COVID-19 Consumer Tracker

Wave 27

Published: 1 April 2021

Fieldwork Period: 22-26 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 22nd to 26th 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	22 – 26 March
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 27: Scorecard of Key Metrics

Key Metrics	Wave 26	Wave 27	Wave Shift
National mood (average score out of 10)	6.5	6.7	+0.2
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	40%	38%	-2
Appetite for Risk: Comfort in undertaking a range of activities (1-4 comfort score)	2.37	2.42	+0.05
Normality score (proportion expecting normality by June)	10%	10%	+/-0
Leading two reasons for not feeling confident about taking a trip in Spring (Apr – June)	1. Restrictions on travel from government 2. Fewer opportunities to eat/drink out	1. Restrictions on travel from government 2. Fewer opportunities to eat/drink out	No change
Near-term confidence in taking UK overnight trip (April confident)	11%	12%	+1
Medium-term confidence in taking UK overnight trip (May/June confident)	20%/38%	20%/33%	0/-5*
Anticipated number of UK short breaks compared to normal (% more/the same)	47%	46%	-1
Anticipated number of UK longer breaks compared to normal (% more/the same)	44%	44%	+/-0
Proportion going on a UK overnight trip in Spring (April – June)	15%	14%	+1
Proportion going on a UK day trip in next two weeks	14%	17%	+3*
Leading UK overnight destination likely to stay in Spring (Apr – June)	South West	South West	No change
Main *type* of overnight destination likely to stay in Spring (Apr – June)	Countryside or village	Traditional coastal/seaside town	New No.1
Main overnight accommodation type likely to stay in Spring (Apr – June)	Commercial rental	Commercial rental	No chance
Place/activity likely to attract highest engagement compared to normal, post-lockdown	Outdoor areas (e.g. beaches, trails etc)	Outdoor areas (e.g. beaches, trails etc)	No change
Place/activity likely to attract lowest engagement compared to normal, post-lockdown	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 has increased to 6.7 out of 10, which is 0.2 points higher than in Wave 26.**
- **The rise is driven by a higher proportion describing their mood as a 9 or 10 out of 10 (rising from 13% to 17%).**

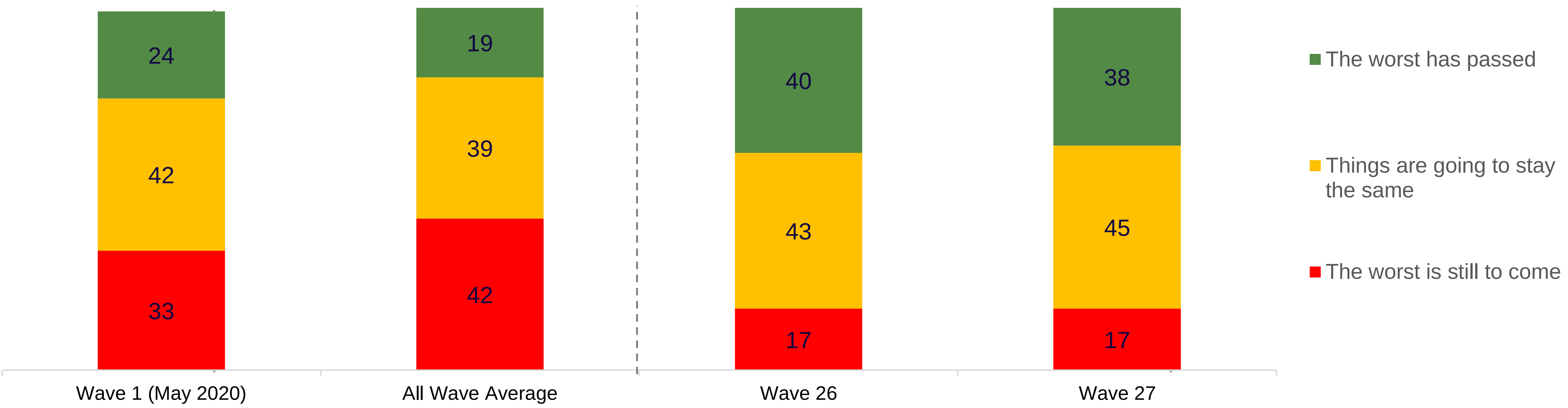
Figure 1. Current mood out of 10, Percentage wave-on-wave, UK

Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 27 n=1,763
Wave average is based on Wave 1 to Wave 26.

Perceptions of the situation relating to COVID-19

- **The proportion of U.K. adults who believe 'the worst has passed' in relation to COVID-19 is 38%, marginally down on Wave 26 but still significantly higher than the 'all wave average' of 19%.**
- **Despite the generally growing levels of optimism, the majority continue to believe '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 27 n=1,763 Wave average is based on Wave 1 to Wave 26.

Perceptions of when things will 'return close to normal'

- **Just 17% of U.K. adults anticipate life will return to something 'close to normal' by July this year, rising to 24% by August – both of which have declined since Wave 26 when they were 21% and 30% respectively.**
- **It isn't until the October to December period that at least half of the adult population expect 'normality'; a proportion that has also fallen slightly since last wave.**

Figure 3. Perceptions of when things will return 'close to normal', cumulative percentage, Wave 27, UK

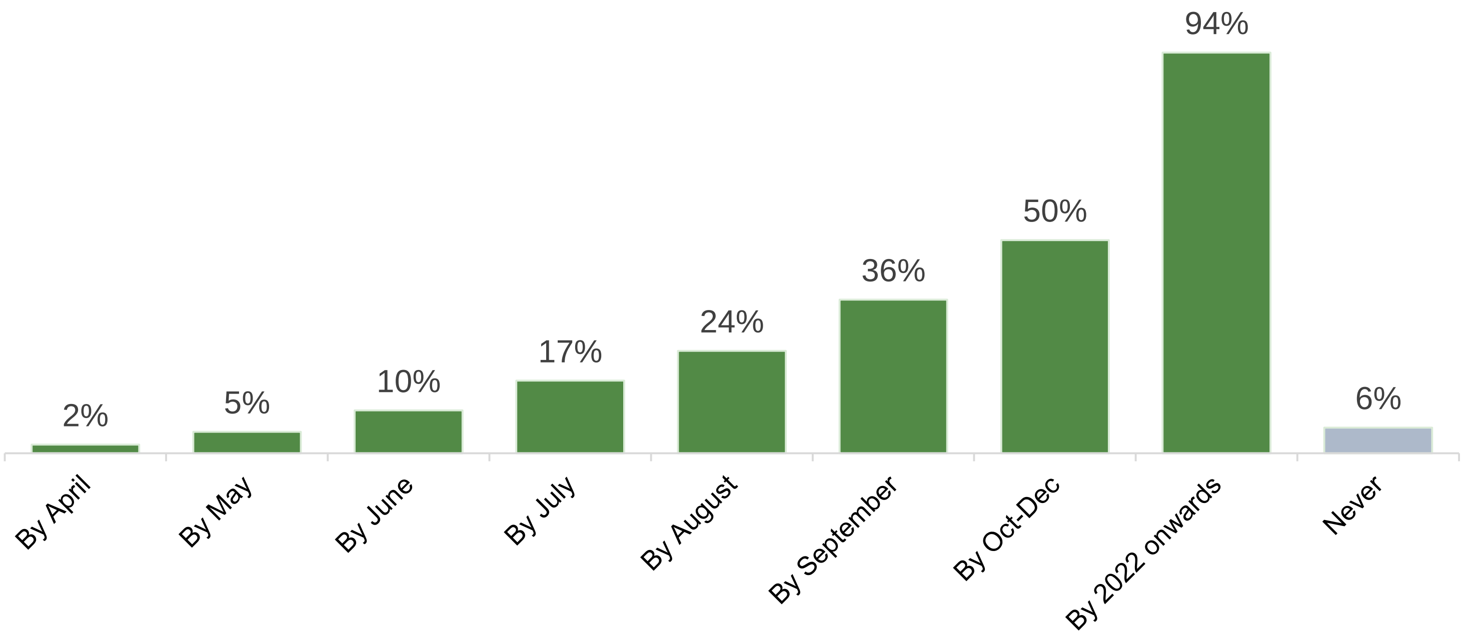
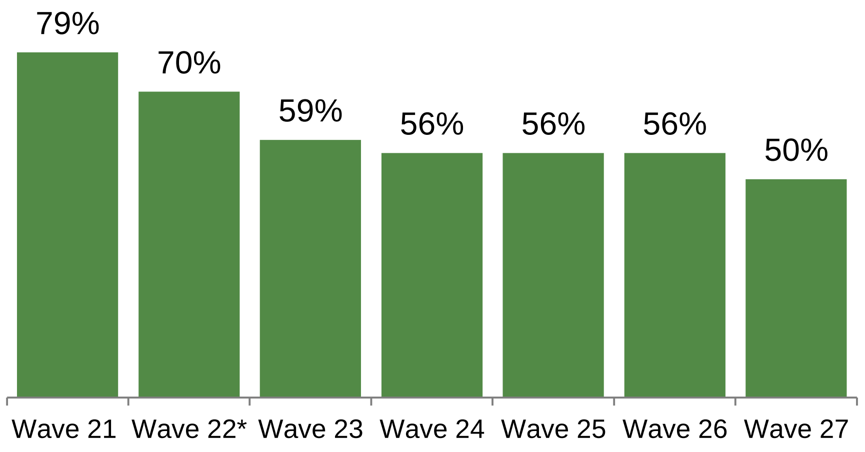


Figure 4. Proportion expecting normality by December, percentage wave-on-wave, UK



Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 27 n=1,763

Confidence in the ability to take overnight trips in UK

- Only 12% of U.K. adults are presently confident that an overnight domestic trip booked for April would go ahead exactly as planned, rising to 20% for a May trip.
- Confidence that a trip planned for June would go ahead as expected has declined significantly this wave to 33%.
- Less than half (45%) express confidence for July trips, which is a significant decline from the 52% that felt this way in Wave 26.

Figure 5. Confidence in taking a UK overnight trip across different time periods, percentage, Wave 27, UK

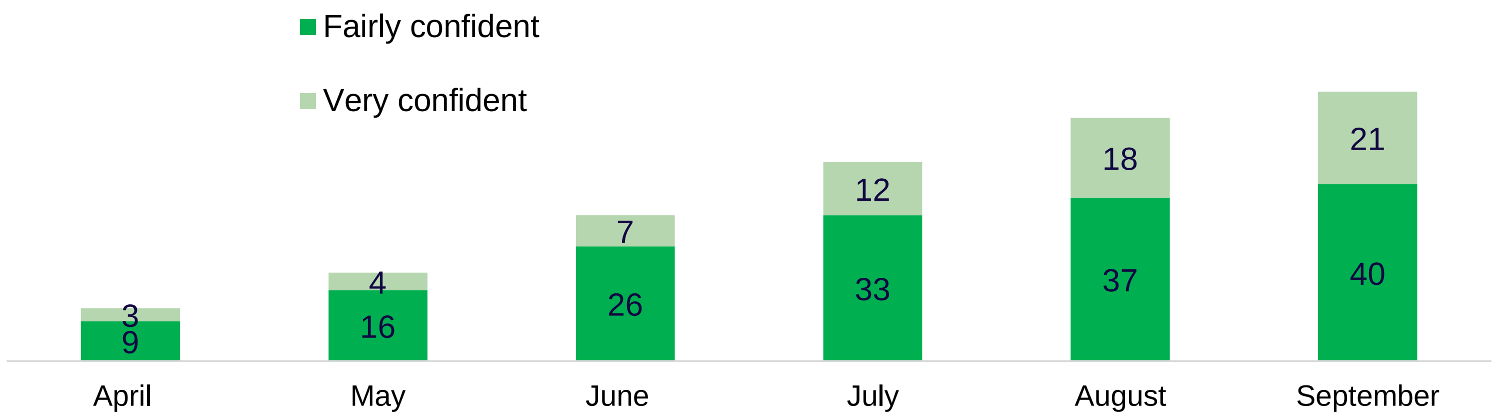
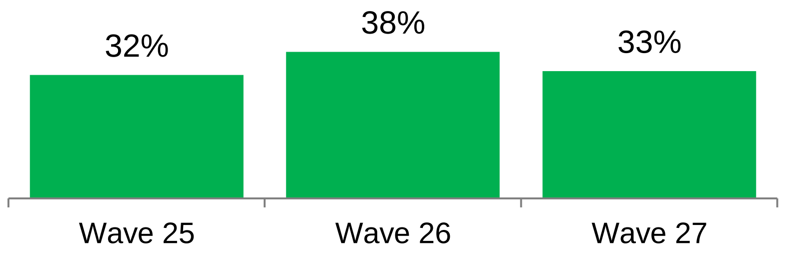


Figure 6. Confidence in taking a UK overnight trip in June 2021, percentage wave-on-wave, UK



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 27 n=1,763

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

- **‘Restrictions on travel from government’ remains the primary reason people do not feel confident about taking an overnight trip during both spring and summer, although it is a significantly more influential reason during the spring period.**
- **Restrictions on opportunities to eat/drink out, on things to do and on opportunities to socialise also feature in the leading five reasons for spring trips.**
- **For the second consecutive wave, ‘personal finances’ also makes the top five reasons for low confidence in the summer period.**

Figure 7. Top 5 reasons for not being confident about travelling in Spring*, percentage Wave 27, UK

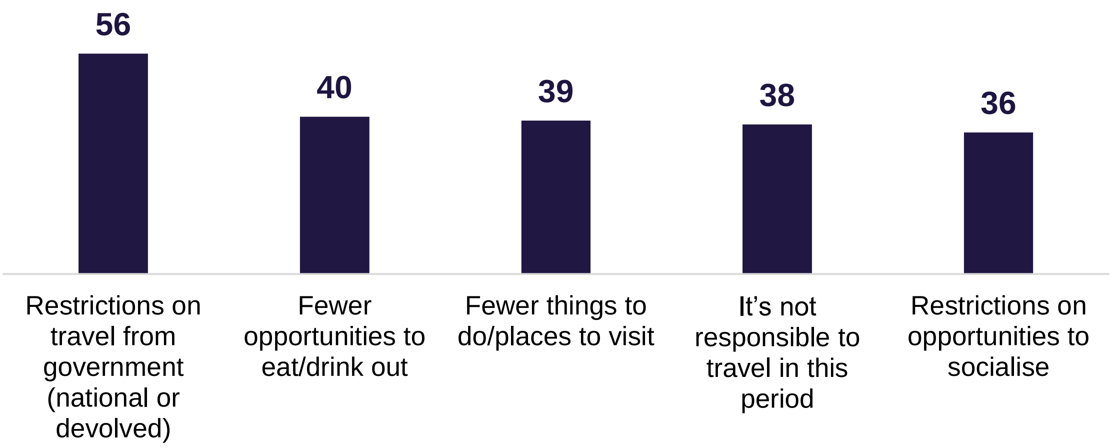
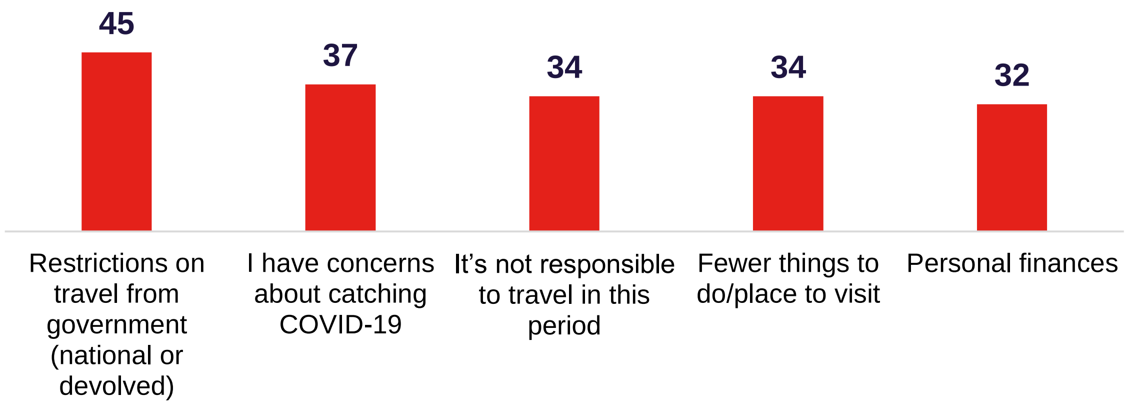


Figure 8. Top 5 reasons for not being confident about travelling in Summer*, percentage Wave 27, UK

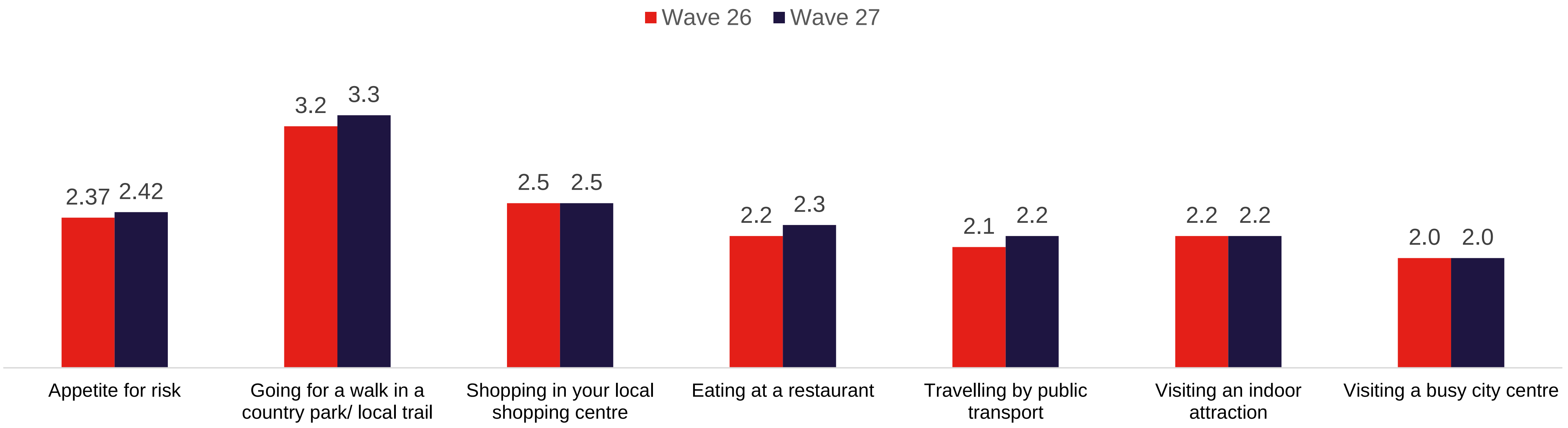


QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a UK short break or holiday? Base: Wave 27 respondents not confident about taking a break in Spring n=304 and Summer n=455. *Spring is defined as April to June, Summer is defined as July to September

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’ continues to hold the highest comfort score at 3.3, significantly ahead of the indoor activities measured, and slightly higher than in Wave 26 (when it scored 3.2).**
- **‘Visiting a busy city centre’ generates the lowest comfort score (2.0), consistent with Wave 26.**

Figure 9. 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, average wave-on-wave, 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 27 n=1,763

2. Overnight Trip Intentions

Anticipated number of U.K. and overseas trips compared to normal

- Between now and the end of the year, nearly half of U.K. adults intend to take more or about the same number of domestic short breaks (46%) or longer breaks of 4+ nights (44%) compared to normal.
- A lower proportion anticipate taking more or about the same number of overseas trips this year compared to normal, within which only a very small minority anticipate taking 'more trips'. A third are unsure – a figure that has increased since Wave 26.

Figure 10. Number of U.K. overnight trips between now and the end of the year compared to normal, Percentage Wave 27, UK

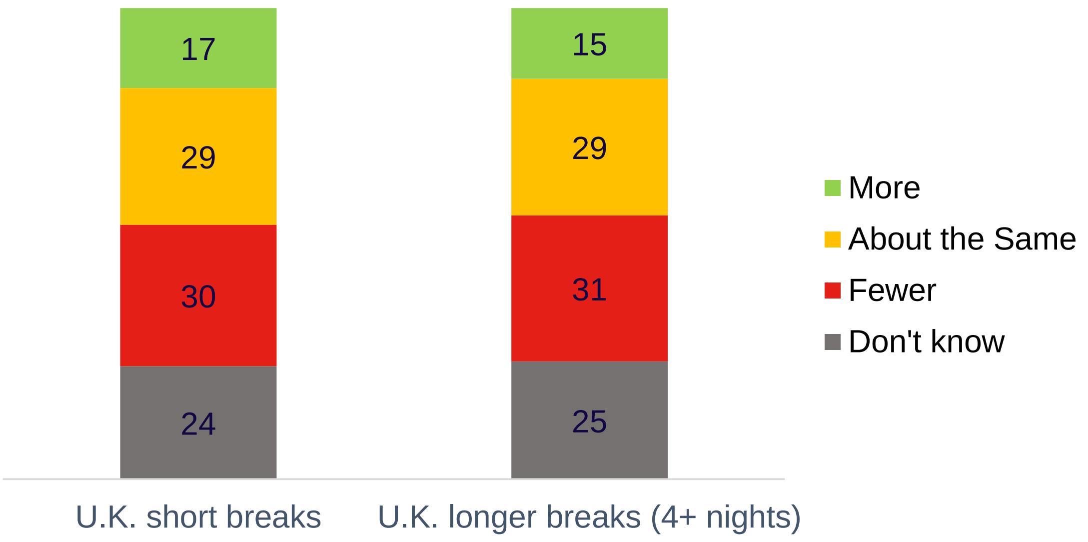
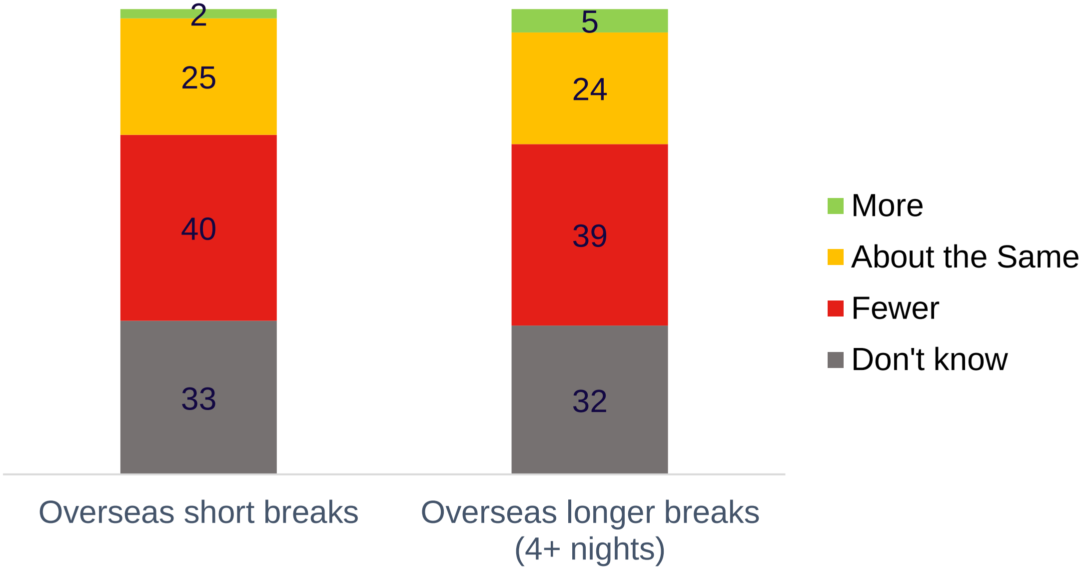


Figure 11. Number of OVERSEAS overnight trips between now and the end of the year compared to normal, Percentage Wave 27, UK



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 27 n=1,763.

When anticipate to plan and book the next overnight trip in UK

- **17% of U.K. adults claim to have already planned and 13% already booked their next domestic overnight trip, consistent with Wave 26.**
- **40% state they have either already planned or intend to plan their next trip by this Spring (defined as before the end of June) while 33% have already booked or intend to book their next trip by then.**
- **1 in 4 are not intending to either plan or book a domestic overnight trip at any point.**

Figure 12. When anticipate TO PLAN the next UK overnight trip, percentage Wave 27, UK

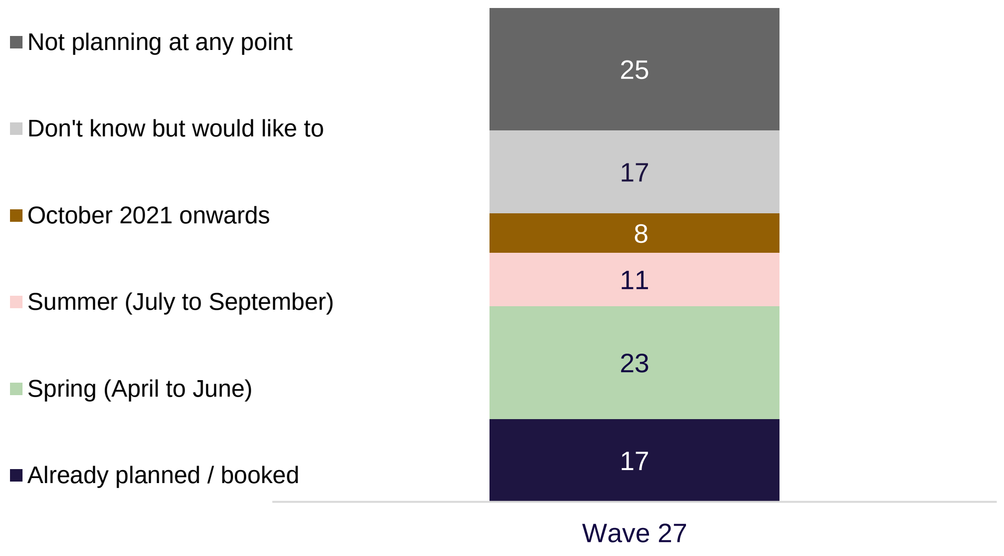
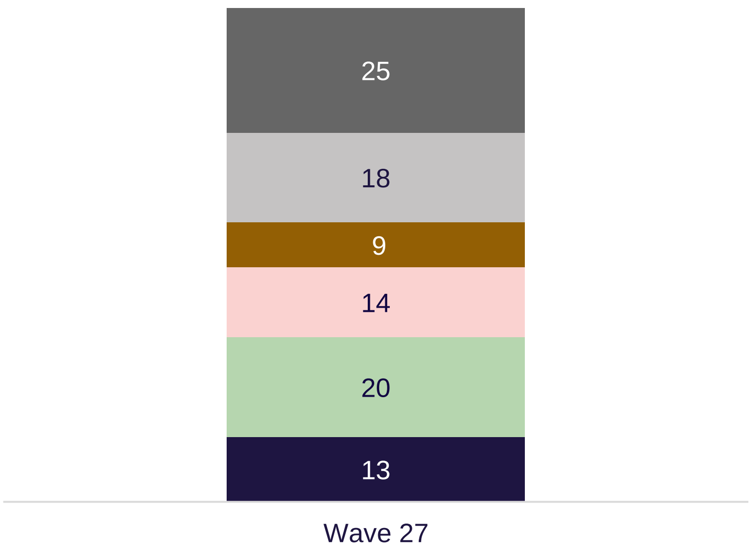


Figure 13. When anticipate BOOKING the next UK overnight trip, Percentage Wave 27, UK

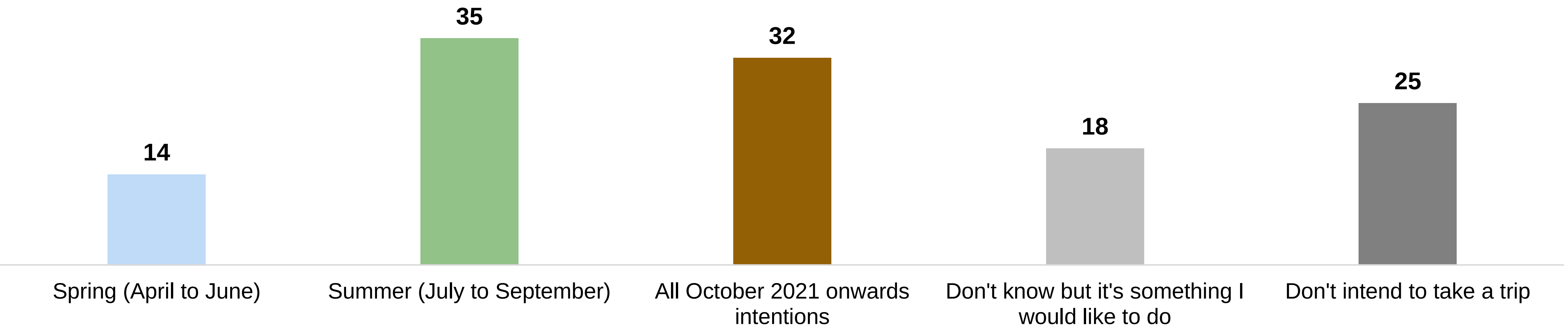


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 27 n=1,763. *Winter = January to March; Spring = April to June; Summer = July to September

When anticipate taking overnight trips in the UK

- **14% of U.K adults are currently intending to take a domestic overnight trip by the end of June; a slight decline versus Wave 26.**
- **More than twice the proportion (35%) anticipate taking a summer trip, again slightly down on Wave 26. Around a third of U.K. adults intend to take a domestic overnight trip at some point from October 2021 onwards.**
- **A quarter are not intending to take any domestic overnight trips at all, while 18% are unsure but would like to do so.**

Figure 14. Proportion anticipating going on any overnight UK trips, percentage Wave 27, 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 27 n=1,763
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Planning and booking timeline compared to normal

- **At a net level, domestic spring and summer trip intenders are *planning* their overnight U.K. trips broadly in line with typical behaviour (i.e. pre-pandemic).**
- **However, both spring and summer intenders anticipate actually *booking* their trips significantly closer to the travel date than usual. This is especially the case for summer trips where more than twice the proportion claim they will book closer than normal to the travel date than further away from it.**

Figure 15. PLANNING lead times for Spring or Summer trips compared to normal, percentage wave 27, U.K.

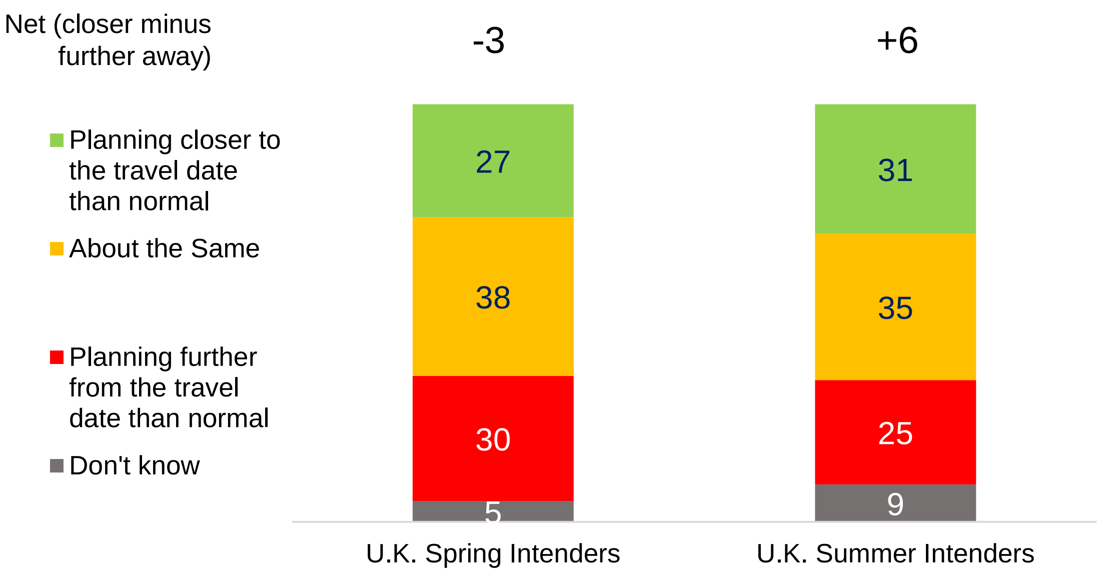
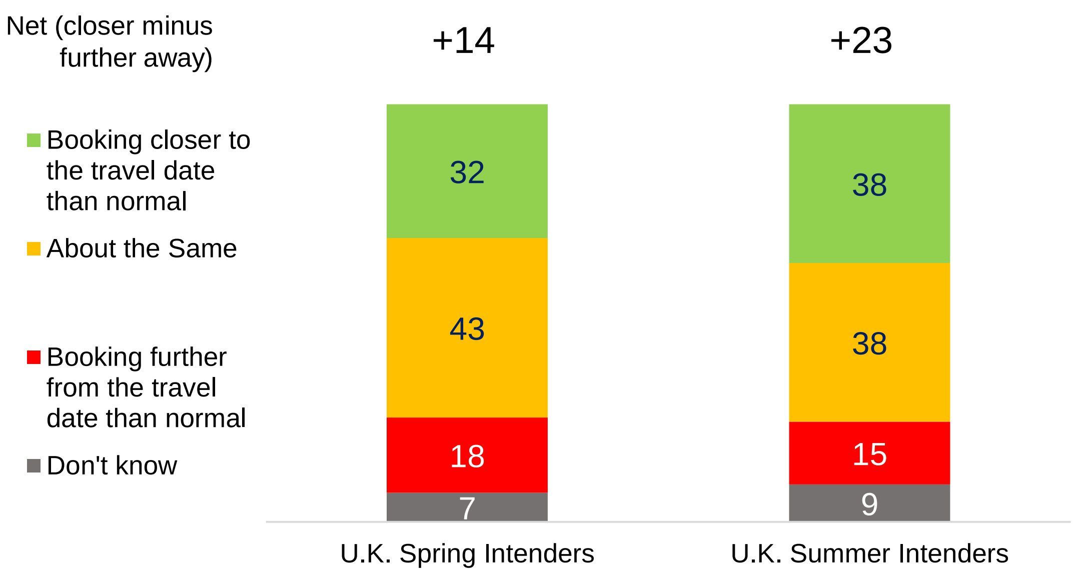


Figure 16. BOOKING lead times for Spring or Summer trips compared to normal, percentage wave 27, U.K.



VB6diic. Compared to normal, when did or will you plan and book your next UK trip?
Base: All Wave 27 respondents planning on taking a holiday or short break in the UK in Spring (April to June) n=246; Summer (July to September) n=455

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

- **Half of spring intenders (50%) claim to have already planned their trip, up from 43% in Wave 26. 44% have already booked it, a significant rise on the 29% that claimed to have done so in Wave 26.**
- **The proportion of intenders who have already planned or booked a summer trip (between July-September) is 25% and 19% respectively – consistent with Wave 26.**

Figure 17. Proportion of Intenders that have already *planned* their trip, percentage Wave 27 for Spring and Summer, UK

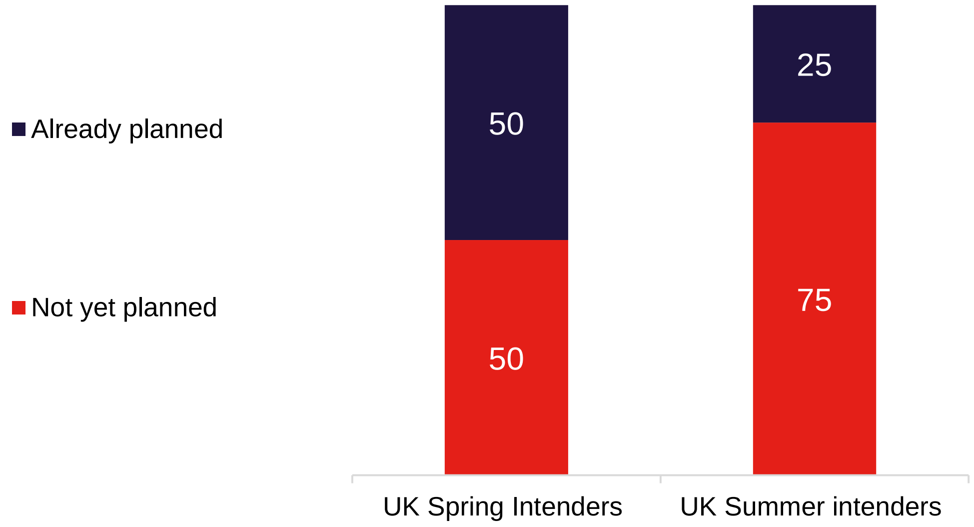
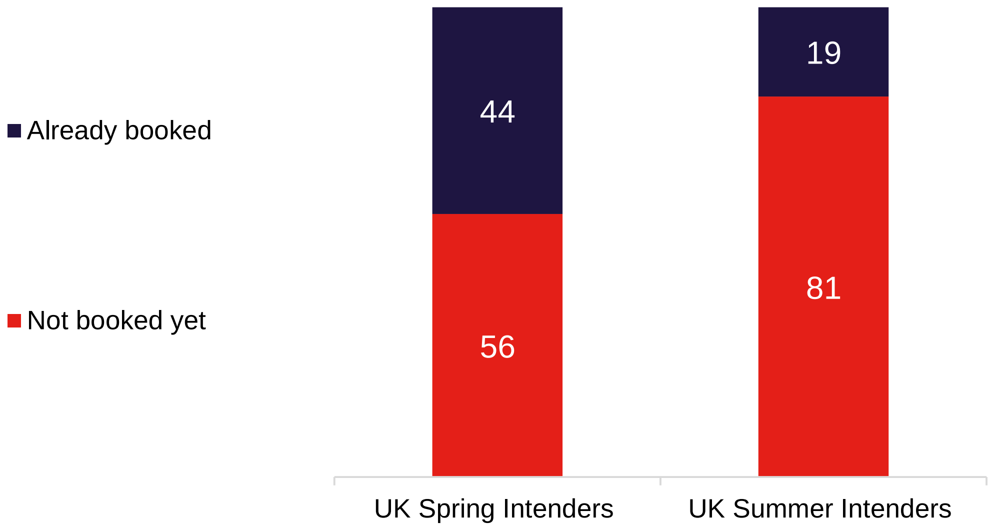


Figure 18. Proportion of Intenders that have already *booked* their trip, percentage for Spring and Summer, UK



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 27 respondents planning on taking a holiday or short break in the UK in Spring (April to June) n=246; Summer (July to September) n=455

Ideal method of booking accommodation for next overnight trip in UK

- **'Directly with an accommodation provider' remains the leading method of booking accommodation across both spring and summer. An 'online travel website' is the next most preferred booking channel across both time periods.**
- **Around a quarter of overnight trips planned for this spring and summer periods are transferred bookings that had previously been cancelled or postponed due to COVID-19.**

Figure 19. Accommodation booking channel for next trip in Spring and Summer, percentage Wave 27, UK

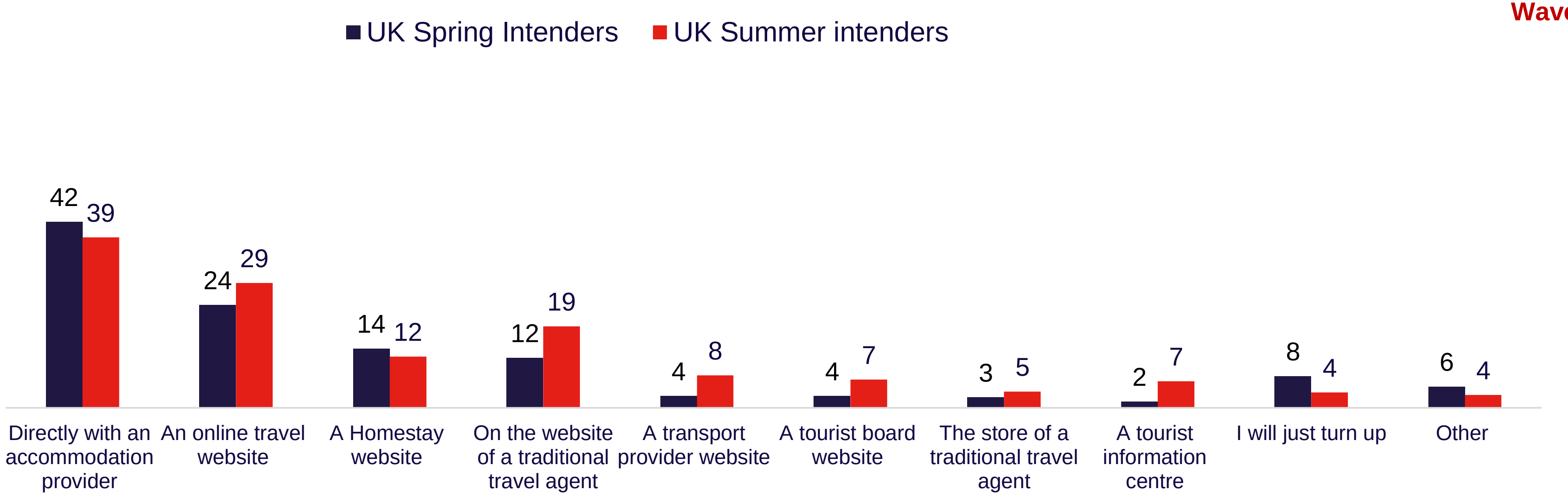
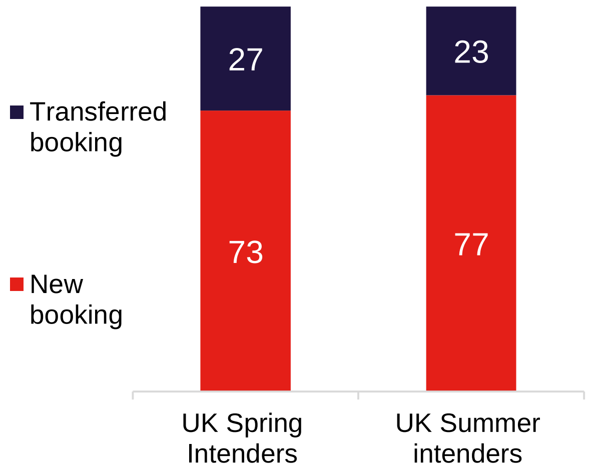


Figure 20. Proportion of next trips that are transferred bookings, percentage Wave 27 for Spring and Summer, UK



VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip. VB6diii Is this next trip a transferred booking from a trip that was previously cancelled or postponed due to COVID-19?
Base: All Wave 27 respondents planning on taking a holiday or short break in the UK for spring (April to June) n=237 and summer (July to September) n=455

Where planning on staying on next overnight trip in UK

- **The South West of England remains the leading destination for an overnight domestic trip during the spring and summer periods, with a dominant 24% share.**
- **However, comparatively little separates the shares of next five parts of the U.K. people say they intend to visit.**

Figure 21. Where planning on staying on next UK overnight trip in Spring, percentage Waves 26 and 27, UK

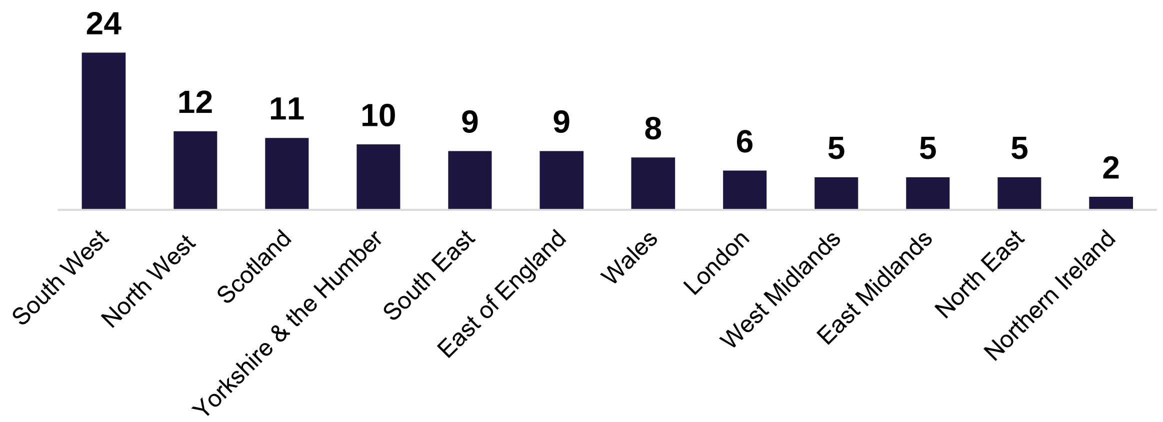
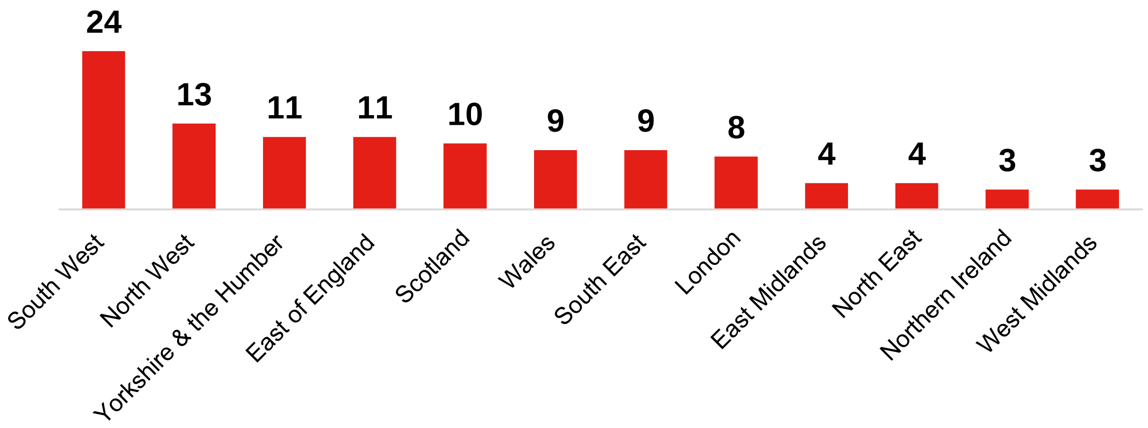


Figure 22. Where planning on staying on next UK overnight trip in Summer, Percentage Waves 26 and 27, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Waves 26 and 27 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=470; Summer (July to September) n=947
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

Destination type for next overnight trip in UK

- **There is minimal separation between the top two destination types for spring trips – around a third are likely to stay in either a 'traditional coastal/seaside town' (32%) or 'countryside or village' (31%).**
- **The same rank order of destination types is evident for trips intended to be taken during either the spring or summer periods.**

Figure 23. Main type of destination for trip in spring, percentage Waves 26 and 27, UK

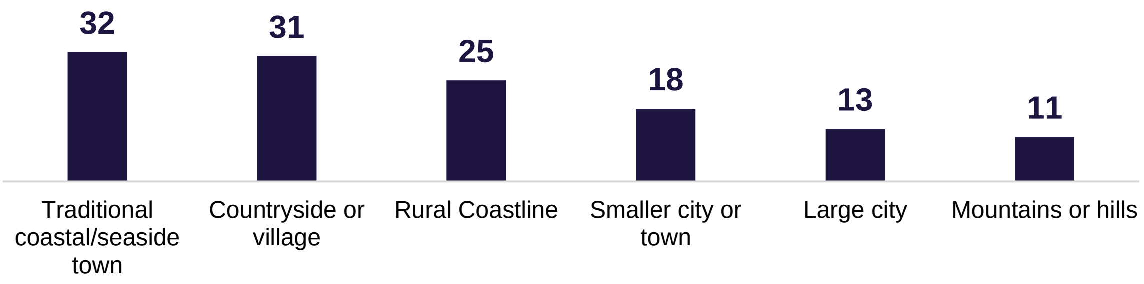
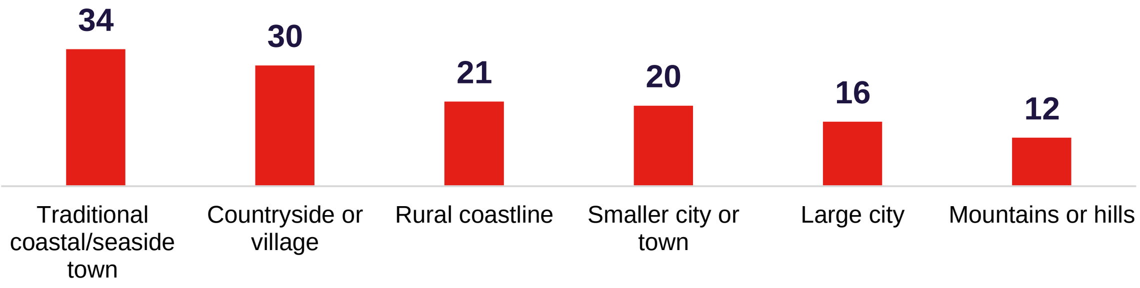


Figure 24. Main type of destination for trip in summer, percentage Waves 26 and 27, UK



QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All Waves 26 and 27 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=470; Summer (July to September) n=947
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

Accommodation type for next overnight trip in UK

- For spring trips, ‘commercial rental’ is the accommodation type of choice, marginally ahead of ‘camping/caravan’ although both ‘hotel/motel/inn’, and ‘a private home’ are close behind.
- There is also minimal separation between the top 4 considered accommodation types in the summer, but for this period ‘hotel/motel/inn’ has a jointly leading share with ‘commercial rental’.

Figure 25. Accommodation planning on staying in on next UK overnight trip in spring, net percentage Waves 26 and 27

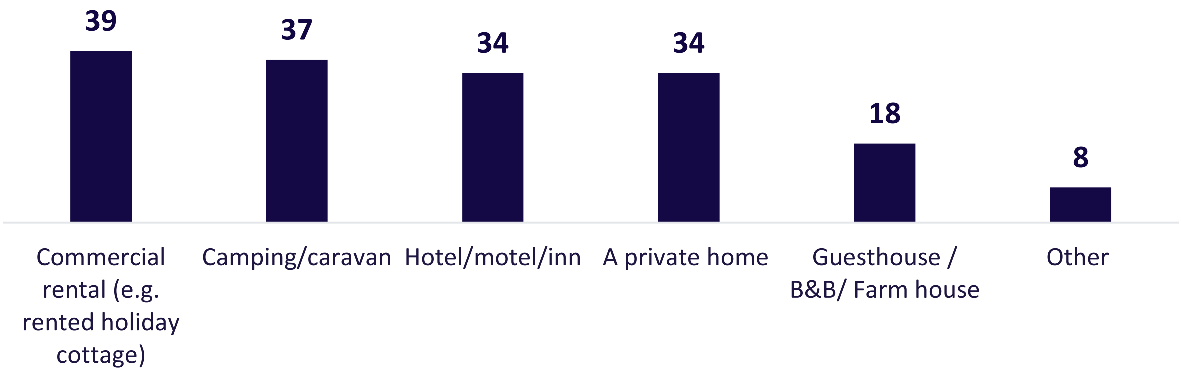
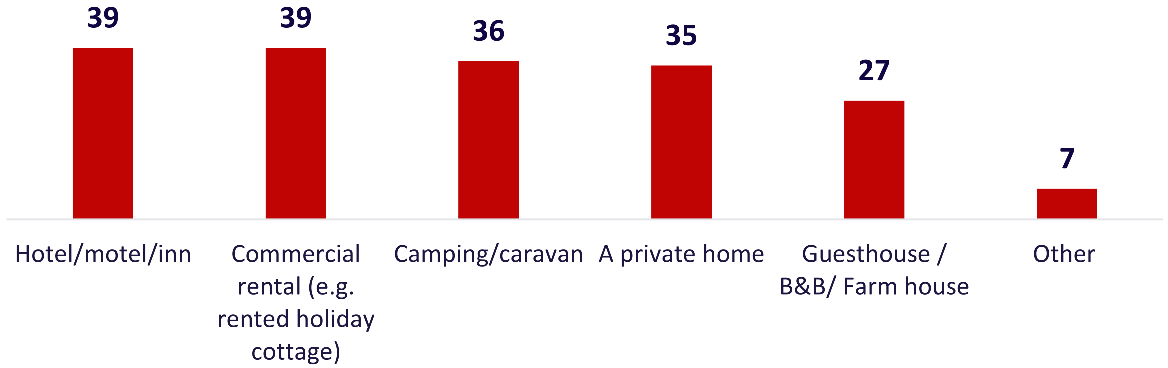


Figure 26. Accommodation planning on staying in on next UK overnight trip in summer, net percentage Waves 26 and 27

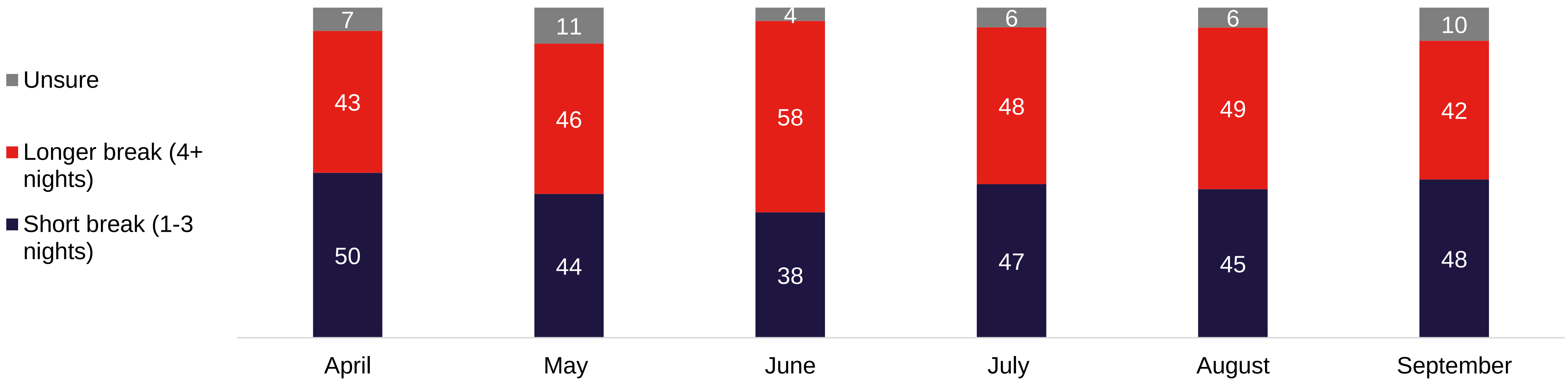


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Waves 26 and 27 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=470; Summer (July to September) n=947
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

Duration of the next overnight trip in UK

- **From May to August domestic overnight trips are more likely to be longer breaks of 4+ nights than short breaks of 1-3 nights, although it's very evenly balanced for the months of May and July.**
- **However, during April and September shorter trips are destined to be more likely.**

Figure 27. Length of next UK holiday or short break by time period, percentage Waves 26 and 27, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 26 and 27 respondents intending to take next holiday or short break in each time period: April n=80, May n=169, June n=221, July n=318, August n=356, September n=273,

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 71% stating this for spring trips and 65% for summer trips.**
- **'Train' is the second most likely mode of travel to an overnight destination in both time periods.**

Figure 28. Top 5 main modes of travel to destination for trip in spring, percentage, Wave 27, UK

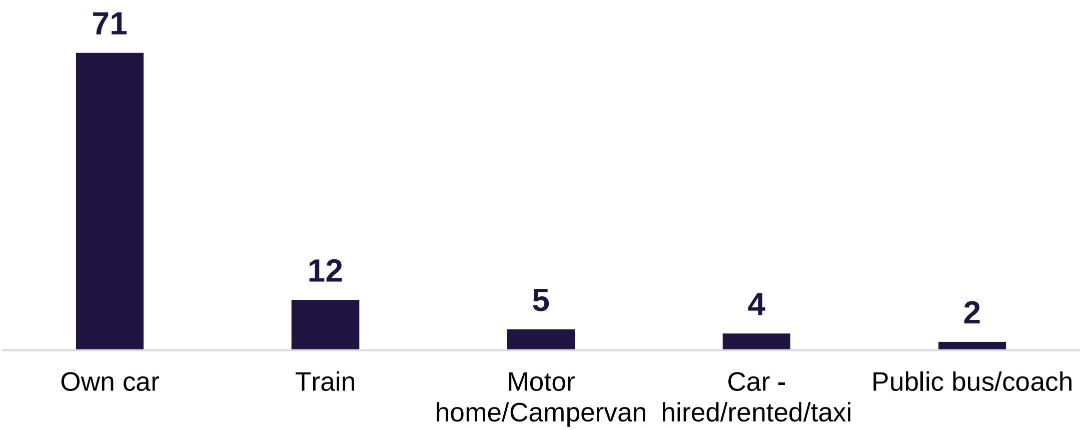
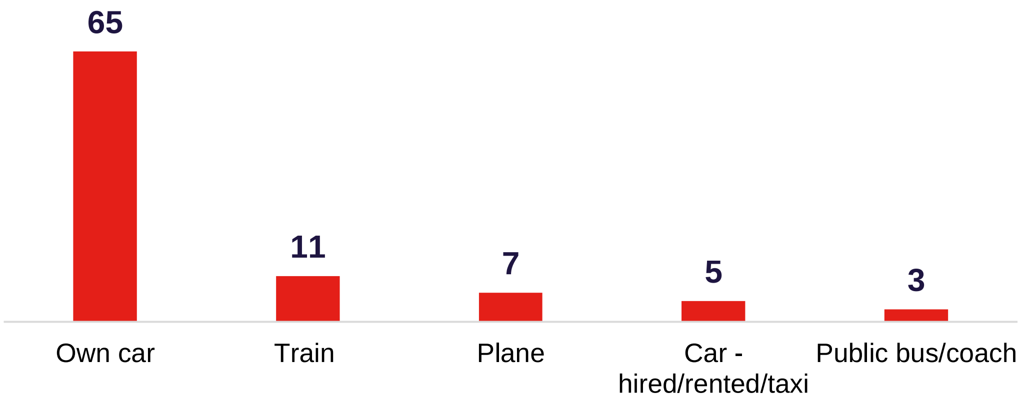


Figure 29. Top 5 main modes of travel to destination for trip in summer, percentage, Wave 27, UK

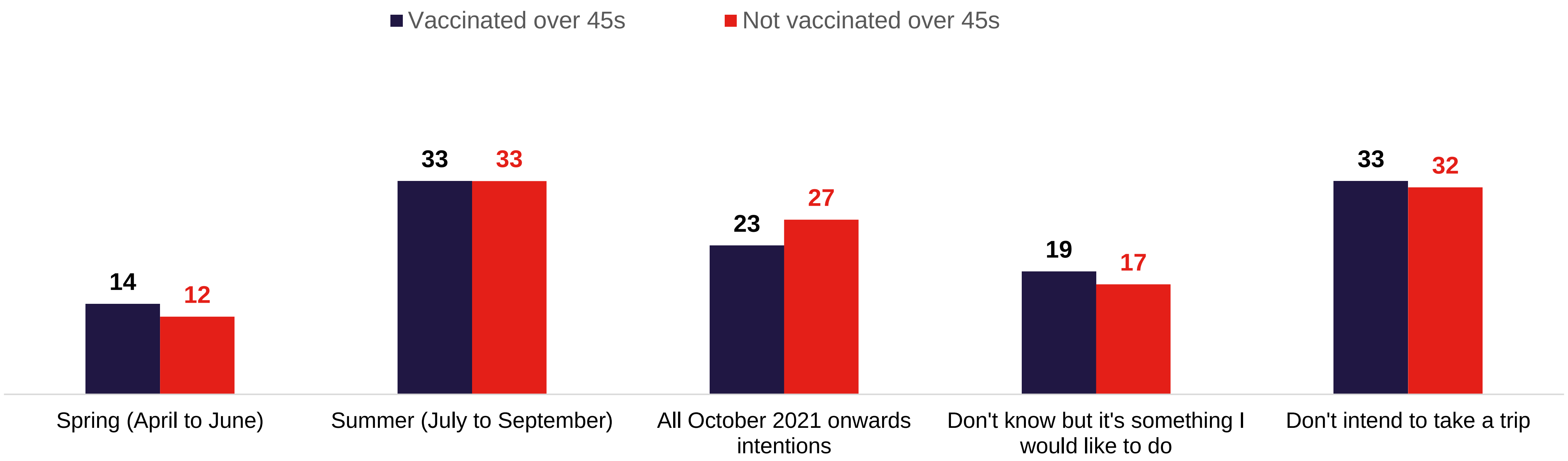


QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 27 respondents planning on taking a holiday or short break in the UK for spring (April to June) n=237 and summer (July to September) n=455 .

Vaccine impact on domestic overnight trip intent

- **U.K. adults aged over 45 and who claim to have had at least one dose of a Covid-19 vaccine exhibit marginally higher spring trip intent compared to those who have not been vaccinated.**
- **Summer intent is equal across both groups, but trip intent from October onwards is slightly higher among the non-vaccinated group.**

Figure 30. Proportion anticipating going on any overnight UK trip by vaccine status, Percentage Wave 27, UK

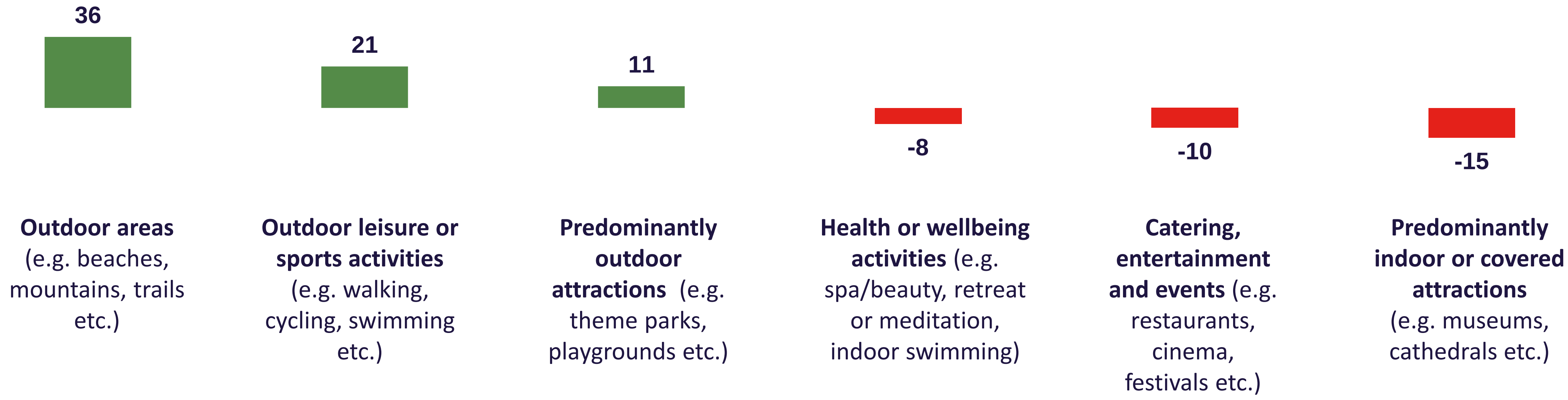


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All vaccinated respondents aged 45+ n=482; Non-vaccinated respondents aged over 45 n=203
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Leisure activity engagement in the next few months

- **Consistent with previous waves, outdoor areas are most likely to attract more visitors/engagement than normal (net +36), followed by outdoor leisure or sports activities (+21) and outdoor attractions (+15)**
- **‘Health or wellbeing activities’ (-8), ‘catering, entertainment and events’ (-10) and ‘predominantly indoor attractions’ (net -15) are likely to attract fewer visitors/engagement than normal.**

Figure 31. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’, Wave 27, UK



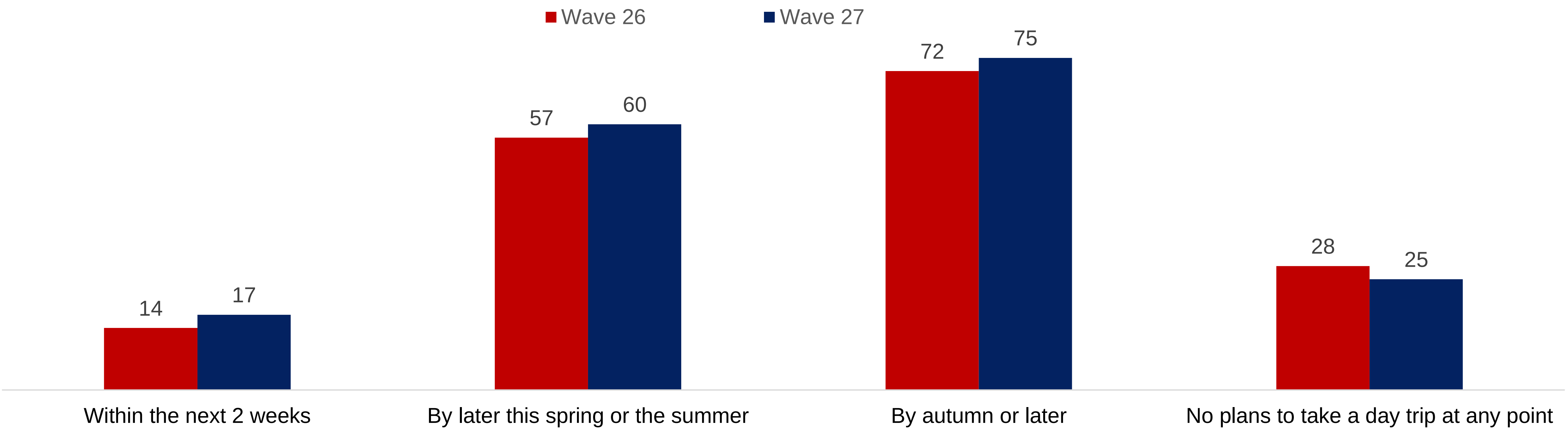
QVB9a/bB10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do over the next few months?
Base: All Wave 27 respondents n=1,763

3. Day Trip Intentions

Day trip intention overall

- Around 1 in 6 (17%) U.K. adults plan on taking a day trip of at least 3+ hours at some point within the next 2 weeks; a significant increase on Wave 26.
- 60% anticipate taking at least one day trip during the summer period and three quarters by autumn or later.
- 1 in 4 (25) have no plans to take a day trip at any point, representing a significant fall on Wave 26.

Figure 32. Likelihood to take any day trip, percentage wave-on-wave, UK

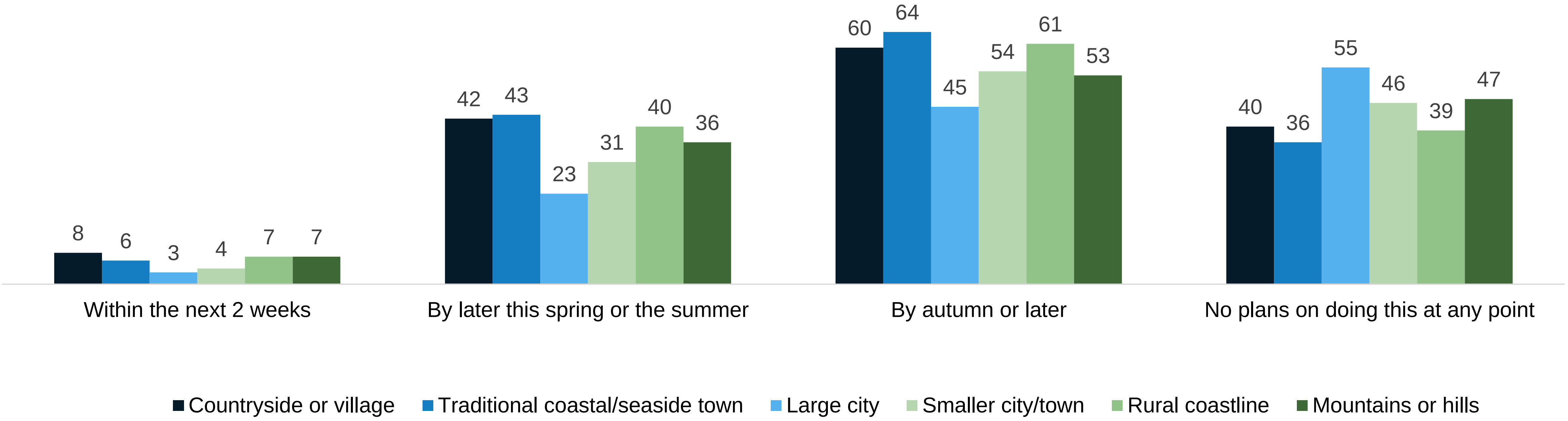


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 27 respondents n = 1,763
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.

Day trip intention by destination type

- The destinations of choice for day trippers are more likely to be rural or coastal in nature.
- Urban day trips, particularly to ‘Large cities’ have lower levels of intent especially during the spring and summer periods.

Figure 33. Likelihood to take a day trip by destination type, percentage, Wave 27, UK

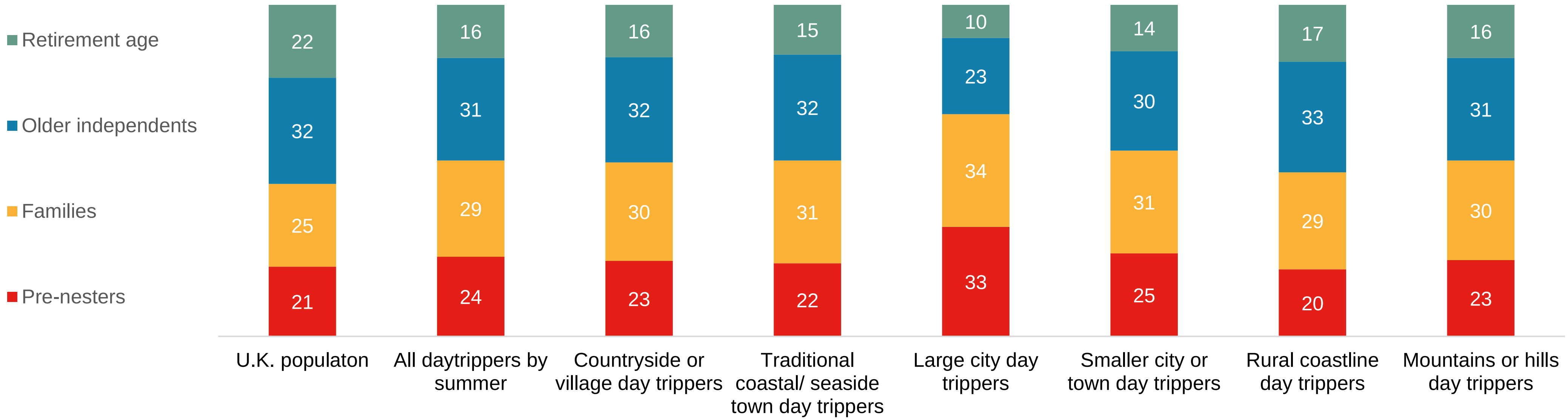


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 27 respondents n = 1,763
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.

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 show a considerably younger profile.

Figure 34. Breakdown of day trip intenders* by life stage, percentage, Wave 27, 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 27 respondents: *All day trippers within the next 2 weeks/early spring summer n=1057; All day-trippers Countryside or village day trippers n=749; Traditional coastal/ seaside town day trippers n=779 Large city day trippers n=444 Smaller city or town day trippers n=580 Rural coastline day trippers n=708 Mountains or hills day trippers n=659

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 27 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-26 where appropriate. Wave 27 fieldwork was conducted between 22nd and 26th 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.