COVID-19 Consumer Tracker

Wave 26

Published: 19 March 2021

Fieldwork Period: 8 – 12 March 2021

UK Results

Introduction

- VisitEngland, VisitScotland and Visit Wales have commissioned a Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight trips both within the UK and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.
- The survey addresses themes such as: the likelihood of UK residents to travel; when and where they plan to go; specific trip details such as destination and accommodation types, alongside the reassurances they're seeking from the sector.
- This tracker is based on a UK nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales.
- Fieldwork for this wave's results took place between 8th – 12th March 2021.
- 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.

– **Spring Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between April and June 2021
– **Summer Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between July and September 2021

Fieldwork Periods

Project Period	Fieldwork Period	Project Period	Fieldwork Period	Project Period	Fieldwork Period
Wave 1	18 – 22 May	Wave 14	31 August – 4 September	Wave 27	
Wave 2	25 – 29 May	Wave 15	14 – 18 September	Wave 28	
Wave 3	1 – 5 June	Wave 16	28 September – 2 October	Wave 29	
Wave 4	8 – 12 June	Wave 17	12 – 16 October	Wave 30	
Wave 5	15 – 19 June	Wave 18	26 – 30 October	Wave 31	
Wave 6	22 – 26 June	Wave 19	9 – 13 November	Wave 32	
Wave 7	29 June – 3 July	Wave 20	23 – 27 November	Wave 33	
Wave 8	6 – 10 July	Wave 21	7 – 11 December	Wave 34	
Wave 9	13 – 17 July	Wave 22	18 – 23 December	Wave 35	
Wave 10	20 – 24 July	Wave 23	11 – 15 January	Wave 36	
Wave 11	27 – 31 July	Wave 24	25 – 29 January	Wave 37	
Wave 12	3 – 7 August	Wave 25	8 – 12 February	Wave 38	
Wave 13	10 – 14 August	Wave 26	8 – 12 March		

Wave 26: Scorecard of Key Metrics (1)

Table 1. Topline Metrics – General Sentiment Scores

Key Metrics	Wave 25	Wave 26	Wave Shift
National mood (average score out of 10)	6.5	6.5	No change
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	29%	40%	+11*
Risk score: Comfort in undertaking a range of activities (1-4 comfort score)	NA^	2.4	NA^
Normality score (proportion expecting normality by June)	16%	10%	-6*
The main reasons for not feeling confident about taking a trip in Spring	1. Restrictions on travel from government 2. Not responsible to travel in this period	1. Restrictions on travel from government 2. Fewer opportunities to eat/drink out	New no. 2

Table 2. Topline Metrics – General Trip Intentions

Key Metrics	Wave 25	Wave 26	Wave Shift
Anticipated number of UK short breaks compared to normal (% more/the same)	NA^	47%	NA^
Anticipated number of UK longer breaks compared to normal (% more/the same)	NA^	44%	NA^
Near-term confidence in taking UK overnight trip (March/April confident)	9%/11%	8%/11%	-1/0
Medium-term confidence in taking UK overnight trip (May/June confident)	20%/32%	20%/38%	0/+6*
Proportion going on a UK overnight trip in Spring (April – June)	13%	15%	+2
Split between longer break / short break / don't know for Spring trip	50%/41%/10%	51%/41%/9%	+1/-/+1

***Represents a significant change on previous wave**
^ Question wording has been modified, so a direct comparison is not possible this wave.

Wave 26: Scorecard of Key Metrics (2)

Table 3. Topline Metrics – Destination and Accommodation Plans

Key Metrics	Wave 25	Wave 26	Wave Shift
Leading UK destination likely to stay in Spring (Apr – June)	South West	South West	No change
Main *type* of destination likely to stay in Spring (Apr – June)	Traditional coastal/seaside town	Countryside or village	New No.1
Main accommodation type likely to stay in Spring (Apr – June)	Camping/caravan	Commercial rental	New No.1

Table 4. Topline Metrics – Broader Leisure Activity

Key Metrics	Wave 25	Wave 26	Wave Shift
Place/activity generating highest engagement compared to normal	Outdoor areas	Outdoor areas	No change
Place/activity generating lowest engagement compared to normal	Predominantly indoor or covered attractions	Predominantly indoor or covered attractions	No change

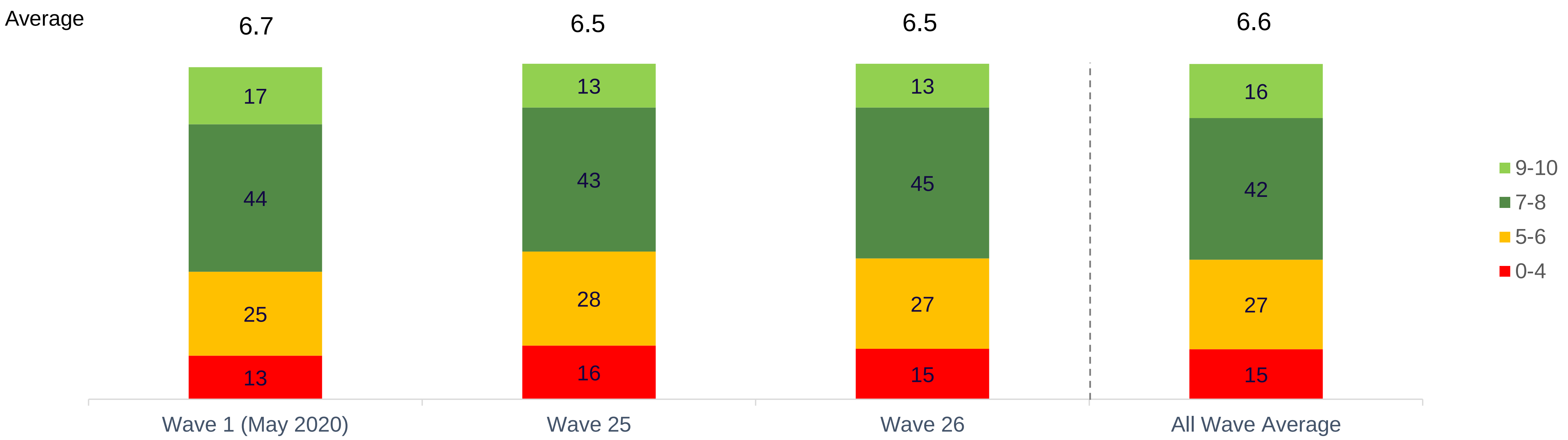
*** Represents a significant change on previous wave**

1. The National Mood

The National Mood

- **The average mood of U.K. adults is unchanged at 6.5 out of 10, slightly lower than the 'all wave average' and consistent with the previous wave (Wave 25).**

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

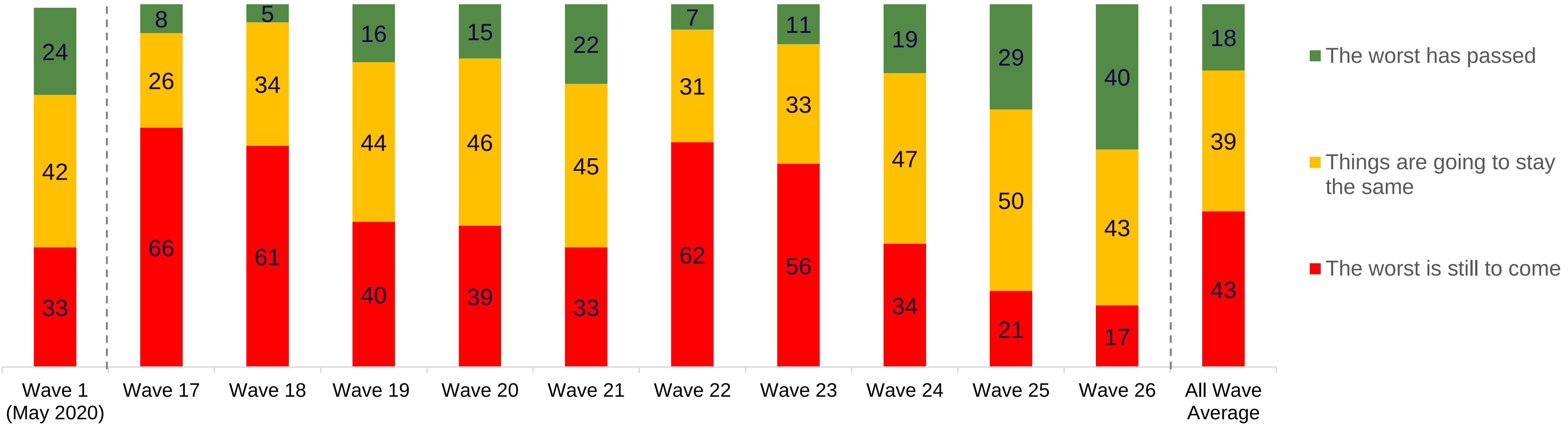


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 26 n=1,757
Wave average is based on Wave 1 to Wave 25.

Perceptions of the situation in relation to COVID-19

- **The proportion who believe 'the worst has passed' in relation to COVID-19 has risen to 40%, the third consecutive wave where it has increased significantly.**
- **That said, a majority of U.K. residents (60%) remain more likely to state 'things are going to stay the same' or 'the worst is still to come'.**

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 26 n=1,757 Wave average is based on Wave 1 to Wave 25.

Perceptions of when things will 'return close to normal'

- **10% of U.K. adults anticipate life will return to something 'close to normal' by June this year, a 6 percentage point decline on Wave 25.**
- **Expectations of 'normality' increase to 21% by July, and 30% by August. It isn't until the October to December period that a majority of the adult population expect normality.**

Figure 3. Cumulative perceptions of when things will return 'close to normal'. Cumulative percentage Wave 26, UK

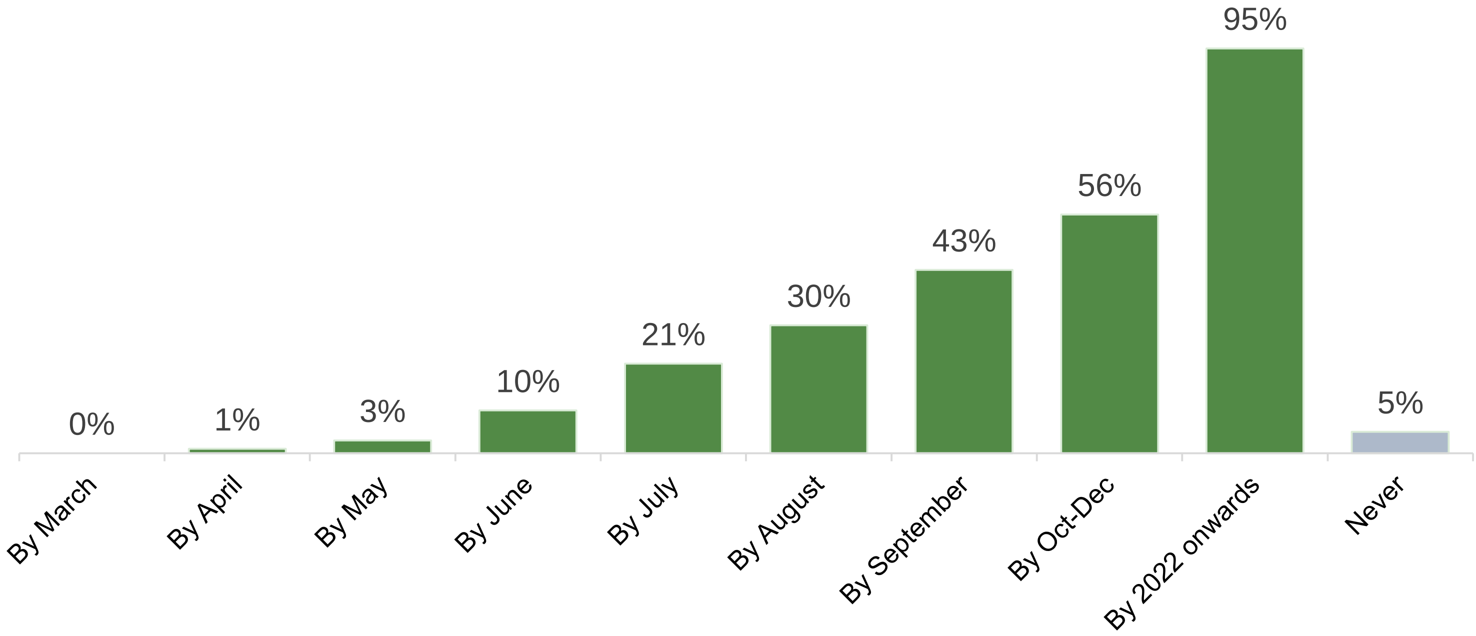
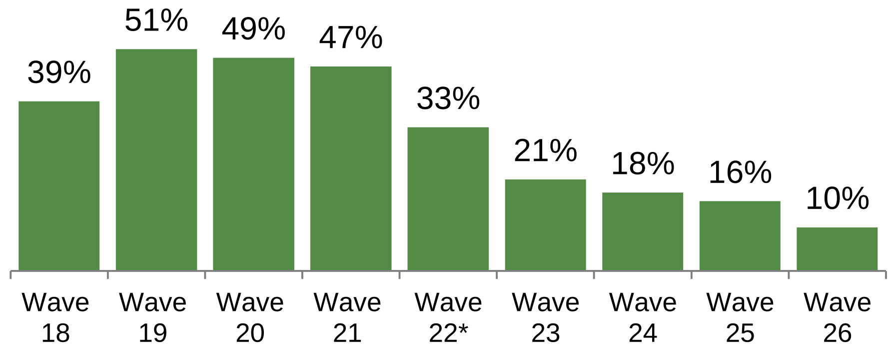


Figure 4. Proportion expecting normality by June, Percentage wave-on-wave, UK

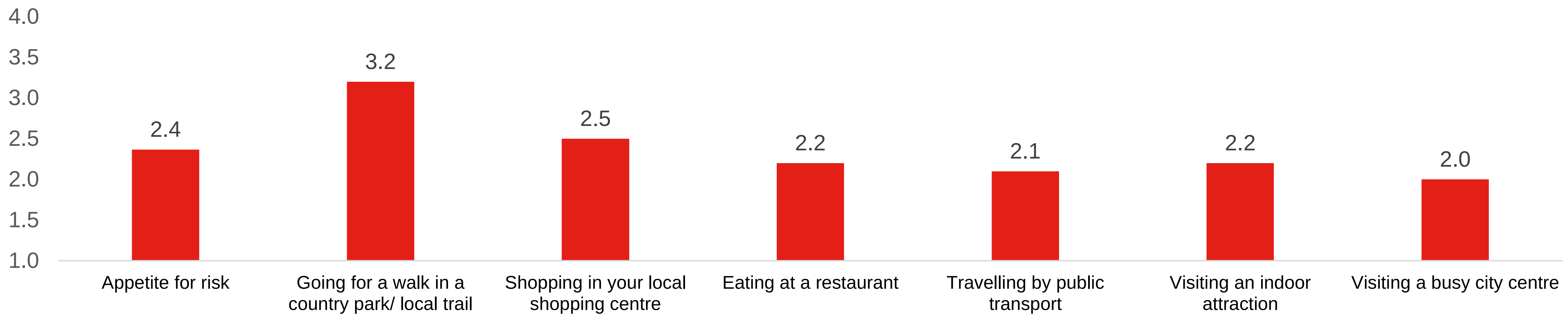


Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 26 n=1,757
*Due to questionnaire wording changes, 'by June' figures pre-Wave 22 are based on expectations of normality returning 'sometime between April and June'.

The ‘Appetite for Risk’

- **The overall ‘appetite for risk’ score sits at 2.4, with 4 representing ‘very comfortable’**
- **‘Going for a walk in a country park/local trail’ has the highest comfort score at 3.2, significantly ahead of the indoor activities measured.**
- **‘Visiting a busy city centre’ generates the lowest comfort score (2.0).**

Figure 5. Level of comfort conducting a range of activities separately and combined, Average Score where 1= not at all comfortable doing activity and 4= very comfortable doing activity, Wave 26, 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 26 n=1,757

2. Trip Intentions

Anticipated number of U.K. trips compared to normal

- **Nearly half (47%) of U.K. adults intend to take more or about the same number of U.K. short breaks compared to normal between now and the end of the year; 44% for longer breaks of 4+ nights.**
- **For both short breaks and longer breaks, the public anticipate taking 'net fewer' trips between now and the end of the year compared to normal.**
- **Around 1 in 4 are unsure of how many trips they will take.**

Figure 6. Number of UK short breaks (1-3 nights) between now and the end of the year compared to normal, Percentage Wave 26, UK

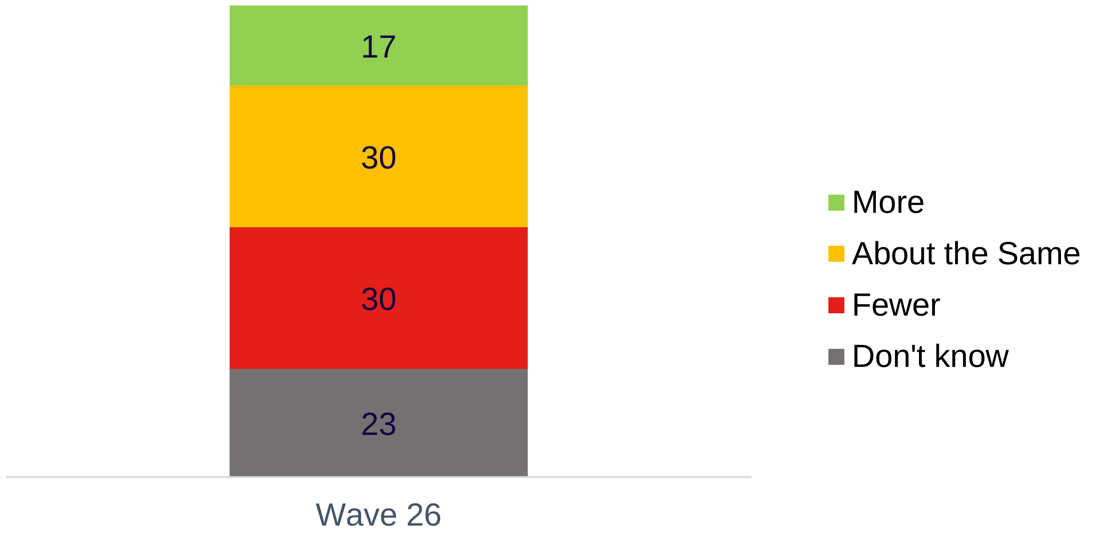
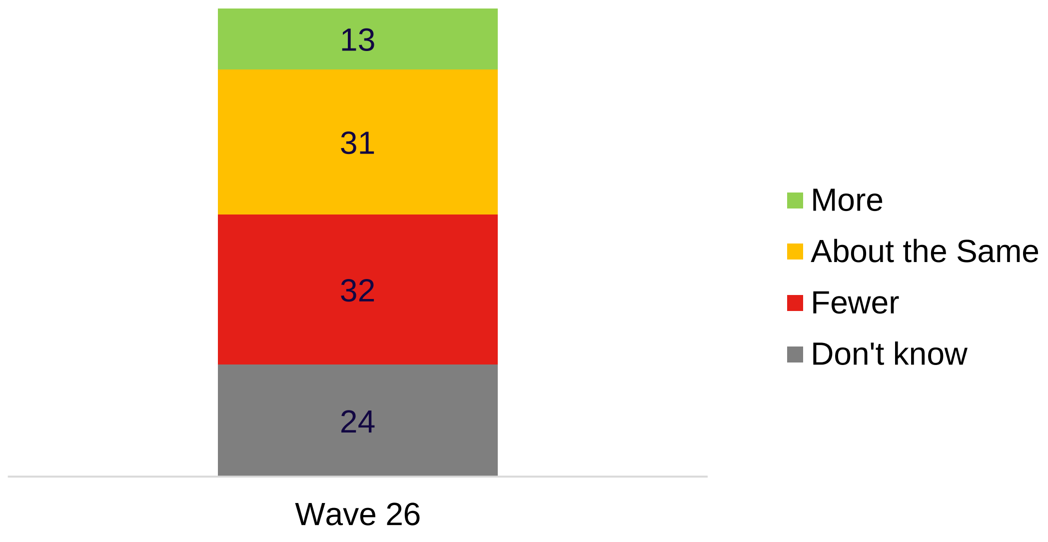


Figure 7. Number of UK longer breaks (4+ nights) between now and the end of the year compared to normal, Percentage Wave 26, UK



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 2021? Base: All respondents. Wave 26 n=1,757.

Anticipated number of overseas trips compared to normal

- A minority of U.K. adults anticipate taking more or about the same number of overseas trips this year compared to normal, within which only a small minority anticipate taking 'more trips'.
- 2 in 5 anticipate taking fewer overseas short breaks or longer breaks, whilst around 3 in 10 are unsure.

Figure 8. Number of OVERSEAS short breaks (1-3 nights) between now and the end of the year compared to normal, Percentage Wave 26, UK

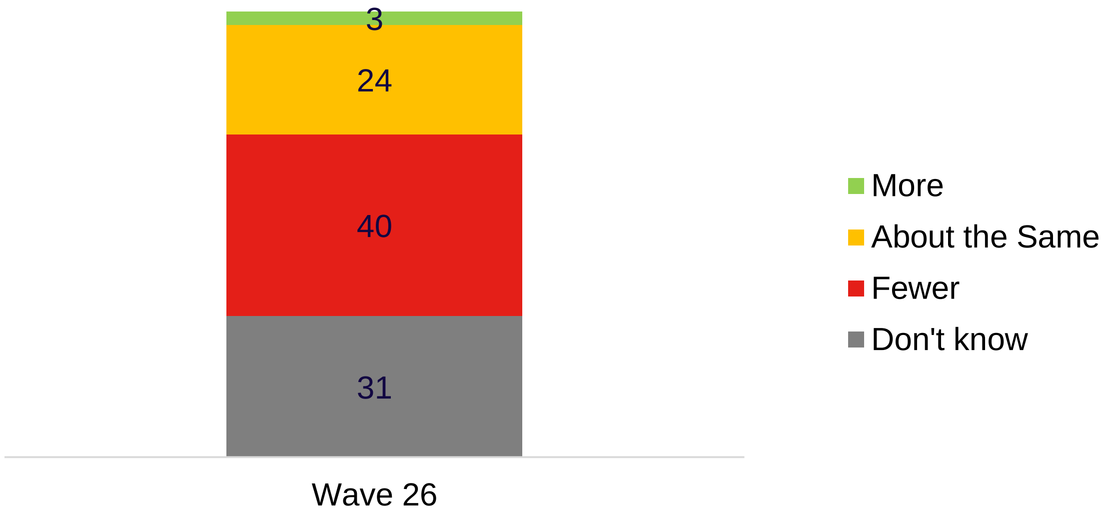
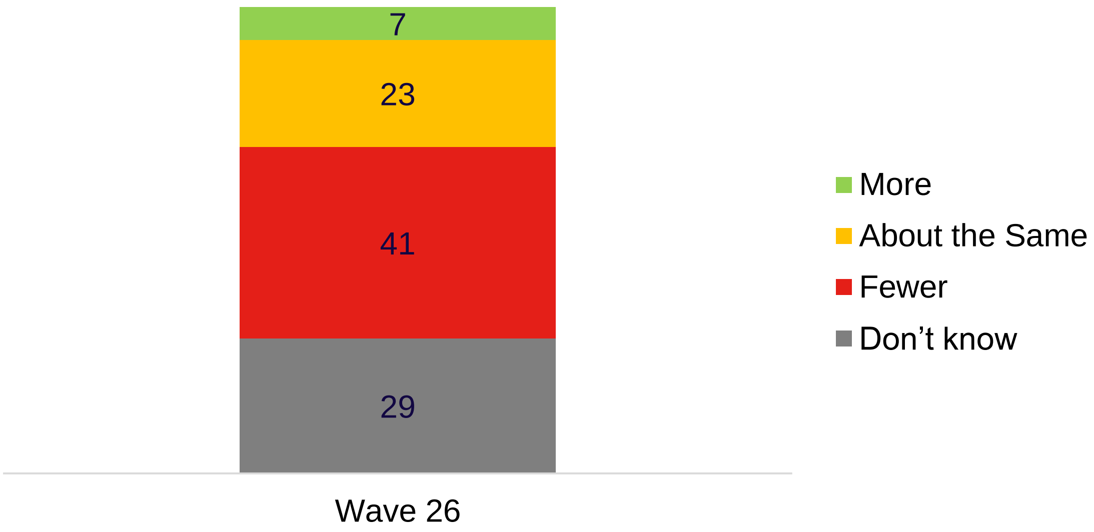


Figure 9. Number of OVERSEAS longer breaks (4+ nights) between now and the end of the year compared to normal, Percentage Wave 26, UK



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 2021? Base: All respondents. Wave 26 n=1,757.

Confidence in the ability to take overnight trips in UK

- **A minority of U.K. adults are confident about taking an overnight domestic trip during April, although confidence almost doubles in May to 20%.**
- **Notably, there is increased confidence a trip planned for June would go ahead as expected (up 6 percentage points to 38% on Wave 25).**
- **A majority (52%) are confident a trip would go ahead in July, rising to more than 3 in 5 (62%) for August .**

Figure 10. Confidence in taking a UK overnight trip across a range of different months, Percentage, Wave 26, UK

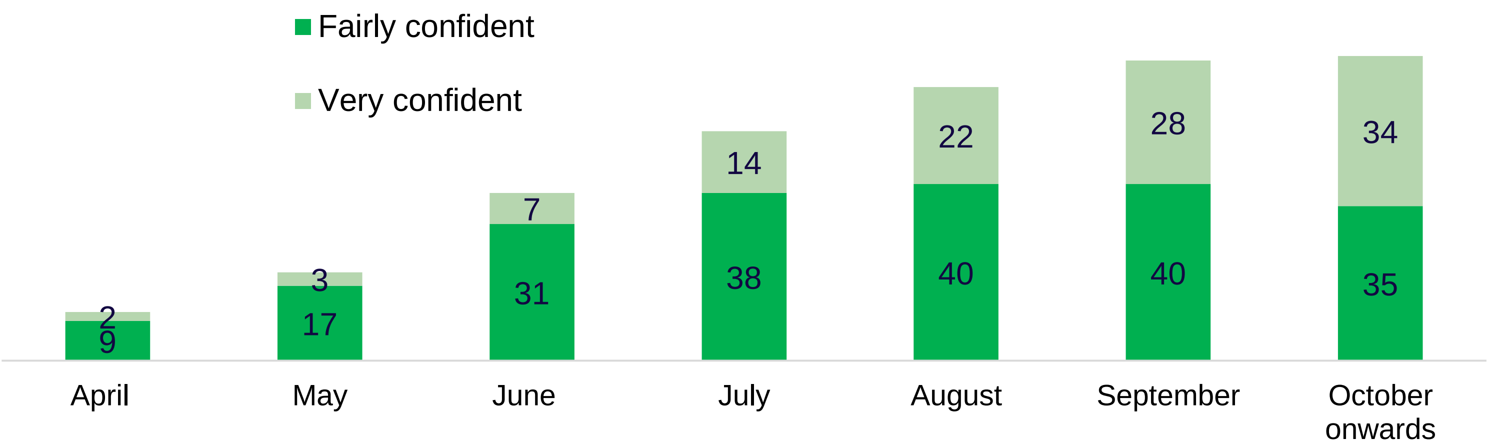
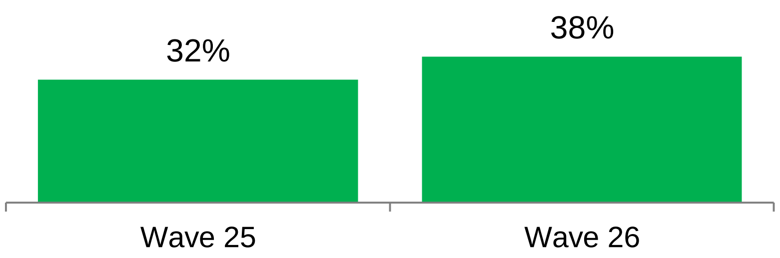


Figure 11. Confidence in taking a UK overnight trip in June 2021, Percentage wave-on-wave, UK



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 26 n=1,757.

Top 5 reasons for not feeling confident about taking overnight trips in the UK

- **‘Restrictions on travel from government’ is the primary reason people do not feel confident about taking an overnight trip during either spring or summer. Restrictions on opportunities to eat/drink out, on things to do and on opportunities to socialise also feature in the leading 5 reasons.**
- **In the summer, ‘concerns around catching COVID-19’ is cited more frequently. This does not represent an actual increase in concern amongst the whole population – it simply highlights that this issue is of greater importance among those who lack confidence in taking a trip during this period.**

Figure 12. Top 5 reasons for not being confident about travelling in Spring*, Percentage Wave 26, UK

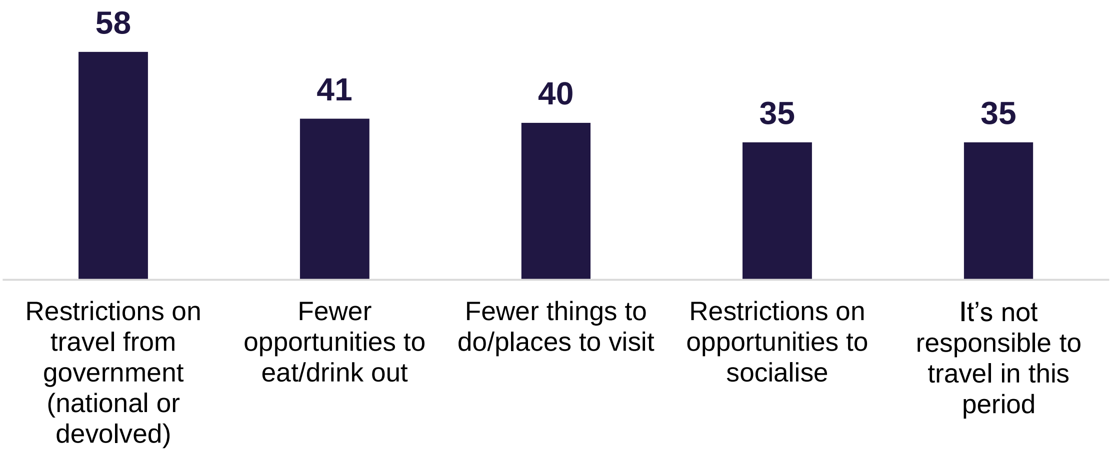
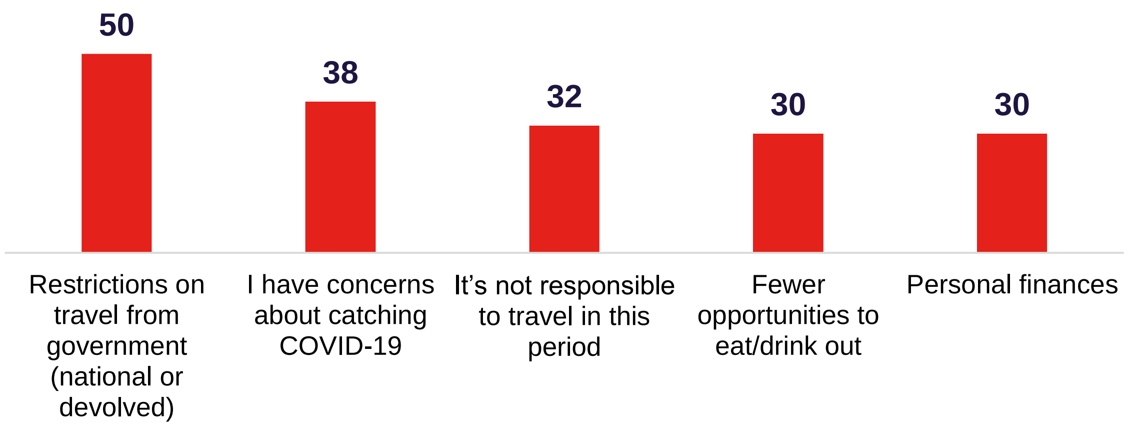


Figure 13. Top 5 reasons for not being confident about travelling in Summer*, Percentage Wave 26, UK



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 26 respondents not confident about taking a break in Spring n=502 and Summer n=444. *Spring is defined as April to June, Summer is defined as July to September

When anticipate planning and booking the next overnight trip in UK

- **17% claim to have already planned and 12% already booked their next domestic overnight trip, which represents a significant rise on wave 25.**
- **43% state they have either already planned or intend to plan their next trip by this Spring (defined as before the end of June) while 36% have already booked or intend to book their next trip by then.**
- **Around 1 in 5 are not intending to plan or book a trip at any point, which is significantly down on Wave 25, when both figures stood at around a third.**

Figure 14. When anticipate PLANNING next UK overnight trip, Percentage Wave 26, UK

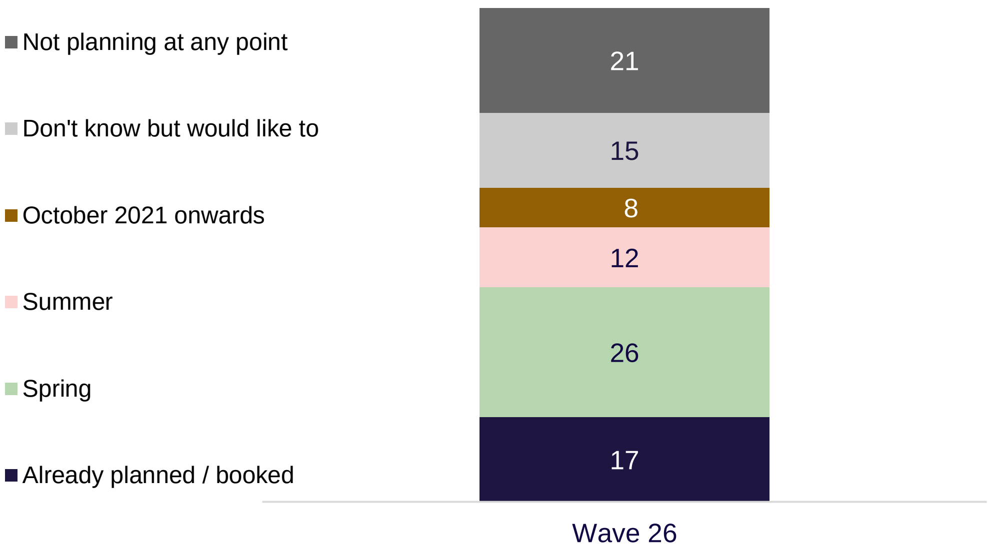
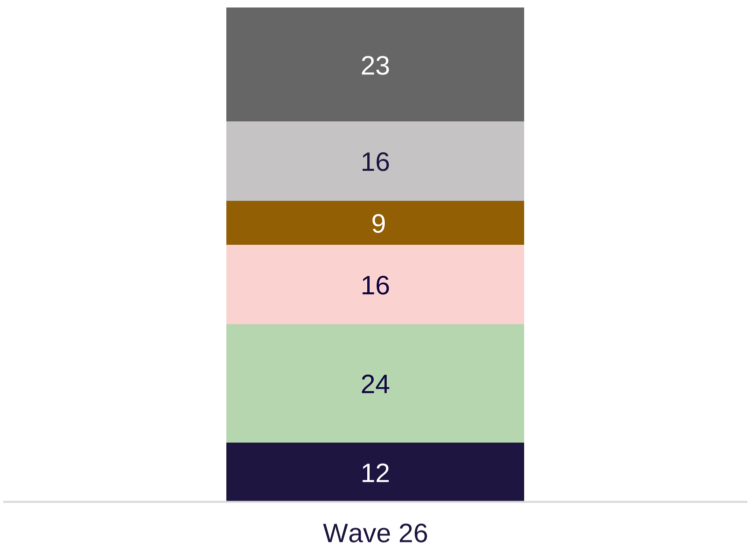


Figure 15. When anticipate BOOKING next UK overnight trip, Percentage Wave 26, UK

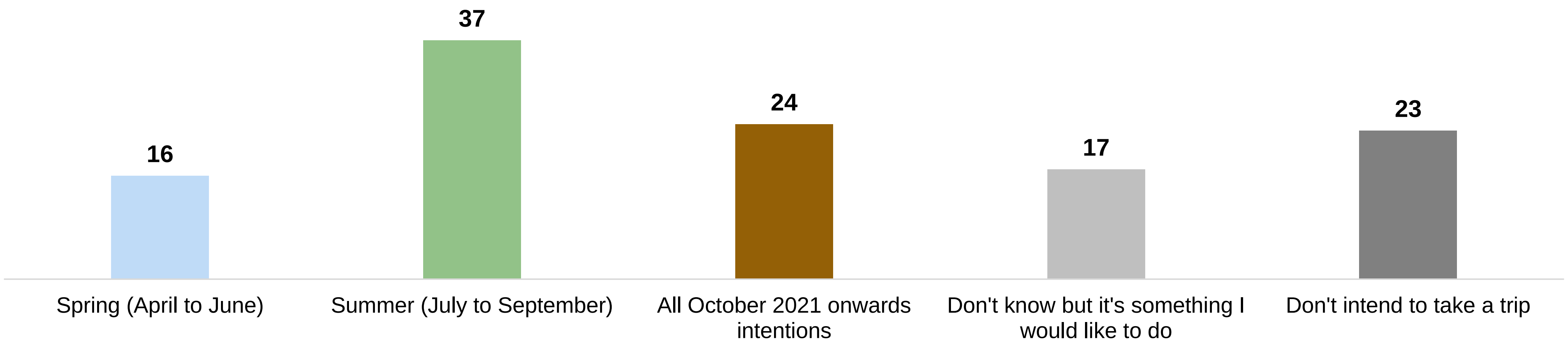


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 26 n=1,757. *Winter = January to March; Spring = April to June; Summer = July to September

When anticipate taking an overnight trip in the UK

- **16% of U.K adults now plan on taking a domestic overnight trip by the end of June (up 2 points on Wave 25).**
- **Summer trip intent has increased significantly (at 37% it is up by 10 percentage points on Wave 25). Trip intent from October onwards is also up by 4 percentage points to 24%.**
- **23% now state they are not intending to take any domestic overnight trips at all, a significant 11 percentage point drop on the proportion stating this in wave 25.**

Figure 16. Proportion anticipating GOING on <u>any</u> overnight UK trip, Percentage Wave 26, UK

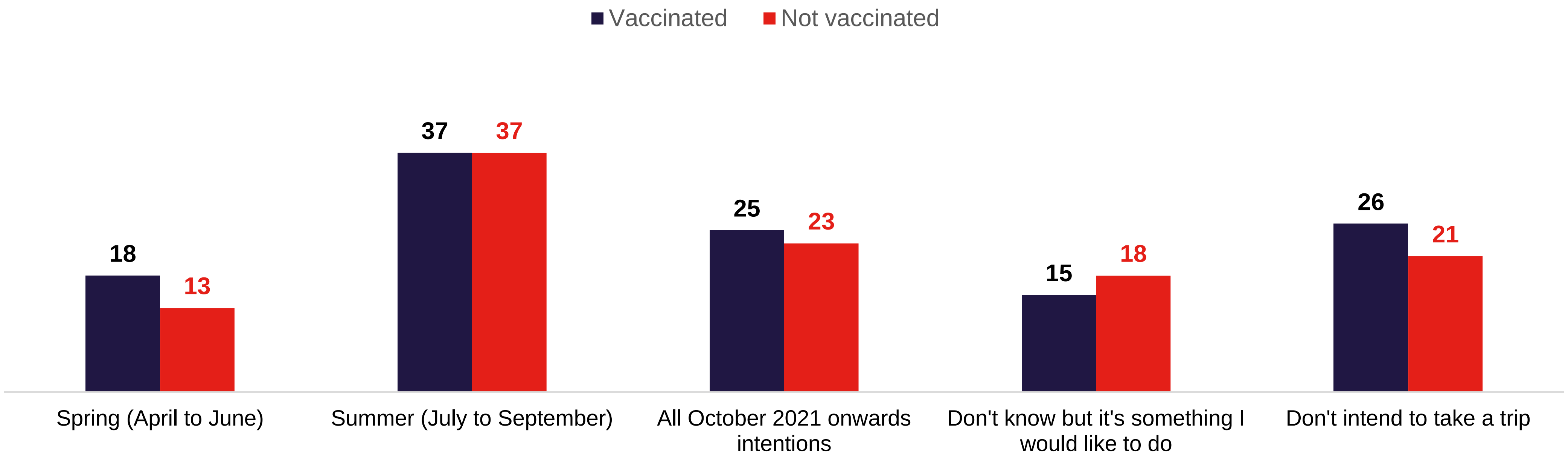


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All respondents. Wave 26 n=1,757

Vaccine impact on taking an overnight trip in the UK

- U.K. adults who claim to have had at least one dose of a Covid-19 vaccine have higher levels of Spring trip than those that have not been vaccinated. Summer intent is equal across both groups.
- Note: It currently remains the case that vaccinated groups have an older age profile than non-vaccinated, so it’s likely this bias will also have an impact on the trip intent figures indicated below.

Figure 16b. Proportion anticipating GOING on any overnight UK trip by vaccine status, Percentage Wave 26, 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 vaccinated respondents =496; Non-vaccinated respondents n=1261

Proportion that have already planned or booked their next overnight trip in the UK

- 2 in 5 spring intenders (43%) claim to have already planned their trip and 29% have already booked it.
- The proportion of those who have already planned or booked a summer trip (between July-September) is 27% and 20% respectively

Figure 17. Proportion of Intenders that have already *planned* their trip, Percentage Wave 26 for Spring and Summer, UK

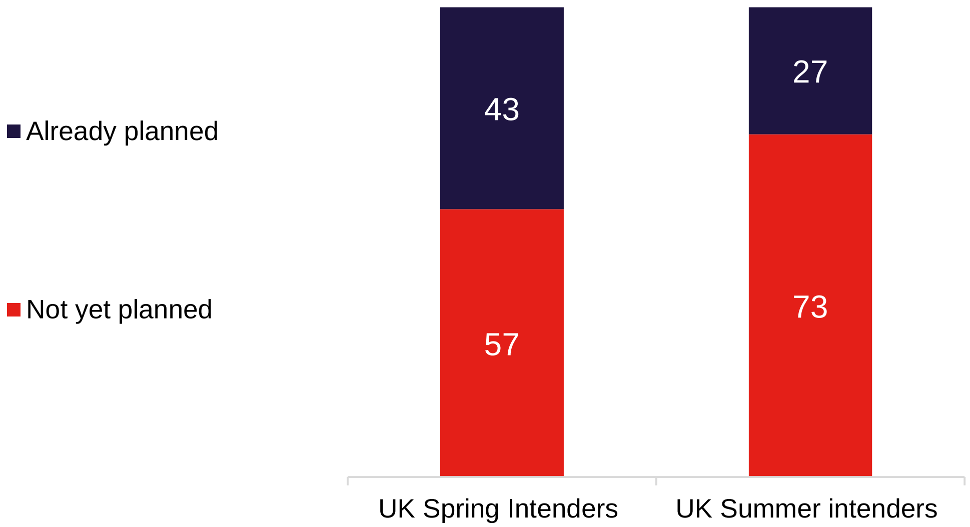
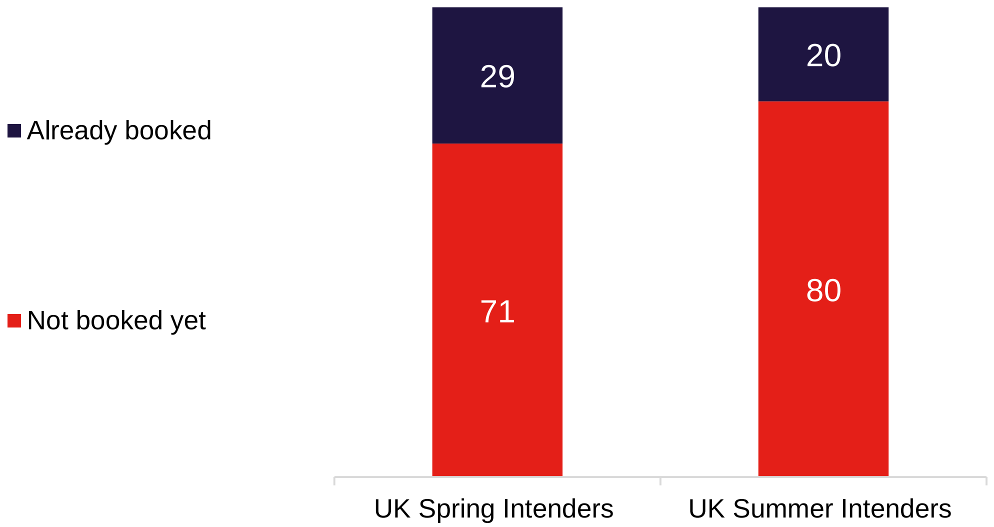


Figure 18. Proportion of Intenders that have already *booked* their trip, Percentage for Spring and Summer, UK

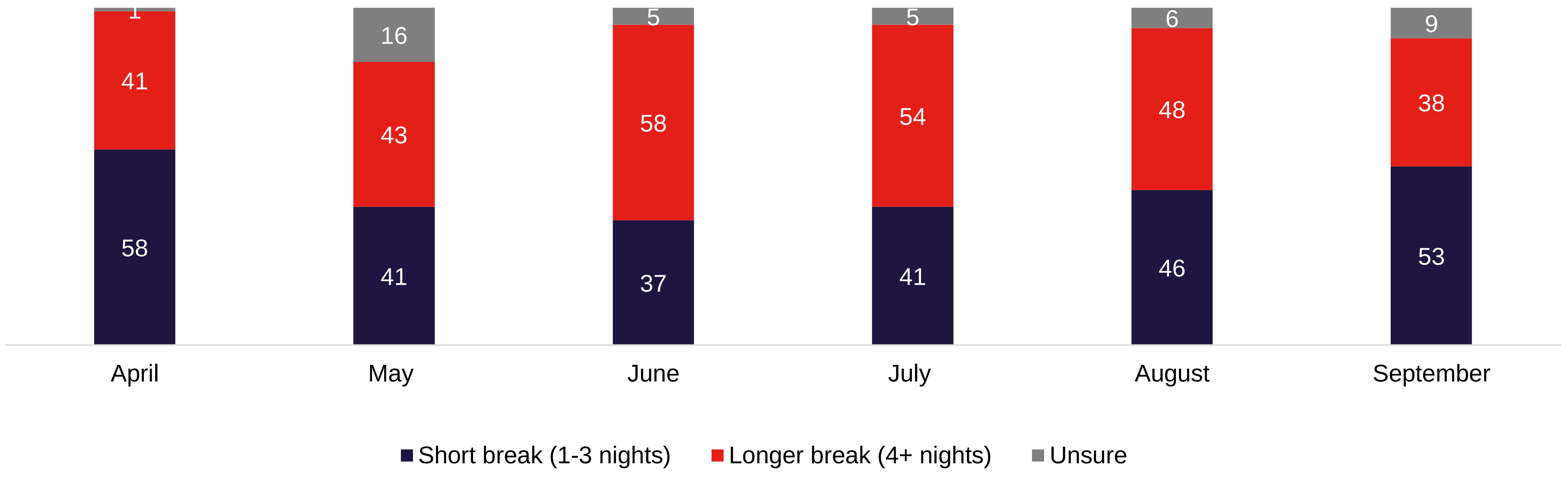


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 26 respondents planning on taking a holiday or short break in the UK in Spring (April to June) n=233; Summer (July to September) n=492

Duration of the next overnight trip in UK

- **Across most time periods, longer breaks of 4+ nights make up a higher proportion of trips than shorter breaks, with the exception of April and September where short breaks dominate.**

Figure 19. Length of next UK holiday or short break by time period, Percentage Wave 26 for Spring/Summer/October onwards, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 26 respondents intending to take next holiday or short break in each time period: April n=30, May n=87, June n=116, July n=159, August n=198, September n=135,

Where planning on staying on next overnight trip in UK

- The South West remains the leading destination for an overnight trip during spring and summer with a dominant 27% and 24% share of intended trips, significantly ahead of second placed North West (in spring) and Yorkshire and the Humber (in summer).
- However, it's clear that outside of the South West, little separates the shares of the leading six regions of the UK for the summer period.

Figure 20. Where planning on staying on next UK overnight trip in spring, Percentage Waves 26, UK

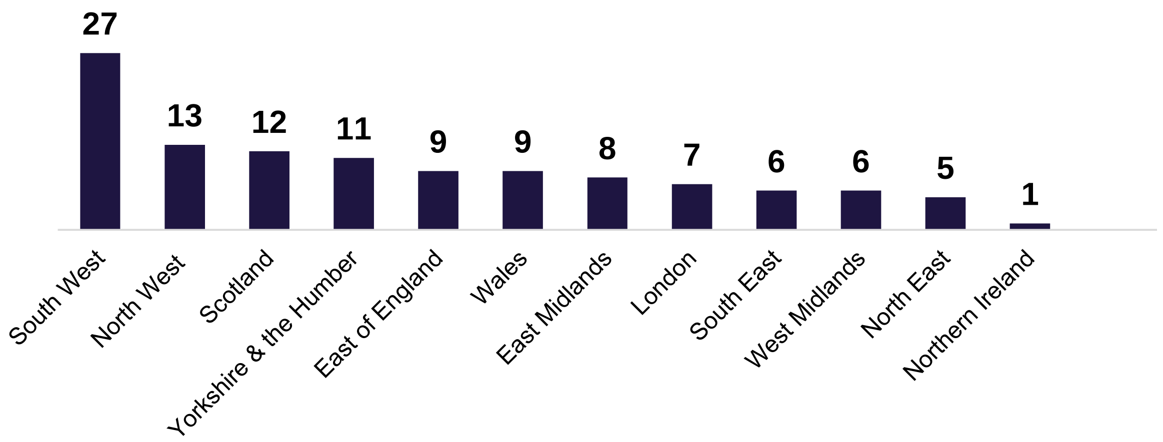
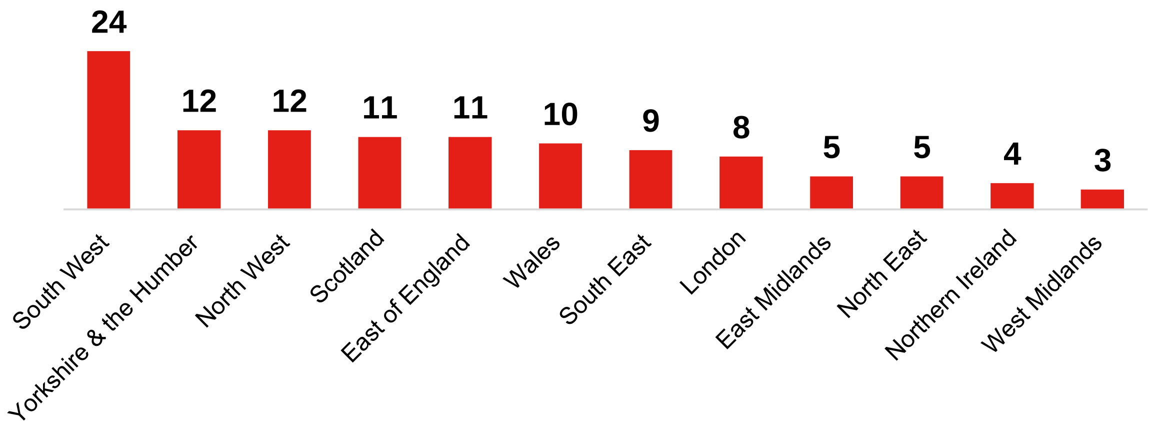


Figure 21. Where planning on staying on next UK overnight trip in summer, Percentage Waves 26 , UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Wave 26 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=233; Summer (July to September) n=492

Main mode of transport for next overnight trip in UK

- **Across both time periods, ‘own car’ is by far the leading primary mode of transport for travelling to an overnight destination, with 67% stating this for spring trips and 62% in summer.**
- **‘Train’ is the second most likely mode of travel to an overnight destination in both time periods.**

Figure 22. Top 5 main modes of travel to destination for trip in spring, Percentage, Wave 26, UK

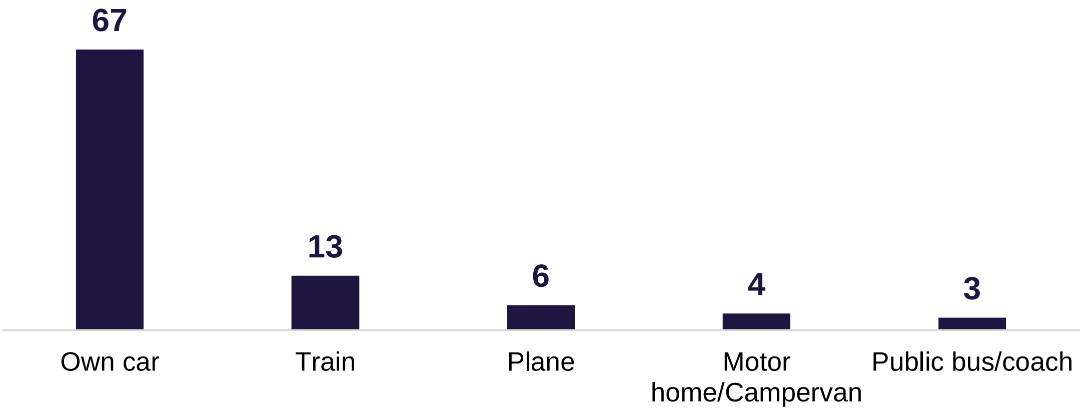
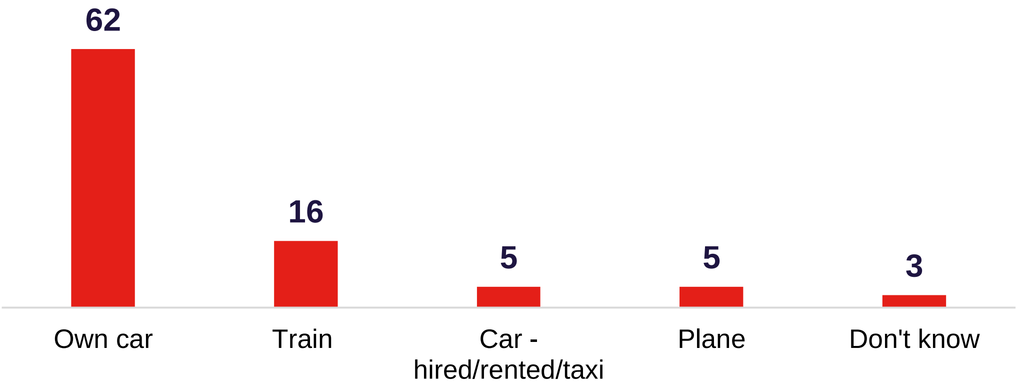


Figure 23. Top 5 main modes of travel to destination for trip in summer, Percentage, Wave 26, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 26 respondents planning on taking a holiday or short break in the UK for spring (April to June) n=233 and summer (July to September) n=492 .

Destination type for next overnight trip in UK

- There is minimal separation in share between the top two destination types for spring trips – around a third likely to stay in ‘countryside or village’ or ‘traditional coastal/seaside town’. The same destination types also lead for the summer period, although here ‘traditional coastal/seaside town’ takes top spot.
- A relatively equal proportion of intenders across both periods plan on visiting a town or city location.

Figure 24. Main type of destination for trip in spring, Percentage
Waves 26, UK

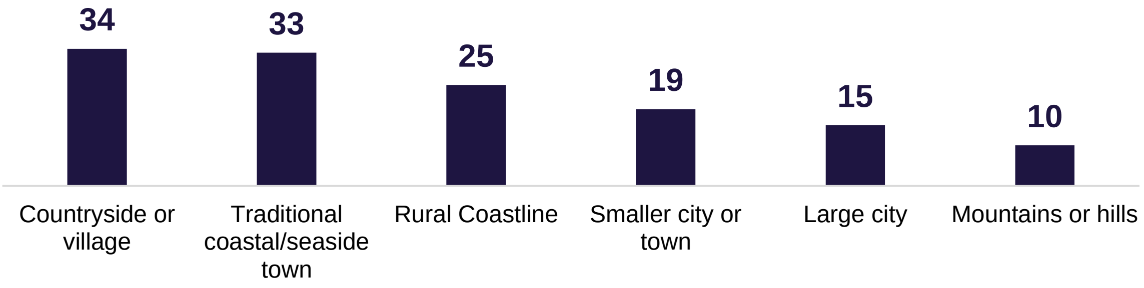
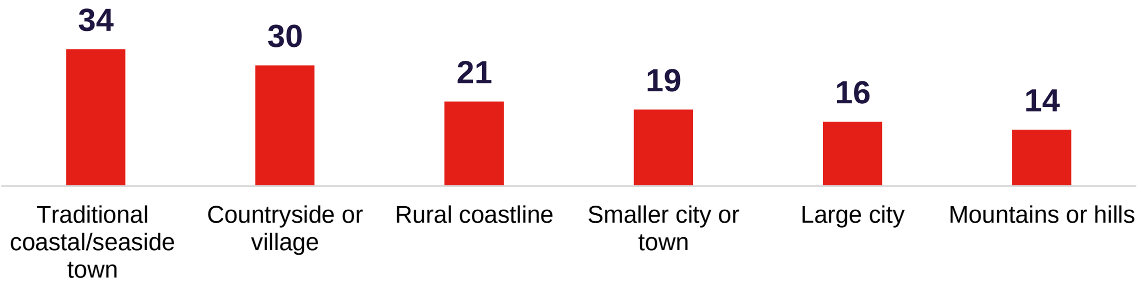


Figure 25. Main type of destination for trip in summer, Percentage
Waves 26, UK



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 26 respondents planning on taking a holiday or short break in the UK for spring (April to June) n=233 and summer (July to September) n=492

Accommodation type for next overnight trip in UK

- For spring trips, ‘commercial rental’ is the accommodation type of choice, marginally ahead of ‘hotel/motel/inn’, ‘camping/caravan’ and ‘a private home’ which each have very similar shares.
- There is also minimal separation between the top 4 considered accommodation types in the summer, with ‘camping/caravan’ and ‘hotel/motel/inn’ marginally ahead of ‘commercial rental’ and ‘a private home’.

Figure 26. Accommodation planning on staying in on next UK overnight trip in spring, Net percentage Waves 26

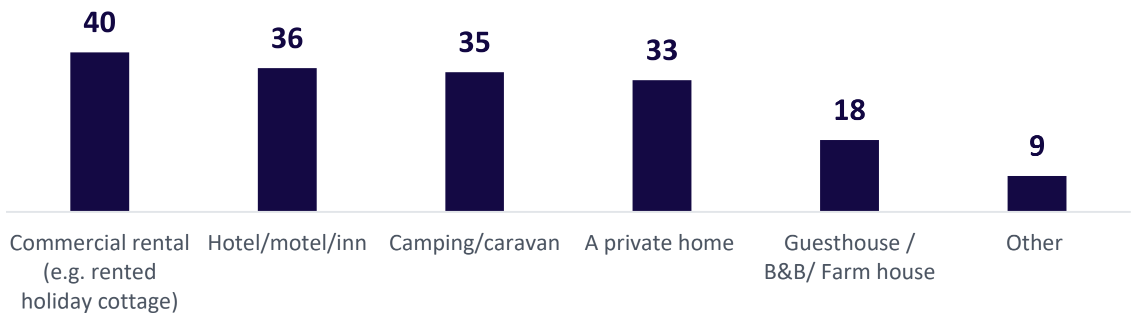
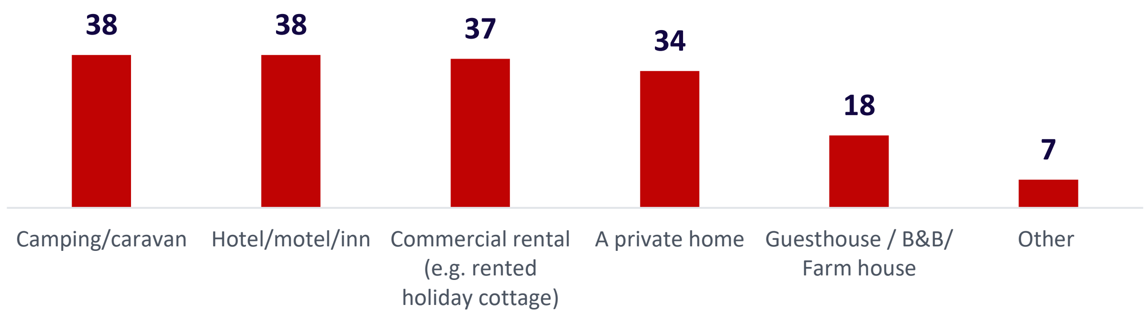


Figure 27. Accommodation planning on staying in on next UK overnight trip in summer, Net percentage Waves 26

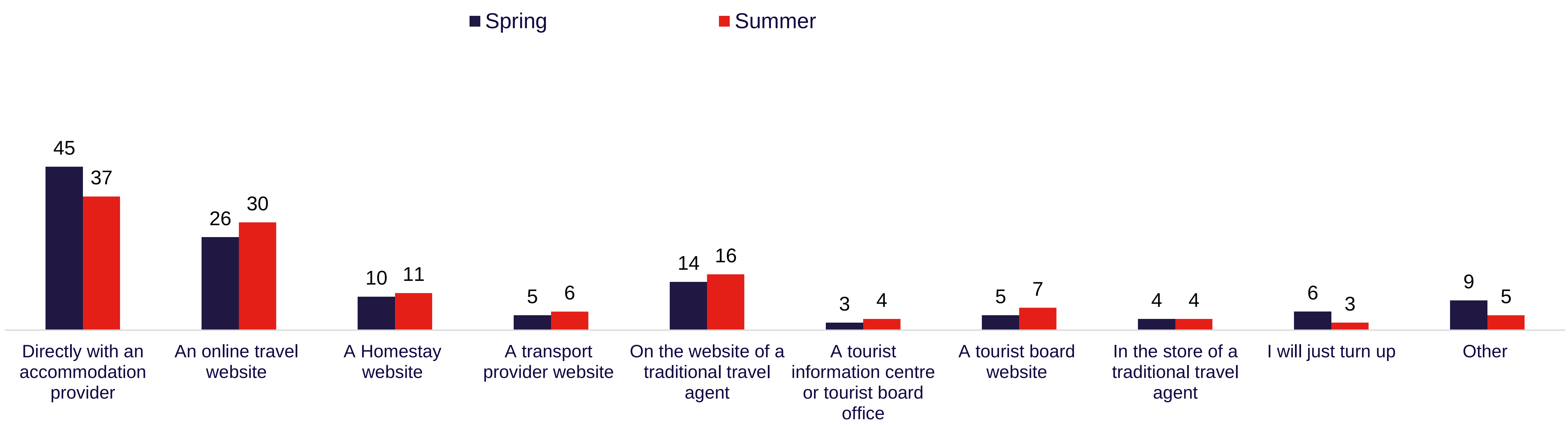


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Wave 26 respondents planning on taking a holiday or short break in the UK for spring (April to June) n=233 and summer (July to September) n=492

Method of booking the accommodation for next overnight trip in UK

- ‘Booking directly with an accommodation provider’ remains the leading method of booking accommodation across both time periods.
- ‘An online travel website’ is the next most preferred booking channel for both spring and summer Intenders, with 26% and 30% choosing this method respectively.

Figure 28. Accommodation booking channel for next trip in spring and summer, Percentage Wave 26 for spring and summer, U.K.

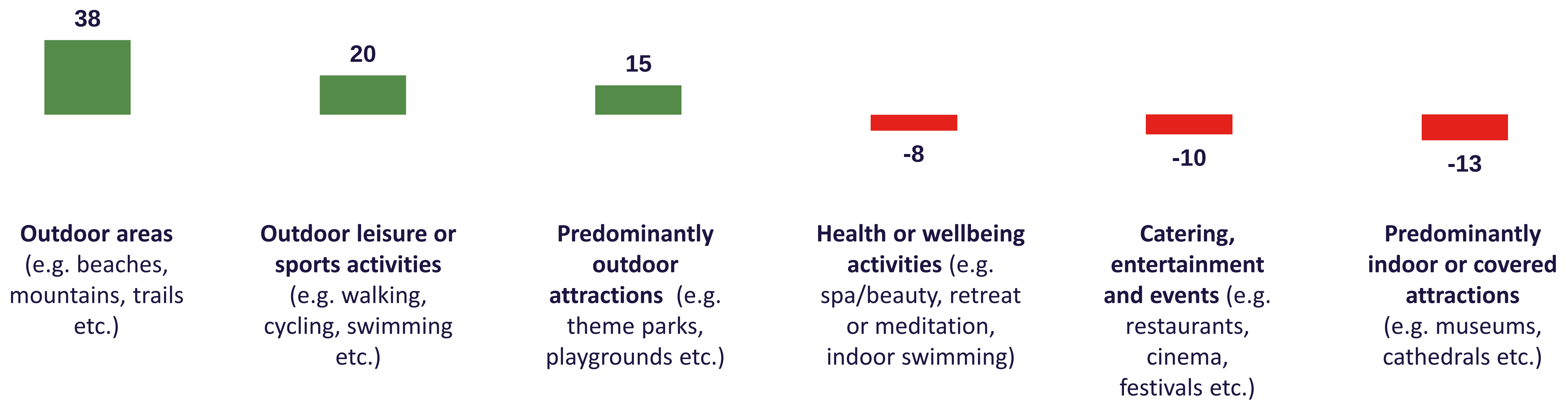


VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All Wave 26 respondents planning on taking a holiday or short break in the UK for spring (April to June) n=233 and summer (July to September) n=492

General leisure activity over the next few months

- **Consistent with previous waves, outdoor areas are most likely to attract more visitors/engagement than normal (net +38), followed by outdoor leisure or sports activities (+20) and outdoor attractions (+15)**
- **'Health or wellbeing activities' (-8), 'Catering, entertainment and events' (-10) and 'predominantly indoor attractions' (net -13) are likely to attract fewer visitors/engagement than normal.**
- **The net likelihood to engage in all activities has increased since wave 25.**

Figure 29. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely' Wave 26, 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 over the next few months?
Base: All Wave 26 respondents n=1,757

3. Business trip Intentions

Intentions for overnight business trips between now and end of the year

- 10% of U.K. adults in employment say they are intending to take a domestic overnight business trip between now and the end of the year.
- Around 1 in 3 (34%) stated this trip would be for a meeting – with meetings of 6 or more making up the majority. Around 1 in 5 (19%) indicated the trip would be for team building purposes.

Figure 30. Proportion anticipating an overnight business trip by end of 2021, Percentage, Wave 26, U.K. adults in employment

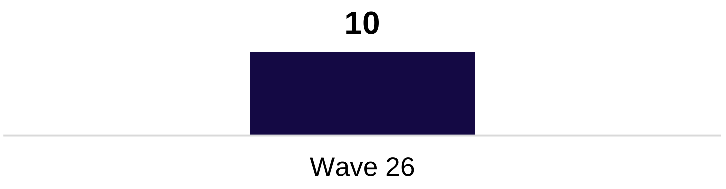
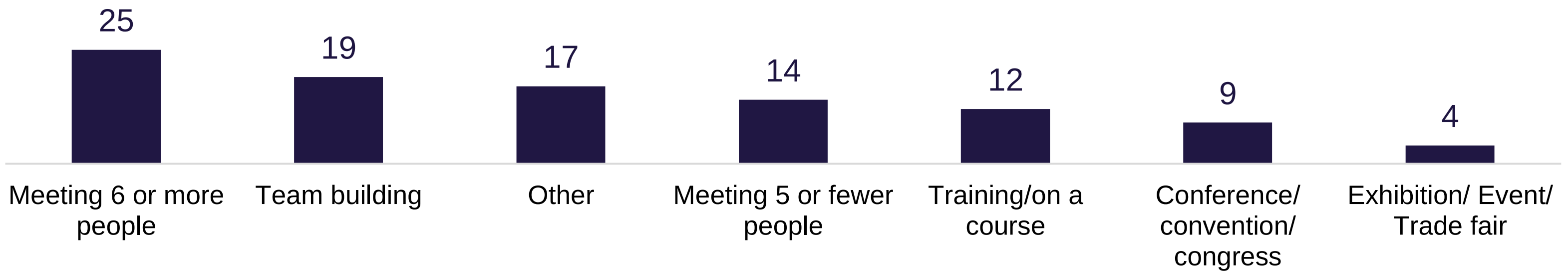


Figure 31. Reasons for taking an overnight business trip, Percentage, Wave 26, U.K. adults in employment planning a trip

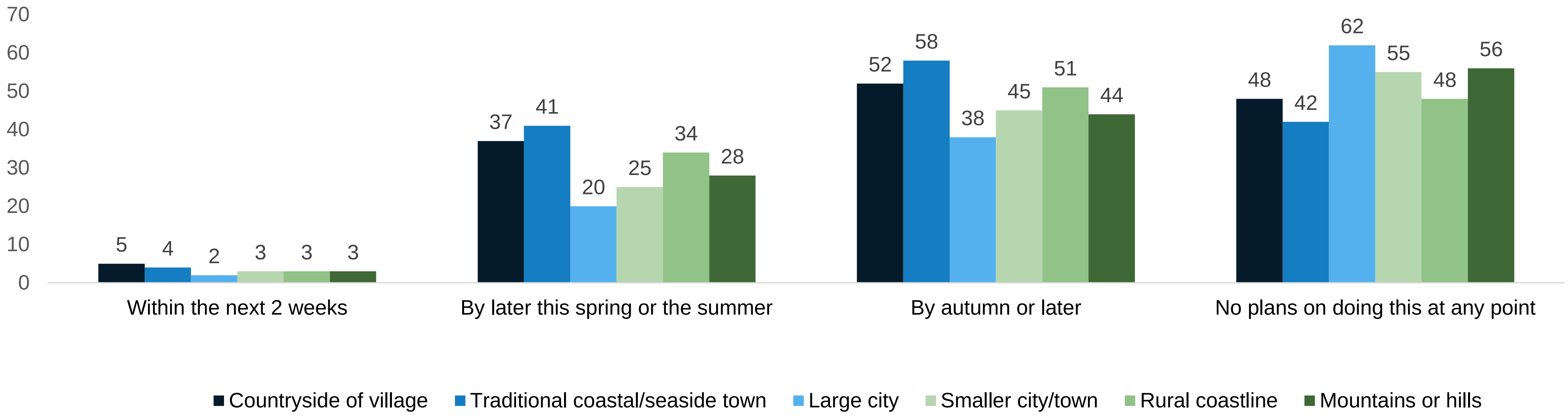


4. Day trips

Day trip intention by destination type

- **Only a very small minority anticipate taking any day trips in March, although intent rises significantly later in the spring or summer periods.**
- **Cities appear set to receive fewer day trippers this spring or summer compared to more rural locations and traditional coastal or seaside towns.**

Figure 31. Likelihood to take a day trip by destination type, Wave 26, UK

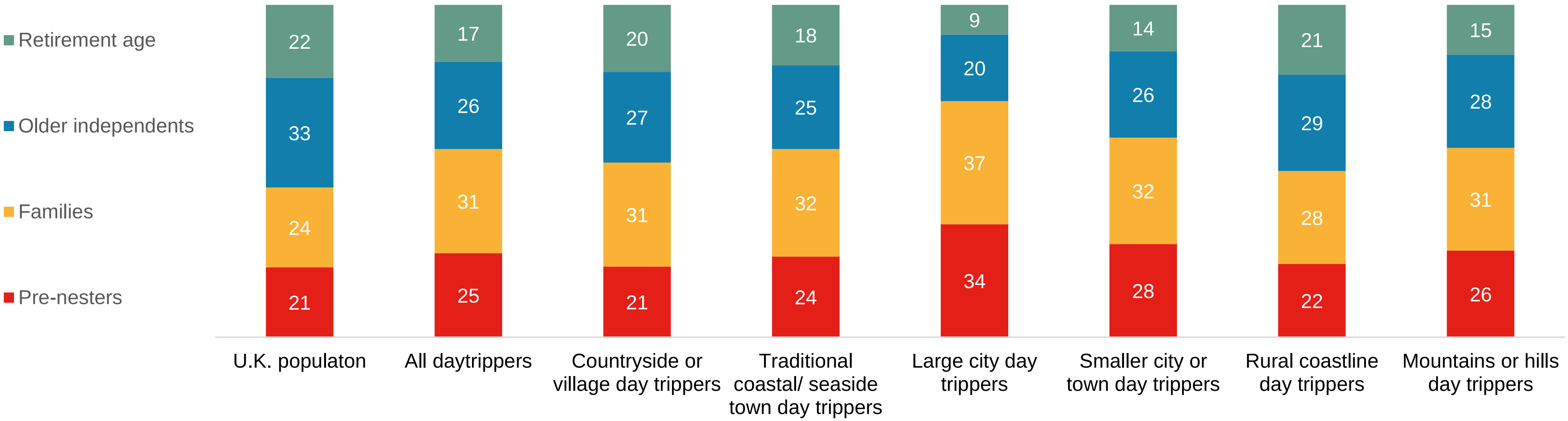


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 26 respondents n = 1,757

Life stage of day trip intenders

- Overall, day trippers have higher representation amongst pre-nesters and families compared to the U.K. population.
- The breakdown of life stage differs by day trip destination, with older groups exhibiting a stronger preference for rural locations, while more urban destinations showing a considerably younger profile.

Figure 32. Breakdown of day trip intenders* by life stage, Percentage, Wave 26, UK

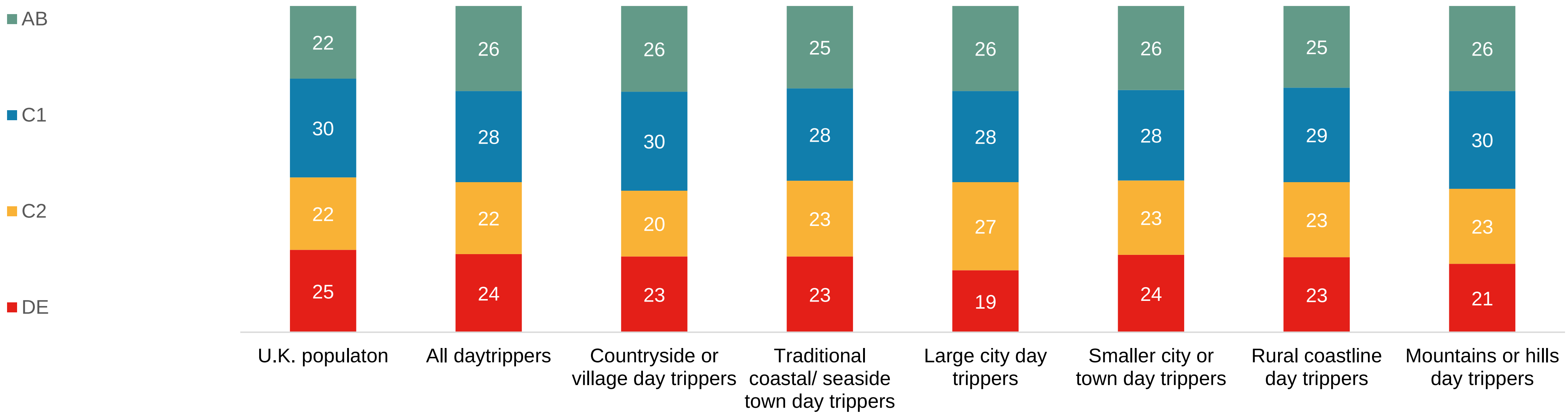


Demographics questions and QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 26 respondents: *All day trippers within the next 2 weeks/early spring summer n=1057; All day-trippers Countryside or village day trippers n=668; Traditional coastal/ seaside town day trippers n=761 Large city day trippers n=406 Smaller city or town day trippers n=496 Rural coastline day trippers n=621 Mountains or hills day trippers n=547

Social grade of day trip intenders

- **The social grade profile of day trippers overall and by day trip destination is broadly similar to the breakdown amongst the wider population. Although some minor differences exist, these are not statistically significant.**

Figure 33. Breakdown of day trip intenders* by social grade, Percentage, Wave 26, UK



Demographics questions and QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 26 respondents: All day trippers within the next 2 weeks/early spring summer n=1057; All day-trippers Countryside or village day trippers n=668; Traditional coastal/ seaside town day trippers n=761 Large city day trippers n=406 Smaller city or town day trippers n=496 Rural coastline day trippers n=621 Mountains or hills day trippers n=547

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 26 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-25 where appropriate. Wave 26 fieldwork was conducted between 8th and 12th March 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.