COVID-19 Consumer Tracker

Wave 20

Fieldwork Period: 23 – 27 November

U.K. 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 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 when they 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.

- **Early winter Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between November 2020 and December 2020.
- **Late winter Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between January 2021 and March 2021.

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	26 – 30 October
Wave 7	29 June – 3 July	Wave 19	9 – 13 November
Wave 8	6 – 10 July	Wave 20	23 – 27 November
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 20: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

*** Represents a significant change on previous wave**

Key Metrics	Wave 19	Wave 20	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')	16%	15%	-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)	18%	14%	-4
The main reasons for not feeling confident about taking a trip November to December	1. Restrictions on travel from government 2. It's not responsible to travel	1. Restrictions on travel from government 2. It's not responsible to travel	No change

Table 2. Top line Metrics – General Trip Intentions

Key Metrics	Wave 19	Wave 20	Wave Shift
Anticipated number of UK short breaks compared to normal (% more/the same)	35%	36%	+1
Anticipated number of UK longer breaks compared to normal (% more/the same)	33%	33%	NA
Near-term confidence in taking UK overnight trip (Nov/Dec/Jan confident)	11%/13%/15%	12%/15%/14%	+1/+2/-1
Medium-term confidence in taking UK overnight trip (Feb/March confident)	22%/34%	20%/28%	-2/-6*
Proportion going on a UK overnight trip in late winter (Jan-Mar)	13%	11%	-2
Split between longer break / short break / don't know for late winter (Jan-Mar)	47%/45%/9%	45%/49%/6%	-2/+4/-3

Wave 20: Scorecard of Key Metrics (2)

Table 3. Top line Metrics – Destination and Accommodation Plans

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

Key Metrics	Wave 19	Wave 20	Wave Shift
Leading UK region likely to stay in between Nov- Dec	South East	South West	New no.1
Main *type* of destination likely to stay in between Nov – Dec	Countryside or village	Countryside or village	No change
Main accommodation type likely to stay in between Nov - Dec	Hotel/motel/inn + Private Home	Private Home	New no.1

Table 4. Top line Metrics – Broader Leisure Activity

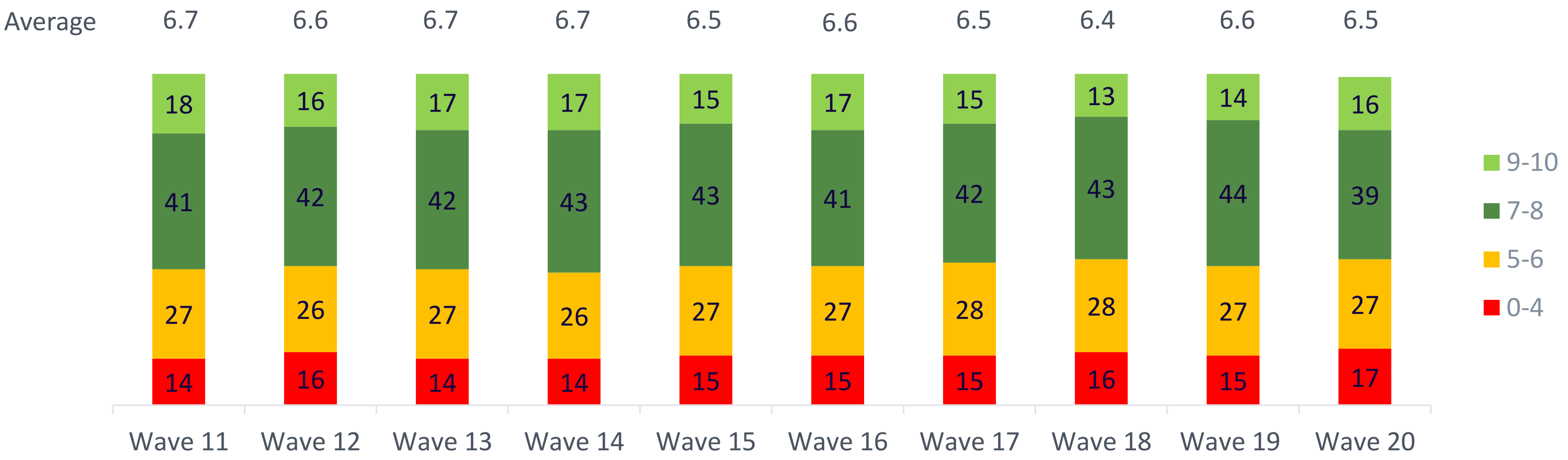
Key Metrics	Wave 19	Wave 20	Wave Shift
Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No change
Place/activity generating lowest engagement compared to normal	Indoor or covered attractions	Indoor or covered attractions	No change

1. The National Mood

The national mood

- The nation’s average mood has marginally declined to 6.5/10
- Despite more people scoring 9-10 there has been a greater contraction in the proportion rating their mood as 7-8.

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

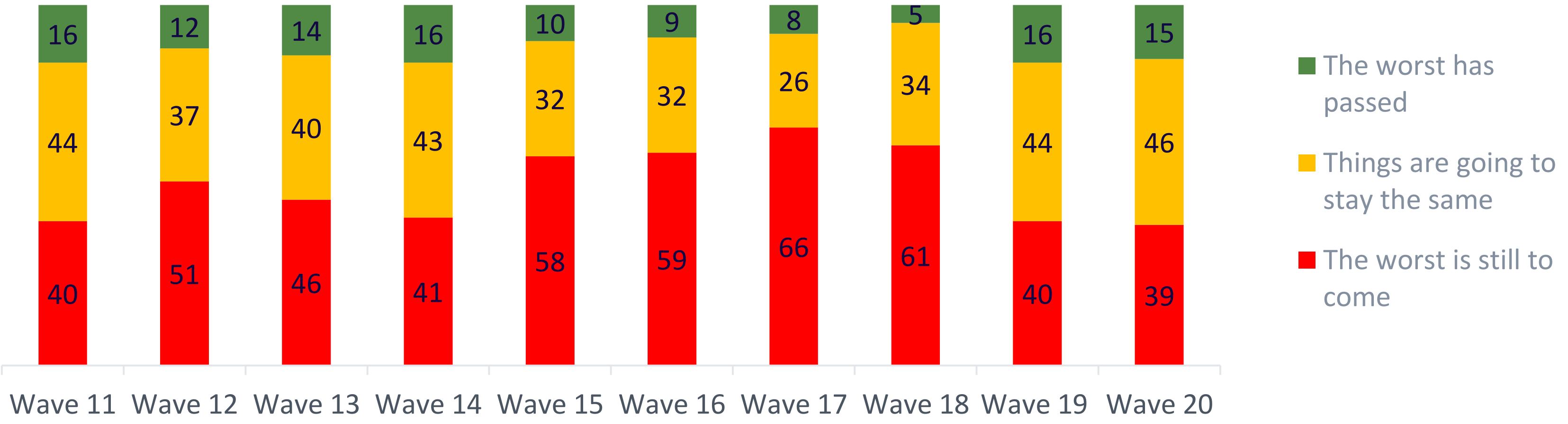


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 20 n=1,764

Perceptions of the situation in relation to COVID-19

- Perceptions of the situation regarding COVID-19 is virtually unchanged compared to Wave 19.

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 20 n=1,764

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

- There has been another slight decline in the proportion of U.K. adults expecting 'normality' by next March (dipping from 18% to 14%).
- The proportion of those expecting normality to return to their lives does not really begin to accelerate until April, while just under half don't envisage normality returning before July (49%).

Figure 3. Perceptions of when things will return 'close to normal' Percentage Wave 20, UK

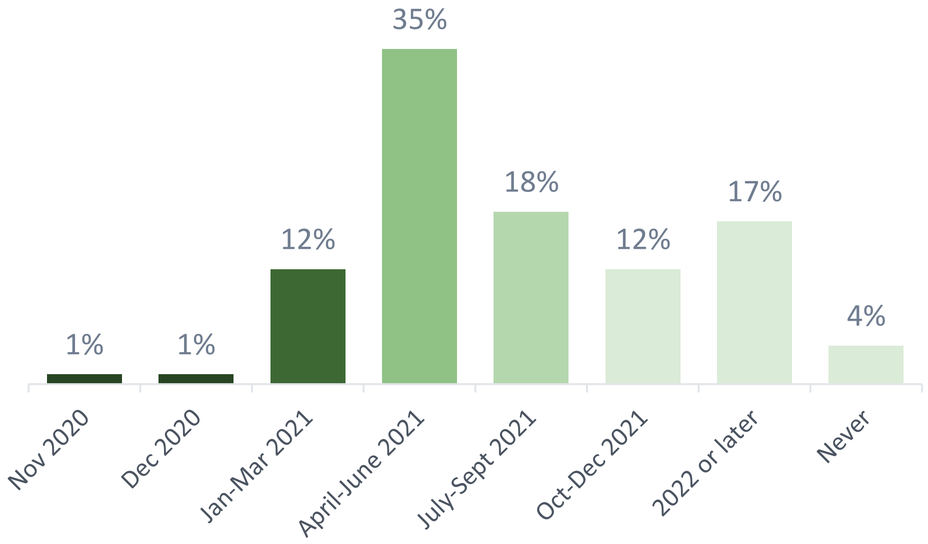
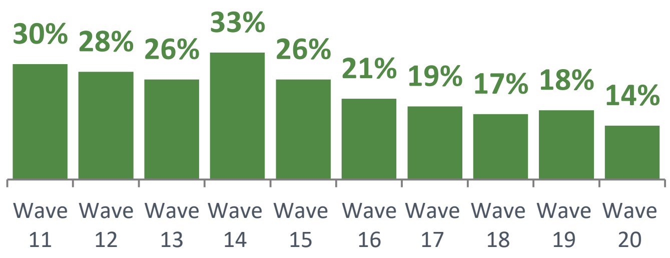


Figure 4. Proportion expecting normality by March, Percentage wave-on-wave, UK

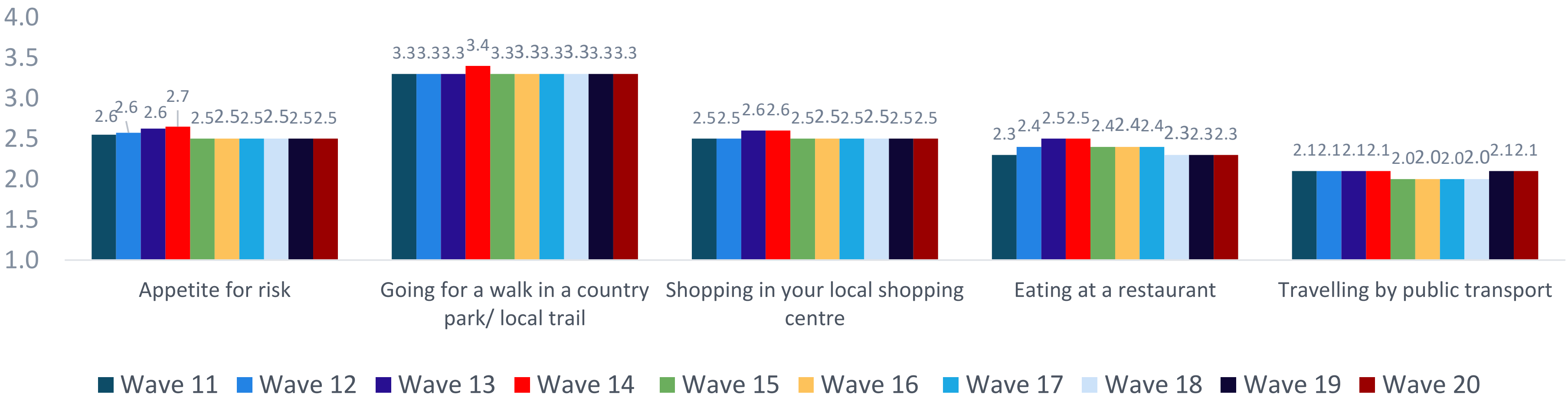


Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 20 n=1,764

Appetite for risk

- The 'levels of comfort' with undertaking everyday activities has remained consistent since Wave 15, with the 'appetite for risk' score 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 20 n=1,764.

2. Trip Intentions

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

Anticipated number of U.K. trips by end March compared to normal

- 36% of U.K. adults anticipate taking the same number or more domestic short breaks compared to normal between now and the end of March. 37% plan on taking fewer short breaks, whilst 27% 'don't know'.
- The pattern is similar for 'longer breaks' of 4+ nights, although a lower proportion plan on taking 'more' of this type of trip (there is also a slightly higher incidence of 'don't know').

Figure 13. Number of UK short breaks (1-3 nights) between now and the end of March compared to normal, Percentage Wave 20, UK

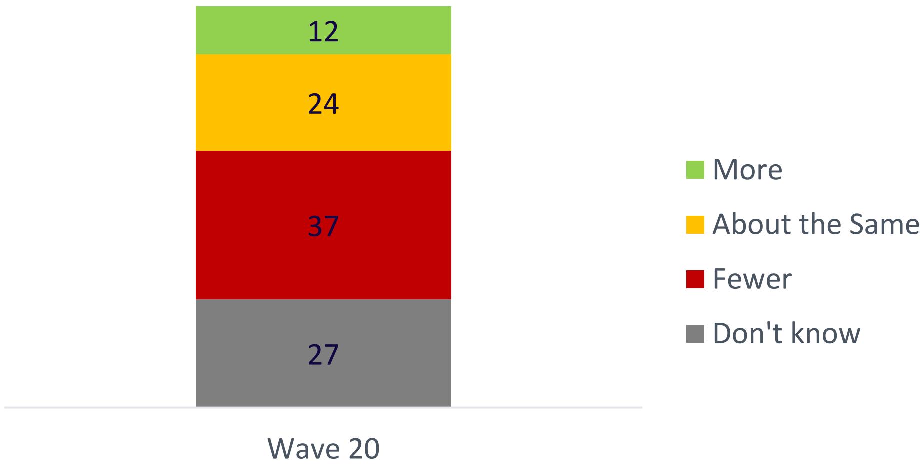
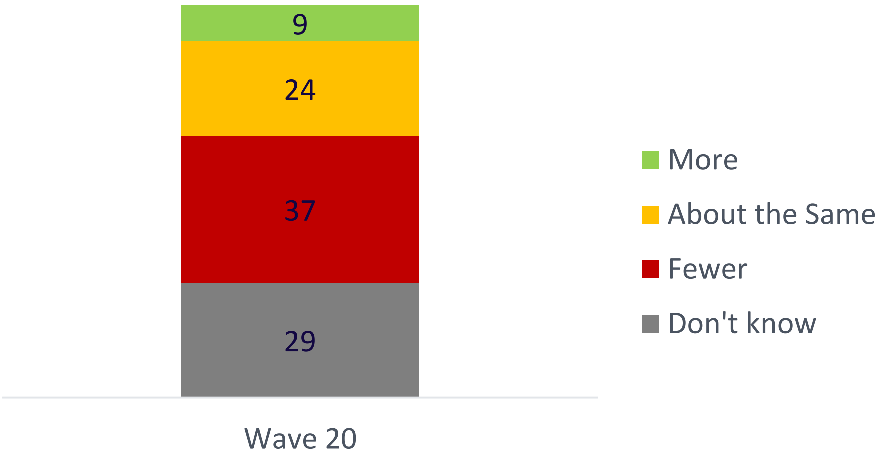


Figure 14. Number of UK longer breaks (4+ nights) between now and the end of March compared to normal, Percentage Wave 20, UK



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 March 2021? Base: All respondents. Wave 20 n=1,764.

Anticipated number of OVERSEAS trips by end March compared to normal

- Around 1 in 4 (24%) UK adults plan on taking more or about the same number of overseas *short* breaks (of 1-3 nights) compared to normal between now and the end of March.
- A similar proportion (25%) plan on taking more or about the same number of overseas *longer* breaks (4+ night).
- The majority, however, either plan on taking fewer overseas trips while around a third 'don't know'.

Figure 15. Number of OVERSEAS short breaks (1-3 nights) between now and the end of March compared to normal, Percentage Wave 20, UK

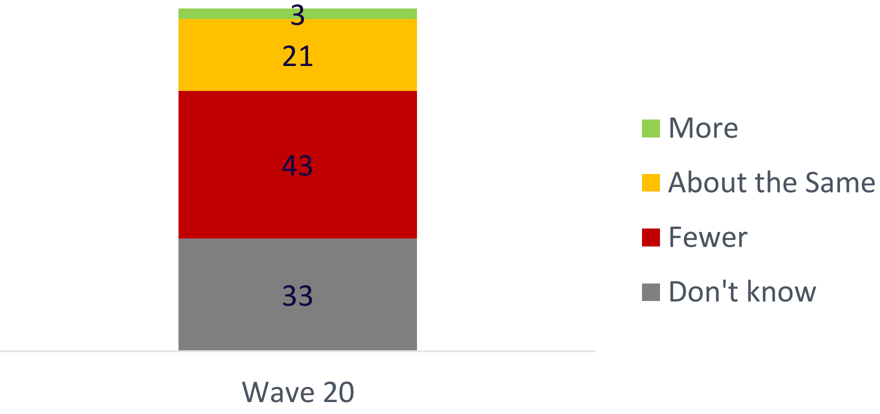
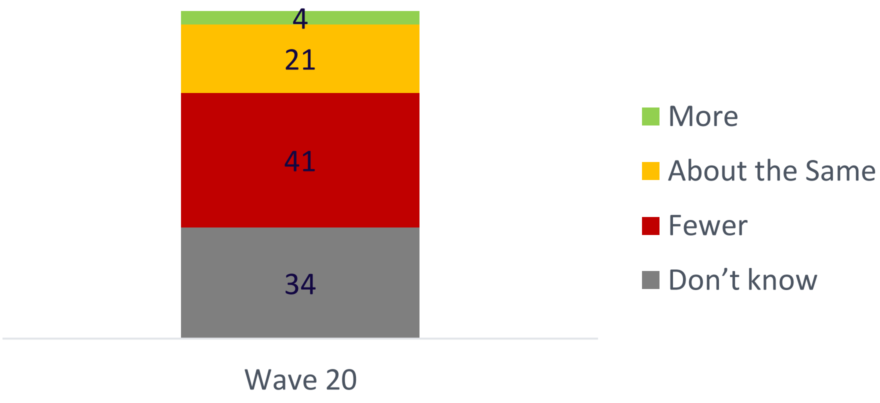


Figure 16. Number of OVERSEAS longer breaks (4+ nights) between now and the end of March compared to normal, Percentage Wave 20, UK



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 March 2021? Base: All respondents. Wave 20 n=1,764.

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

- Confidence in the ability to take a domestic overnight trip booked for December or January has remained relatively consistent since Wave 18, while confidence in the medium-term (February to June) has declined slightly.
- However, longer-term confidence (from July onwards) exhibits an improving trend, and it's not until this period is reached that the majority claim to be very or fairly confident.

Figure 17. Confidence in taking a UK overnight trip across a range of different months, Percentage, Wave 20, UK

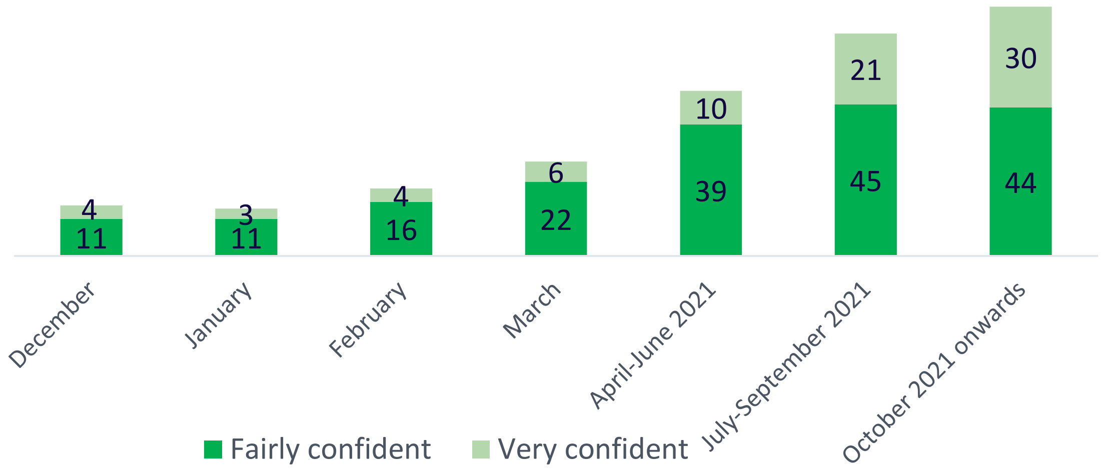
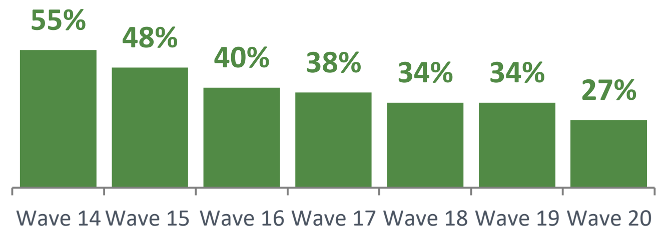


Figure 18. Confidence in taking a UK overnight trip in March 2021, Percentage wave-on-wave, UK



QVB7anew. We'd like you to imagine that you have booked a UK holiday or short break in each of the 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 20 n=1,764.

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

- ‘Restrictions on travel from government’ is the leading reason, by a significant margin, why UK adults do not feel confident about taking an overnight trip this winter. Having ‘fewer opportunities to eat/drink out’ and ‘fewer things to do/places to visit’ are also key factors driving this lack of confidence.
- ‘Concerns about catching COVID-19’ remains an important barrier across both the early and late winter time periods, with ‘it’s not responsible to travel’ being more influential to the former.

Figure 19. Top 5 reasons for not being confident about travelling in early winter*, Percentage Wave 20, UK

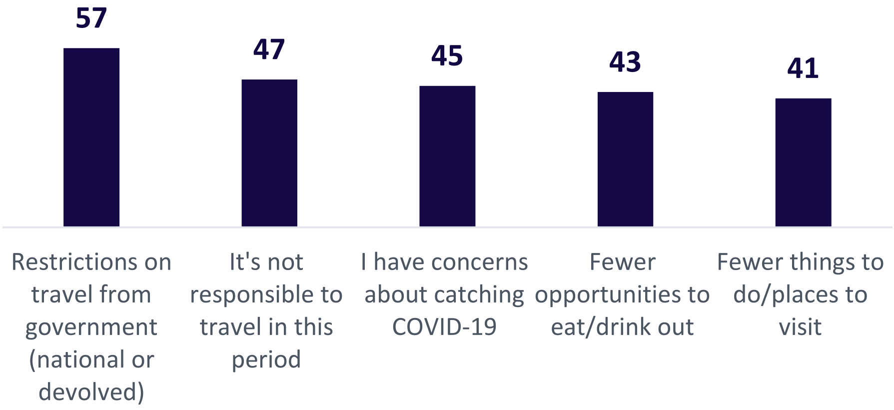
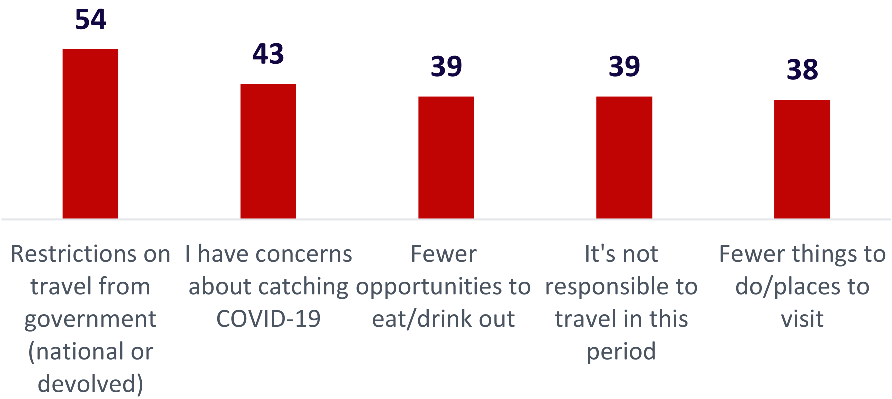


Figure 20. Top 5 reasons for not being confident about travelling in late winter*, Percentage Wave 20, UK



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 20 respondents not confident about taking a break in early winter n=415 and in late winter n=622. *Early Winter is defined as Nov - Dec. Late Winter is defined as Jan - Mar 2021.

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

- 12% claim to have already planned and 8% already booked their next domestic overnight trip; a slight increase from Wave 19 (recording 10% and 7% respectively).
- Some 17% expect to plan their next trip between Jan – March and 15% book it, largely consistent with the 16% reported in Wave 19.
- There has been rise in Spring/Summer intent, with 14% anticipating planning and 19% booking a trip during that period (compared with 10% and 14% respectively in Wave 19)

Figure 21. When anticipate PLANNING next UK overnight trip, Percentage Wave 20, UK

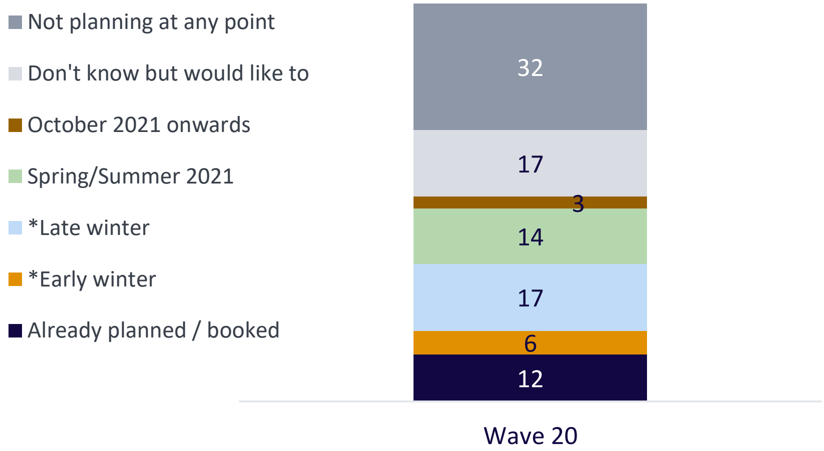
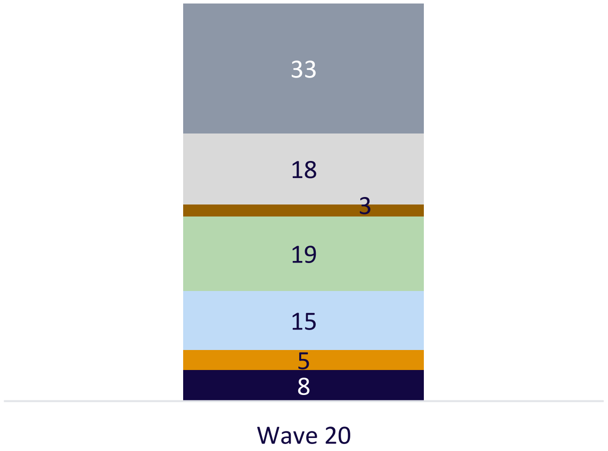


Figure 22. When anticipate BOOKING next UK overnight trip, Percentage Wave 20, UK

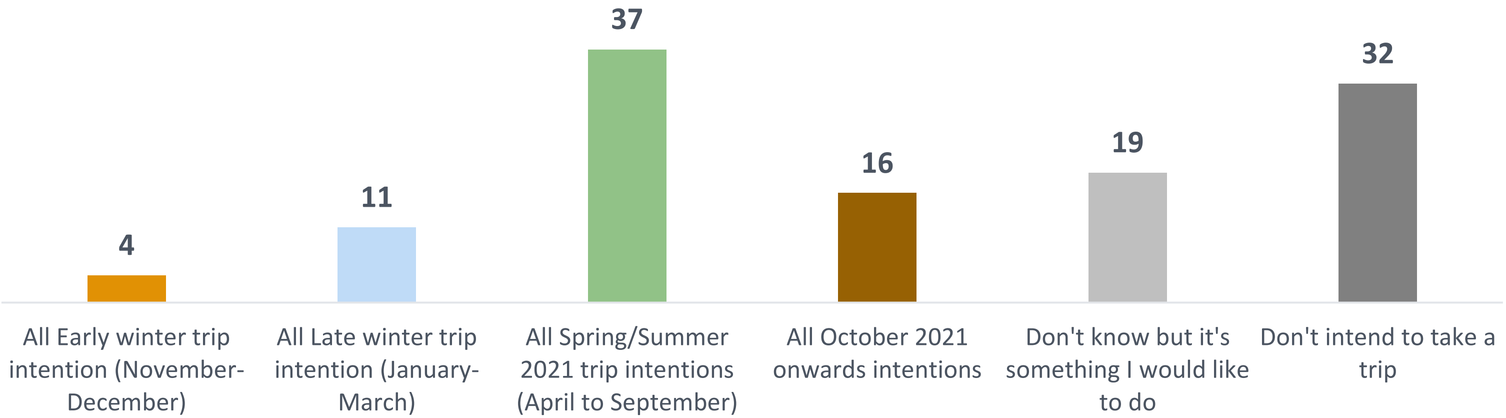


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 20 n=1,764. *Early winter is defined as Nov - Dec. Late winter is defined as Jan - Mar 2021

When anticipating going on a U.K. overnight trip

- 4% plan on taking a domestic overnight trip before the end of this year; a decline on the 6% that stated this in Wave 19, although some of these trips may have been taken during the intervening two weeks.
- Roughly 1 in 10 (11%) intend to take an overnight trip between January and March (marginally down from the 13% in Wave 19) rising to just over a third (37%) during Spring/Summer 2021 (versus 35% in Wave 19).
- 32% of U.K. adults are not currently intending to take any domestic overnight trips, consistent with Wave 19.

Figure 23. Proportion anticipating GOING on any overnight UK trip, Percentage Wave 20, 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 20 n=1,764

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

- Although some caution is advised interpreting the 'Early Winter' scores due to low base size (n=69), indicatively there has been a substantial increase in the planning and booking of trips for this period. Some 72% of intenders have already planned and 51% already booked (versus just 39% and 22% respectively in Wave 19).
- Looking to the Late Winter period, levels of planning are up to 33% (versus 23% in Wave 19) but bookings remain low at just 16% of intenders (versus 18% in Wave 19)

Figure 24. Proportion of Intenders that have already *planned* their trip, Percentage Wave 20, UK

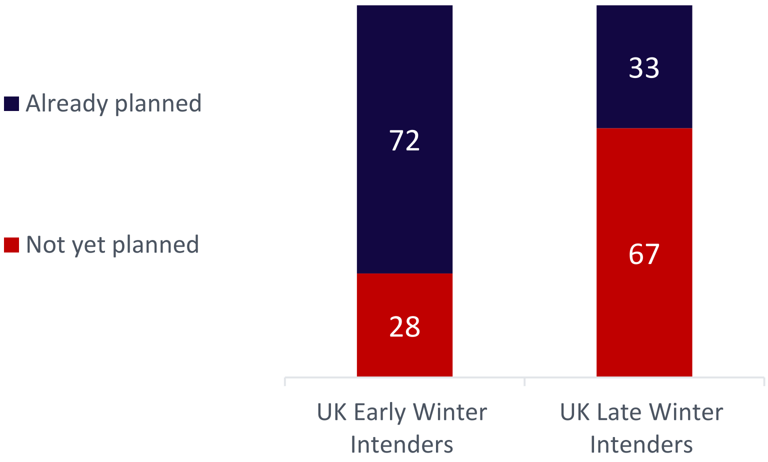
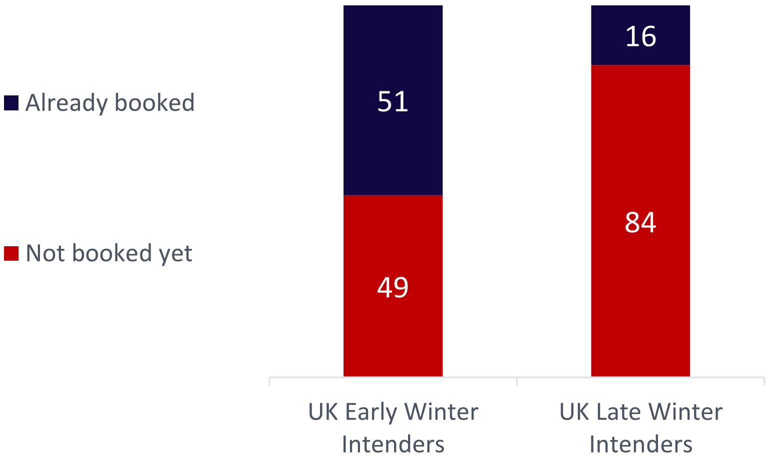


Figure 25. Proportion of Intenders that have already *booked* their trip, Percentage Wave 20, UK

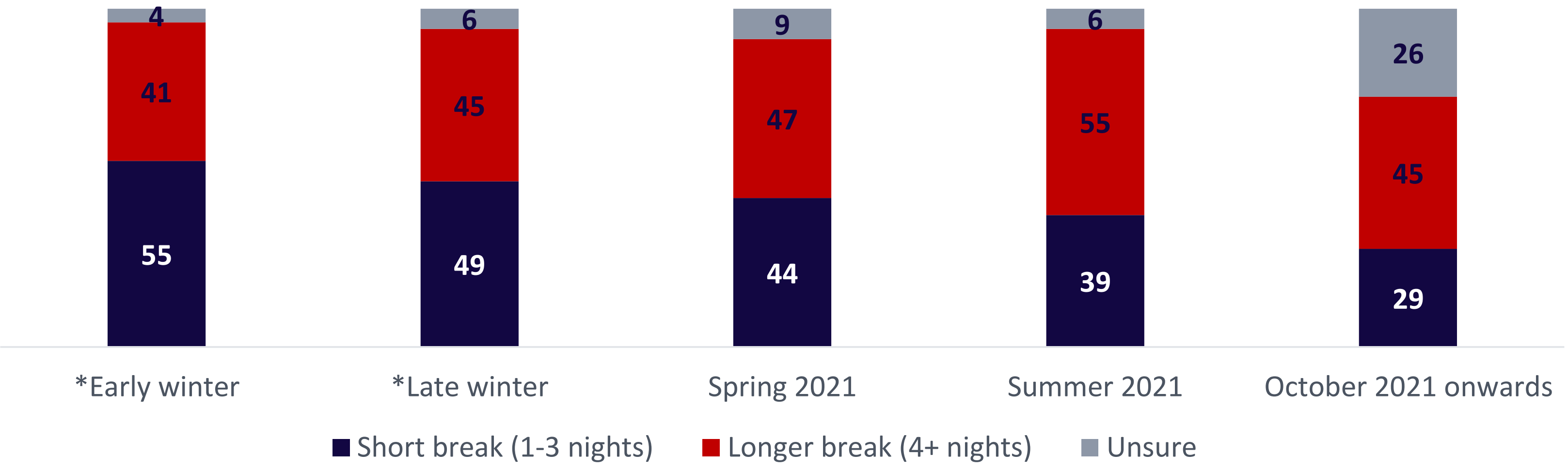


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 20 respondents planning on taking a holiday or short break in the UK in early winter (November-December) n=69 and in late winter (January-March) n=153

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 longer trips of 4+ nights in Early Winter, while it's more evenly balanced in Late Winter.
- From Spring 2021 (April onwards) longer breaks of 4+ nights are likely to comprise the majority of overnight trips.

Figure 26. Length of next UK holiday or short break by time period, Percentage Wave 20, UK



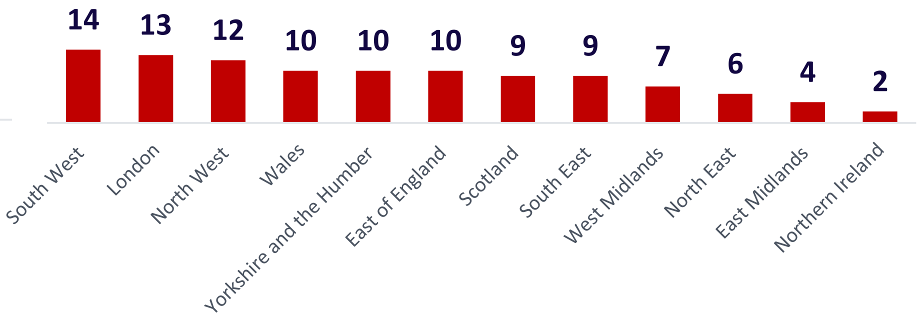
QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 20 respondents intending to take next holiday in each time period: Early winter n=69; Late winter n=153; Spring 2021 n=272; Summer 2021 n=246; October 2021 onwards n= 114. *Early is defined as November - December. Late winter is defined as January - March 2021

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

- The South West is the leading destination for an overnight stay between now and the end of the year, followed by London, North West England and Yorkshire & the Humber.
- In Late Winter, there is minimal separation between the top three regions, with South West (14%) narrowly ahead of London (13%) and the North West (12%).

Figure 27. Where planning on staying on next UK overnight trip in early winter, Percentage Waves 19-20, UK

Figure 28. Where planning on staying on next UK overnight trip in late winter, Percentage Waves 19-20, UK



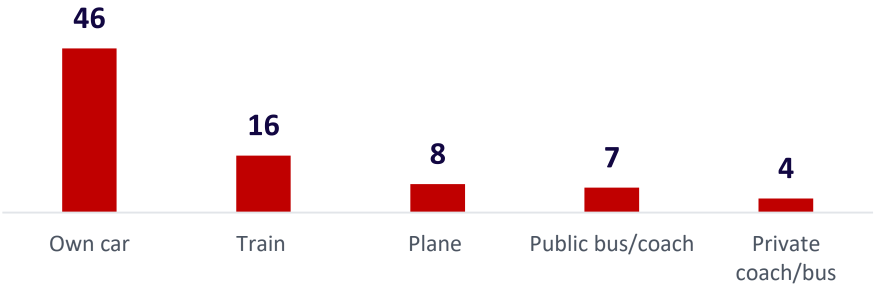
QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Wave 19-20 respondents planning on taking a holiday or short break in the UK for early winter (November-December) n=168 and for late winter (January-March) n=337.

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

- Across both time periods, ‘own car’ is the leading mode of transport for travelling to the overnight destination, with 51% citing this this for Early Winter trips and 46% for Late Winter.
- Travel by ‘train’ is the second most preferred mode in both Early and Late Winter.

Figure 29. Top 5 main modes of travel to destination for trip in early winter, Percentage, Wave 20, UK

Figure 30. Top 5 main modes of travel to destination for trip in late winter, Percentage, Wave 20, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 20 respondents planning on taking a holiday or short break in the UK for early winter (November-December) n=69 and from late winter (January-March) n=153.

Type of destination for next U.K. overnight trip

- The leading destination type for a trip between now and the end of the year is ‘countryside or village’ (29%), just ahead of ‘city or large town’ (26%).
- However, the top two swap positions for Late Winter, with ’City or large town’ leading (on 30%) followed by ‘countryside or village’ (28%) while ‘traditional coastal/seaside town’ occupies third spot (26%).

Figure 31. Main type of destination for trip in early winter, Percentage Waves 19-20, UK

Figure 32. Main type of destination for trip in late winter, Percentage Waves 19-20, 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 19-20 respondents planning on taking a holiday or short break in the UK for early winter (November-December) n=168 and for late winter (January-March) n=337.

Type of accommodation for next U.K. overnight trip

- A ‘private home’ overhauls ‘hotel/motel/inn’ as the leading accommodation choice for both Early and Late Winter overnight trips, with the festive period likely responsible for the increase in share it receives in the former period.

Figure 33. Accommodation planning on staying in on next UK overnight trip in <u>early winter</u>, Net percentage Waves 19-20

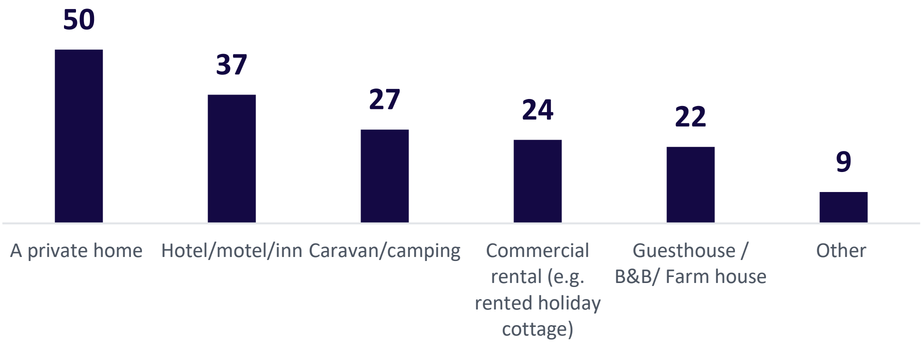
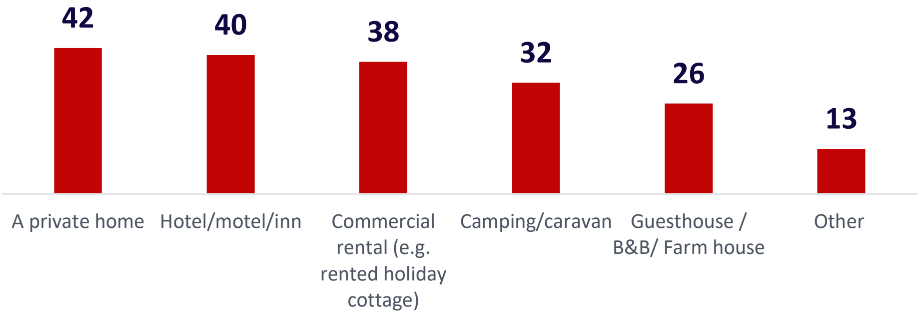


Figure 34. Accommodation planning on staying in on next UK overnight trip in <u>late winter</u>, Net percentage Waves 19-20

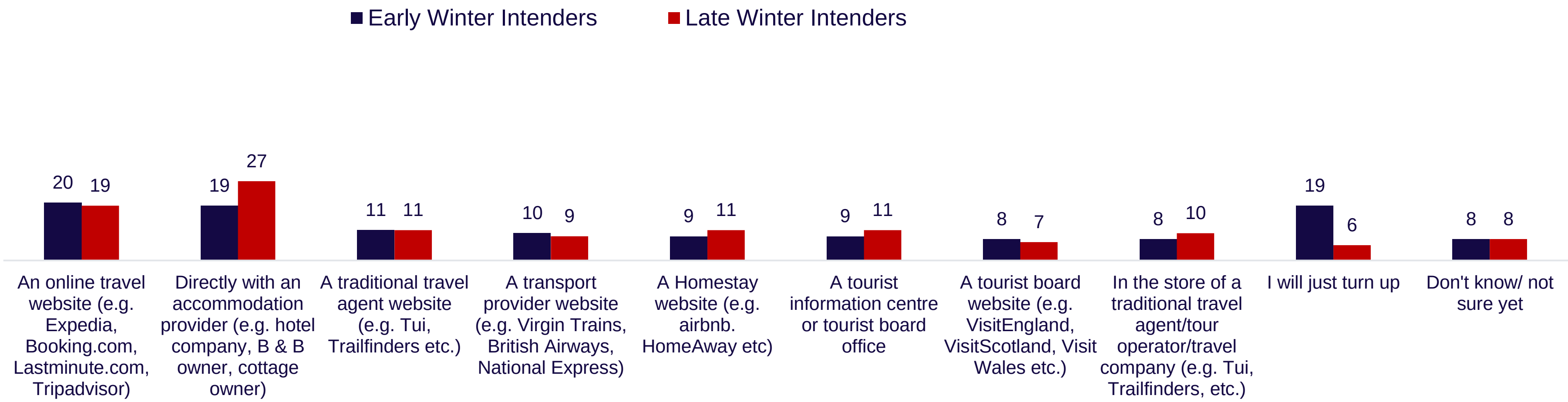


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Wave 19-20 respondents planning on taking a holiday or short break in the UK for early winter (November-December) n=168 and for late winter (January-March) n=337.

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

- Early Winter intenders are most likely to book via an online travel website, while Late Winter intenders are most likely to book their accommodation directly with an accommodation provider (around 1 in 4 intend to use this channel), followed by an online travel website (about 1 in 5).
- The relatively high incidence of ‘I will just turn up’ (19%) among Early Winter intenders is due to the volume of visits to private homes (and visiting friends and relatives) that is characteristic of many overnight trips taken during December.

Figure 35. Accommodation booking channel for next trip in early winter and late winter, Percentage Wave 20, U.K.

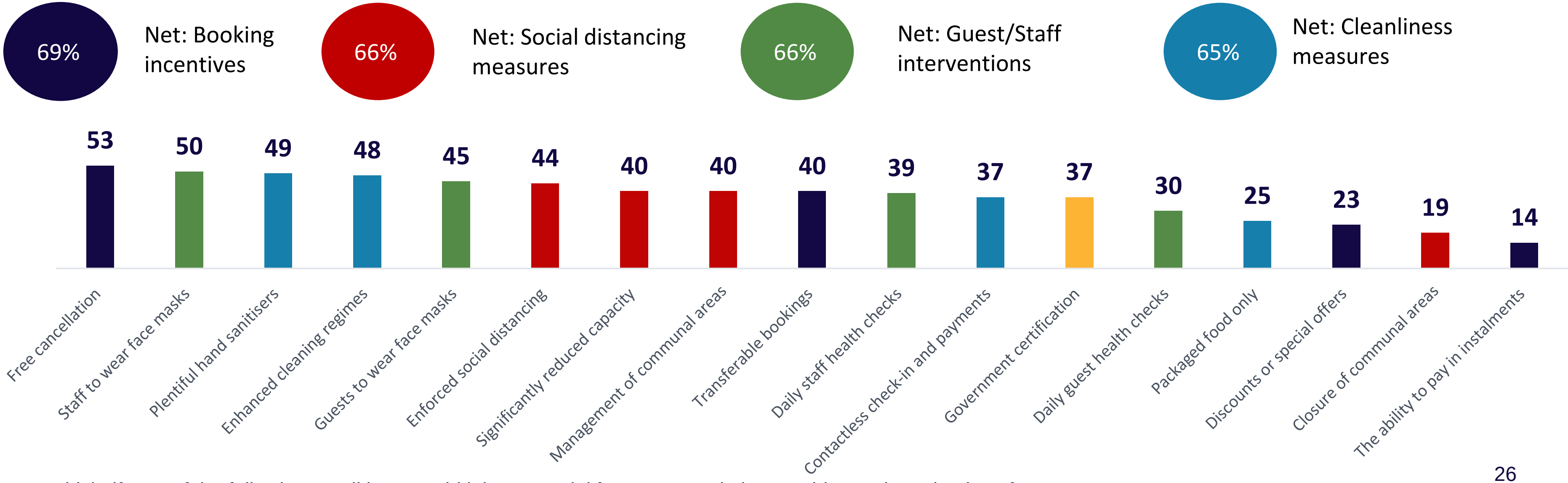


VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All Wave 20 respondents planning on taking a holiday or short break in the UK for early winter (November-December) n=69 and for late winter (January-March) n=153

Conditions essential to stay in accommodation this winter

- At a net level, there is little to separate 'booking incentives', 'social distancing measures', 'guest/staff interventions' and 'cleanliness'.
- Overall the most frequently cited condition is 'free cancellations' followed by a range of cleanliness/hygiene measures: 'staff to wear face masks'; 'plentiful hand sanitisers'; 'enhanced cleaning regimes' and 'guests to wear face masks.'

Figure 36. Conditions that are essential for a stay in accommodation this winter, Percentage and Net Percentages Wave 20, UK

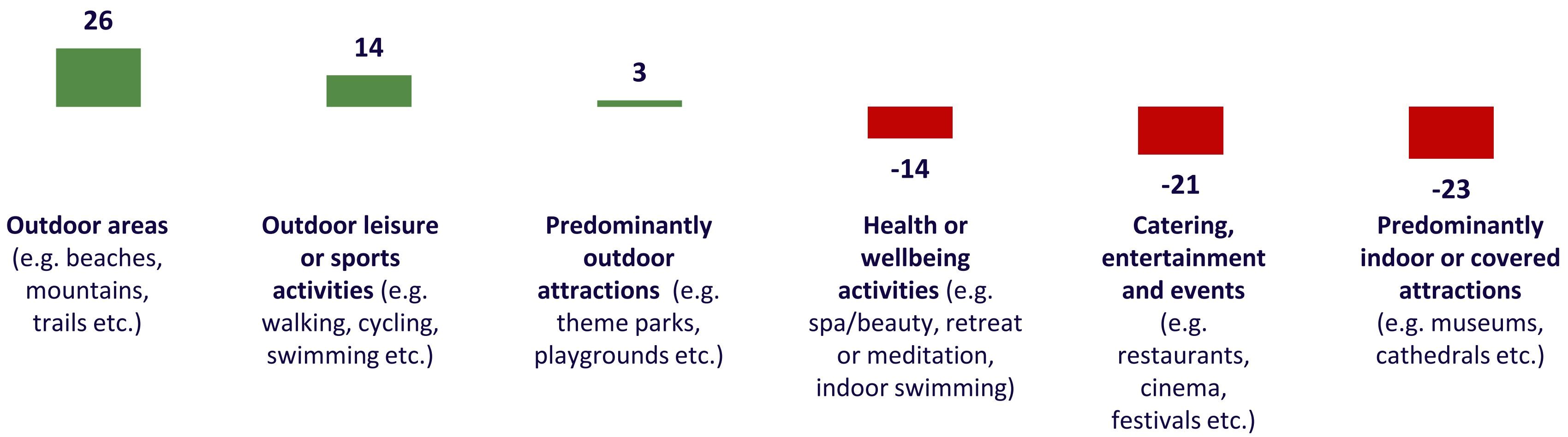


Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them over the next few months? Base: All Wave 20 early and late winter Intenders n=222

General leisure activity intentions as lockdown restrictions are lifted

- Consistent with previous waves, outdoor areas are most likely to attract more visitors/engagement than normal (+26) under the current circumstances, followed by outdoor leisure or sports activities (net +14) and outdoor attractions (+3).
- ‘Predominantly indoor attractions’ (net -23) and ‘catering, entertainment and events’ (-21) remain behind ‘health or wellbeing activities’ (net -14) in being likely to attract fewer visitors/engagement than normal at the present time.

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 20, 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 20 respondents n=1,764

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 20 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-19 where appropriate. Wave 20 fieldwork was conducted between 23rd to 27th November 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.