COVID-19 Consumer Tracker

Wave 24

Fieldwork Period: 25 – 29 January

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.
- NOTE: Fieldwork for this Wave's results took place between 25th – 29th January.
- 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 strict meteorological definitions.

- **Winter Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between January and March 2021
- **Spring Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between April and June 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	7 – 11 December
Wave 10	20 – 24 July	Wave 22	18 – 23 December
Wave 11	27 – 31 July	Wave 23	11 – 15 January
Wave 12	3 – 7 August	Wave 24	25 – 29 January

Wave 24: Scorecard of Key Metrics (1)

Table 1. Top line Metrics – General Sentiment Scores

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

Key Metrics	Wave 23	Wave 24	Wave Shift
National mood (average score out of 10)	6.4	6.5	+0.1
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	11%	19%	+8*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	2.3	2.3	No change
Normality score (proportion expecting normality by June)	21%	18%	-3*
The main reasons for not feeling confident about taking a trip in winter	1. Restrictions on travel from gov't 2. It's not responsible to travel	1. Restrictions on travel from gov't 2. It's not responsible to travel	No change

Table 2. Top line Metrics – General Trip Intentions

Key Metrics	Wave 23	Wave 24	Wave Shift
Anticipated number of UK short breaks compared to normal (% more/the same)	33%	32%	-1
Anticipated number of UK longer breaks compared to normal (% more/the same)	32%	31%	-1
Near-term confidence in taking UK overnight trip (Feb/March confident)	7%/8%	6%/8%	-1/0
Medium-term confidence in taking UK overnight trip (April/May confident)	14%/24%	11%/20%	-3*/-4*
Proportion going on a UK overnight trip in winter (January – March)	4%	4%	No change
Split between longer break / short break / don't know for winter trip	53%/43%/4%	52%/39%/9%	-1/-4/-5

Wave 24: Scorecard of Key Metrics (2)

Table 3. Top line Metrics – Destination and Accommodation Plans

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

Key Metrics	Wave 23	Wave 24	Wave Shift
Leading UK destination likely to stay in winter	South West	South West	No change
Main *type* of destination likely to stay in winter	Countryside or Village	Countryside or Village	No change
Main accommodation type likely to stay in winter	Commercial rental	Camping/caravan	New No. 1

Table 4. Top line Metrics – Broader Leisure Activity

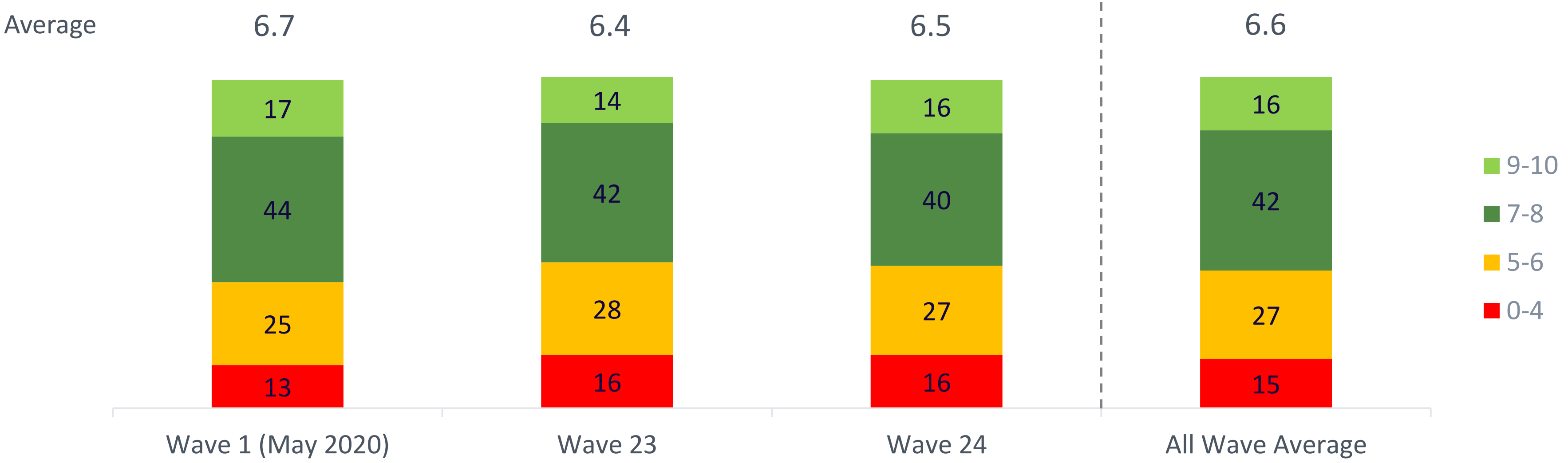
Key Metrics	Wave 23	Wave 24	Wave Shift
Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No change
Place/activity generating lowest engagement compared to normal	Catering, entertainment and events	Catering, entertainment and events	No change

1. The National Mood

The national mood

- The average mood of U.K. adults is 6.5 out of 10. Whilst this is still lower than the ‘all wave average’ (6.6) and in comparison to Wave 1, it does represent a marginal improvement on Wave 23 (6.5)

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

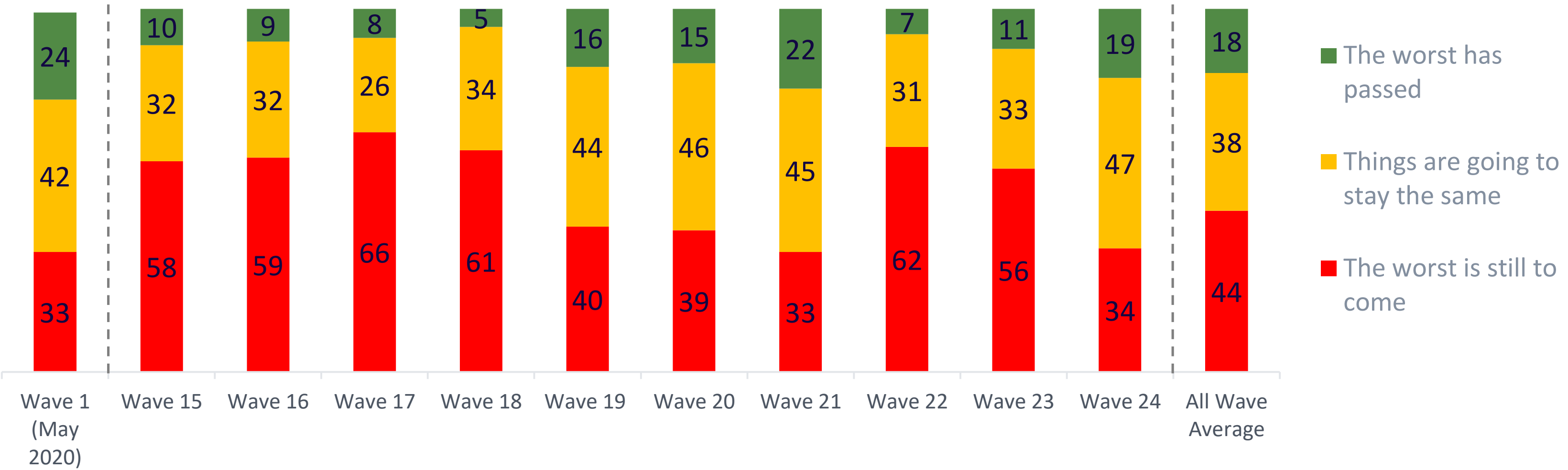


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 24 n=1,758
Wave average is based on Wave 1 to Wave 23.

Perceptions of the situation in relation to COVID-19

- The proportion of U.K. adults feeling 'the worst is still to come' has dropped by a significant 22 percentage points since Wave 23 (conducted in mid-January), and at 34% is now 10 percentage points below average and in line with sentiment in early December.
- The proportion who consider 'the worst' has passed has also increased, although remains in line with the average.

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 24 n=1,758 Wave average is based on Wave 1 to Wave 23.

Perceptions of when things will return to ‘close to normal’

- 18% of U.K. adults anticipate life will return to something ‘close to normal’ by June this year; a significant drop from Wave 23 and almost half the proportion feeling this in December (Wave 22).
- Just over 2 in 5 (42%) people expect normality to return between July-September and nearly 6 in 10 (56%) by the end of the year; relatively consistent with expectations in Wave 23 (45% and 59% respectively).

Figure 3. Cumulative perceptions of when things will return ‘close to normal’. Cumulative percentage Wave 24, UK

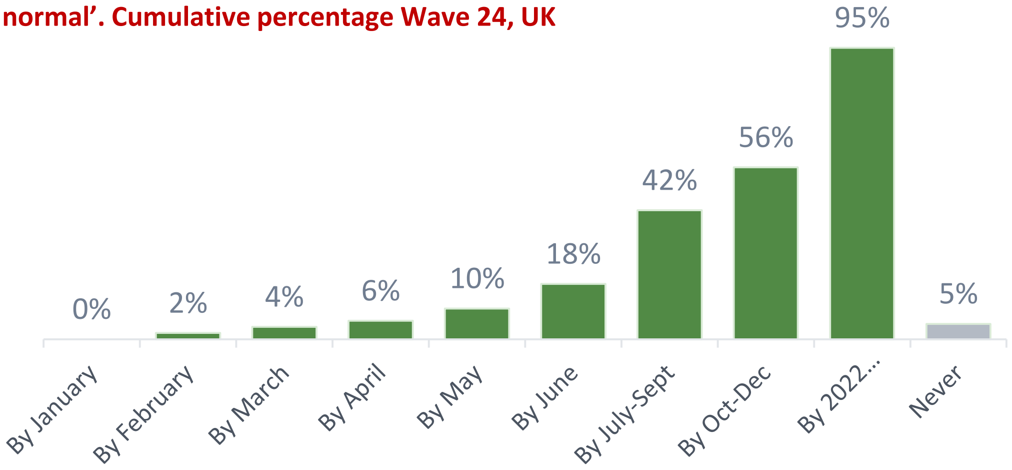
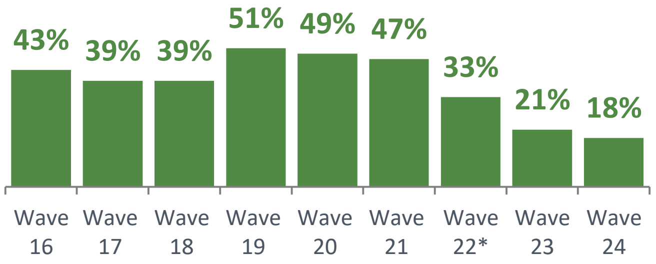


Figure 4. Proportion expecting normality by June, Percentage wave-on-wave, UK

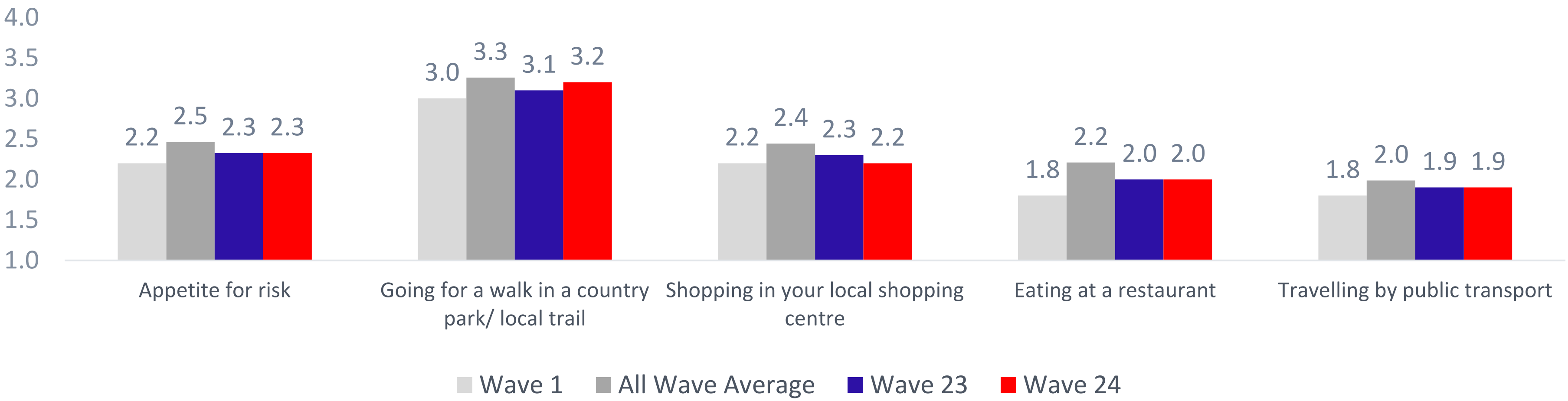


Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 24 n=1,758
*Due to questionnaire wording changes, ‘by June’ figures pre-Wave 22 are based on expectations of normality returning ‘sometime between April and June’.

Appetite for risk

- The overall 'appetite for risk' score is consistent with Wave 23, remaining at 2.3
- 'Comfort' in eating at a restaurant and travelling by public transport is stable with Wave 23 (at an average of 2.0 and 1.9 respectively) while going for a walk in a country park has improved by 0.1 while shopping in a local shopping centre declines slightly.

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 24 n=1,758 . Wave average is based on Wave 1 to Wave 23.

2. Trip Intentions

Note: Winter is defined as January to March; Spring is defined as April to June

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

- Nearly a third of U.K. adults say they intend to take more or about the same number of U.K. short breaks (32%) and longer breaks (31%) compared to normal between now and the end of June. Nearly half anticipate taking fewer of both types of trips, whilst around 1 in 5 are unsure. These expectations remain largely consistent with Wave 23.

Figure 6. Number of UK <u>short breaks</u> (1-3 nights) between now and the end of June compared to normal, Percentage Wave 24, UK

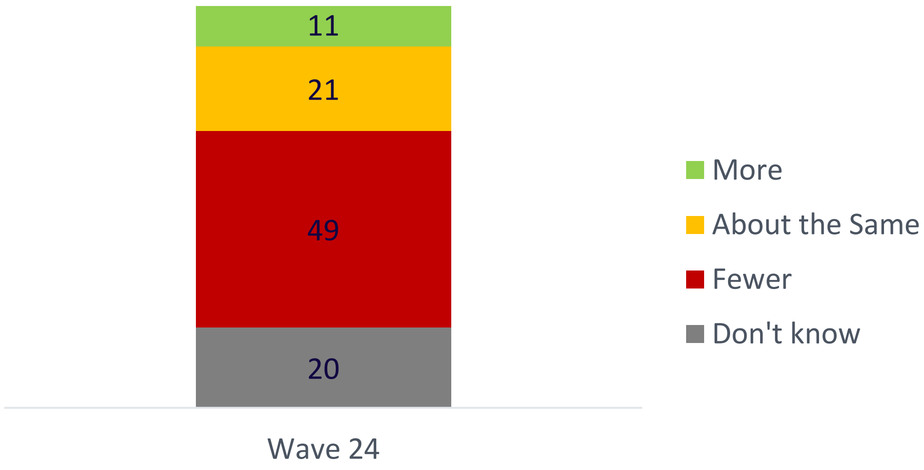
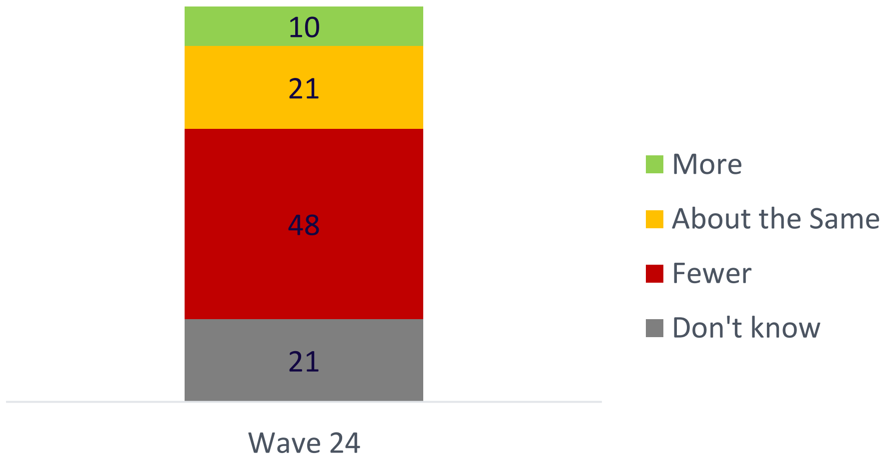


Figure 7. Number of UK <u>longer breaks</u> (4+ nights) between now and the end of June compared to normal, Percentage Wave 24, UK



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 June 2021? Base: All respondents. Wave 24 n=1,758.

Anticipated number of overseas trips by end of June compared to normal

- Around 1 in 4 (23%) of U.K. adults plan on taking more or about the same number of overseas *short* breaks and *longer* breaks compared to normal between now and the end of June.
- However, just over half of U.K. adults (53%) anticipate taking fewer of both types of trips, a proportion that has increased since Wave 23 which recorded 49% for this measure.

Figure 8. Number of OVERSEAS short breaks (1-3 nights) between now and the end of June compared to normal, Percentage Wave 24, UK

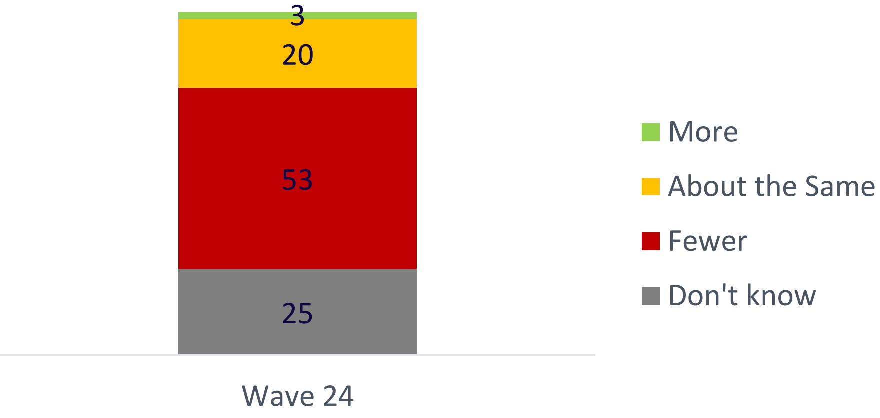
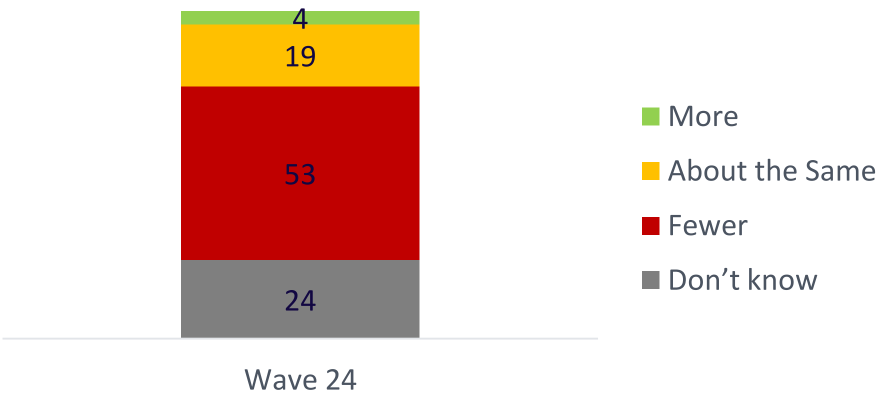


Figure 9. Number of OVERSEAS longer breaks (4+ nights) between now and the end of June compared to normal, Percentage Wave 24, UK



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 June 2021? Base: All respondents. Wave 24 n=1,758.

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

- A minority of U.K. adults are confident a booked overnight domestic trip would go ahead as planned this winter (between January and March).
- Confidence begins to rise for trips in Spring and Summer, although it isn't until October onwards that a majority (63%) claim to be either fairly or very confident.
- Overall, confidence has declined for each individual time frame compared to Wave 23, and for trips in June there has been a 6 percentage point drop.

Figure 10. Confidence in taking a UK overnight trip across a range of different months, Percentage, Wave 24, UK

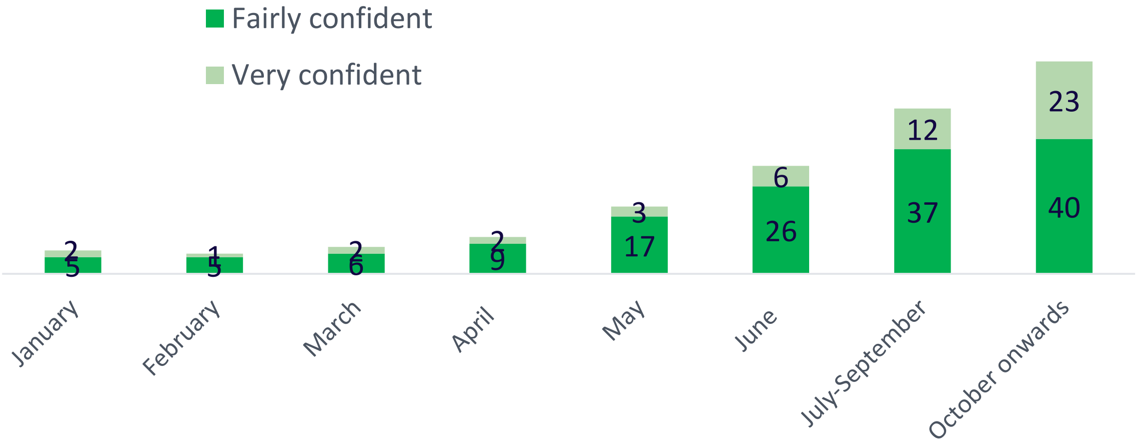
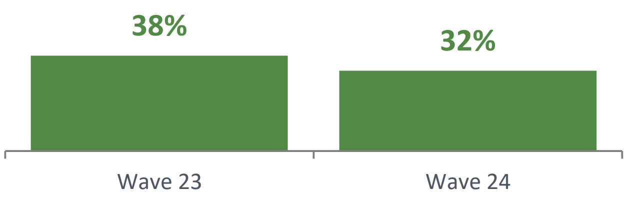


Figure 11. Confidence in taking a UK overnight trip in June 2021, Percentage wave-on-wave, UK



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 24 n=1,758.

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

- Consistent with recent waves, ‘restrictions on travel from government’ remains the primary reason people do not feel confident about taking an overnight trip during either the Winter or forthcoming Spring periods.
- The leading five reasons for not feeling confident about taking trips this Spring are the same as Winter, although in a slightly different order.

Figure 12. Top 5 reasons for not being confident about travelling in Winter*, Percentage Wave 24, UK

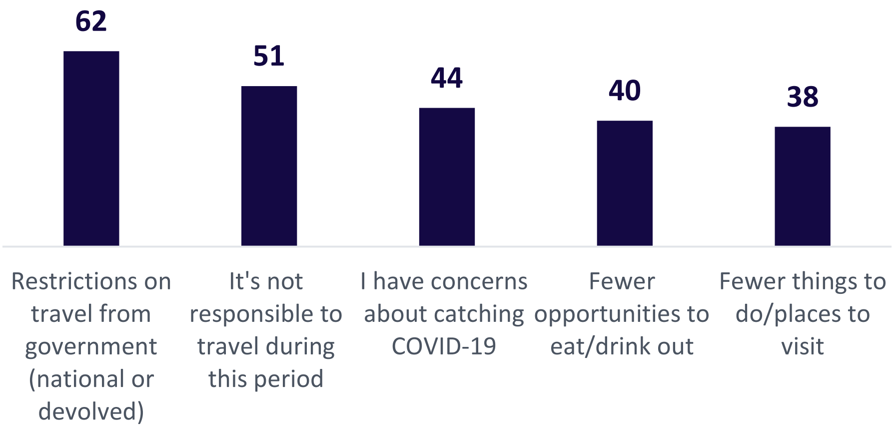
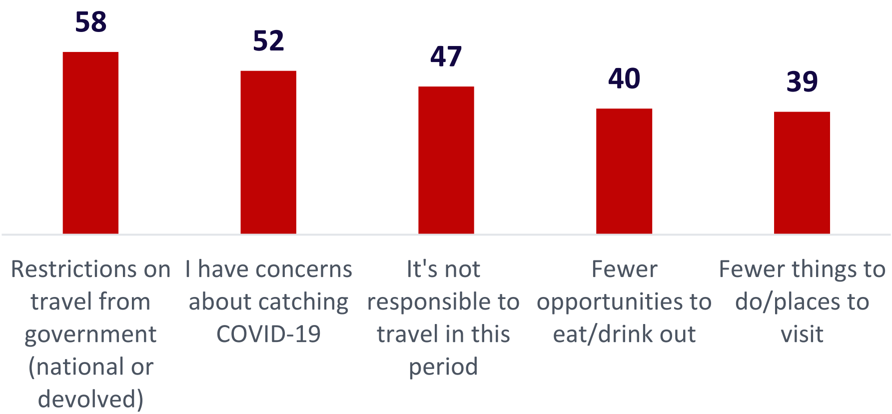


Figure 13. Top 5 reasons for not being confident about travelling in Spring*, Percentage Wave 24, UK



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 24 respondents not confident about taking a break in Winter n=514 and in Spring n=513. *Winter is defined as January to March; Spring is defined as April to June

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

- 12% claim to have already planned and 8% already *booked* their next domestic overnight trip; virtually unchanged from Wave 23.
- 12% also say they intend to plan (down from 14% in Wave 23) and 9% intend to book their next trip (down from 11% in Wave 23) sometime this winter (between January and March)

Figure 14. When anticipate PLANNING next UK overnight trip, Percentage Wave 24, UK

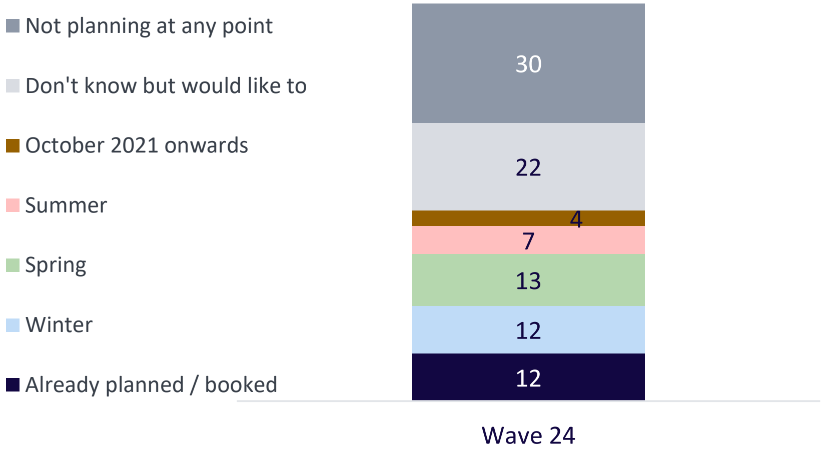
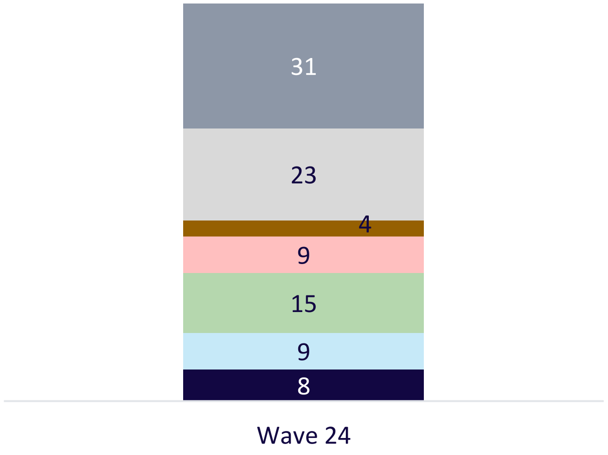


Figure 15. When anticipate BOOKING next UK overnight trip, Percentage Wave 24, UK

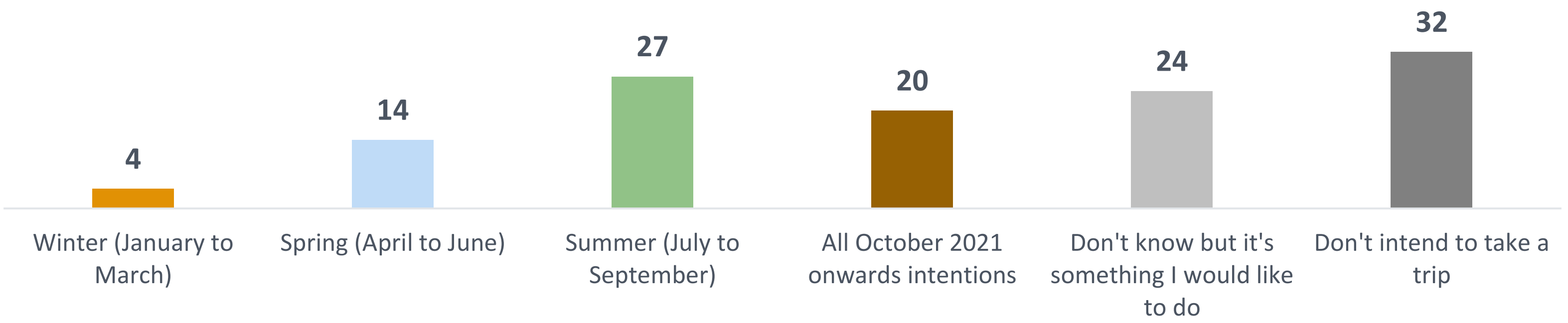


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 24 n=1,758. *Winter = January to March; Spring = April to June; Summer = July to September

When anticipating going on a U.K. overnight trip

- Consistent with Wave 23, just 4% of U.K adults plan on taking an overnight trip in the U.K. by the end of March. The proportion of those who anticipate taking a trip during the spring period (April to June) declines 3 percentage points from 17% in Wave 23, whilst anticipated trips this summer remains largely consistent at 27% (up by 1 point).
- October onwards exhibits a relatively strong wave-on-wave increase, with 20% anticipating travelling then (up by 4 percentage points versus Wave 23).
- 32% are not intending to take any domestic overnight trips at all, which is largely consistent with the last two waves.

Figure 16. Proportion anticipating GOING on any overnight UK trip, Percentage Wave 24, 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 24 n=1,758.

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

- Half of UK Winter Intenders (50%) claim to have already planned their overnight trip with nearly 3 in 10 (29%) saying they have booked it; this compared with 47% and 24% respectively in Wave 23.
- The proportion of those who have either already planned or booked a trip during spring has risen significantly to 38% and 29% respectively (up from 28% and 21% in Wave 23).

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

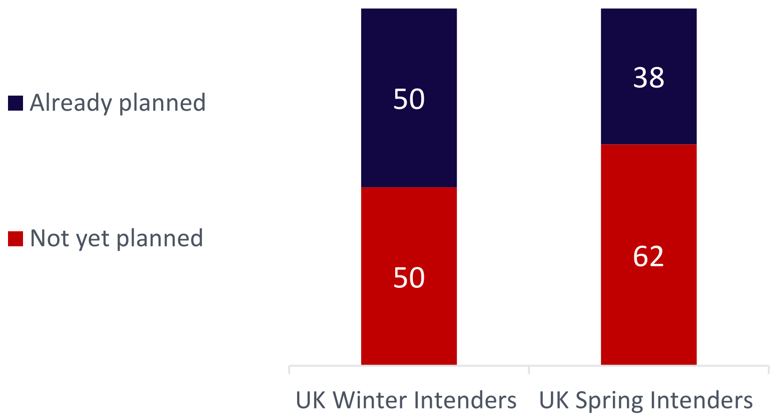
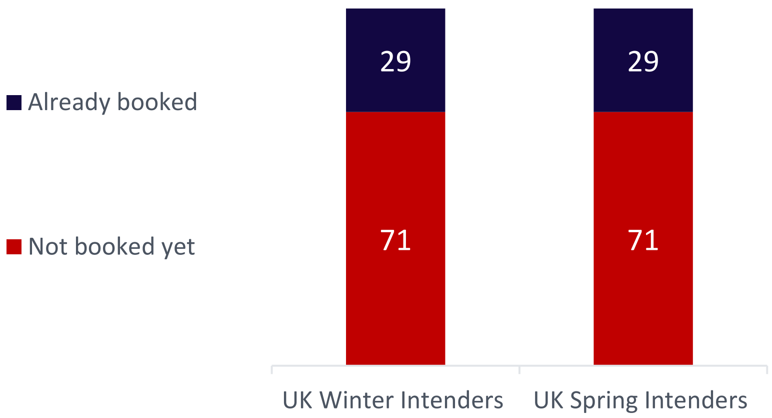


Figure 18. Proportion of Intenders that have already *booked* their trip, Percentage Wave 24, UK

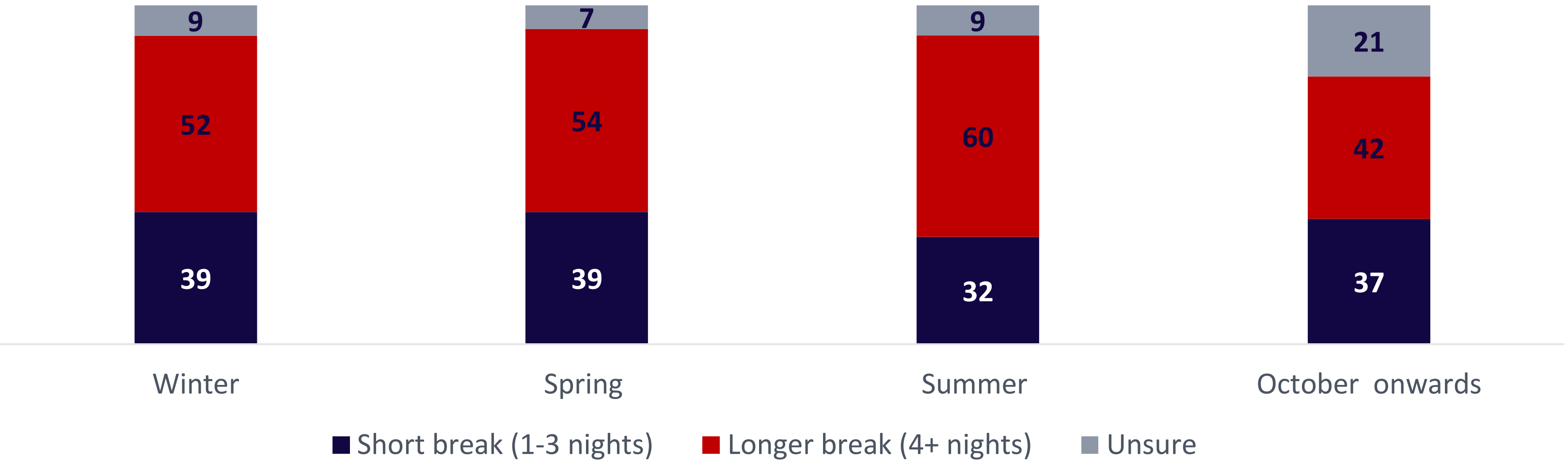


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 24 respondents planning on taking a holiday or short break in the UK in winter (January to March) n=76 and in spring (April to June) n=225

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

- Overall, longer breaks of 4+ nights make up the majority of intended trips across the winter, spring and summer periods.
- These longer trips are becoming more prevalent among Spring Intenders (up 8 points to 54% in Wave 24) and have a significantly increased share for the Summer period (up 11 points to 60% in Wave 24).

Figure 19. Length of next UK holiday or short break by time period, Percentage Wave 24, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 24 respondents intending to take next holiday or short break in each time period: Winter n=76 (Jan – March); Spring n=225 (Apr – June); Summer n=329 (July – Sept); October 2021 onwards n=156

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

- The South West is the lead destination for an overnight stay in both the winter and spring periods (with 20% and 24% shares respectively).
- London is ranked second for winter trips but experiences a halving of its share in spring.
- Scotland's share increases substantially for spring trips and moves into the second ranked position, ahead of the North West.

Figure 20. Where planning on staying on next UK overnight trip in winter, Percentage Waves 23-24, UK

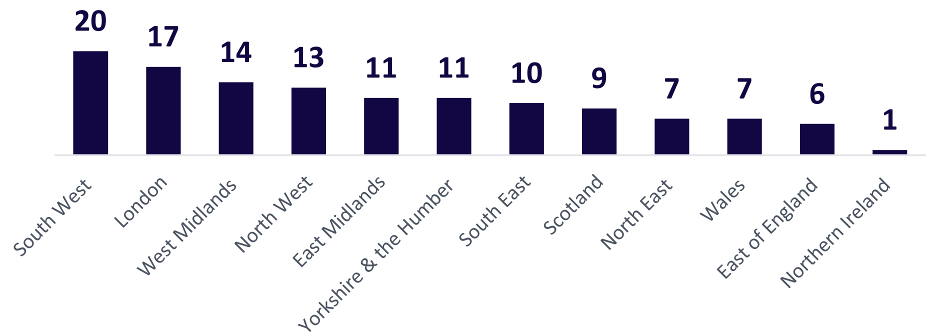
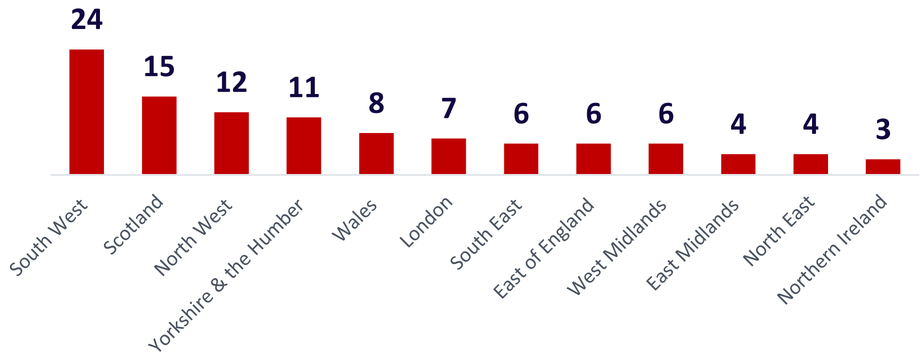


Figure 21. Where planning on staying on next UK overnight trip in spring, Percentage Waves 23-24, UK



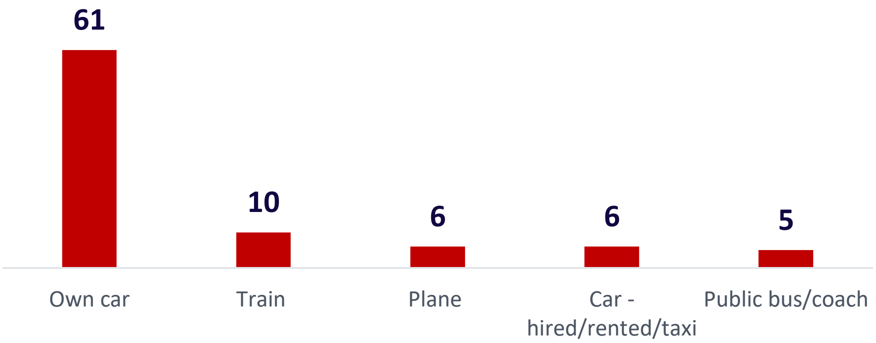
QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Wave 23-24 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=157 and spring (April to June) n=475

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

- Across both time periods, ‘own car’ continues to lead as the main transport mode for travelling to an overnight destination, with 43% anticipating this in winter and 61% in spring.
- ‘Train’ is the second most preferred mode of travel to an overnight destination in winter and spring.

Figure 22. Top 5 main modes of travel to destination for trip in winter, Percentage, Wave 24, UK

Figure 23. Top 5 main modes of travel to destination for trip in spring, Percentage, Wave 24, UK



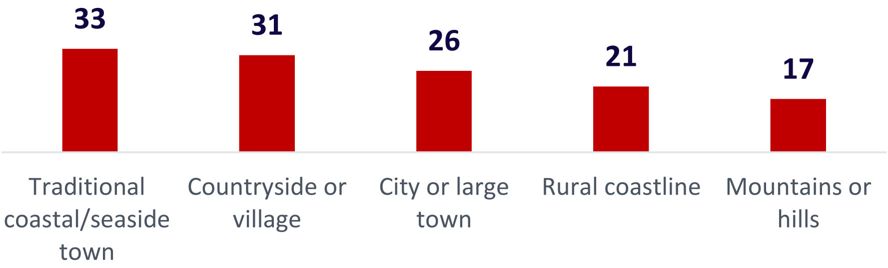
QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 24 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=76 and from spring (April to June) n=225 .

Type of destination for next U.K. overnight trip

- ‘Countryside or village’ continues to be the preferred destination type for overnight winter trips
- ‘Traditional coastal/seaside town’ is increasingly preferred for both winter and spring trips – now positioned as the most preferred destination type for spring overnight trips and moving to second most preferred destination for winter trips (up 5 percentage points since Wave 23)

Figure 24. Main type of destination for trip in winter, Percentage Waves 23-24, UK

Figure 25. Main type of destination for trip in spring, Percentage Waves 23-24, 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 23-24 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=157 and spring (April to June) n=475

Type of accommodation for next U.K. overnight trip

- A range of accommodation types are being considered for U.K. overnight trips this winter, with ‘camping/caravan’, ‘a private home’, and ‘commercial rental’ the top three among winter intenders. On average, U.K. adults are considering more than two accommodation types for anticipated winter trips, possibly reflecting a degree of uncertainty about this element of their trip.
- In spring, ‘hotel/motel/inn’, ‘commercial rental’ and ‘camping/caravan’ are being considered by nearly 1 in 3 trip intenders, with ‘a private home’ narrowly behind in fourth position.

Figure 26. Accommodation planning on staying in on next UK overnight trip in winter, Net percentage Waves 23-24

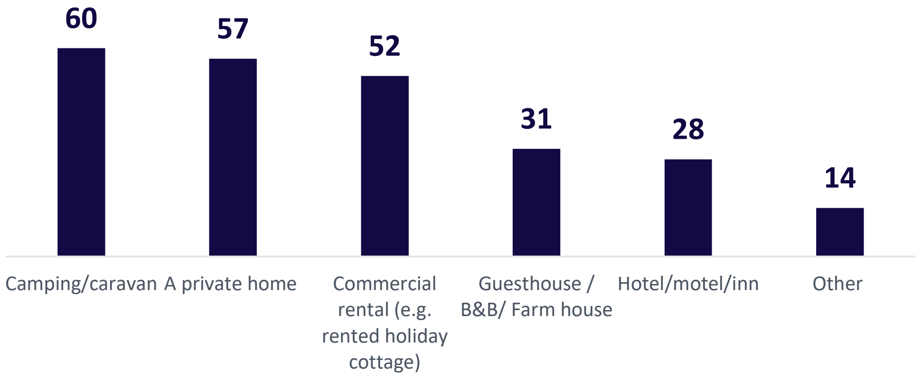
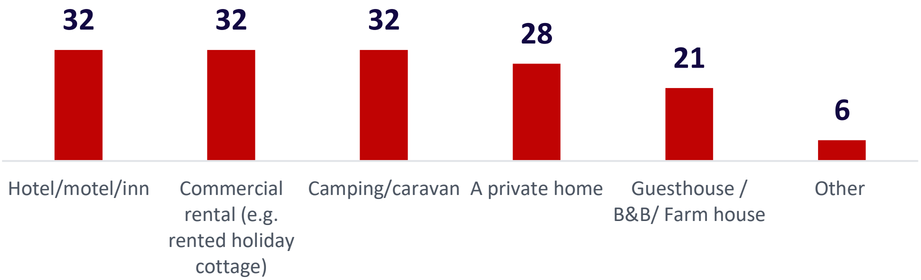


Figure 27. Accommodation planning on staying in on next UK overnight trip in spring, Net percentage Waves 23-24

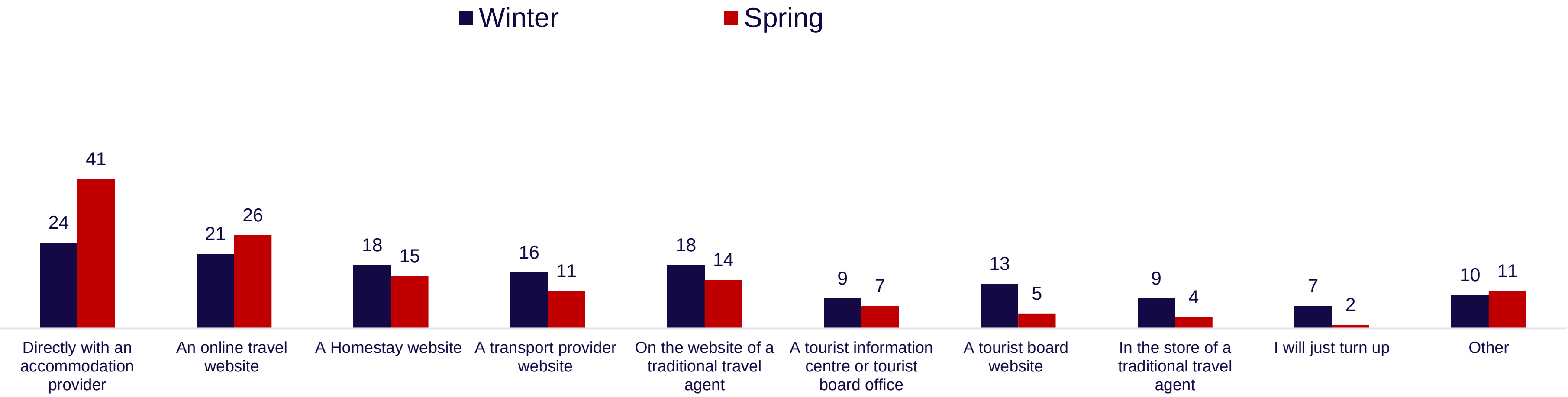


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Wave 23-24 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=157 and spring (April to June) n=475

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

- Booking directly with an accommodation provider remains the leading method of booking across both time periods in Wave 24, although spring trips show a significantly larger proportion of bookings via this channel compared with winter trips
- An online travel website is the next most preferred booking channel for both winter and spring intenders, with 21% and 26% respectively choosing this method.

Figure 28. Accommodation booking channel for next trip in winter and spring, Percentage Wave 24, U.K.

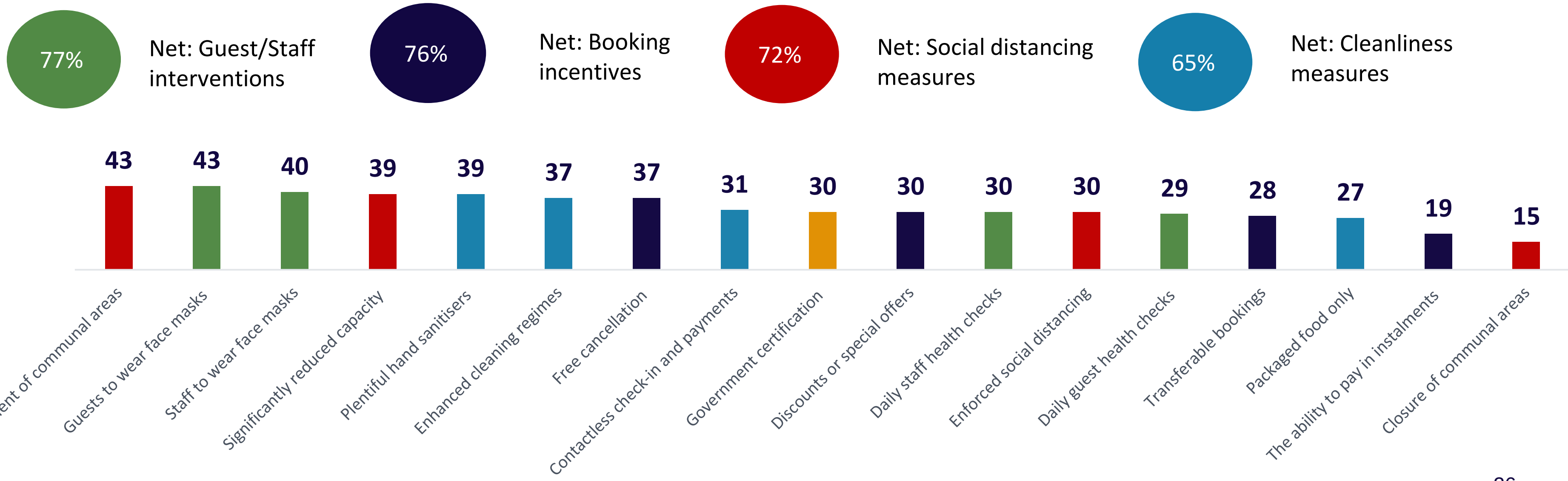


VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All Wave 24 respondents planning on taking a holiday or short break in the UK for winter (January to March) n=76 and for spring (April to June) n=225

Conditions essential to stay in accommodation this winter

- At a net level, ‘Guest/Staff interventions’ are the most important condition for accommodation to apply this winter, driven predominantly by the need for face masks to be worn by guests and staff. ‘Booking incentives’ are close behind. Note, base sizes are small so figures should be treated with caution.

Figure 29. Conditions that are essential for a stay in accommodation this winter, Percentage and Net Percentages Wave 24, UK

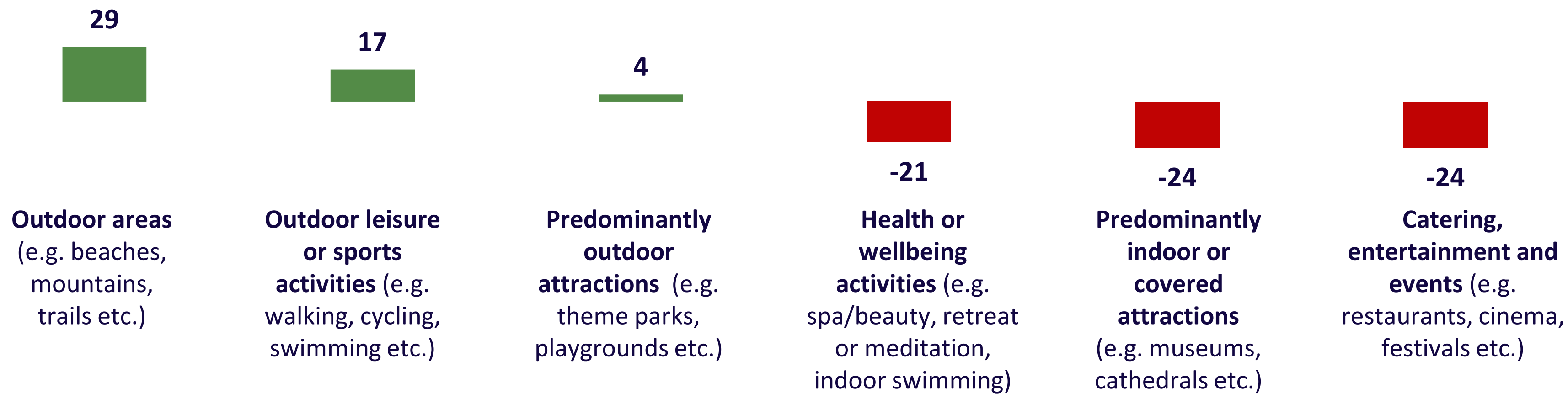


Q63new. Which, if any, of the following conditions would it be essential for accommodation providers to have in place for you to stay at them over the next few months? Base: All Wave 24 Winter Intenders n=76

General leisure activity intentions as lockdown restrictions are lifted

- Consistent with Wave 23, outdoor areas are most likely to attract more visitors/engagement than normal (net +29), followed by outdoor leisure or sports activities (+17) and outdoor attractions (+4); all of which have experienced increases in the likelihood to visit since Wave 23. ‘Catering, entertainment and events’ and ‘predominantly indoor attractions’ (net -24) and ‘health or wellbeing activities’ (-21) are likely to attract fewer visitors/engagement than normal when restrictions ease.
- The anticipated likelihood to undertake ‘health and wellbeing activities’ and ‘predominantly indoor attractions’ have declined since Wave 23.

Figure 30. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Wave 24, 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 24 respondents n=1,758

3. Business Trip Intentions

Intentions for overnight business trips between now and end of June

- 6% of U.K. adults in employment say they are intending to take a domestic overnight business trip between now and end of June 2021.
- Around 1 in 3 (34%) stated this trip would be for a meeting – with meetings of 5 of fewer making up the majority of meetings. Just over a quarter (26%) stated the trip would be for team building purposes.

Figure 31. Proportion anticipating an overnight business trip by end June 2021, Percentage, Wave 24, U.K. adults in employment

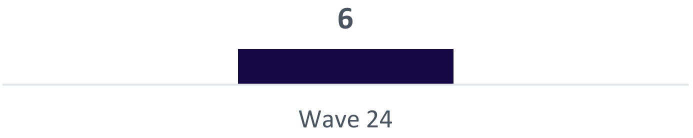
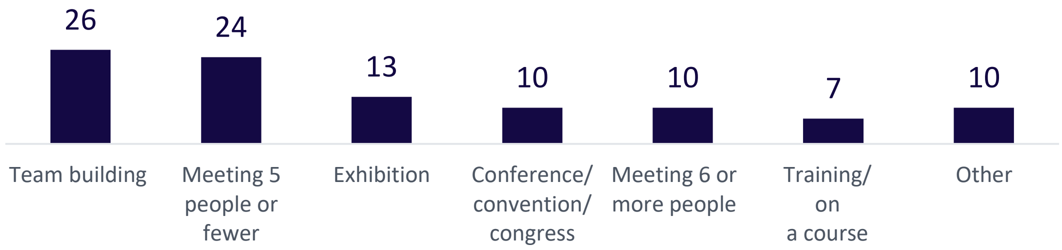


Figure 32. Reasons for taking an overnight business trip, Percentage, Wave 24, U.K. adults in employment planning a trip



QVB14a/b. Now looking ahead, are you intending to take any overnight business trips in the UK between now and March 2021? VB14b: What would be the main reason for this overnight business trip? Base: Wave 24 respondents currently in employment n = 1319. All taking a business trip n=96

Anticipated number of overnight business trips between now and the end of June compared to normal

- Of U.K. adults in employment, 44% anticipate taking fewer overnight business trips than normal between now and end of June. The leading reason for this is 'personal choice due to concerns around COVID-19' (38%), with 'cancellations' in second place (36%), and postponements being a factor for around a quarter (24%). Taken together, cancellations and postponements are cited by just over half (51%).

Figure 33. Anticipated number of overnight business trips compared to normal, Percentage Wave 24, U.K. residents in employment

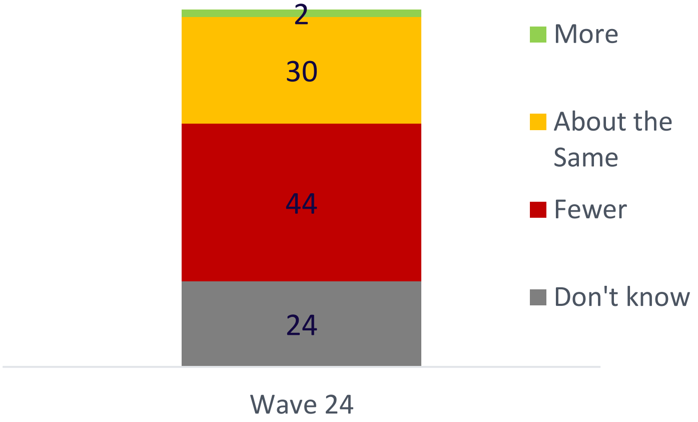
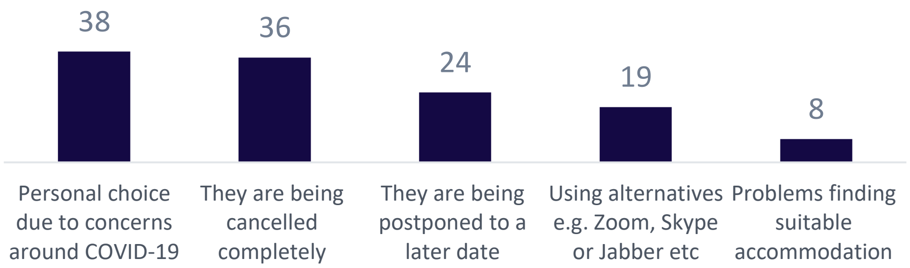


Figure 34. Top 5 factors contributing to taking fewer overnight business trips, Percentage, Merged Wave 24, UK



QVB14c/d. Compared to normal, are you likely to take more, fewer or about the same number of overnight business trips between now and the end of March? Which, if any, of the following factors are contributing to you feeling that you'll be taking fewer overnight business trips? Base: Wave 24 respondents currently in employment 1,319. All taking fewer business trips n=723

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 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 24 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-23 where appropriate. Wave 24 fieldwork was conducted between 25th and 29th January 2021.

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.