National mood (average score out of 10)	6.6	6.5	-0.1
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	9%	8%	-1
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.5	2.5	0
Normality score (proportion expecting normality by March)	21%	19%	-2
The main reasons for not feeling confident about taking a trip between Oct - Dec (Top 2)	1. Restrictions on travel from government 2. Concerns about catching Covid-19	1. Restrictions on travel from government 2. Concerns about catching Covid-19	No change

Table 2. Top line Metrics – General Trip Intentions

Key Metrics	Wave 16	Wave 17	Wave Shift
Anticipated number of UK short breaks compared to normal (% more/the same)	38%	33%	-5*
Anticipated number of UK longer breaks compared to normal (% more/the same)	37%	31%	-6*
Near-term confidence in taking UK overnight trip (October confident)	25%	20%	-5*
Medium-term confidence in taking UK overnight trip (Nov/Dec confident)	22%/23%	17%/20%	-5*/-3
Proportion going on a UK overnight trip between now and end October	10%	5%	-5*
Split between longer break / short break / don't know for Autumn trip	40%/53%/6%	33%/60%/6%	-7*/+7*/0

Wave 17: Scorecard of Key Metrics (2)

Table 3. Top line Metrics – Destination and Accommodation Plans

*** Represents a significant change on previous Wave**

Key Metrics	**Wave 16**	**Wave 17**	**Wave Shift**
Leading UK destination likely to stay in between Oct - Dec	South West	South West	No change
Main *type* of destination likely to stay in between Oct - Dec	Countryside or village	Countryside or village	No change
Main accommodation type likely to stay in between Oct - Dec	Hotel/motel/inn	Hotel/motel/inn	No change

Table 4. Top line Metrics – Broader Leisure Activity

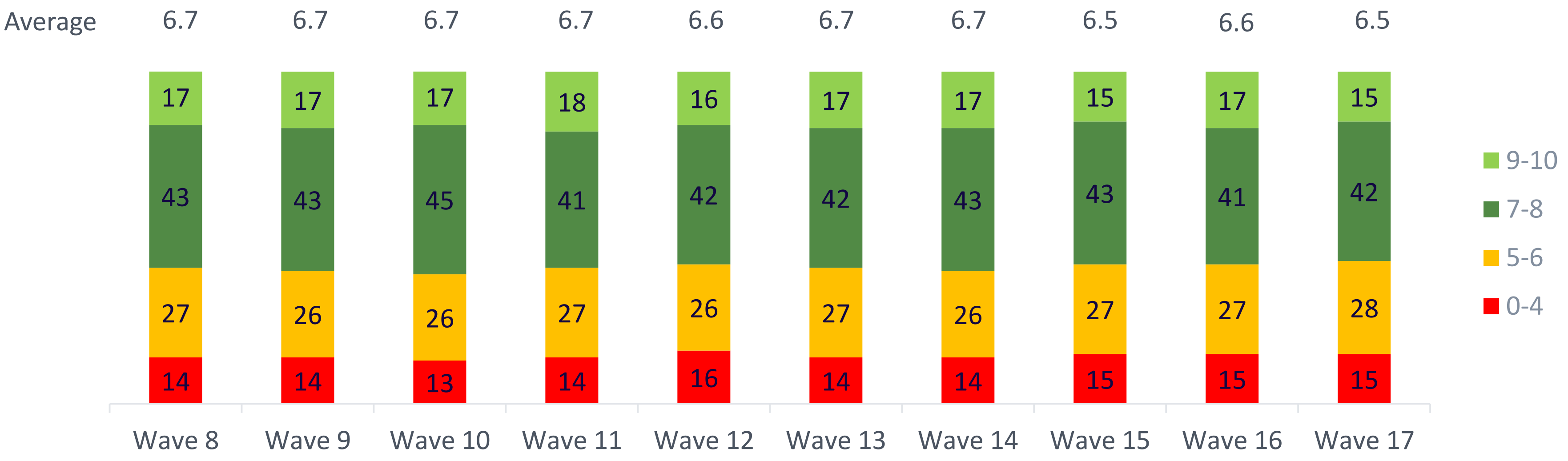
Key Metrics	**Wave 16**	**Wave 17**	**Wave Shift**
Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No change
Place/activity generating lowest engagement compared to normal	Catering, entertainment and events	Predominantly indoor or covered attractions	New No.1

1. The National Mood

The national mood

- The average mood of U.K. residents has fallen marginally since Wave 16, from 6.6 to 6.5 driven by a slight fall in those rating their mood as 9-10 out of 10, the lowest average seen so far and level with Wave 15

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

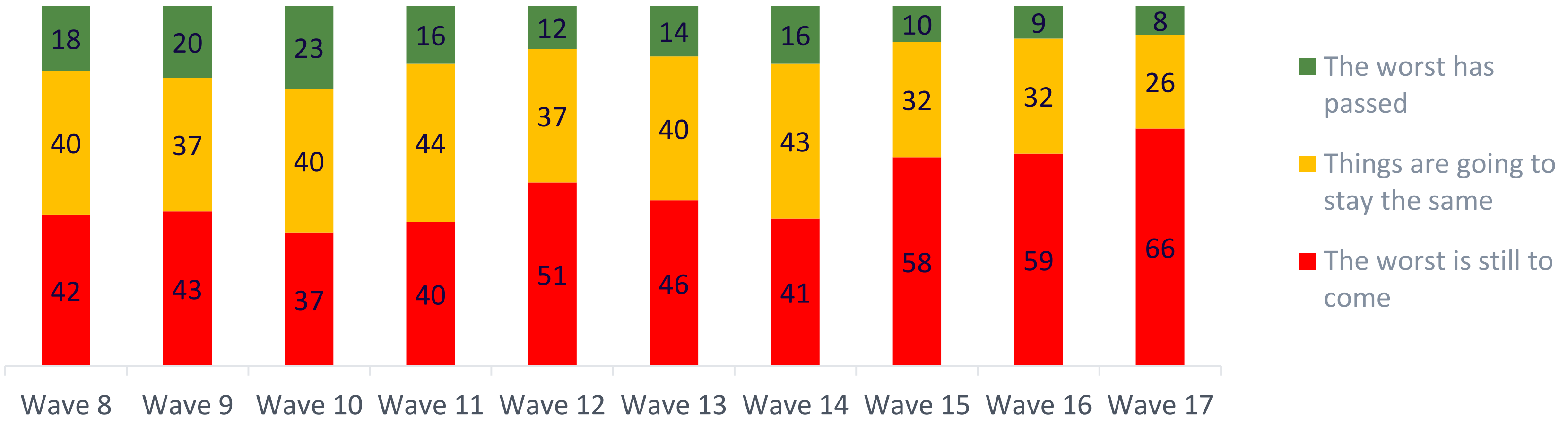


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 17 n=1,760

Perceptions of the situation in relation to COVID-19

- 66% of the adult population feel ‘the worst is still to come’ in relation to COVID-19, significantly higher than in Wave 16 and making it the third consecutive wave of increases on this measure.

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. Wave 17 n=1,760

Perceptions of when things will return to 'close to normal'

- The majority of the U.K. adult population (61%) don't believe life will 'return to normal' before July next year. Only 19% of Wave 17 respondents expect some sort of 'normality' by March next year.

Figure 3. Perceptions of when things will return 'close to normal' Percentage Wave 17, UK

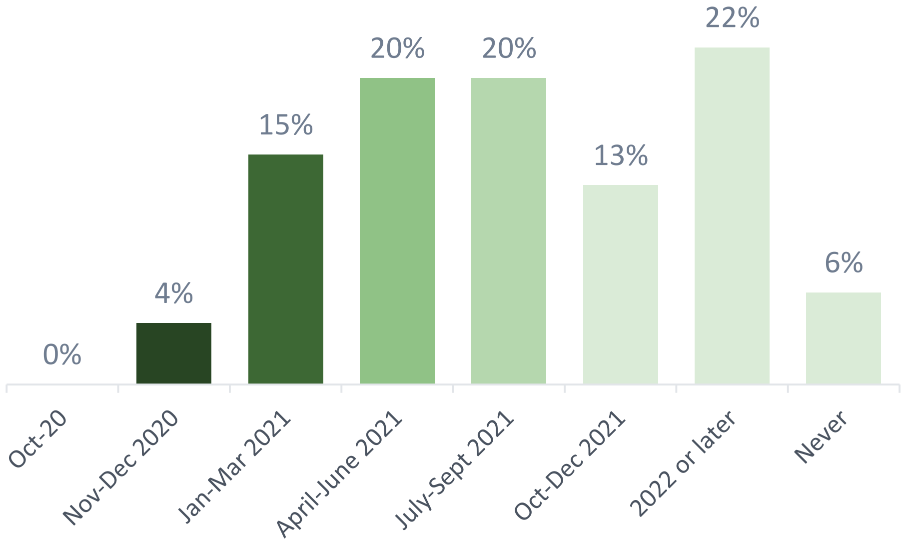
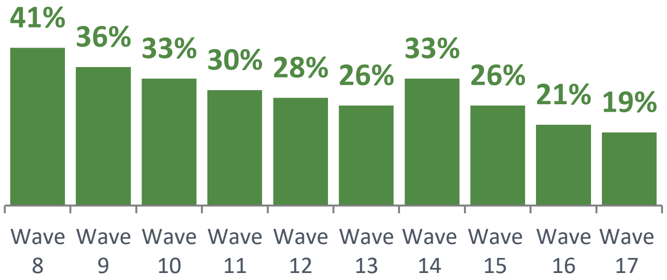


Figure 4. Proportion expecting normality by March, Percentage wave-on-wave, UK

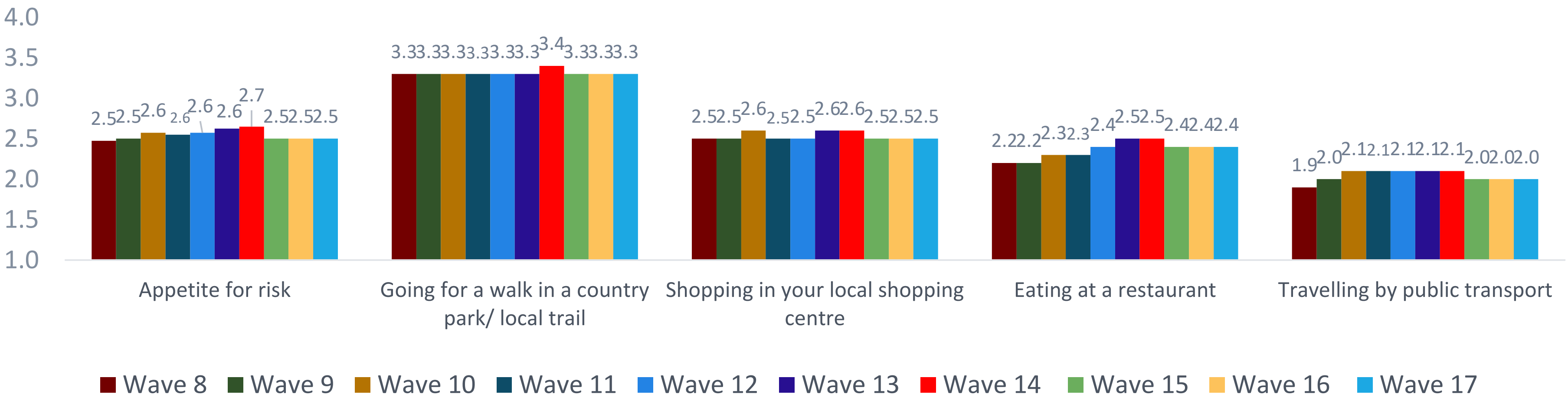


Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 17 n=1,760

Appetite for risk

- Comfort with undertaking everyday activities has remained consistent since Wave 15, with the 'appetite for risk' average holding steady at 2.5 out of 4

Figure 5. Level of comfort conducting a range of activities separately and combined, Average Score wave-on-wave where 1= not at all comfortable doing activity and 4= very comfortable doing activity, 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. 'Net: appetite for risk' is calculated as a straight average of the four scores. Wave 16 n=1,759.

2. Trips *taken* in the Autumn*

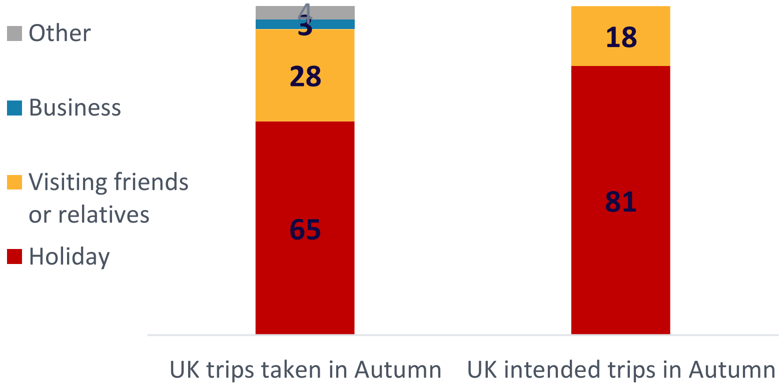
*Autumn is defined as September and October 2020

Proportion of trips taken and intended and trip purpose in Autumn*

- 15% of U.K. adults claim to *have been* on a U.K. overnight trip since September; three times as high as the proportion that took an overseas trip in this period. With 2 weeks of October still left, it's likely that actual trip activity will closely align with the 20% intent (asked during August).
- Trip purpose for both intenders and takers was most likely to be 'holiday', although visiting friends or relatives (VFR) has higher representation among the latter, possibly because these types of trip will tend to be more spontaneous in nature.

Figure 6. Proportion taken an overnight holiday or short break in Autumn* compared to intentions, Percentage, Wave 17 and Waves 10-13, U.K.

Figure 7. Purpose of intended and taken holiday or short break in UK, Percentage Waves 16-17 and Waves 10-13, U.K.

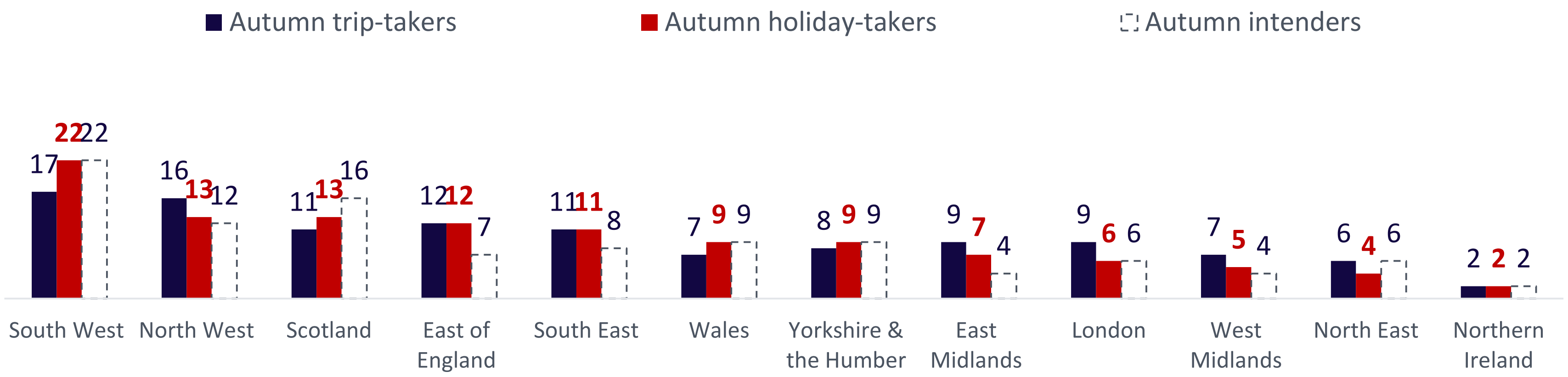


QVB13a. Have you already taken an overnight short break or holiday in the U.K. since the start of July? VB13e. And which of the following best describes the purpose of the most recent trip you took in summer? Base: All respondents. Wave 17 n=1,760. Base: UK trips taken in Autumn. Waves 16-17 n=543. Trip intentions are based on Waves 10-13 conducted in August.
*Autumn is defined as September and October.

Destination for trips taken and intended in Autumn*

- The South West of England is attracting the highest proportion of trip-takers at 17%, although this is down on the 22% share it received among trip intenders when they were asked in August. Scotland, Wales and Yorkshire are the other regions currently set to receive fewer trips than intent suggested.
- By contrast, regions such as The East of England and East Midlands have a higher share of actual trips versus intent.

Figure 8. Where trip takers in Autumn* stayed compared to their intentions, Percentage Waves 16-17 and Waves 10-13, U.K., Ranked on holidays

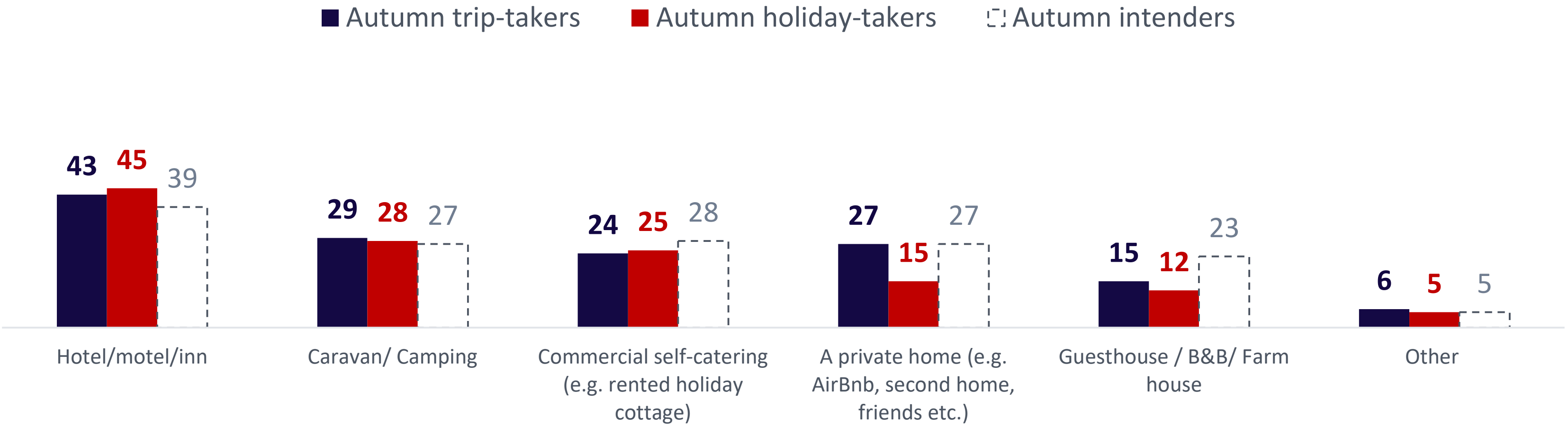


VB13c. Where in the U.K. did you stay on this trip in September/October?
Base: Wave 16 and 17 Autumn trip-takers n=543; Autumn holiday-takers n=346. Trip intentions are based on Waves 10-13 conducted in August. *Autumn is defined as September and October.

Accommodation type of trips taken and intended in Autumn*

- ‘Hotel/motel/inn’ has been the most popular type of accommodation for trips so far this Autumn, consistent with intentions.
- With the exception of ‘Guesthouse/B&B’ all other accommodation types are attracting an overall share of visitors broadly comparable with intentions.

Figure 9. Accommodation stayed in this Autumn*, Net Percentage Waves 16-17 and Waves 10-13, U.K.



VB13f. In what type/s of accommodation did you stay in during your U.K. trip in summer?
Base: Wave 16 and 17 Autumn trip-takers n=543; Autumn holiday-takers n=346. Trip intentions are based on Waves 10-13 conducted in August. *Autumn is defined as September and October.

Destination type of trips taken and intended in Autumn*

- Cities or large towns have received the greatest share of visits thus far during the Autumn period, significantly over indexing compared to intent, although the majority of holiday makers visited the countryside or village destinations.
- Traditional coastal/seaside towns, rural coastlines and mountains/hills are destination types attracting a lower share of visits compared to intent.

Figure 10. Main type of destination for Autumn* overnight trip, Percentage Waves 16-17 and Waves 10-13, U.K.

VB13d. Which of the following best describes the main type of destination you stayed in during your trip in summer?
Base: Wave 16 and 17 Autumn trip-takers n=543; Autumn holiday-takers n=346. Trip intentions are based on Waves 10-13 conducted in August. *Autumn is defined as September and October.

Trips not going to plan and reasons why

- The majority of trip-takers say the ended up staying at the destination type they initially planned, although 1 in 10 did not.
- The main reason why a small proportion of trip-takers didn't stay at their intended destination was because they were worried there would be too many people there, closely followed by the accommodation options being too expensive. Around 1 in 5 (equating to approximately 2% of overall trip-takers) claimed they weren't confident the venue chosen was 'COVID-safe'.

Figure 11. Number staying in the destination type initially planned since July, Percentage, Waves 16-17, UK

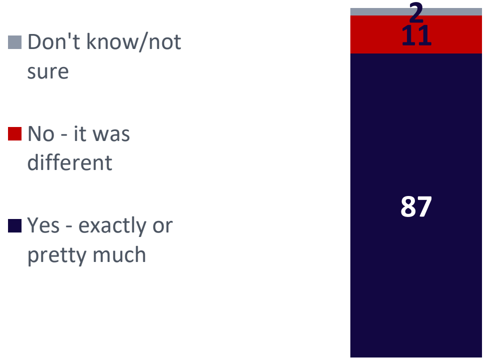
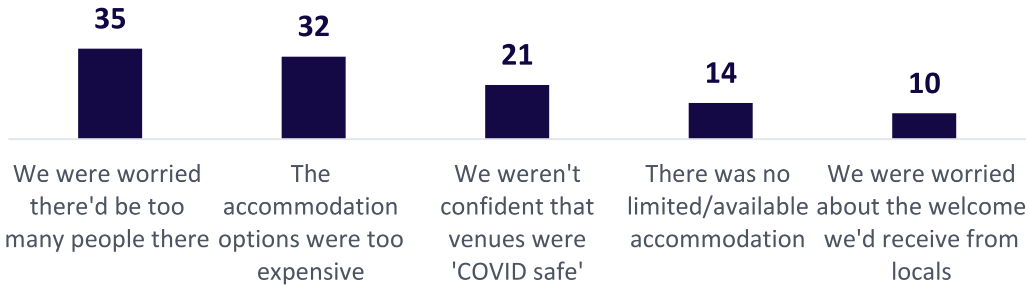


Figure 12. Top 5 reasons for not staying in the planned destination type, Percentage, Waves 16-17, UK



VB13fi. Did you end up staying in the type of destination you had originally planned to during your most recent trip? VB13fii. Why didn't you end up staying at the destination type you originally planned to?
Base: All Wave 16-17 respondents that have taken a U.K. trip since the start of July n=1066. Those that weren't able to stay at the planned destination type n=119

3. Trip Intentions

Note: ‘Early Winter’ is defined as Sept – Dec 2020 and ‘Late Winter’ as Jan – March 2021

Anticipated number of U.K. trips this year compared to normal

- 33% intend to take the same or more U.K. short breaks compared to normal between now and the end of the year, slightly lower than Wave 16 (38%). 31% express this for longer breaks of 4+ nights, significantly lower than Wave 16 (37%).
- 49% feel they are likely to take fewer overnight domestic trips (versus 43% in Wave 16) and around 1 in 5 remain unsure.

Figure 13. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Wave 17, UK

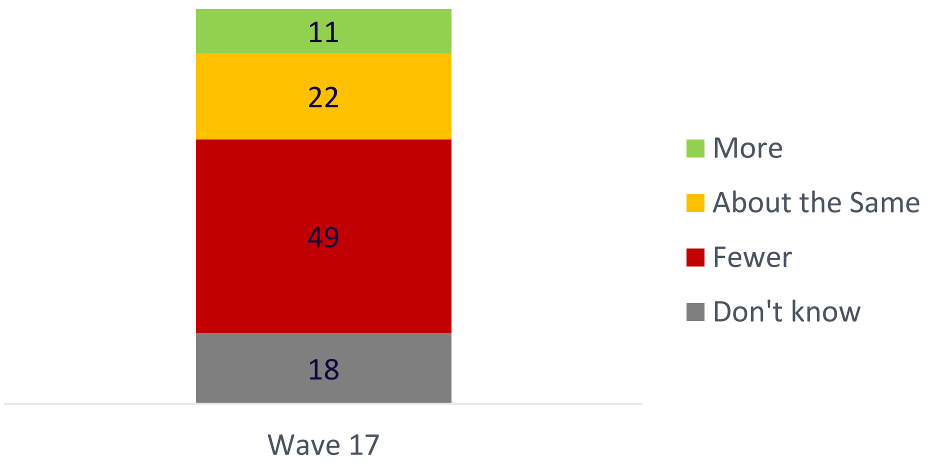
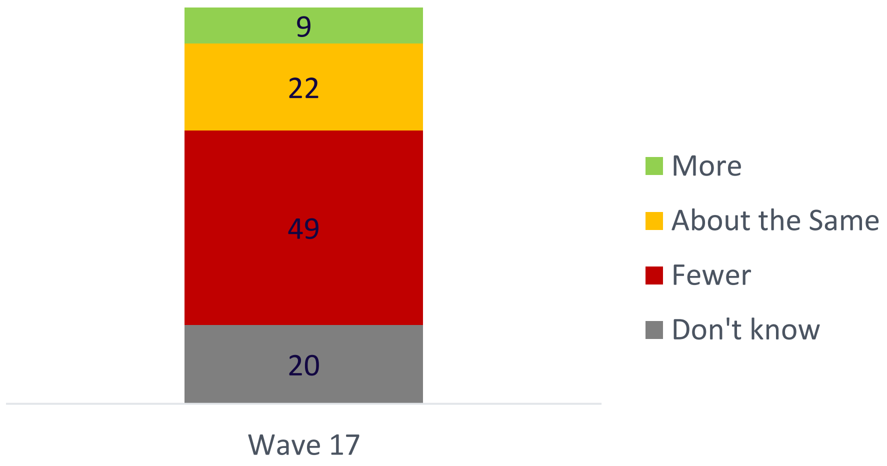


Figure 14. Number of UK longer breaks (4+ nights) over the rest of this year compared to normal, Percentage Wave 17, UK



QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of UK holidays/short breaks between now and the end of the year? Base: All respondents. Wave 17 n=1,760

Anticipated number of OVERSEAS trips this year compared to normal

- 24% of U.K. adults intend to take more or about the same number of overseas short breaks (1-3 nights) and longer breaks (4+ nights) by the end of the year compared to normal – a decrease on Wave 16 (28%). Both of these figures are dominated by those who anticipate taking about the same number of trips – very few expect to take more
- Just over half the UK adult population anticipate taking fewer overseas trips between now and the end of the year compared to normal.

Figure 15. Number of OVERSEAS short breaks (1-3 nights) over rest of this year compared to normal, Percentage Wave 17, UK

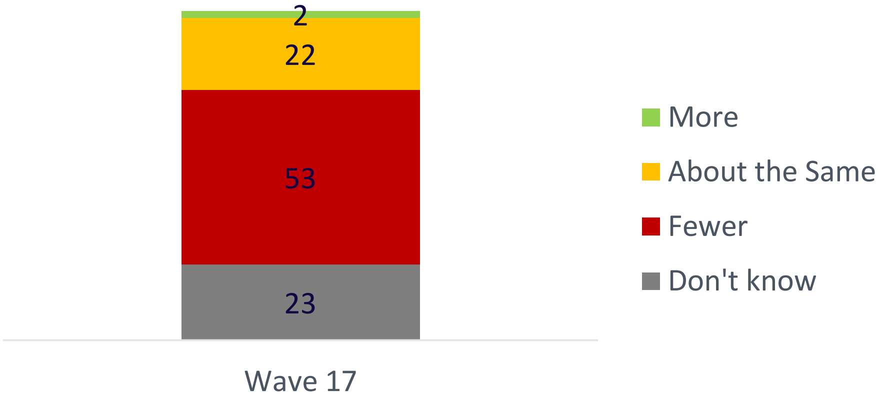
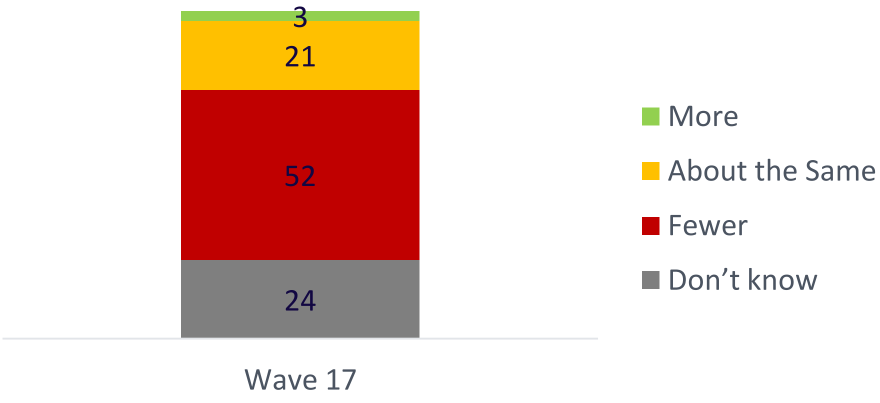


Figure 16. Number of OVERSEAS longer breaks (4+ nights) over rest of this year compared to normal, Percentage Wave 17, UK



QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of overseas holidays/short breaks between now and the end of the year? Base: All respondents. Wave 17 n=1,760

Confidence in the ability to take a U.K. overnight trip

- Confidence in the ability to take an overnight trip in the UK is at 20% in October. This remains broadly consistent until February when the proportion of 'fairly confident' begins to rise, although it is not until April that confidence as a whole exhibits firm signs of recovery.
- The proportion of UK adults having confidence in taking a domestic trip in March 2021 continues to fall, declining another 2 points this wave to 38%.

Figure 17. Confidence in taking a UK overnight trip across a range of different months, Percentage, Wave 17, UK

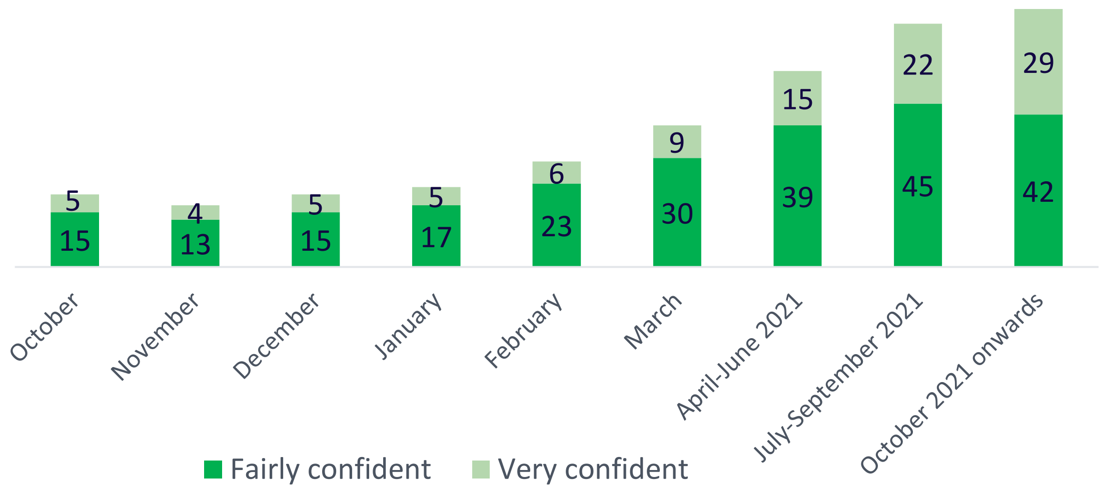
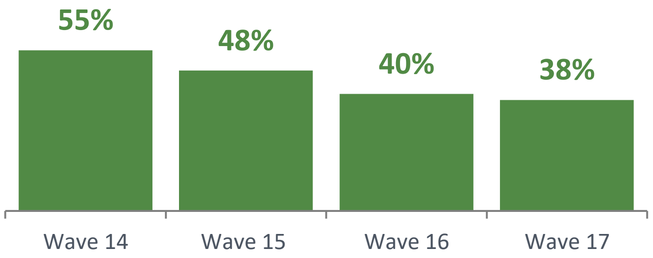


Figure 18. Confidence in taking a UK overnight trip in March 2021, Percentage wave-on-wave, UK



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: All respondents. Wave 17 n=1,760.

Reasons for not feeling confident about taking trips in the U.K. – Top 5

- ‘Restrictions on travel from government’, by a significant margin, the leading reason that U.K. adults do not feel confident about taking an overnight trip in either early or late winter. Concerns about catching COVID-19 is the second most cited reason.

Figure 19. Top 5 reasons for not being confident about travelling in Early winter*, Percentage Wave 17, UK

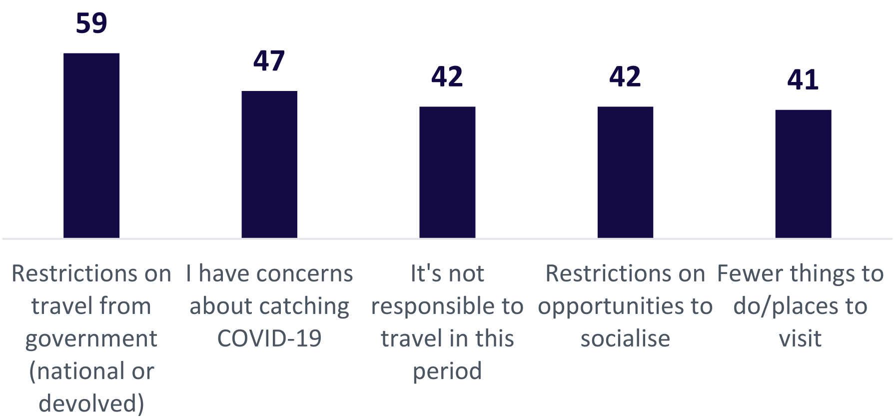
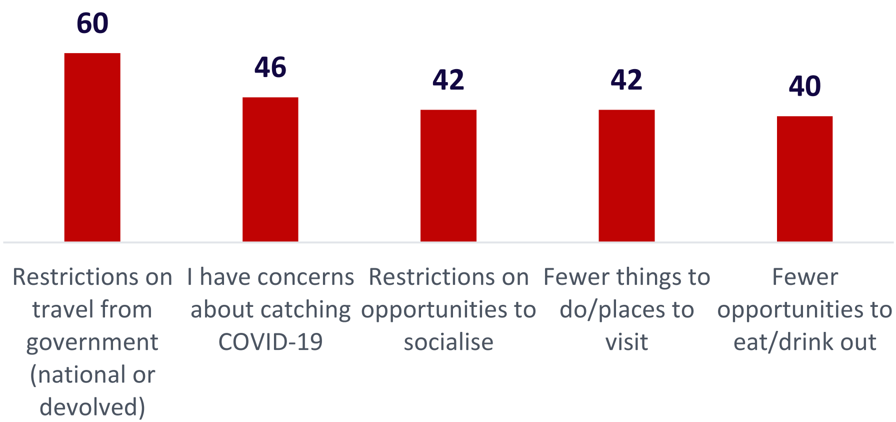


Figure 20. Top 5 reasons for not being confident about travelling in Late winter*, Percentage Wave 17, UK



QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a UK short break or holiday? Base: Wave 17 respondents not confident about taking a break in Early Winter n=533 and in Late Winter n=536. *Early Winter is defined as October - December. Late Winter is defined as January - March 2021.

When anticipating to plan and book next U.K. overnight trip

- Just 13% have already planned and 9% already booked their next domestic overnight trip
- A further 27% intend to plan and 26% intend to book their next trip sometime between now and March 2021.

Figure 21. When anticipate PLANNING next UK overnight trip, Percentage Wave 17, UK

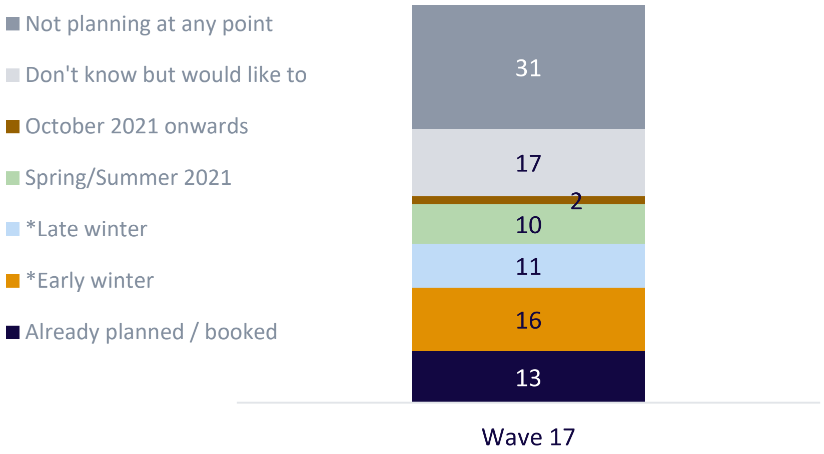
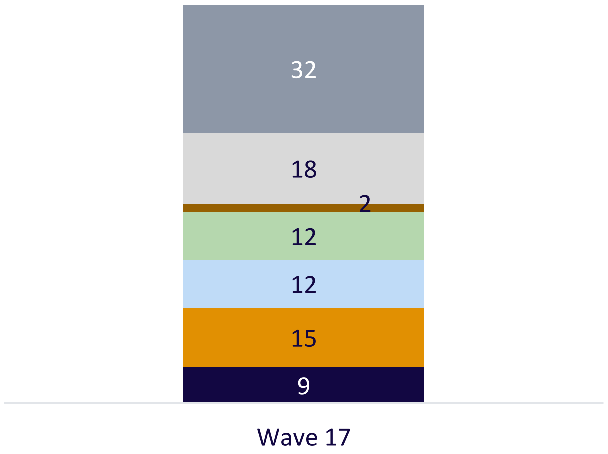


Figure 22. When anticipate BOOKING next UK overnight trip, Percentage Wave 17, UK

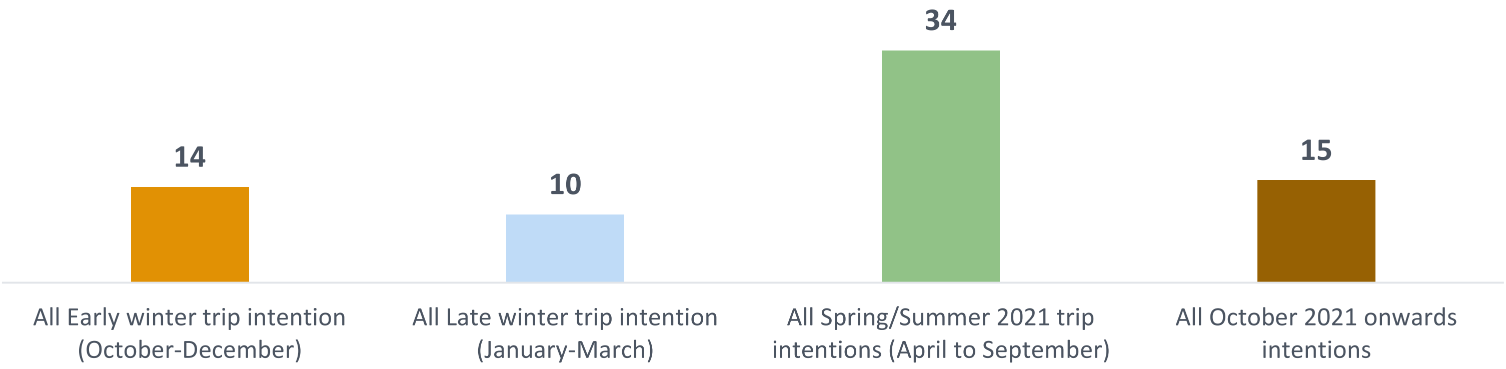


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 17 n=1,760. Early winter is defined as October - December. Late winter is defined as January - March 2021

When anticipating going on a U.K. overnight trip

- 14% of U.K. adults plan on taking a domestic overnight trip before the end of the year
- 1 in 10 intend to take a trip sometime between January and March 2021, rising to just over 1 in 3 during Spring/Summer.
- Although not charted, 28% of adults are not intending to go on a trip at all, which is significantly up on the 19% recorded last wave.

Figure 23. Proportion anticipating GOING on any overnight UK trip, Percentage Wave 17, 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? Base: All respondents. Wave 17 n=1,760

Proportion already planned or booked their next U.K. overnight trip

- 58% of Early Winter intenders have yet to plan their next overnight trip, with 69% still yet to book. A minority of Late winter intenders have either planned or booked their trips (just 24% and 14% respectively)

Figure 24. Proportion of Intenders that have already *planned* their trip, Percentage Wave 17, UK

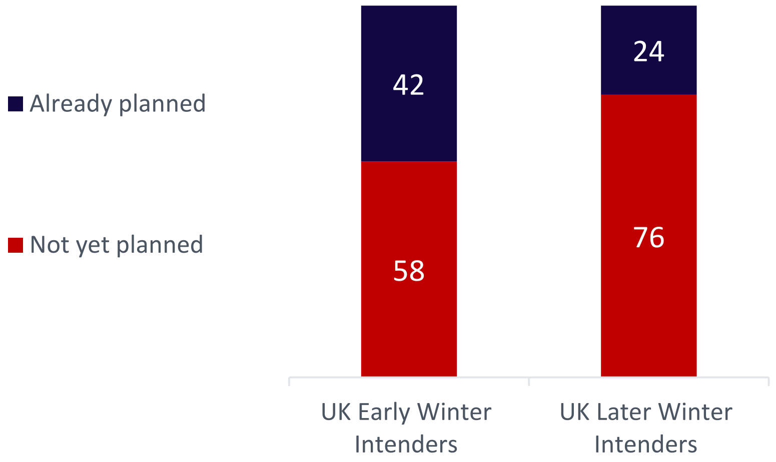
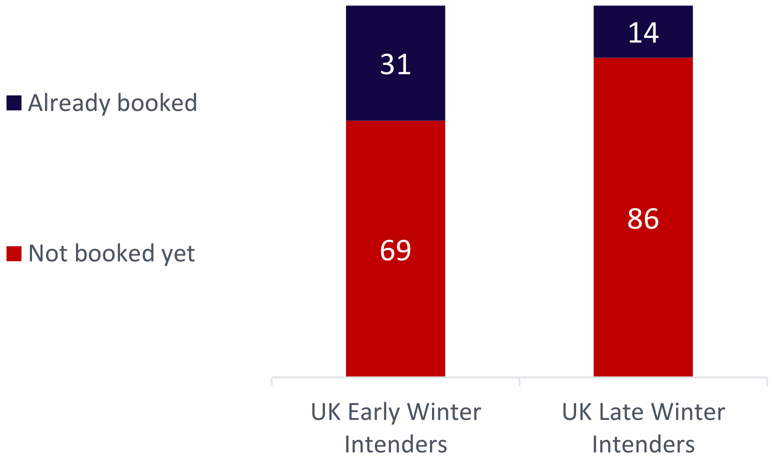


Figure 25. Proportion of Intenders that have already *booked* their trip, Percentage Wave 17, UK

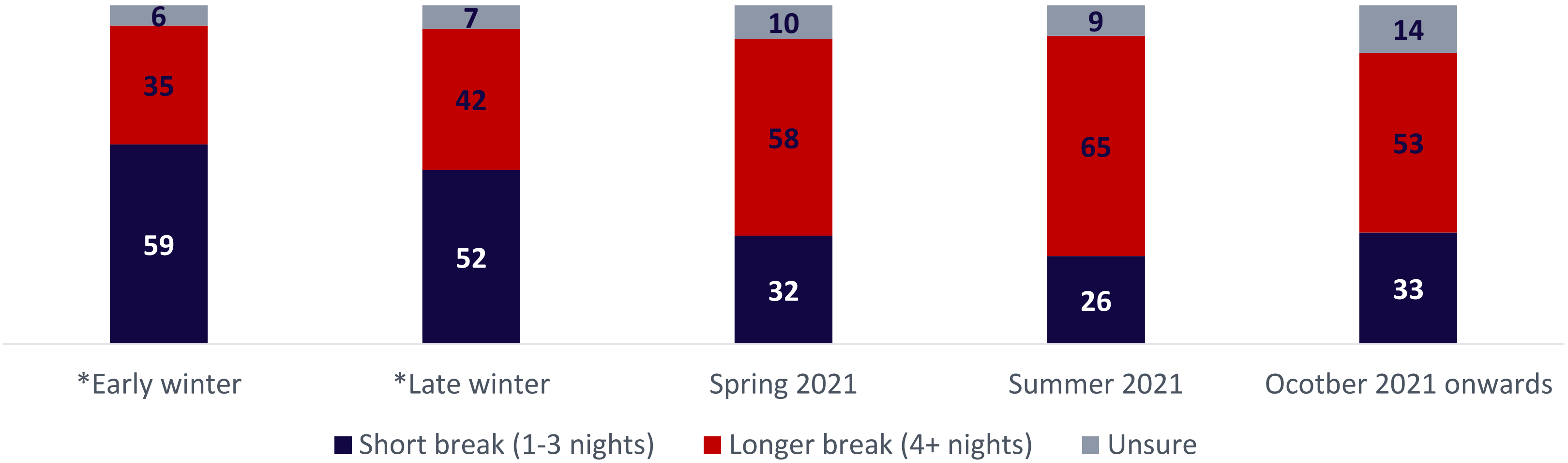


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 17 respondents planning on taking a holiday or short break in the UK by Early Winter (October-December) n=243 and from Late Winter (January-March) n=122

Length of next overnight U.K. trip, by time period

- Shorter breaks of 1-3 nights look set to account for a higher volume of trips than those of 4+ nights for trips taken between now and next March.
- From Spring 2021 onwards, longer breaks comprise the majority of trips.

Figure 26. Length of next UK holiday or short break by time period, Percentage Wave 17, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 17 respondents intending to take next holiday in each time period Early winter n=243; Late winter n=122; Spring 2021 n=184; Summer 2021 n=215; October 2021 onwards n= 98. *Early is defined as October - December. Late Winter is defined as January - March 2021

Where planning on staying on next U.K. overnight trip

- The South West remains significantly more likely than any other part of the UK to receive visitors between now and the end of the year (21% intending to visit)
- The South West ties with the North West (on 18% share) for trips destined to happen in the Late Winter period (Jan – March 2021) with London narrowly behind on 16%.

Figure 27. Where planning on staying on next UK overnight trip in Early winter, Percentage Waves 16-17, UK

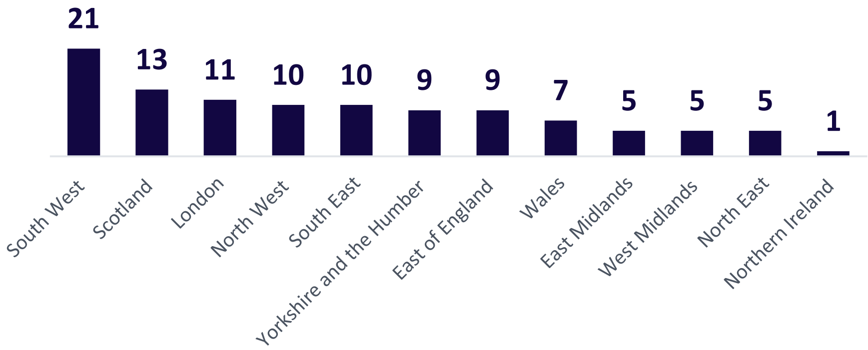
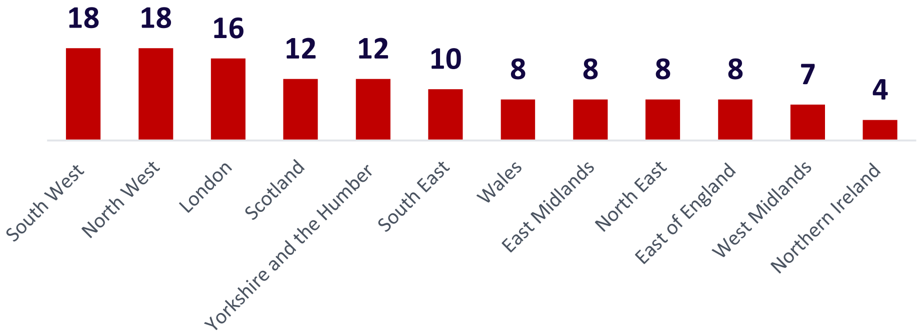


Figure 28. Where planning on staying on next UK overnight trip in Late winter, Percentage Waves 16-17, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Wave 16-17 respondents planning on taking a holiday or short break in the UK for Early Winter (October-December) n=554 and for Winter (January-March) n=236.

Main mode of transport for next U.K. overnight trip

- Across both time periods, 'own car' is the leading mode of transport although more so for Early Winter trips. Train is the second most preferred mode, but again, more so in early winter than late winter period.

Figure 29. Top 5 main modes of travel to destination for trip in <u>Early winter</u>, Percentage, Wave 17, UK

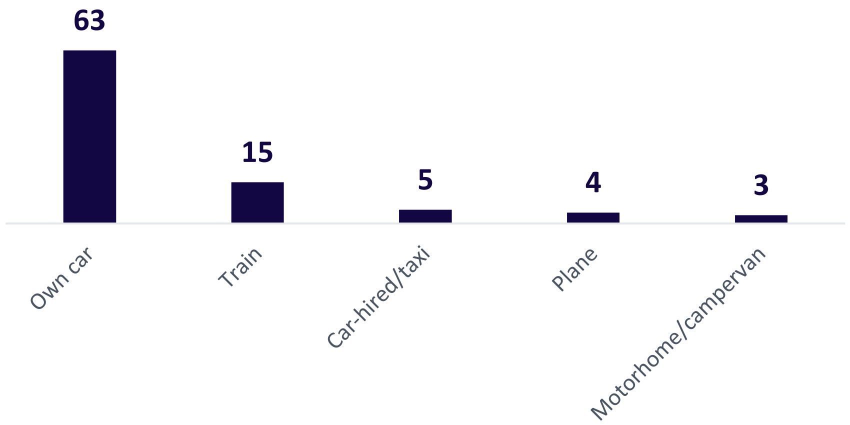
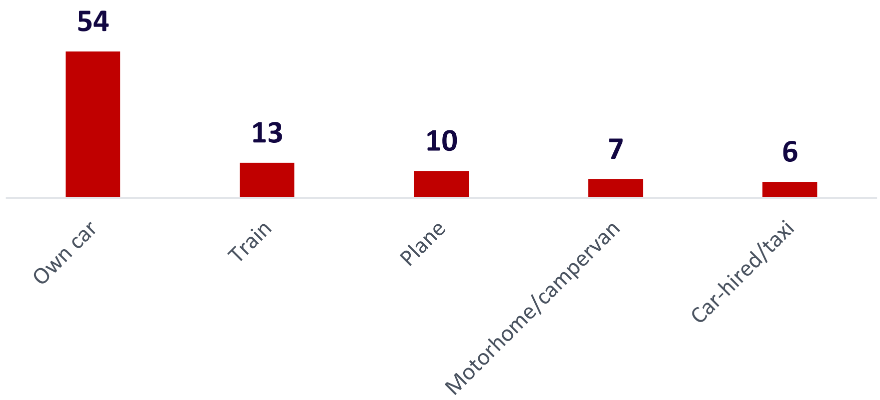


Figure 30. Top 5 main modes of travel to destination for trip in <u>Late winter,</u> Percentage, Wave 17, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 17 respondents planning on taking a holiday or short break in the UK for Early Winter (October-December) n=243 and from Late Winter (January-March) n=122

Type of destination for next U.K. overnight trip

- ‘Countryside or village’ (35%) is ahead of ‘city or large town’ (32%) and ‘traditional coastal/seaside town’ (26%) as the main destination type for an Early Winter overnight trip.
- The proportions change for trips destined to happen during the latter half of winter, although the rank order remains consistent.

Figure 31. Main type of destination for trip in Early winter, Percentage Waves 16-17, UK

Figure 32. Main type of destination for trip in Late winter, Percentage Waves 16-17, 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 Wave 16-17 respondents planning on taking a holiday or short break in the UK for Early Winter (October-December) n=554 and for Late Winter (January-March) n=236.

Type of accommodation for next U.K. overnight trip

- ‘Hotel/motel/inn’ is, by a significant margin, the preferred type of accommodation for trips during Early Winter, with 39% share
- In Late Winter ‘camping/caravan’ is on 43% and promoted to first place following a significant rise in share versus the Early Winter period.

Figure 33. Accommodation planning on staying in on next UK overnight trip in Early winter, Net percentage Waves 16-17

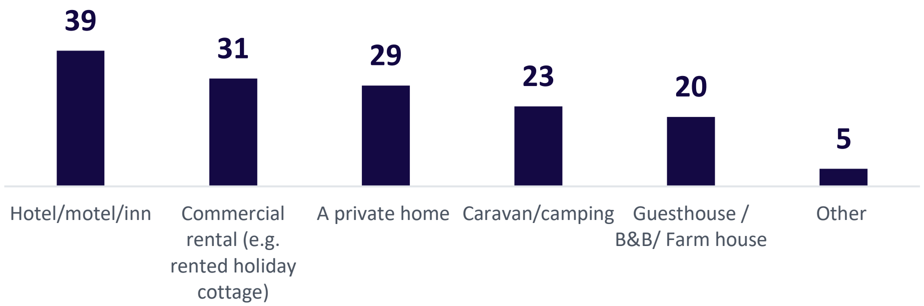
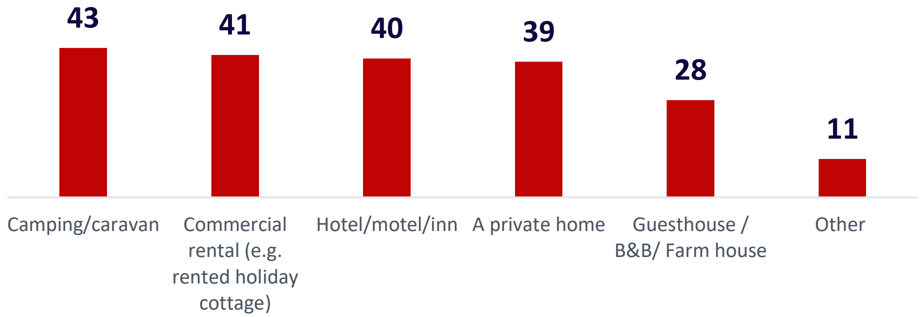


Figure 34. Accommodation planning on staying in on next UK overnight trip in Late winter, Net percentage Waves 16-17



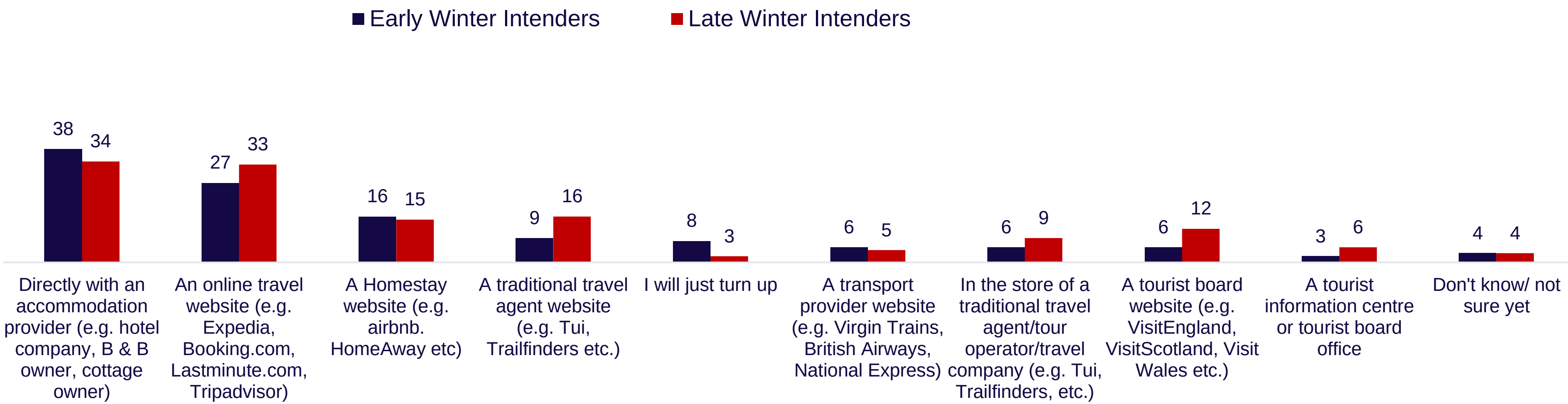
QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?

Base: All Wave 16-17 respondents planning on taking a holiday or short break in the UK for Early Winter (October-December) n=554 and for Late Winter (January-March) n=236.

Method of booking accommodation for next U.K. overnight trip

- People are most likely to book their accommodation directly with an accommodation provider, with just over a 1 in 3 share, followed closely by an online travel website.

Figure 35. Accommodation booking channel for next trip in Early winter and Late winter, Percentage Wave 17, U.K.

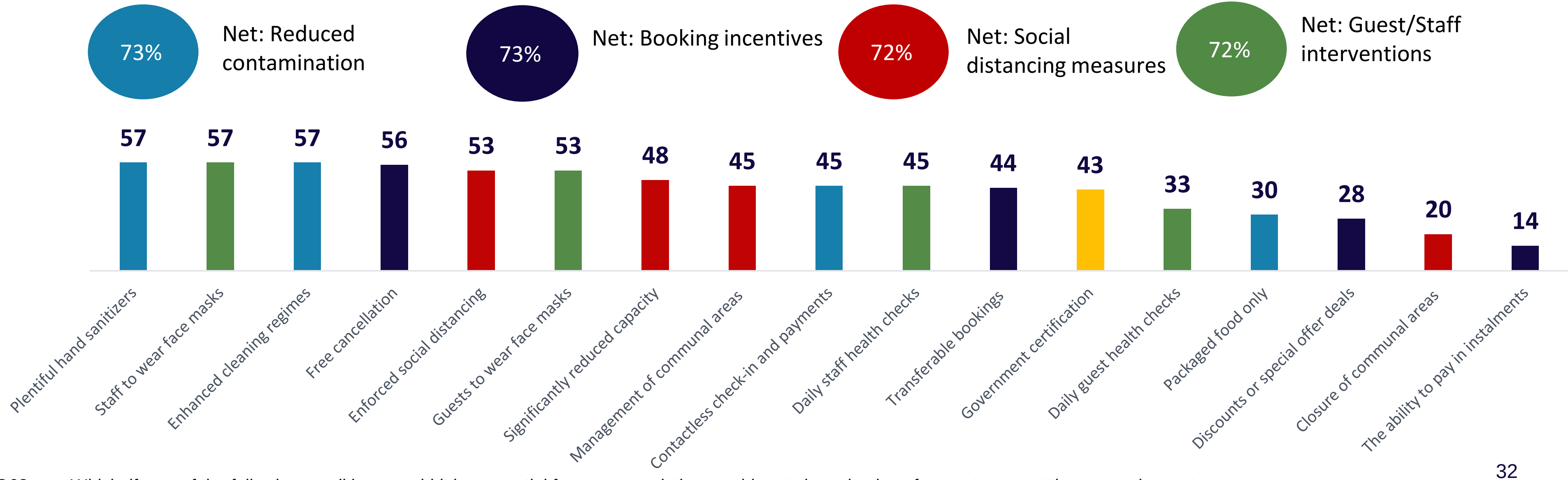


VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All Wave 17 respondents planning on taking a holiday or short break in the UK for Early Winter (October-December) n=243 and for Late Winter (January-March) n=122

Conditions essential to stay in accommodation in next few months

- Unsurprisingly, cleanliness, hygiene and distancing feature highly among the measures considered essential for staying in accommodation during the coming months.
- Offering free cancellations also features highly, suggesting a strong need to provide reassurance and confidence that reimbursement will occur should plans change.

Figure 36. Conditions that are essential for a stay in accommodation, Percentage and Net Percentages Wave 17, UK

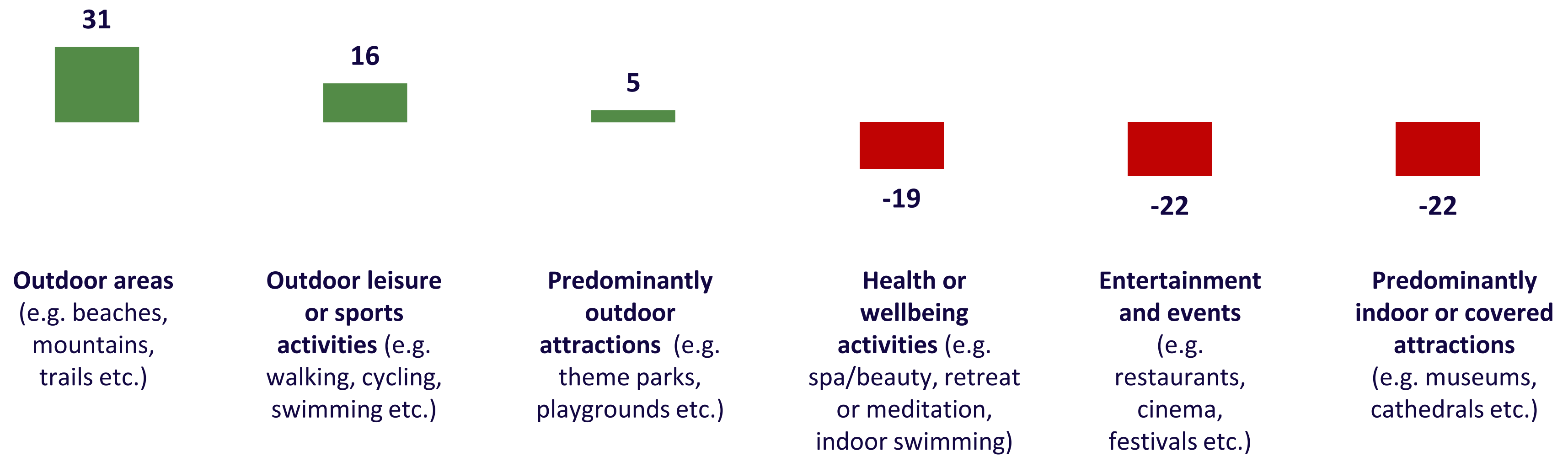


Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them over the next few months? Base: All Wave 17 respondents n=1,760.

General leisure activity intentions as lockdown restrictions are lifted

- Outdoor areas are most likely to attract more visitors/engagement than normal but slightly down on Wave 16 (net +37 compared to +31), followed by outdoor leisure or sports activities (net +16) and predominantly outdoor attractions (+5). 'Indoor attractions' and 'entertainment and events' (both net -22) remain just behind 'health or wellbeing activities' (net -19) as likely to attract fewer visitors/engagement than normal.
- Most activity types have experienced a drop in 'net intention' since Wave 16

Figure 37. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Wave 17, UK



QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted?
Base: All Wave 17 respondents n=1,760.

4. October Half-Term Intentions

Day trip intentions during the October school half-term period

- Around 1 in 10 intend on taking a day trip during October half-term whilst another 12% remain unsure
- Very few expect to take more day trips than normal during October half-term, while 28% anticipate taking about the same number as usual. Over half anticipate taking fewer.

Figure 38. Anticipated number of day trips during October half-term, Percentage Wave 17, U.K.

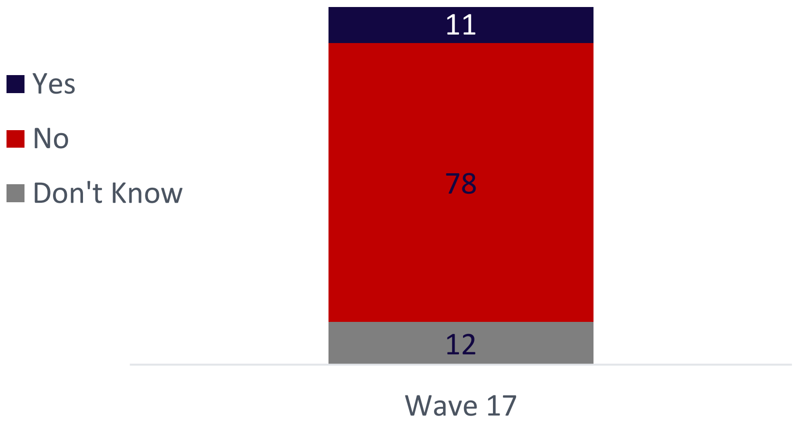
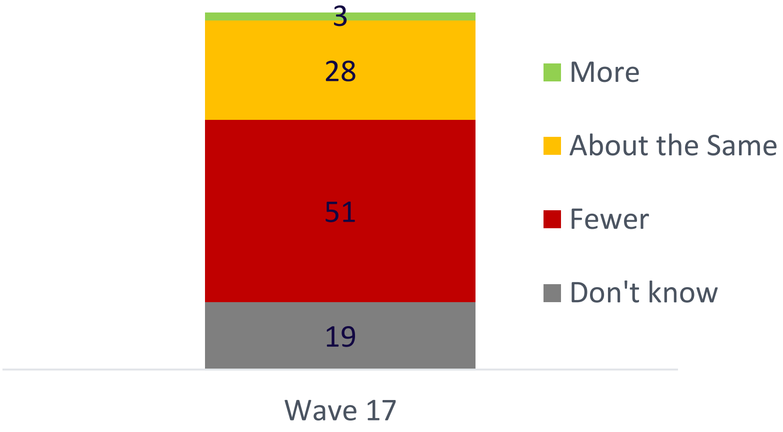


Figure 39. Anticipated number of day trips during October half-term compared to normal, Percentage Wave 17, U.K.



QVB15a. Are you intending to go on any day trips during the October school half-term period? QVB15b. Compared to normal, are you likely to take more, fewer or about the same number of day trips during the October school half-term period? Base: All respondents. Wave 17 n=1,760

Methodology

Methodology

- The findings in this report are based on an online survey conducted amongst a sample of the U.K. 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 Scotland to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the U.K. overall and within each nation.
- This report presents findings from Wave 17 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-16 where appropriate. Wave 17 fieldwork was conducted between 12th to 16th October 2020.

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.