COVID-19 Consumer Tracker

Wave 28

Published: 19th April 2021

Fieldwork Period: 6 – 10 April 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 6th to 10th April 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	6 – 10 April
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 28: Scorecard of Key Metrics

Key Metrics	Wave 27	Wave 28	Wave Shift
National mood (average score out of 10)	6.7	6.6	-0.1
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	38%	40%	+2
Appetite for Risk: Comfort in undertaking a range of activities (1-4 comfort score)	2.42	2.48	+0.06
Normality score (proportion expecting normality by June)	10%	5%	-5*
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)	12%	17%	+5*
Medium-term confidence in taking UK overnight trip (May/June confident)	20%/33%	23%/38%	+3*/+5*
Anticipated number of UK short breaks compared to normal (% more/the same)	46%	49%	+3
Anticipated number of UK longer breaks compared to normal (% more/the same)	44%	47%	+3
Proportion going on a UK overnight trip in Spring (April – June)	14%	13%	-1
Proportion going on a UK day trip in next two weeks	17%	22%	+5*
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)	Traditional coastal/seaside town	Traditional coastal/seaside town	No change
Main overnight accommodation type likely to stay in Spring (Apr – June)	Commercial rental	Commercial rental	No change
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

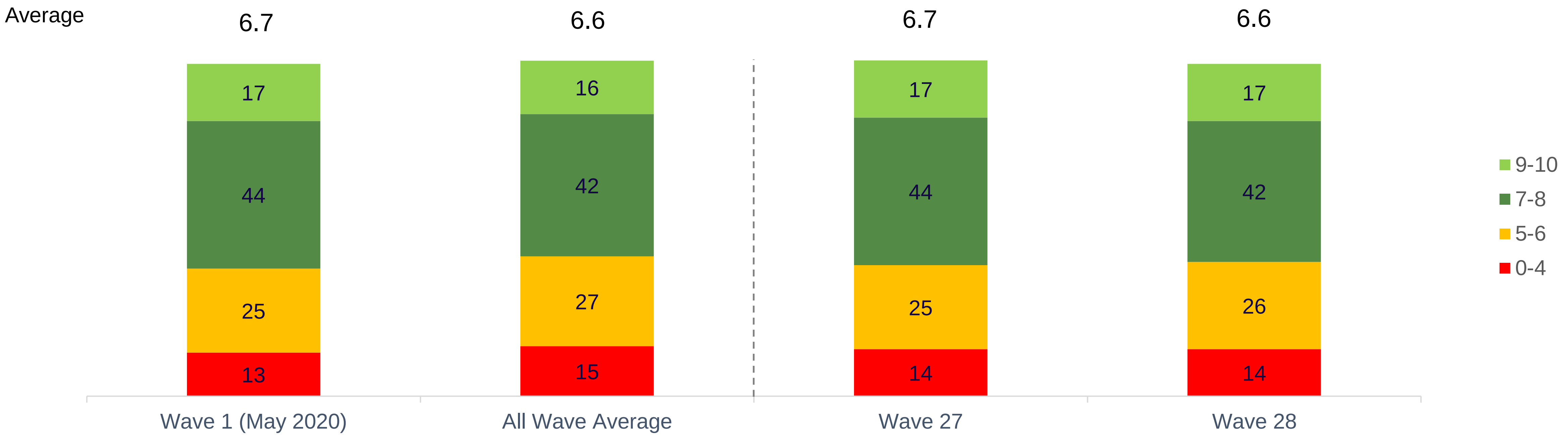
*** Represents a significant change on previous wave**

1. The National Mood

The National Mood

- **The average mood of U.K. adults is largely consistent with Wave 27 and the 'all wave average' at 6.6. Around 3 in 5 of U.K. adults rate their mood as 7 out of 10 or above, also consistent with the 'all wave average'.**

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

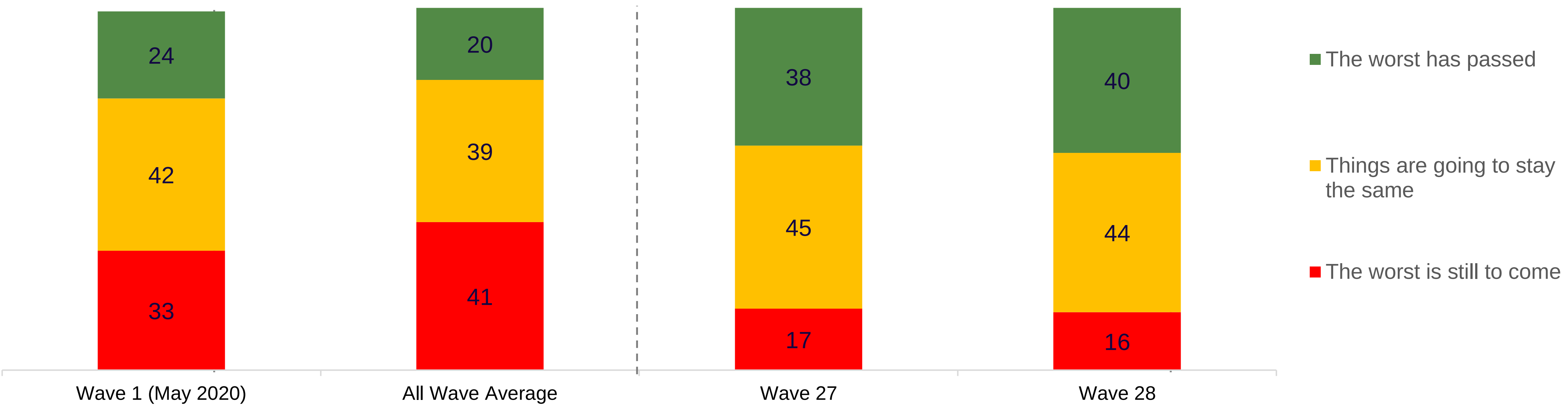


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 28 n=1,760
Wave average is based on Wave 1 to Wave 27.

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 currently stands at 40%; marginally up on Wave 27 and still significantly higher than the 'all wave average' of 20%.
- Despite generally growing levels of optimism, the majority remain of the opinion '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 28 n=1,760 Wave average is based on Wave 1 to Wave 27.

Perceptions of when things will 'return close to normal'

- **Just 12% of U.K. adults anticipate life will return to something 'close to normal' by July this year, rising to 19% by August – both of which have declined since Wave 27 when they were 17% and 24% respectively.**
- **The proportion expecting 'normality' by the end of this year has also eased for the second consecutive wave, declining by 6 percentage points compared to Wave 27.**

Figure 3. Perceptions of when things will return 'close to normal', cumulative percentage, Wave 28, UK

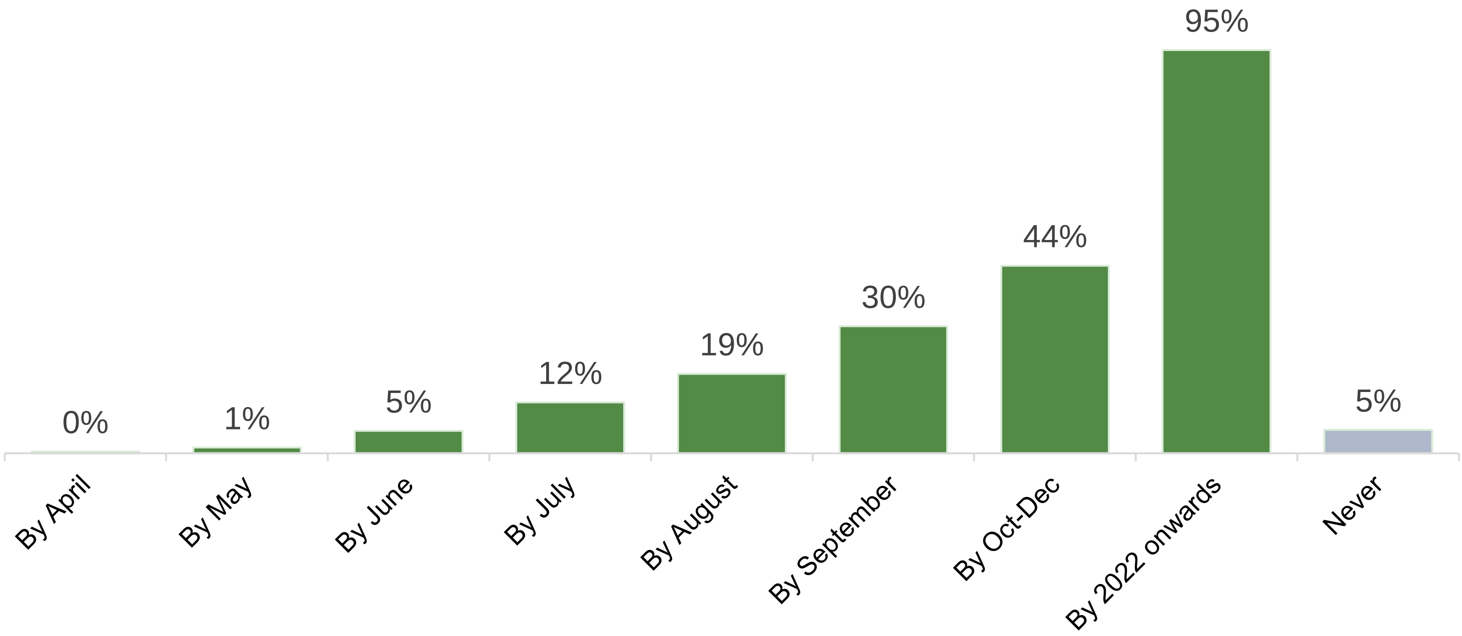
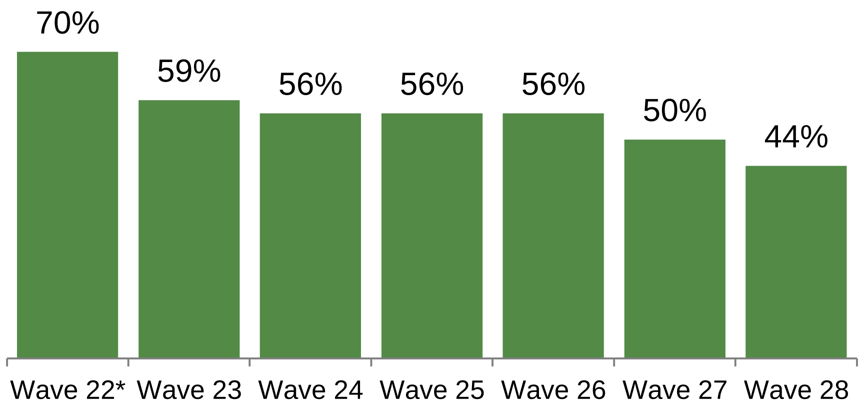


Figure 4. Proportion expecting normality by December, percentage wave-on-wave, UK



Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 28 n=1,760

Confidence in the ability to take overnight trips in UK

- **17% of U.K. adults are confident that an overnight domestic trip booked for April would go ahead as intended, representing a rise on Wave 27, when 12% cited confidence.**
- **Confidence has also risen for overnight domestic trips for all other months between May and September, although it isn't until August that a majority are confident that planned trips would go ahead as intended.**

Figure 5. Confidence in taking a UK overnight trip across different time periods, percentage, Wave 28, UK

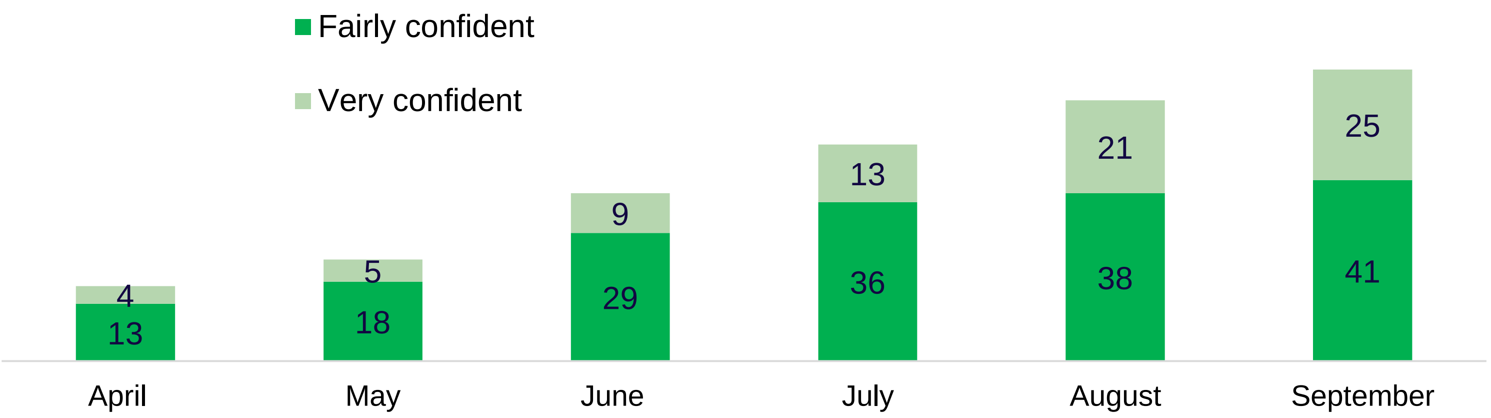
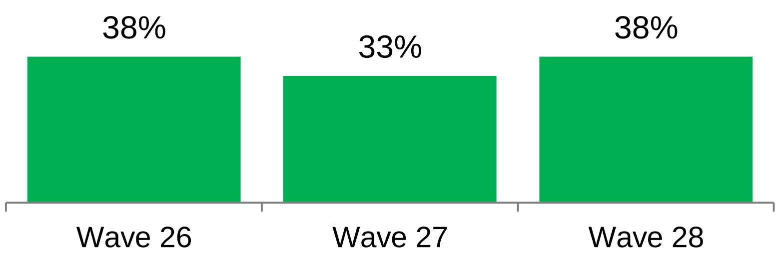


Figure 6. Confidence in taking a UK overnight trip in June 2021, percentage wave-on-wave, UK



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 28 n=1,760

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.**
- **Restrictions on opportunities to eat/drink out and on things to do are the second and third most important factors cited for a lack of confidence during the spring period.**
- **Interestingly, fears around catching COVID-19 is a stronger factor impacting confidence during the summer months, possibly driven by concerns related to over-crowding, new more resistant strains or ongoing vaccine availability.**

Figure 7. Top 5 reasons for not being confident about travelling in Spring*, percentage Wave 28, UK

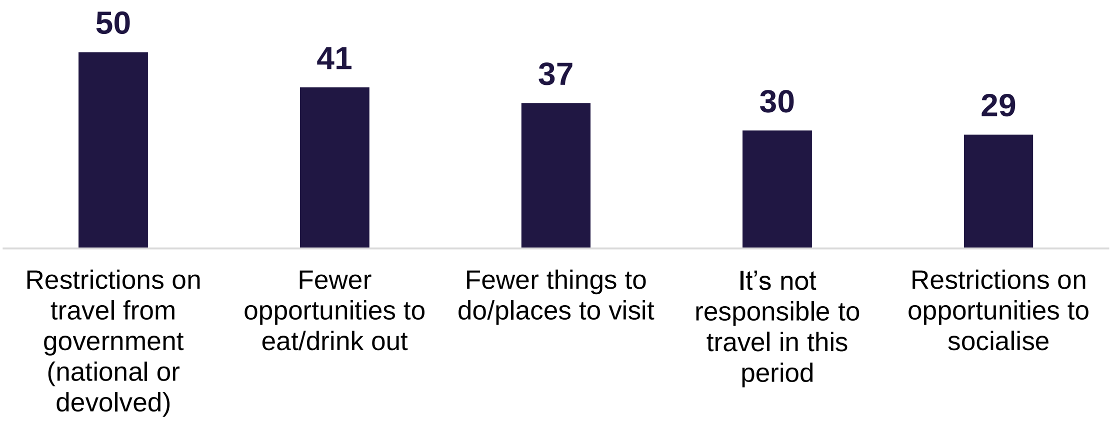
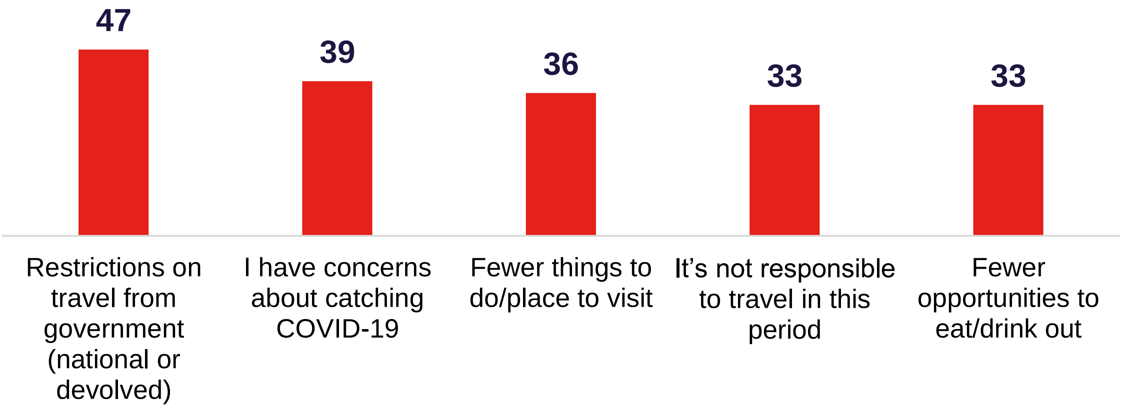


Figure 8. Top 5 reasons for not being confident about travelling in Summer*, percentage Wave 28, UK

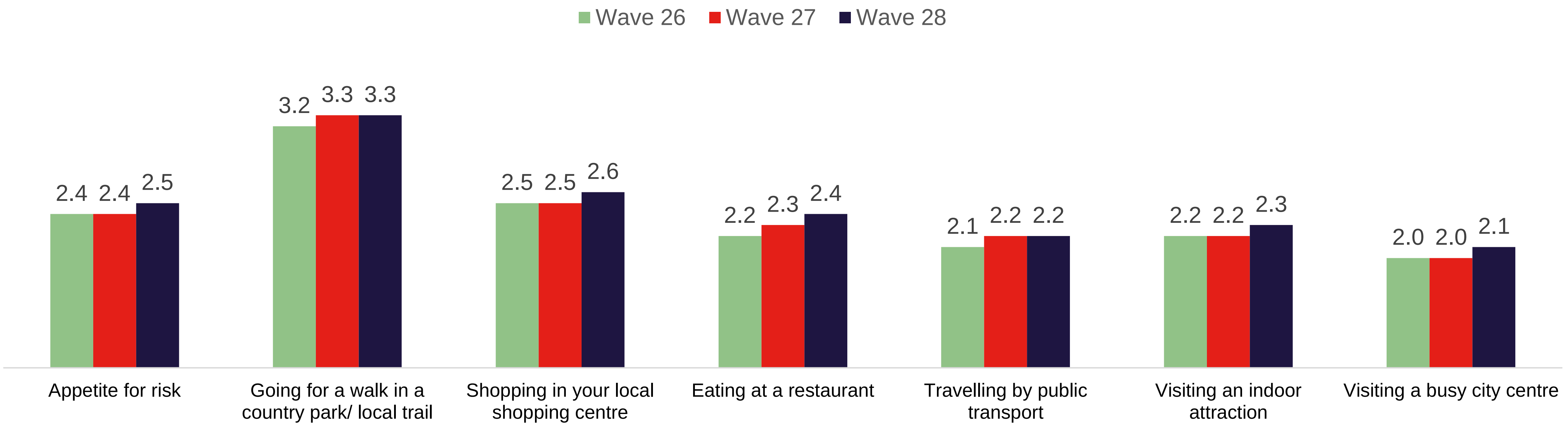


QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a UK short break or holiday? Base: Wave 28 respondents not confident about taking a break in Spring n=355 and Summer n=468. *Spring is defined as April to June, Summer is defined as July to September

The 'Appetite for Risk'

- The overall 'appetite for risk' score sits at 2.5, which represents a slight gain on Wave 27.
- The rise in sentiment is driven by increasing comfort levels across most of the listed activities including: 'shopping in your local shopping centre'; 'eating at a restaurant'; 'visiting an indoor attraction' and 'visiting a busy city centre'.

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 28 n=1,760

2. Overnight Trip Intentions

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

- **Between now and the end of the year, almost half of U.K. adults intend to take more or about the same number of domestic overnight short breaks (49%) or longer breaks of 4+ nights (47%) compared to normal – both of which have increased since Wave 27, when they were 46% and 44% respectively.**
- **A significantly 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'.**

Figure 10. Number of U.K. overnight trips between now and the end of the year compared to normal, Percentage Wave 28, UK

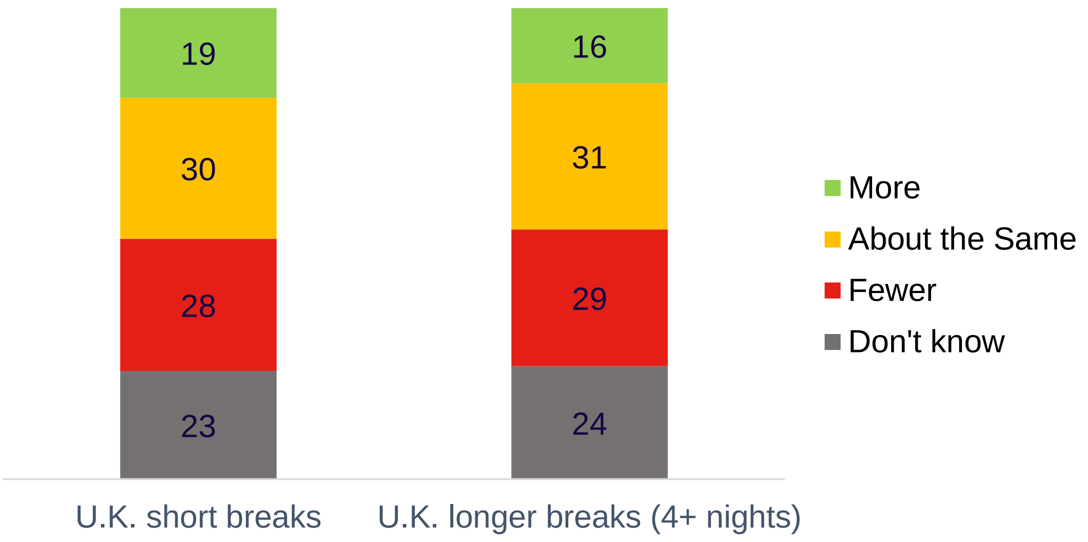
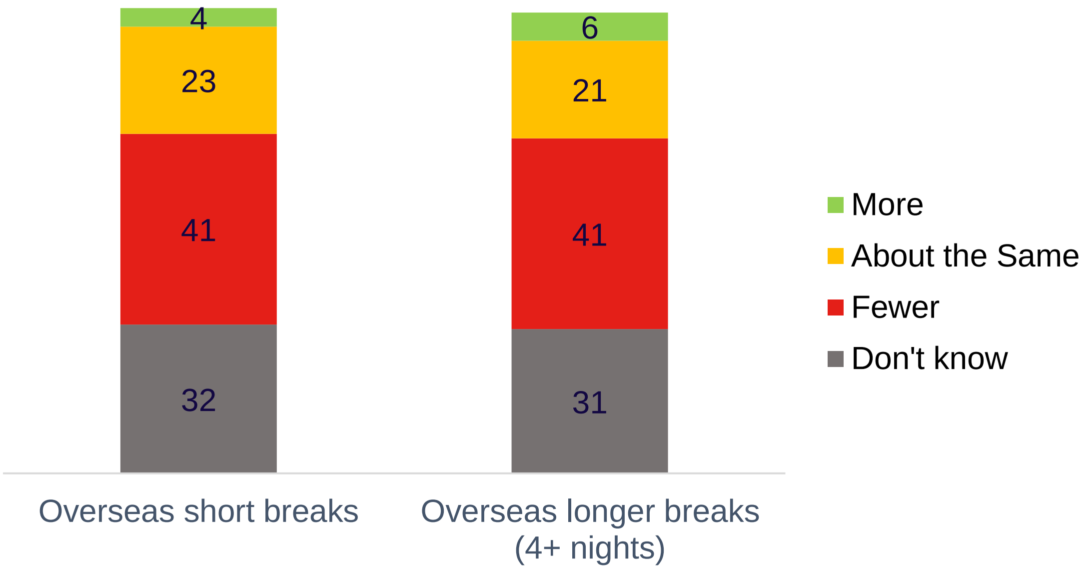


Figure 11. Number of OVERSEAS overnight trips between now and the end of the year compared to normal, Percentage Wave 28, UK



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 28 n=1,760.

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

- 20% of U.K. adults claim to have already planned and 15% already booked their next domestic overnight trip, both of which represent increases on Wave 27, when they were 17% and 13% respectively.
- Also notably, the proportion of those not intending to either plan or book a domestic overnight trip at any point has decreased compared to the previous wave (‘not planning’ down from 25% to 21%; ‘not booking’ down from 25% to 22%).

Figure 12. When anticipate TO PLAN the next UK overnight trip, percentage Wave 28, UK

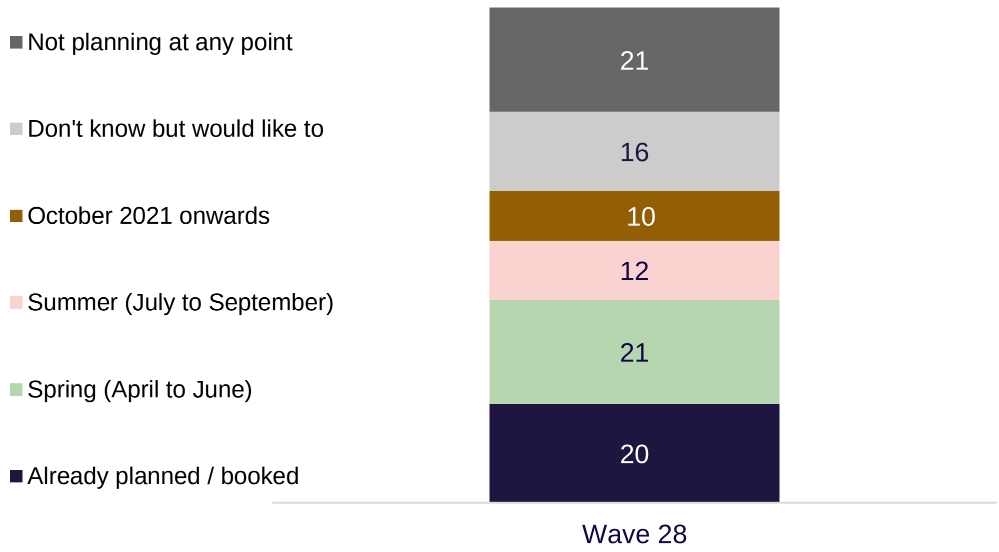
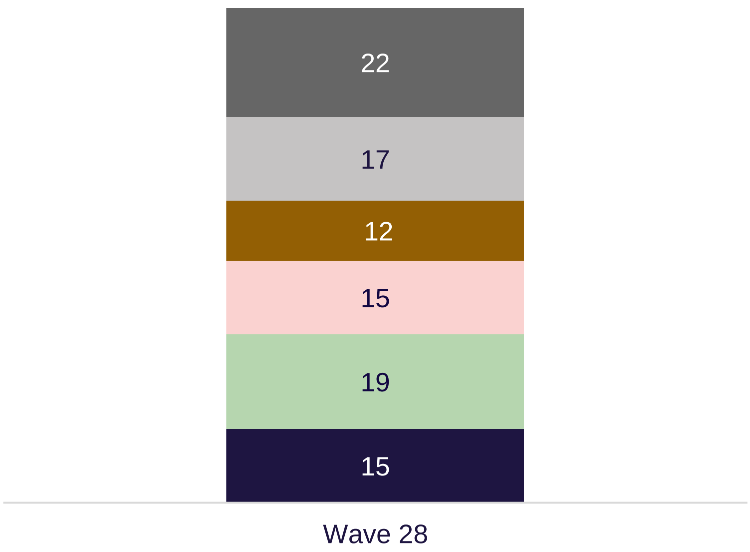


Figure 13. When anticipate BOOKING the next UK overnight trip, Percentage Wave 28, UK

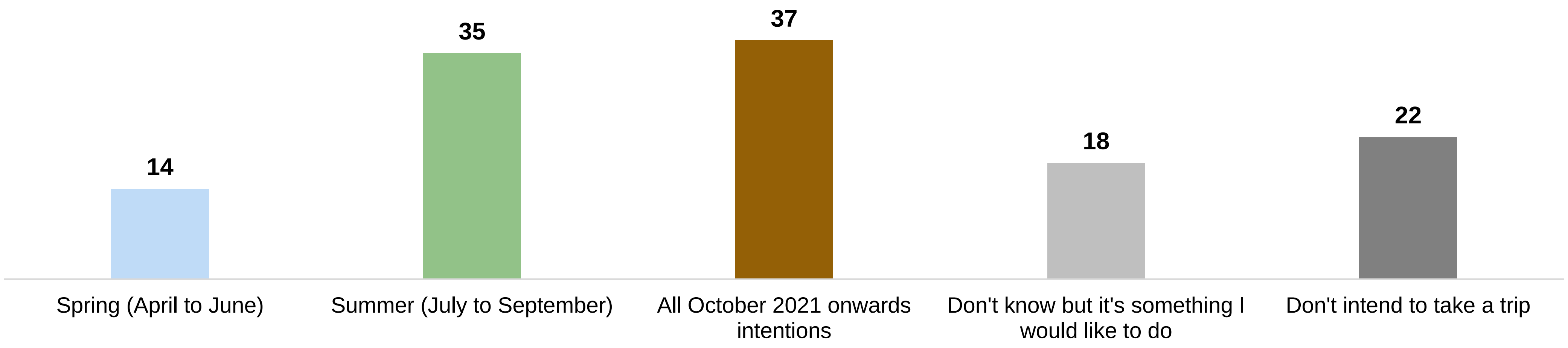


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 28 n=1,760. *Winter = January to March; Spring = April to June; Summer = July to September

When anticipate taking overnight trips in the UK

- 14% of U.K adults are currently intending to take a domestic overnight trip between now and the end of June, which is consistent with Wave 27.
- Just over a third (35%) anticipate taking a summer trip; also unchanged since Wave 27. Nearly 2 in 5 of U.K. adults intend to take a domestic overnight trip at some point from October 2021 onwards, a proportion that has increased by 5 percentage points since the previous wave.
- 22% are not intending to take any domestic overnight trips at all, a figure that has fallen by 3 percentage points since Wave 27.

Figure 14. Proportion anticipating going on any overnight UK trips, percentage Wave 28, 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 28 n=1,760
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, at a net level both spring and summer intenders anticipate actually *booking* their trips significantly closer to the travel date than usual.

Figure 15. PLANNING lead times for Spring or Summer trips compared to normal, percentage wave 28, U.K.

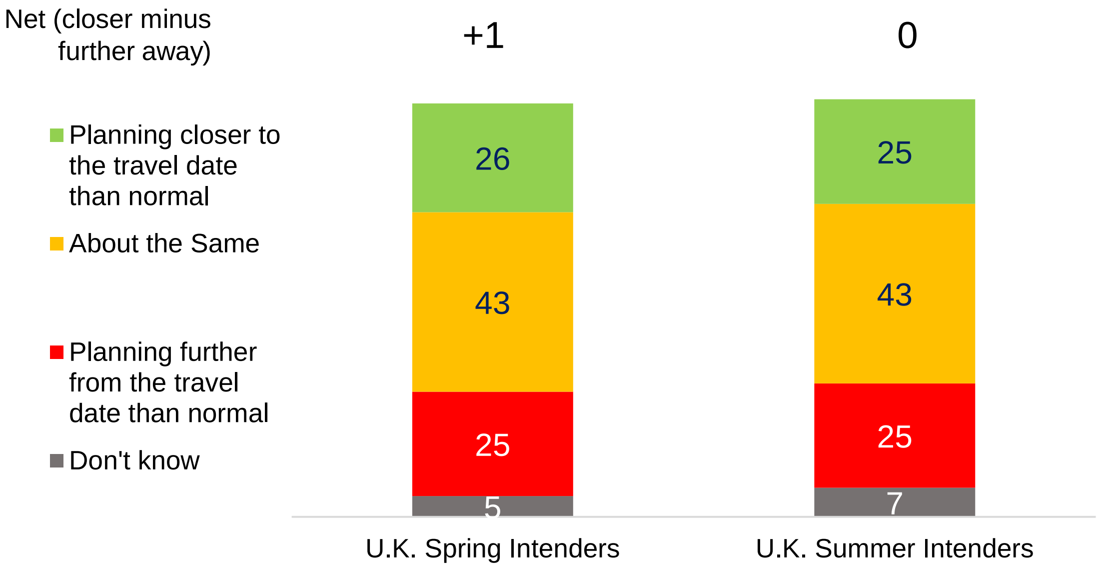
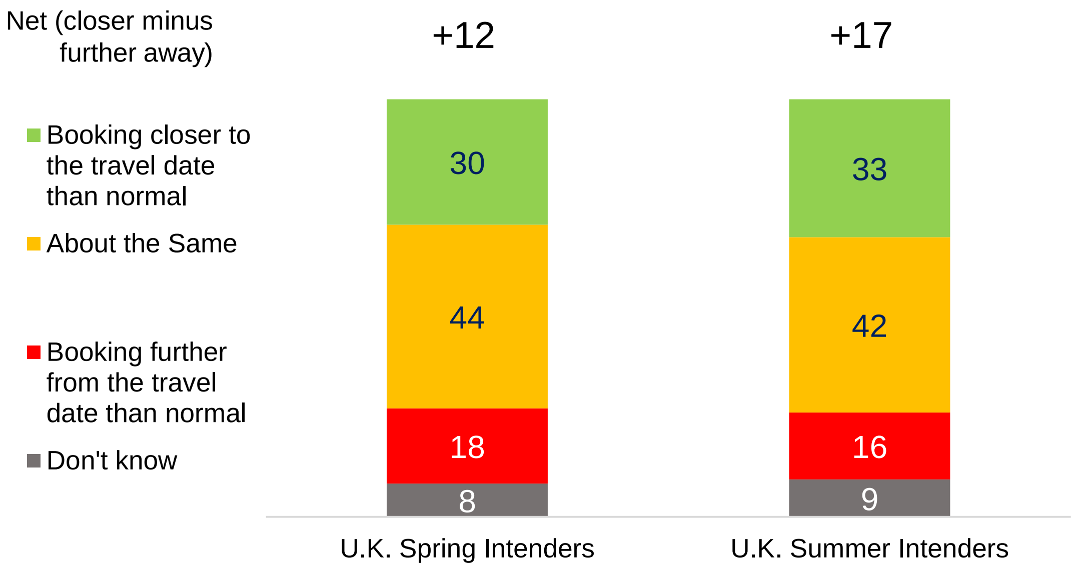


Figure 16. BOOKING lead times for Spring or Summer trips compared to normal, percentage wave 28, U.K.



VB6diic. Compared to normal, when did or will you plan and book your next UK trip?
Base: All Wave 28 respondents planning on taking a holiday or short break in the UK in Spring (April to June) n=225; Summer (July to September) n=468

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

- **62% of spring intenders claim to have already planned their trip; significantly up from 50% in Wave 27. Some 49% have already booked it, a rise on the 44% that claimed to have done so in Wave 27.**
- **The proportion summer intenders who have already planned or booked their trip stands at 29% and 22% respectively, both of which have also increased since Wave 27 (at 25% and 19%).**
- **31% of spring bookings and 24% of summer bookings are transferred from trips that have previously been cancelled or postponed due to COVID-19.**

Figure 17. Proportion of Intenders that have already *planned* their trip, percentage Wave 28 for Spring and Summer, UK

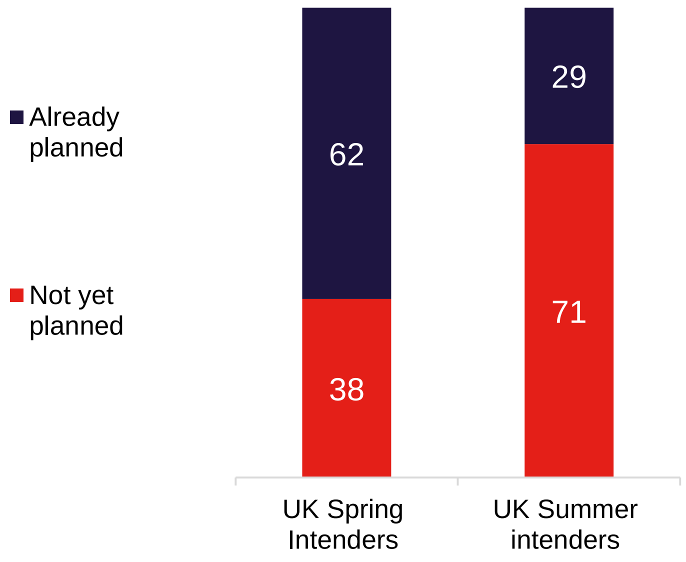


Figure 18. Proportion of Intenders that have already *booked* their trip, percentage Wave 28 for Spring and Summer, UK

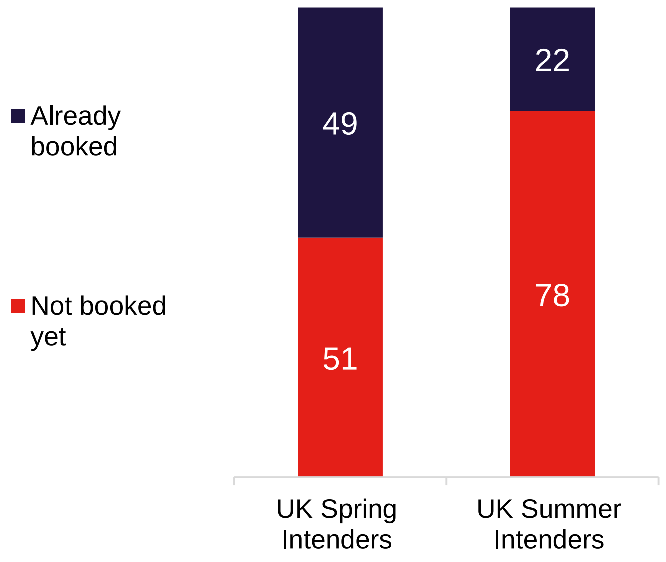
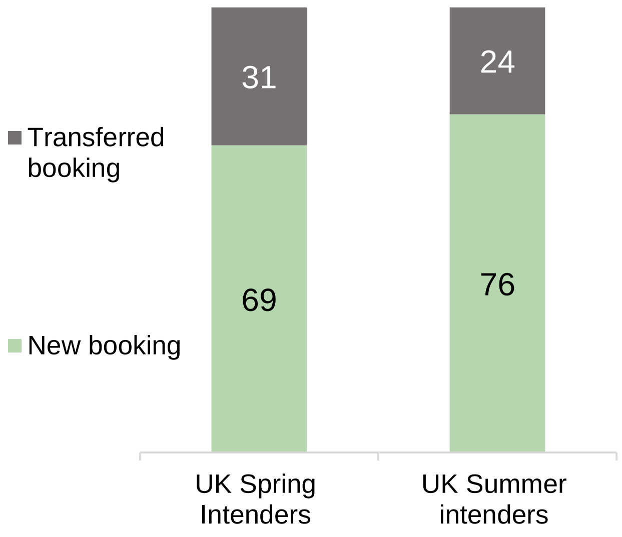


Figure 19. Proportion of next trips that are *transferred bookings*, percentage Wave 28 for Spring and Summer, UK

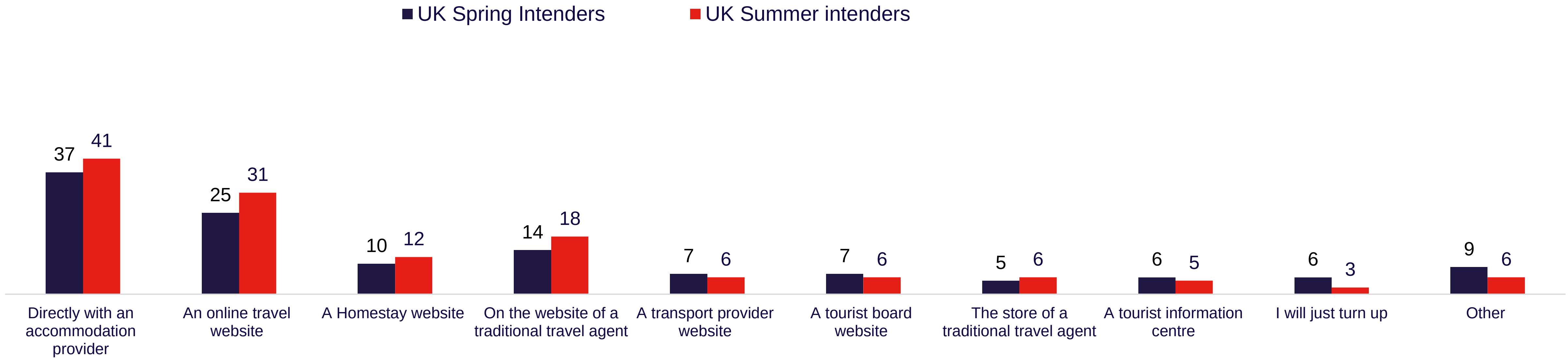


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 28 respondents planning on taking a holiday or short break in the UK in Spring (April to June) n=225; Summer (July to September) n=468

Ideal method of booking accommodation for next overnight trip in UK

- **‘Directly with an accommodation provider’ remains the leading anticipated method of booking accommodation across both the spring and summer periods.**
- **Using an ‘online travel website’ is the next most preferred booking channel across both time periods.**

Figure 19a. Accommodation booking channel for next trip in Spring and Summer, percentage Wave 28, 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 28 respondents planning on taking a holiday or short break in the UK for spring (April to June) n=225 and summer (July to September) n=468

Where planning on staying on next overnight trip in UK

- The South West of England remains the lead destination for an overnight domestic trip during the spring and summer periods, with a 26% and 24% share respectively.
- As in the previous wave, comparatively little separates the subsequent four destinations, with shares all around the 10% mark.

Figure 21. Where planning on staying on next UK overnight trip in Spring, percentage Waves 27 and 28, UK

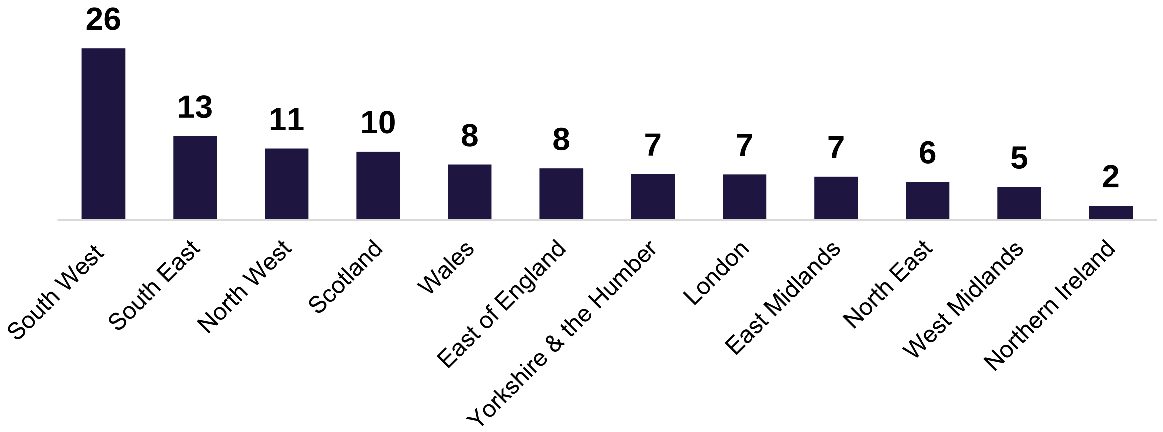
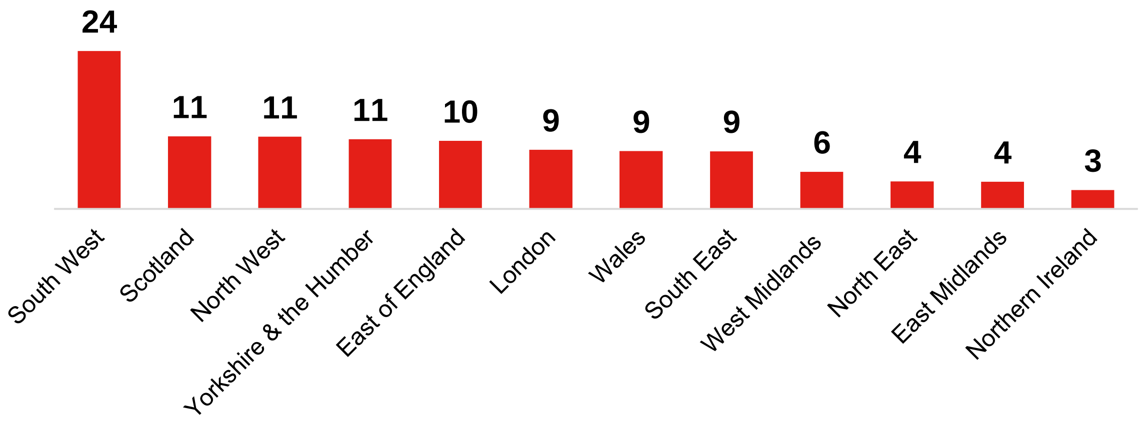


Figure 22. Where planning on staying on next UK overnight trip in Summer, Percentage Waves 27 and 28, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Waves 27 and 28 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=412; Summer (July to September) n=923
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 3 in 10 are likely to occur in either a 'traditional coastal/seaside town' (30%) or 'countryside or village' (27%), both of which have significantly higher shares than other destination types.
- The rank order for summer trips is broadly similar to spring, although 'Large city' overtakes 'mountains or hills'.

Figure 23. Main type of destination for trip in spring, percentage
Waves 27 and 28, UK

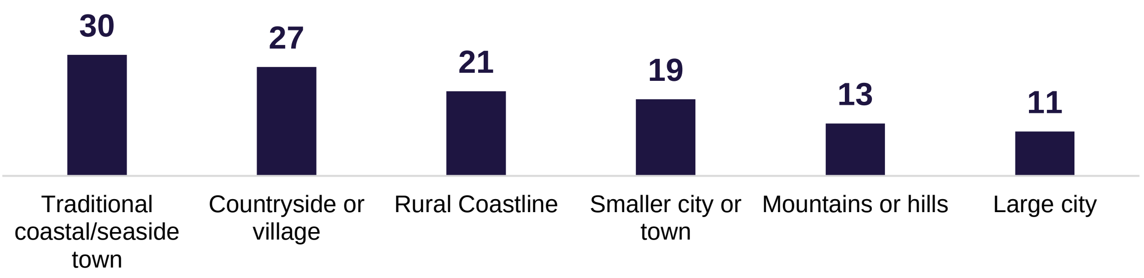
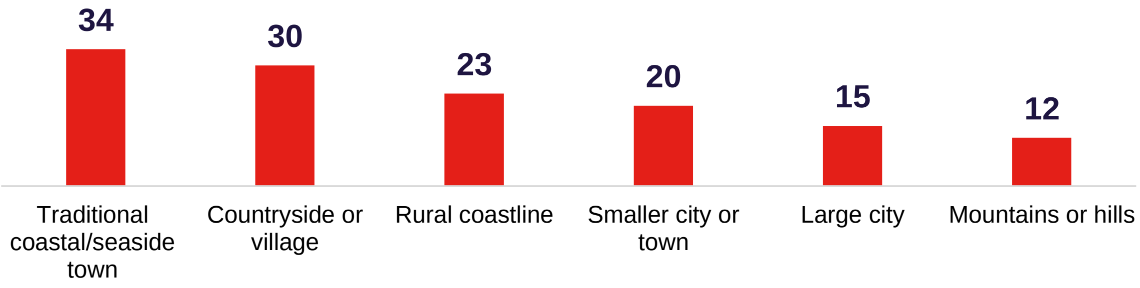


Figure 24. Main type of destination for trip in summer, percentage
Waves 27 and 28, UK



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 27 and 28 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=412; Summer (July to September) n=923
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 both spring trips, ‘commercial rental’ (e.g. holiday cottage) is the leading accommodation choice, although only marginally ahead of ‘camping/caravan’, ‘hotel/motel/inn’ and ‘private home’.
- The leading accommodation types remain the same for trips destined to be taken during the summer period, albeit in a slightly different rank order, however ‘commercial rental’ is significantly ahead of second-placed ‘hotel/motel/inn’.

Figure 25. Accommodation planning on staying in on next UK overnight trip in spring, net percentage Waves 27 and 28

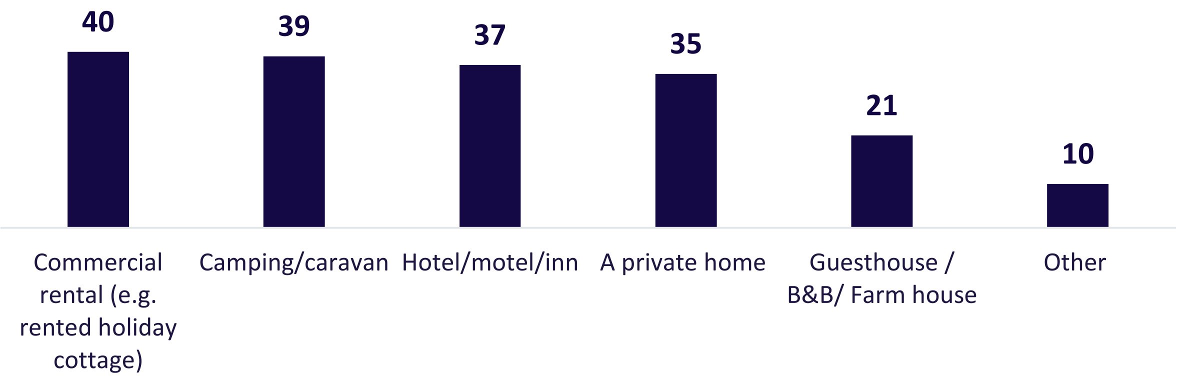
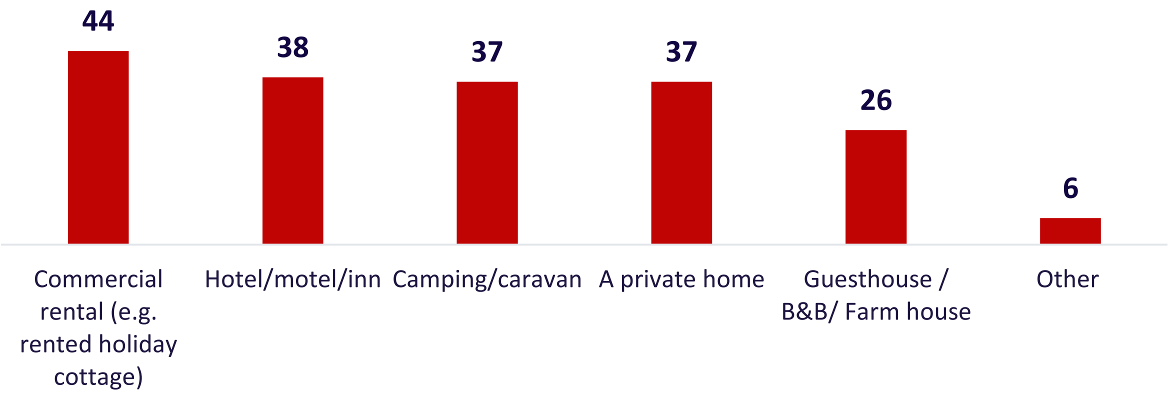


Figure 26. Accommodation planning on staying in on next UK overnight trip in summer, net percentage Waves 27 and 28

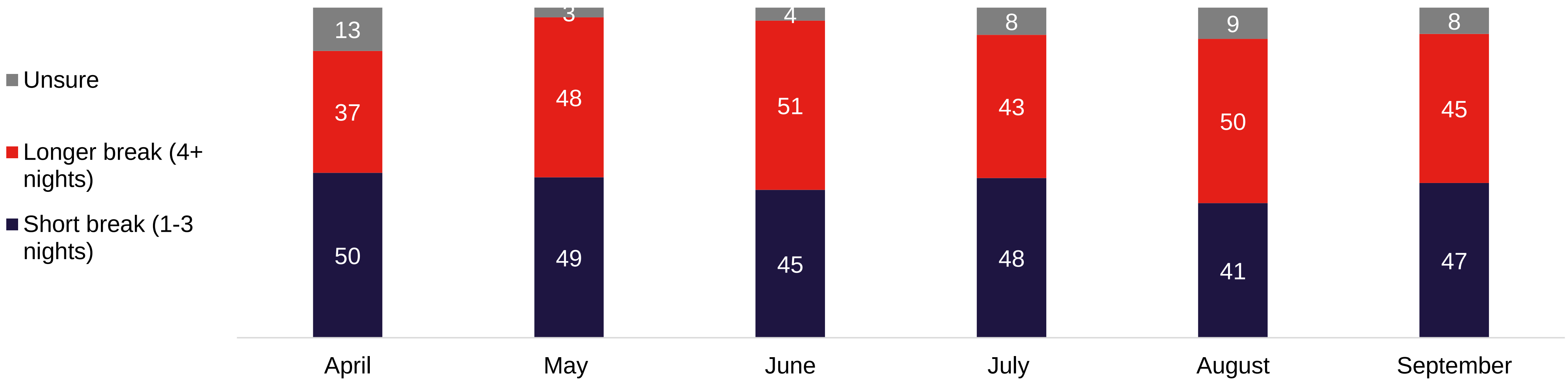


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Waves 27 and 28 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=412; Summer (July to September) n=923
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

Duration of the next overnight trip in UK

- **Broadly speaking, overnight domestic trips are relatively evenly split between short breaks (1-3 nights) and longer breaks (4+ nights), although longer trips are slightly more prevalent during June and the peak August holiday period.**

Figure 27. Length of next UK holiday or short break by time period, percentage Waves 27 and 28, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 27 and 28 respondents intending to take next holiday or short break in each time period: April n=55, May n=166, June n=211, July n=317, August n=341, September n=265,

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 65% stating this for spring trips and 70% 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 28, UK

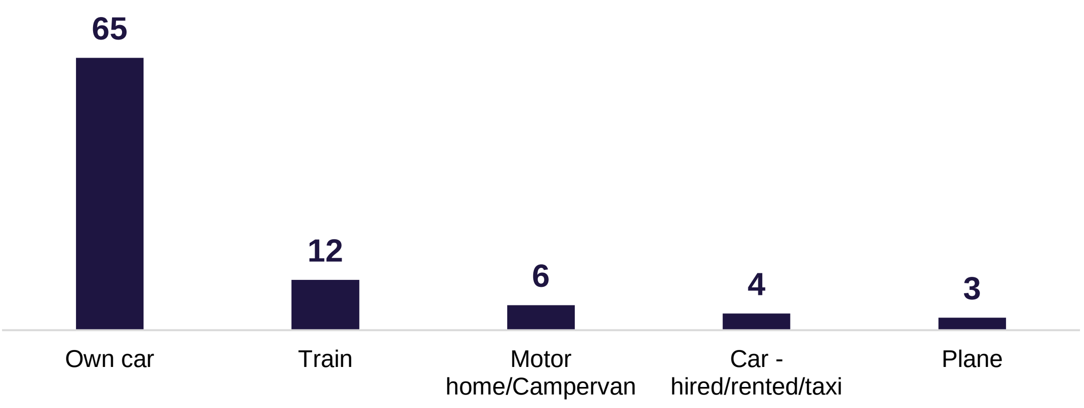
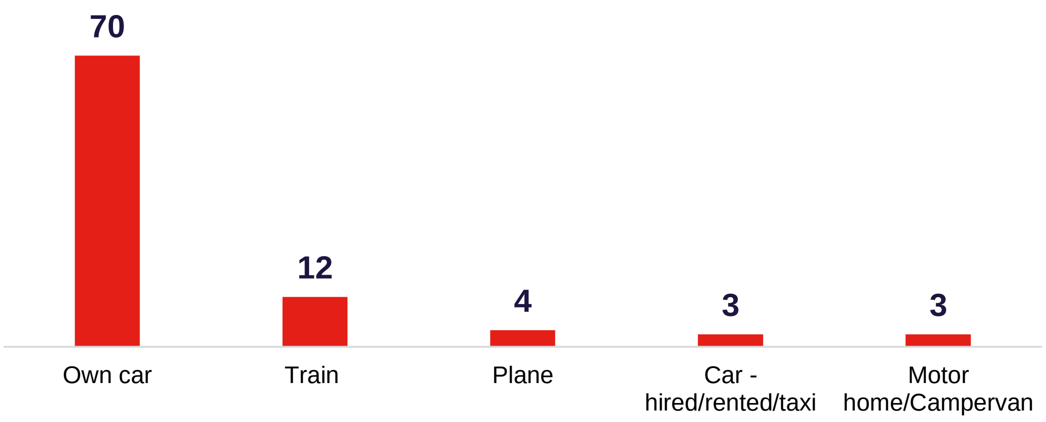


Figure 29. Top 5 main modes of travel to destination for trip in summer, percentage, Wave 28, UK

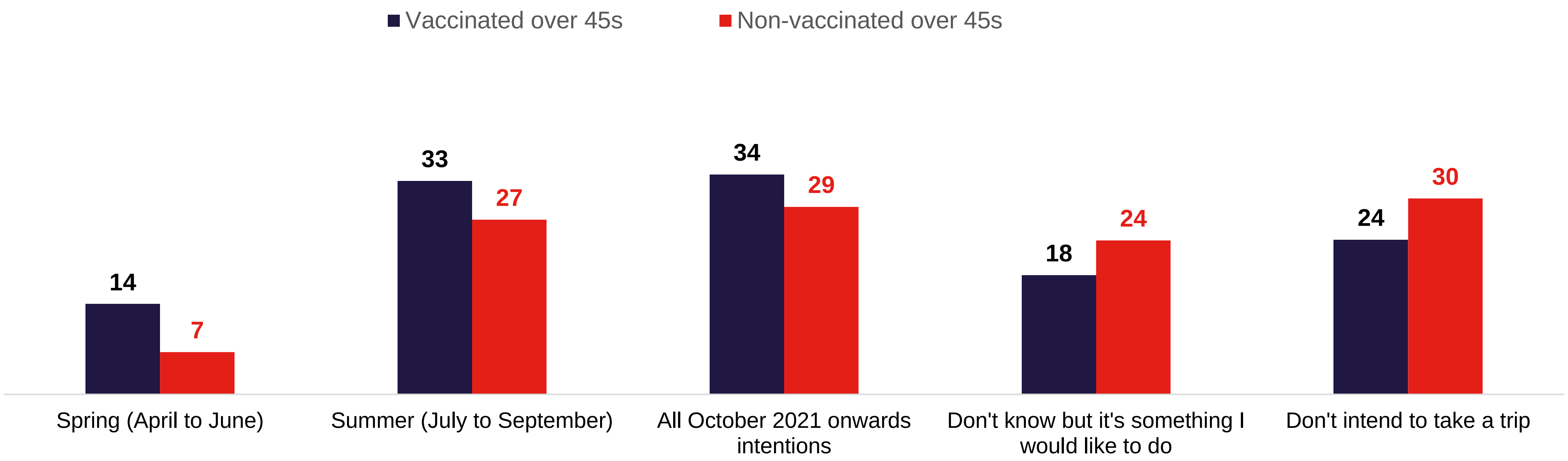


QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 28 respondents planning on taking a holiday or short break in the UK for spring (April to June) n=225 and summer (July to September) n=468.

Vaccine impact on domestic overnight trip intent

- **U.K. adults aged over 45 who claim to have had at least one dose of a Covid-19 vaccine express a greater likelihood to go on a domestic overnight trip compared to those who are not vaccinated.**
- **The non-vaccinated group within this age band exhibit higher levels of uncertainty and significantly lower levels of intent**

Figure 30. Proportion anticipating going on any overnight UK trip by vaccine status, Percentage Wave 28, UK

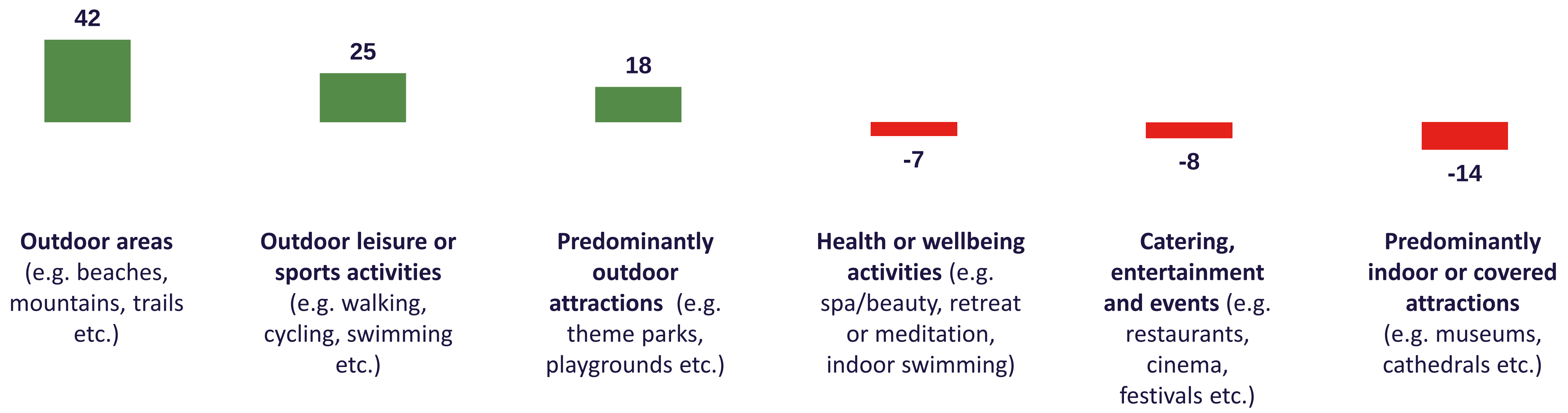


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All vaccinated respondents aged 45+ n=450; Non-vaccinated respondents aged over 45 n=139
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

- There is evidence of uplift in intended engagement with all place and activity categories this wave.
- Consistent with previous waves, outdoor areas are most likely to attract more visitors/engagement than normal (net +42), followed by outdoor leisure or sports activities (+25) and outdoor attractions (+18).
- ‘Health or wellbeing activities’ (-7), ‘catering, entertainment and events’ (-8) and ‘predominantly indoor attractions’ (net -14) are likely to attract fewer visitors/engagement than normal, although their net score are showing signs of recovery.

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 28, 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 28 respondents n=1,760

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**
- **The top reason for taking an overnight business trip is for a small meeting between fewer than 6 people, with around 3 in 10 (30%) stating this.**

Figure 30a. Proportion anticipating an overnight business trip by end of 2021, Percentage, Wave 28, U.K. adults in employment

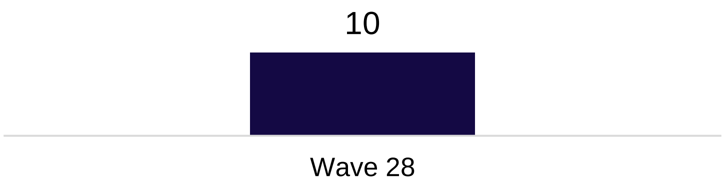
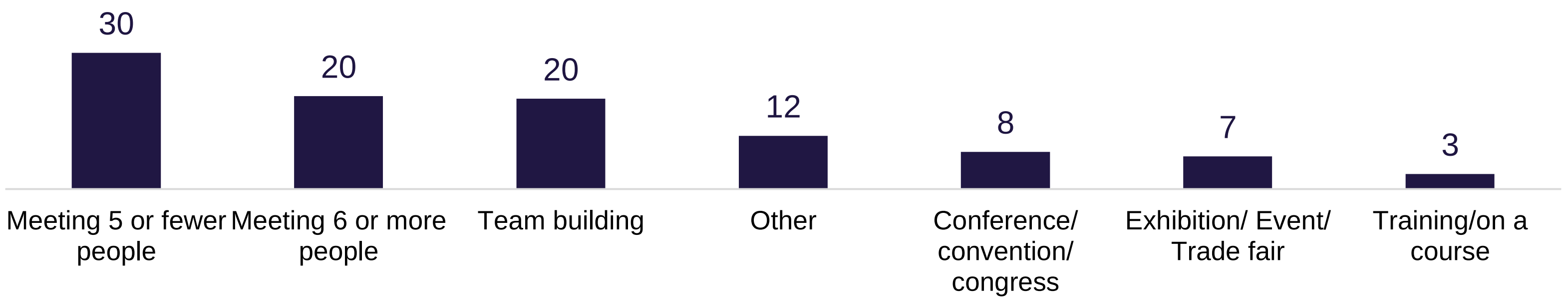


Figure 31b. Reasons for taking an overnight business trip, Percentage, Wave 28, U.K. adults in employment planning a trip



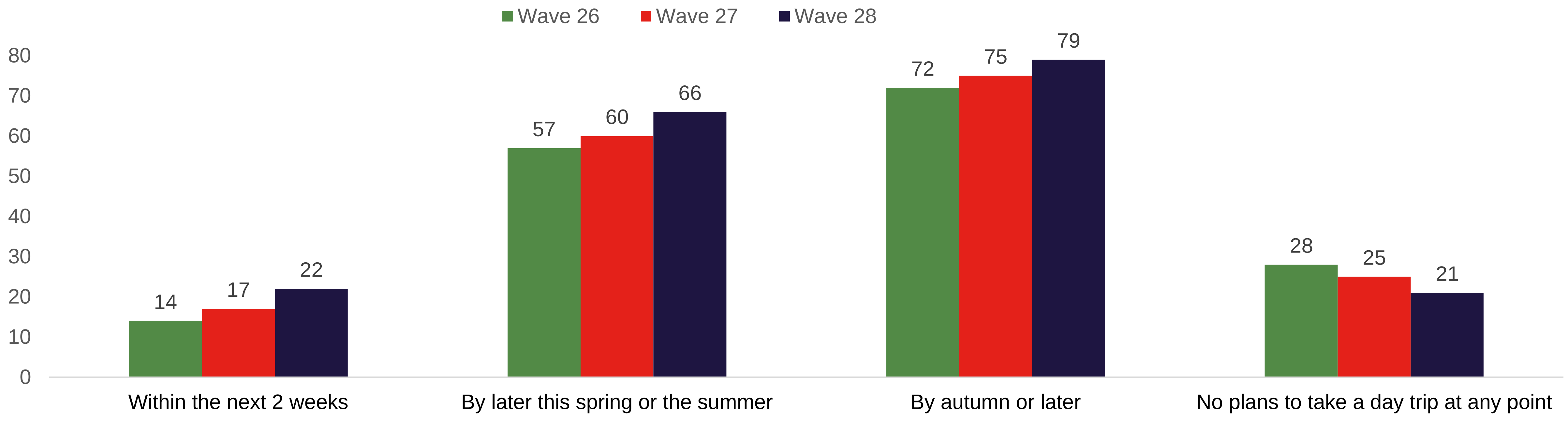
QVB14a/b. Now looking ahead, are you intending to take any overnight business trips in the UK between now and end of the year? VB14b: What would be the main reason for this overnight business trip? Base: Wave 28 respondents currently in employment n = 1283. All taking a business trip n=147

4. Day Trip Intentions

Day trip intention overall

- Aligned with increased intent to take overnight trips, the likelihood to take day trips in the short, medium and longer-terms have also risen for the second consecutive wave.
- 22% now anticipate taking a day trip within the next 2 weeks, compared to 17% in the previous wave.
- Only 1 in 5 currently have no plans to take a day trip at any point; a decline from 25% in Wave 27 and 28% in Wave 26.

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

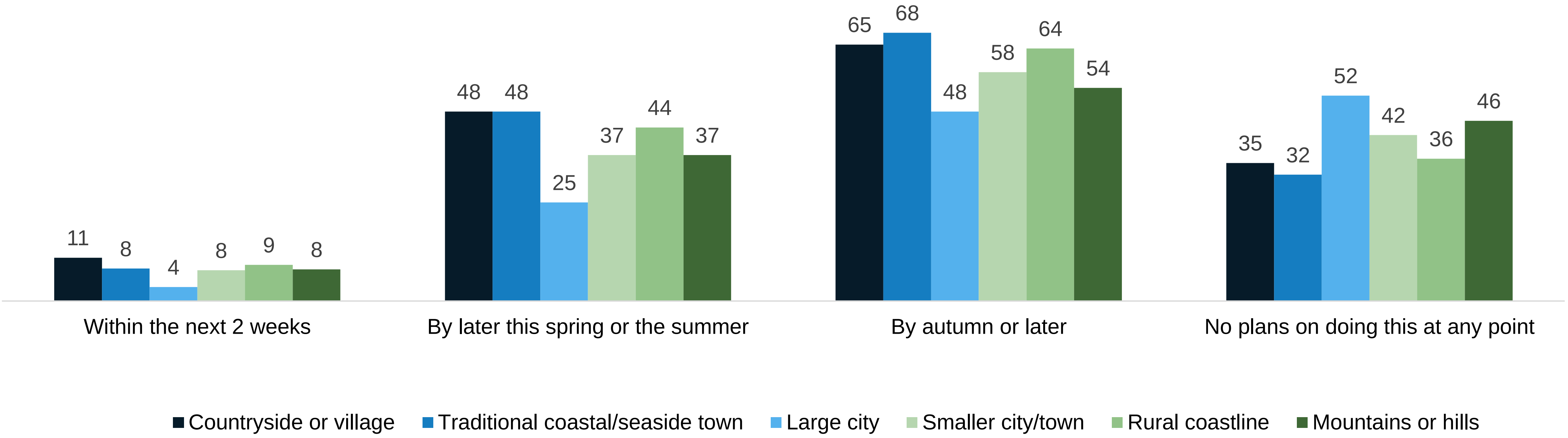


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 28 respondents n = 1,760
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.

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’ exhibit lower levels of intent especially during the spring and summer periods, with half of U.K. adults claiming to have no plans to visit a large city for a day trip at any point.**

Figure 33. Likelihood to take a day trip by destination type, percentage, Wave 28, UK

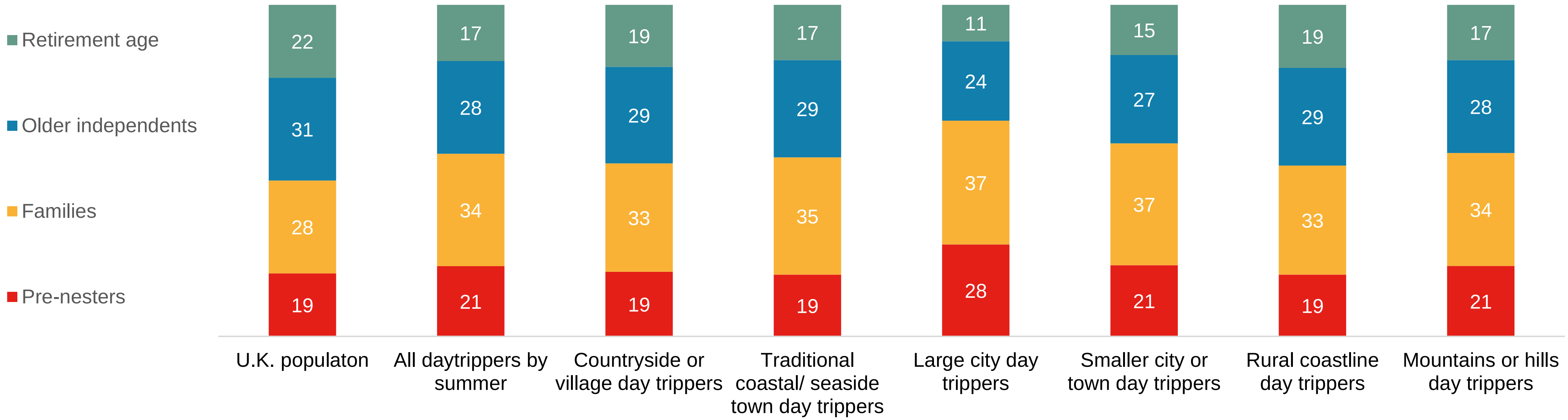


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 28 respondents n = 1,760
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.

Life stage of day trip intenders

- **Day trippers have higher representation amongst pre-nesters and families compared to the overall U.K. adult population.**
- **There are differences by life stage, with older groups exhibiting a stronger preference for rural locations, while more urban and built-up destinations exhibit a markedly younger profile.**

Figure 34. Breakdown of day trip intenders* by life stage, percentage, Wave 28, 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 28 respondents: *All day trippers within the next 2 weeks and spring/summer n=1072; Countryside or village day trippers n=851; Traditional coastal/ seaside town day trippers n=882 Large city day trippers n=483 Smaller city or town day trippers n=686 Rural coastline day trippers n=804 Mountains or hills day trippers n=698

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 28 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-27 where appropriate. Wave 28 fieldwork was conducted between 6th and 10th April 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.