COVID-19 Consumer Tracker

Wave 30

Published: 14th May 2021

Fieldwork Period: 4 – 9 May 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 4th and 9th May 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 <u>May and June 2021</u>
– **Summer Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between <u>July and September 2021</u>

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	19 – 23 April
Wave 4	8 – 12 June	Wave 17	12 – 16 October	Wave 30	4 – 9 May
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 30: Scorecard of Key Metrics

Key Metrics	Wave 29	Wave 30	Wave Shift
National mood (average score out of 10)	6.7	6.7	No change
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	38%	48%	+10*
Appetite for Risk: Comfort in undertaking a range of activities (1-4 comfort score)	2.6	2.7	+0.1
Normality score (proportion expecting normality by December)	45%	47%	+2
Leading two reasons for not feeling confident about taking a trip in Spring (May - June)	1. Restrictions on travel from government 2. Fewer opportunities to eat/drink out	1. Restrictions on travel from government 2. Fewer things to do/places to visit	New No.2
Near-term confidence in taking UK overnight trip (May confident)	31%	33%	+2
Medium-term confidence in taking UK overnight trip (June/July confident)	44%/53%	43%/55%	-1/+2
Anticipated number of UK short breaks compared to normal (% more/the same)	51%	51%	No change
Anticipated number of UK longer breaks compared to normal (% more/the same)	47%	48%	+1
Proportion going on a UK overnight trip in Spring (May - June)	15%	14%	-1
Proportion going on a UK day trip in next two weeks	24%	25%	+1
Leading UK overnight destination likely to stay in Spring (May - June)	South West	South West	No change
Main *type* of overnight destination likely to stay in Spring (May - June)	Countryside or village	Traditional coastal/seaside town	New No.1
Main overnight accommodation type likely to stay in Spring (May - June)	Commercial rental and Camping/Caravan	Camping/caravan	New No.1
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

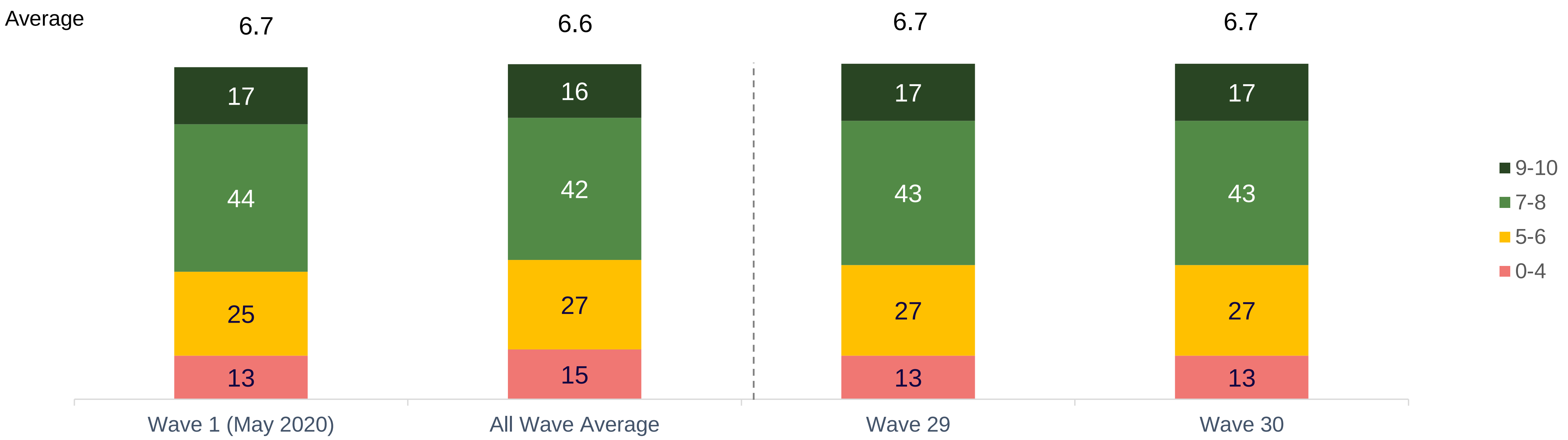
*** Represents a significant change on previous wave**

1. The National Mood

The National Mood

- **The average mood of U.K. adults remains unchanged this wave at 6.7 out of 10.**

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

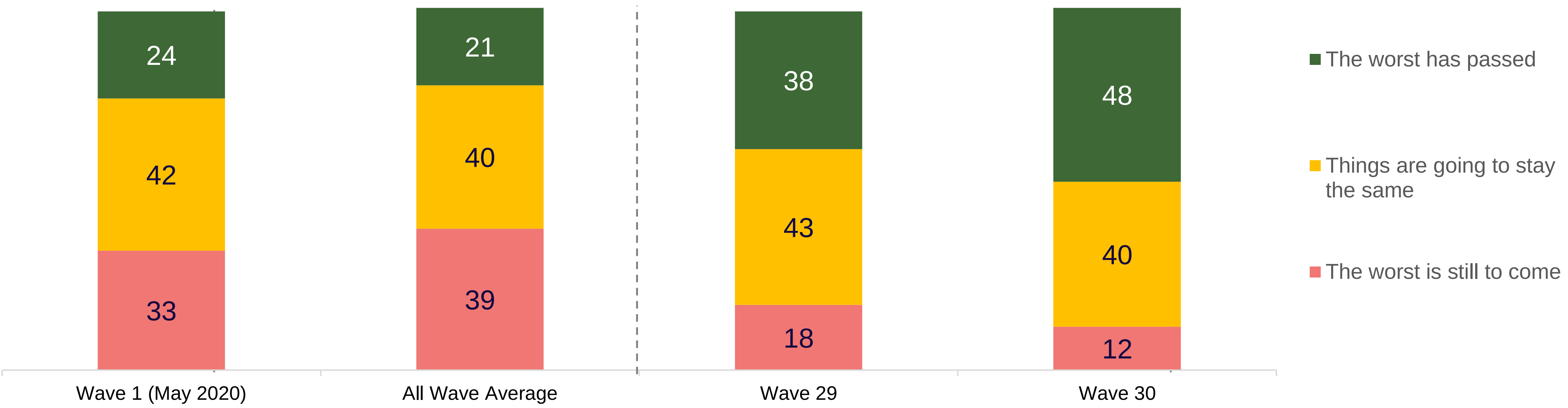


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 30 n=1,758
Wave average is based on Wave 1 to Wave 29.

Perceptions of the situation relating to COVID-19

- **The proportion of adults who believe 'the worst has passed' in relation to COVID-19 significantly increases this wave to 48%.**
- **Those of the opinion the 'worst is still to come' declines to 12% although 40% continue to think 'things are going to stay the same' in the coming month which is aligned to the all wave average for this measure.**

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 30 n=1,758 Wave average is based on Wave 1 to Wave 29.

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 these figures have eased back slightly since Wave 29 when they were 15% and 21% respectively.**
- **However, the proportion expecting ‘normality’ by the end of the year now stands at 47%, which is up 2 percentage points on last wave.**

Figure 3. Perceptions of when things will return ‘close to normal’, cumulative percentage, Wave 30, UK

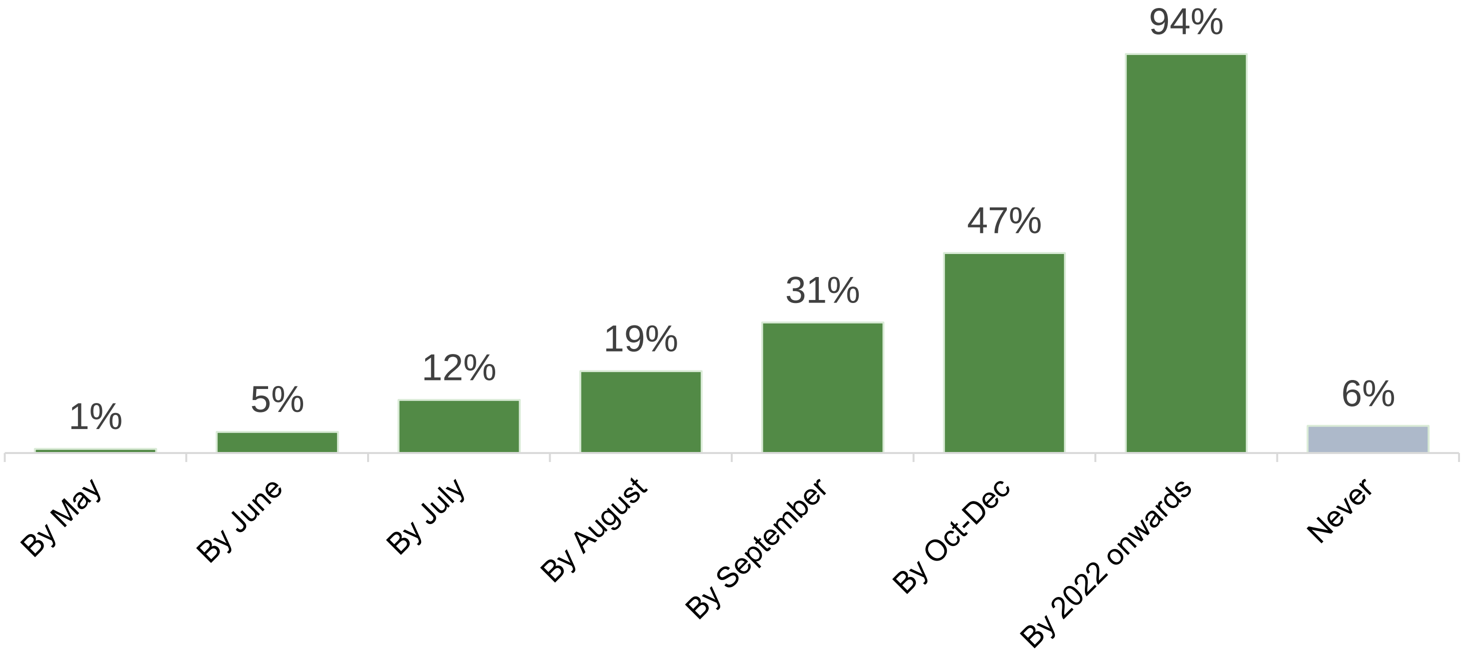
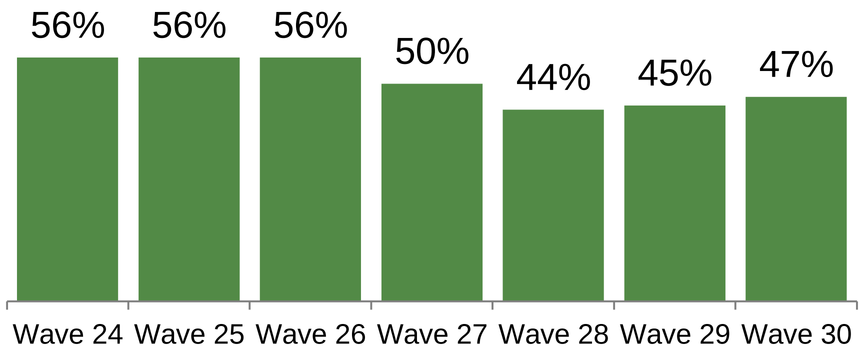


Figure 4. Proportion expecting normality by December, percentage wave-on-wave, UK



Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 30 n=1,758

Confidence in the ability to take overnight trips in UK

- **33% of U.K. adults express confidence that an overnight domestic trip booked for May would go ahead which represents a rise on Wave 29 when 31% were confident.**
- **While confidence for June trips has dipped slightly this wave, gains are apparent for all the other months between July and September.**

Figure 5. Confidence in taking a UK overnight trip across different time periods, percentage, Wave 30, UK

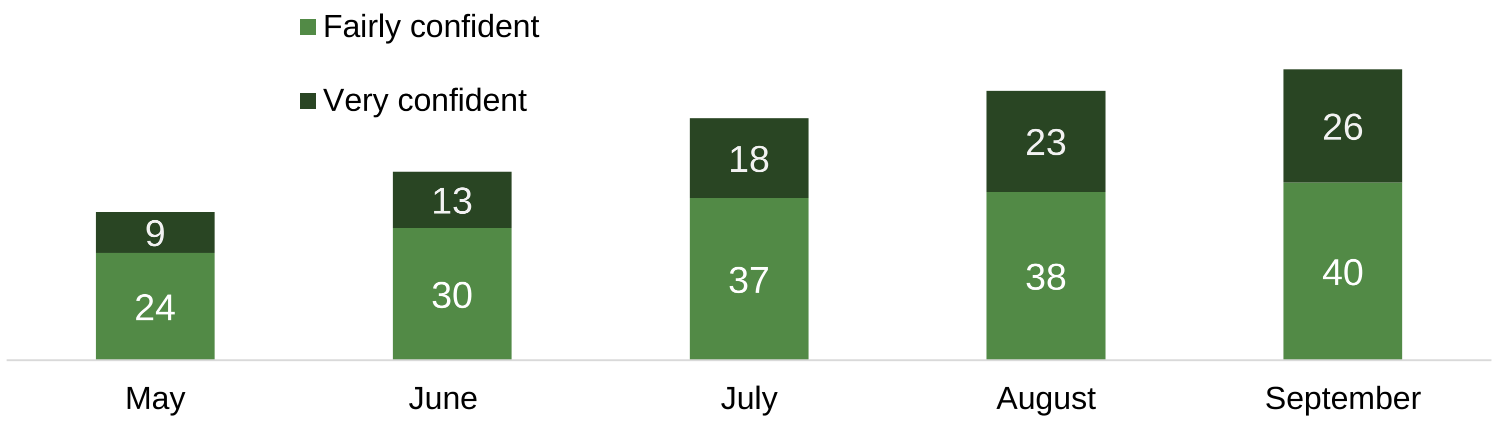
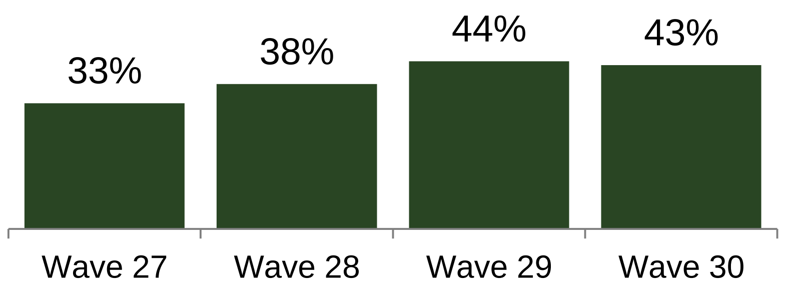


Figure 6. Confidence in taking a UK overnight trip in June 2021, percentage wave-on-wave, UK



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 30 n=1,758

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

- **‘Restrictions on travel from government’ and having ‘fewer things to do/places to visit’ are the leading reasons cited by those not feeling confident about taking an overnight trip during spring.**
- **‘Restrictions on travel from government’ also leads among those lacking confidence about travelling in the summer period, although ‘personal finances’ moves into second spot, closely followed by ‘concerns about catching COVID-19’.**

Figure 7. Top 5 reasons for not being confident about travelling in Spring*, percentage Wave 30, UK

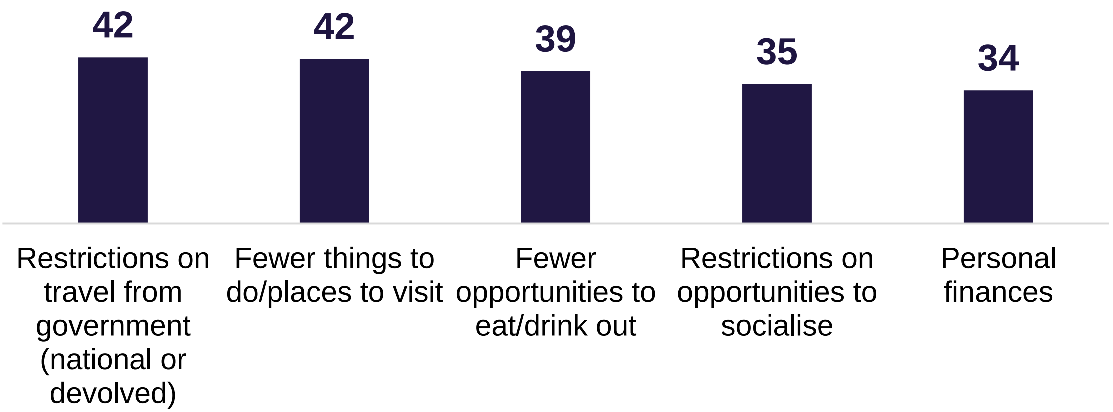
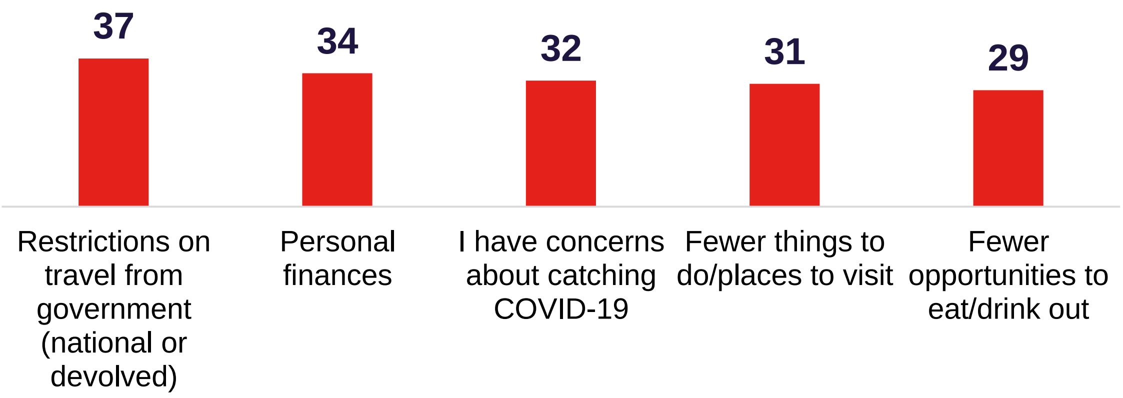


Figure 8. Top 5 reasons for not being confident about travelling in Summer*, percentage Wave 30, UK

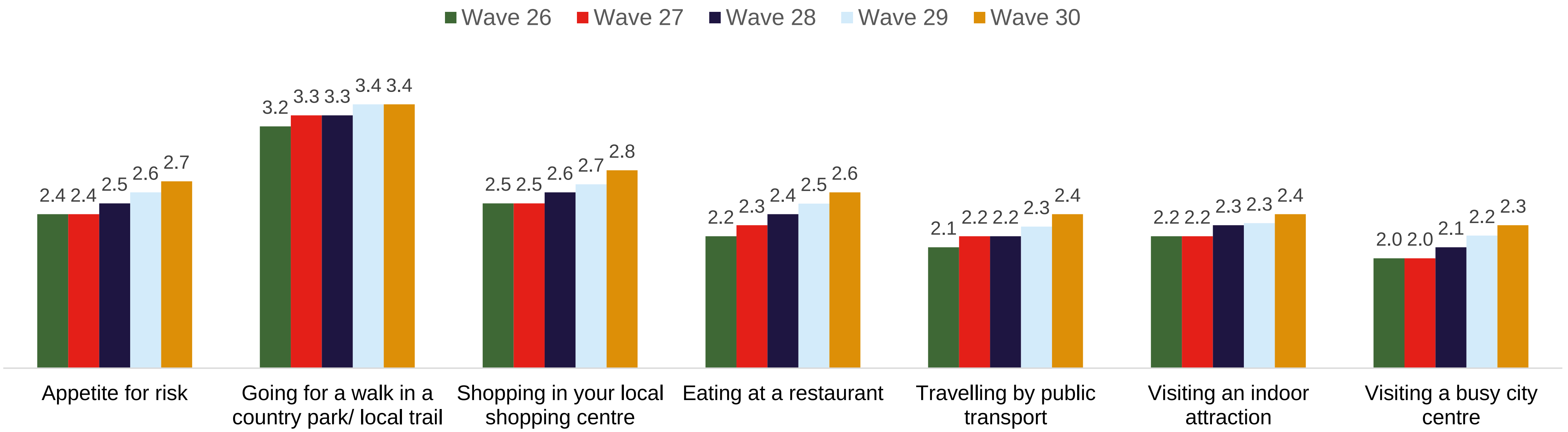


QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a UK short break or holiday? Base: Wave 30 respondents not confident about taking a break in Spring n=171 and Summer n=436. *Spring is defined as April to June, Summer is defined as July to September

The ‘Appetite for Risk’

- **This waves ‘appetite for risk’ score rises to 2.7/4 which represents the third consecutive wave of increase.**
- **Average levels of ‘comfort’ participating in the listed activities shows a similar trend, although ‘going for a walk in a country park/local trail’ remains unchanged at a comparatively high 3.4/4**

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 30 n=1,758

2. Overnight Trip Intentions

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

- **Between now and the end of the year, around half of U.K. adults intend to take more or about the same number of domestic short breaks (51%) or longer breaks of 4+ nights (48%) compared to normal – both of which are relatively consistent with Wave 29.**
- **A significantly lower proportion anticipate taking more or about the same number of <u>overseas</u> trips this year compared to normal, within which only a very small minority anticipate taking 'more trips'.**

Figure 10. Number of <u>U.K.</u> overnight trips between now and the end of the year compared to normal, Percentage Wave 30, UK

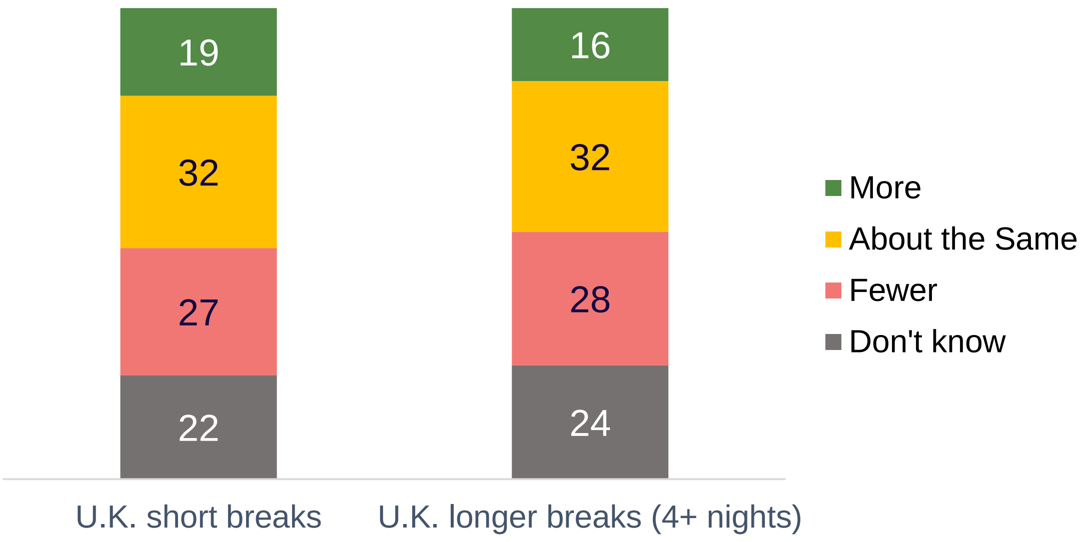
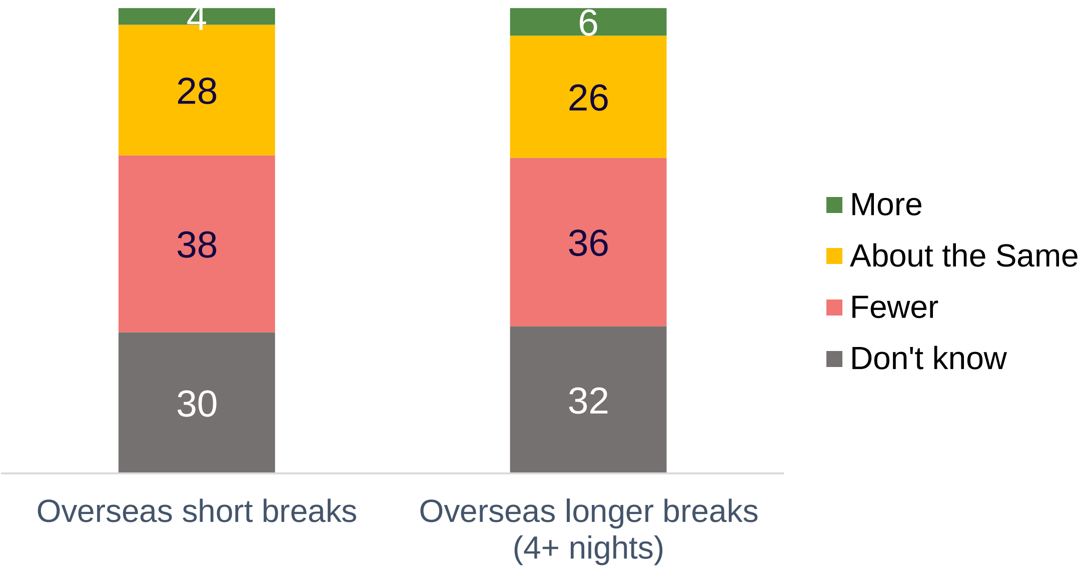


Figure 11. Number of <u>OVERSEAS</u> overnight trips between now and the end of the year compared to normal, Percentage Wave 30, UK



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 30 n=1,758

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

- **22% of U.K. adults claim to have already planned and 17% to have already booked their next domestic overnight trip, both of which are very consistent with Wave 29.**

Figure 12. When anticipate TO PLAN the next UK overnight trip, percentage Wave 30, UK

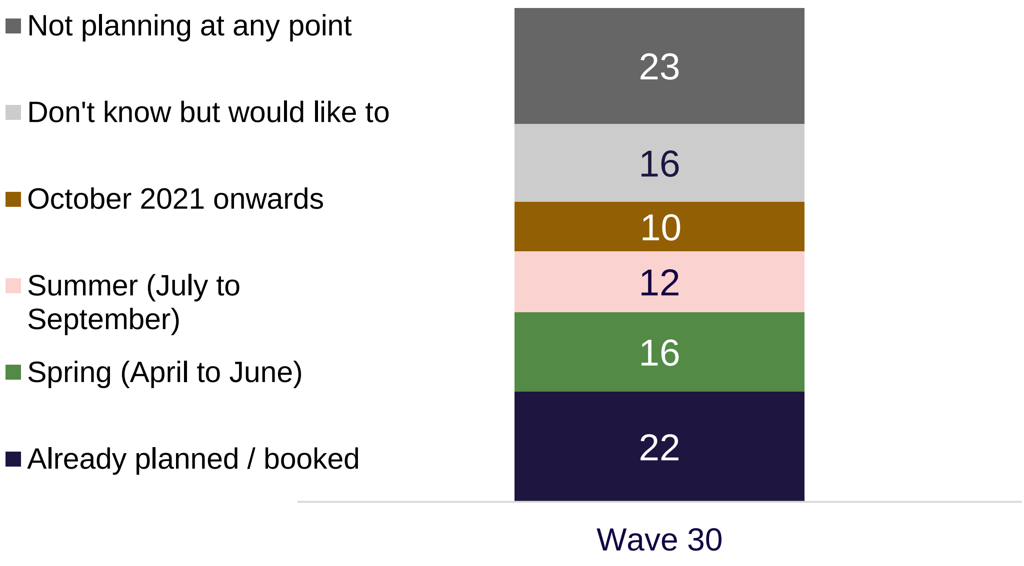


Figure 13. When anticipate BOOKING the next UK overnight trip, Percentage Wave 30, UK

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 30 n=1,758 . *Winter = January to March; Spring = April to June; Summer = July to September

When anticipate taking overnight trips in the UK and impact on UK trip if overseas restrictions are lifted

- 14% are currently intending on taking a domestic overnight trip by the end of June. Just under a third (32%) anticipate taking a summer trip while 37% are looking to take one at some point from October 2021 onwards. All of these proportions show minimal change from last wave.
- The vast majority of both spring and summer intenders state they would still take their planned domestic trip even if the vast majority of overseas travel restrictions were lifted.

Figure 14. Proportion anticipating going on any overnight UK trips, percentage Wave 30, UK

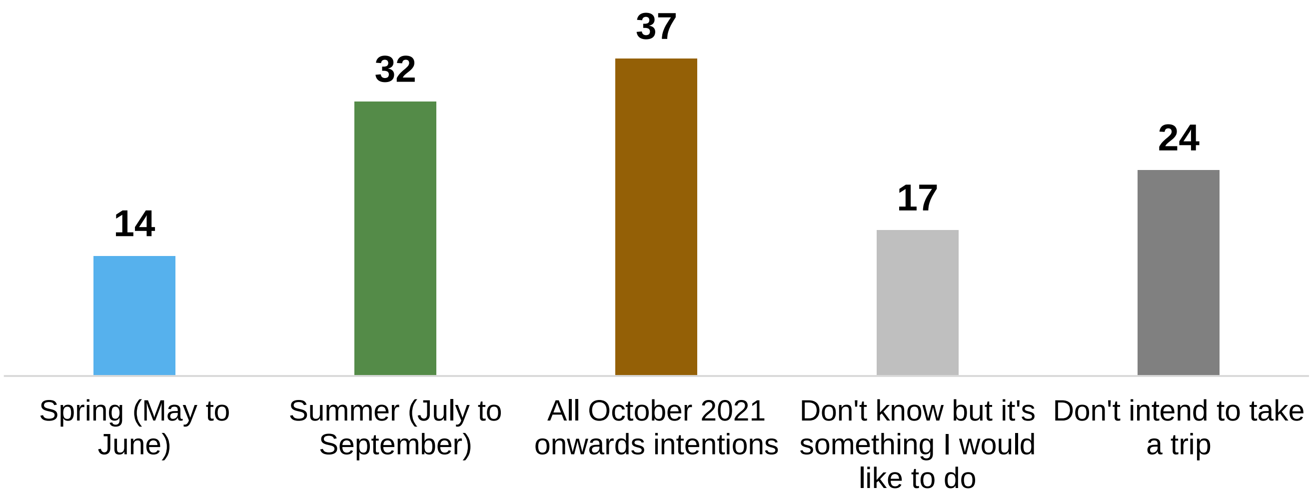
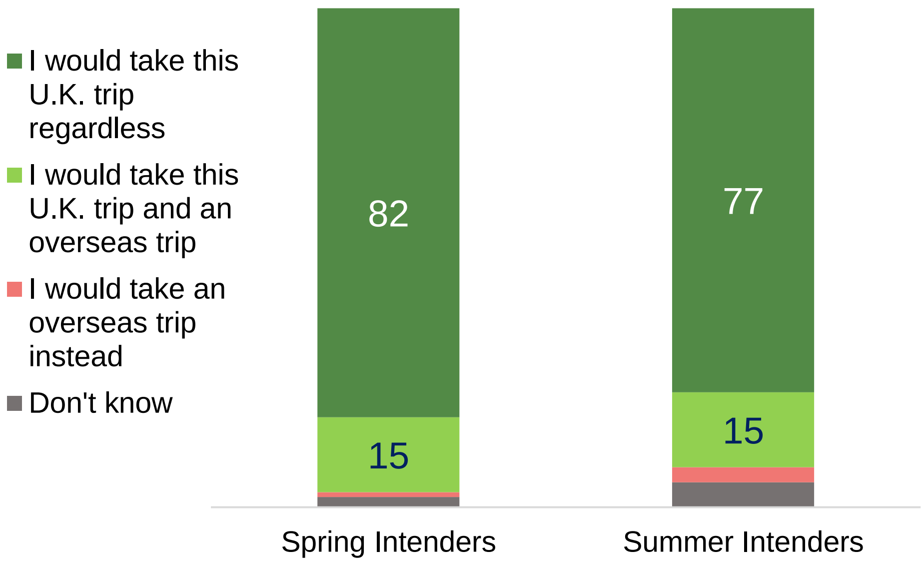


Figure 14b. Impact on U.K. trip if majority of overseas travel restrictions were lifted, percentage Wave 30, UK



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 30 n=1,758 Multiple choice question so totals may exceed 100%.
VB6gii. In the event of the vast majority of restrictions relating to overseas travel being lifted, how, if at all, would this impact your planned overnight trip in the UK during <<insert month>>? Base: All Wave 30 respondents planning on taking a holiday or short break in the UK in Spring (April to June) n=241; Summer (July to September) n=441

Planning and booking timeline compared to normal

- The *planning* phase of spring trips is currently occurring slightly closer to the travel date than normal (on a net score basis) while for summer trips planning is happening further in advance.
- The 'net' position among both spring and summer intenders is that the actual *booking* of trips is presently happening closer to the travel date than usual. This being said, half of spring and summer intenders will book with similar lead times to before the pandemic.

Figure 15. PLANNING lead times for Spring or Summer trips compared to normal, percentage wave 30, U.K.

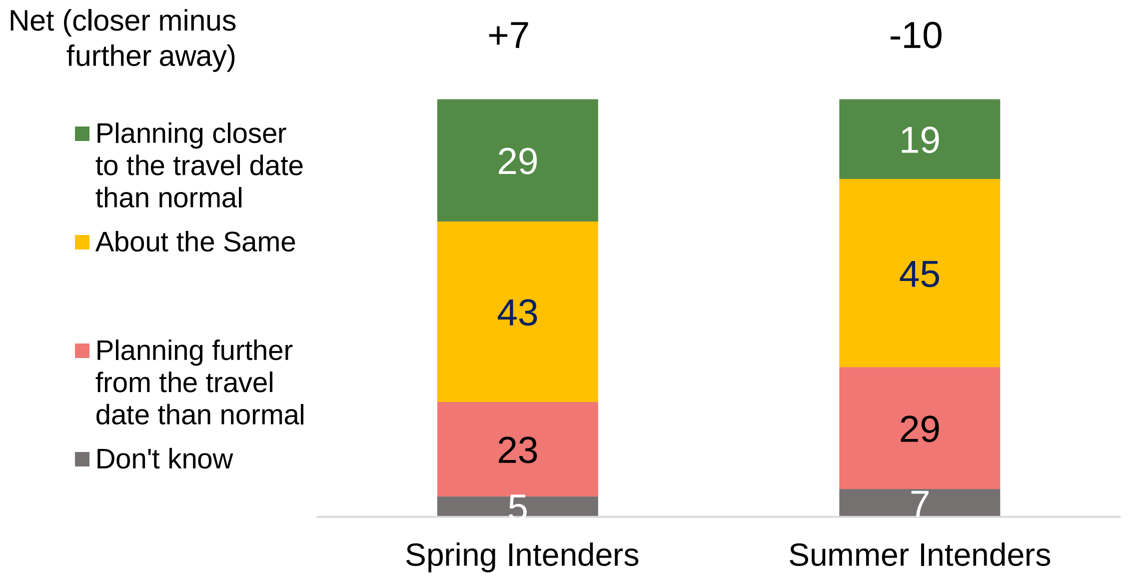
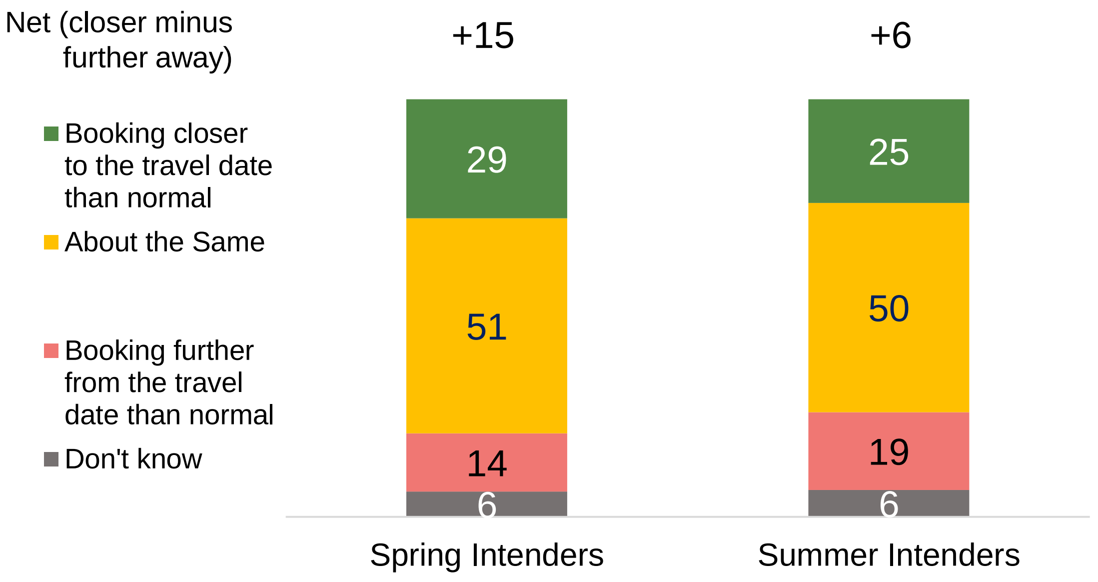


Figure 16. BOOKING lead times for Spring or Summer trips compared to normal, percentage wave 30, U.K.



VB6diic. Compared to normal, when did or will you plan and book your next UK trip?
Base: All Wave 30 respondents planning on taking a holiday or short break in the UK in Spring (April to June) n=241; Summer (July to September) n=441

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

- **Just over a third of spring intenders (69%) claim to have already planned their trip with 54% having already booked it. The proportion who have already planned or booked a *summer* trip (between July-September) is 37% and 29%, both of which have increased since Wave 29 (when it was 33% and 29% respectively).**
- **31% of spring overnight trips and 26% of summer overnight trips are transferred bookings that were previously cancelled or postponed due to COVID.**

Figure 17. Proportion of Intenders that have already *planned* their trip, percentage Wave 30 for Spring and Summer, UK

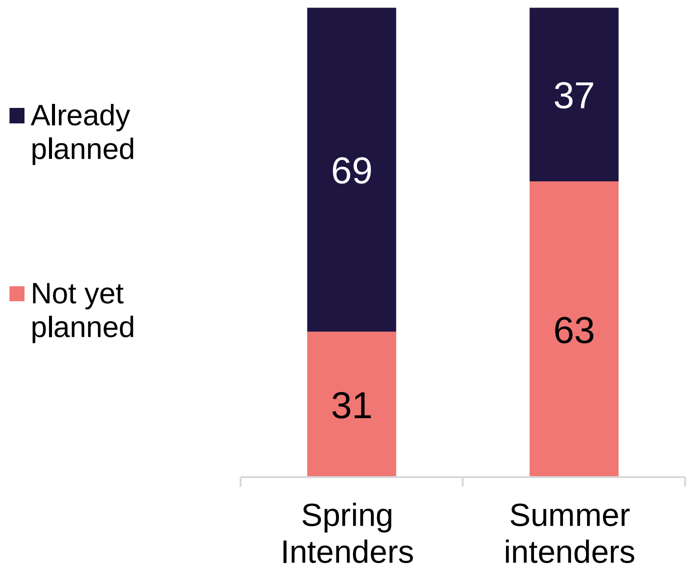


Figure 18. Proportion of Intenders that have already *booked* their trip, percentage Wave 30 for Spring and Summer, UK

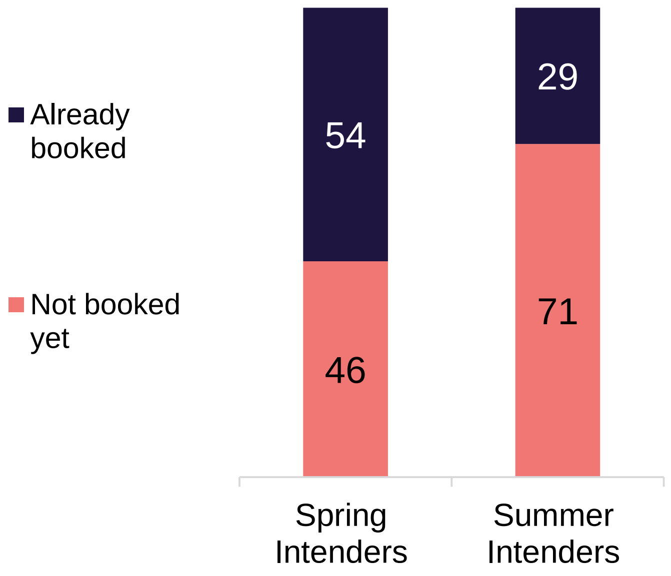
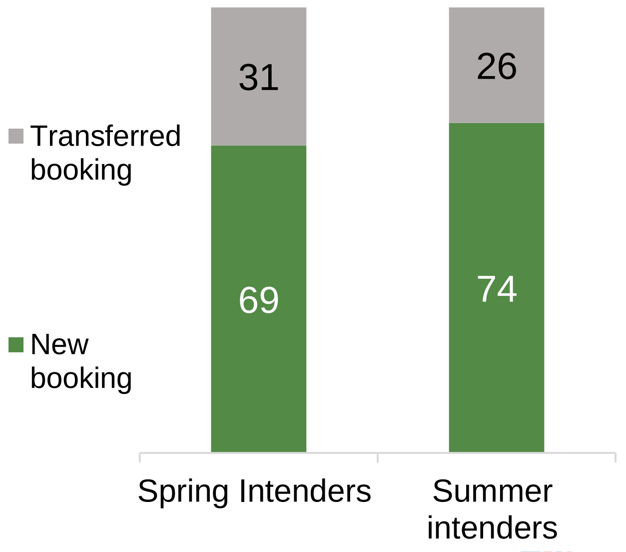


Figure 19. Proportion of next trips that are *transferred bookings*, percentage Wave 30 for Spring and Summer, UK

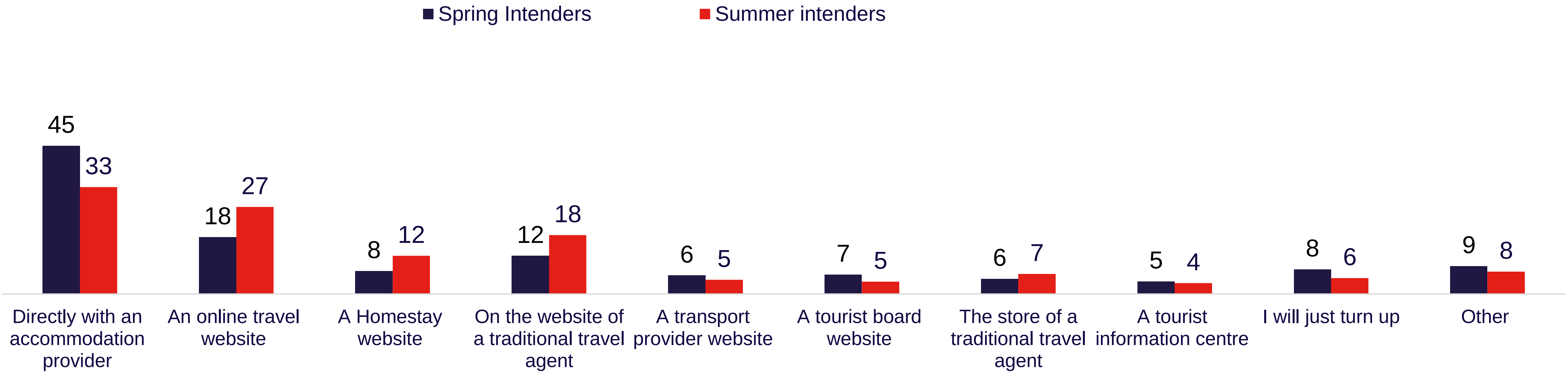


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All Wave 30 respondents planning on taking a holiday or short break in the UK in Spring (April to June) n=241; Summer (July to September) n=441

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 spring and summer, followed by an ‘online travel website’.**

Figure 19a. Accommodation booking channel for next trip in Spring and Summer, percentage Wave 30, UK



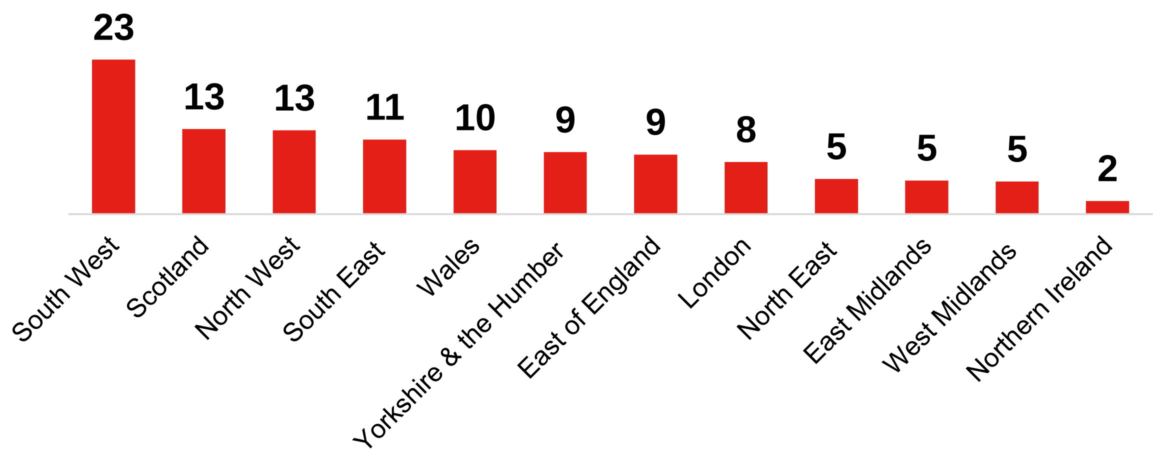
VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip. VB6diii Is this next trip a transferred booking from a trip that was previously cancelled or postponed due to COVID-19?
Base: All Wave 30 respondents planning on taking a holiday or short break in the UK in Spring (April to June) n=241; Summer (July to September) n=441

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 20% and 23% share respectively.
- In line with the previous wave, little separates the visitor shared of the subsequent five destinations.

Figure 21. Where planning on staying on next UK overnight trip in Spring, percentage Waves 29 and 30, UK

Figure 22. Where planning on staying on next UK overnight trip in Summer, Percentage Waves 29 and 30, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Waves 29 and 30 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=371; Summer (July to September) n=896
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

- **‘Traditional coastal/seaside town’ and ‘countryside or village’ have significantly higher shares among both spring and summer intenders than other destination types.**

Figure 23. Main type of destination for trip in spring, percentage
Waves 29 and 30, UK

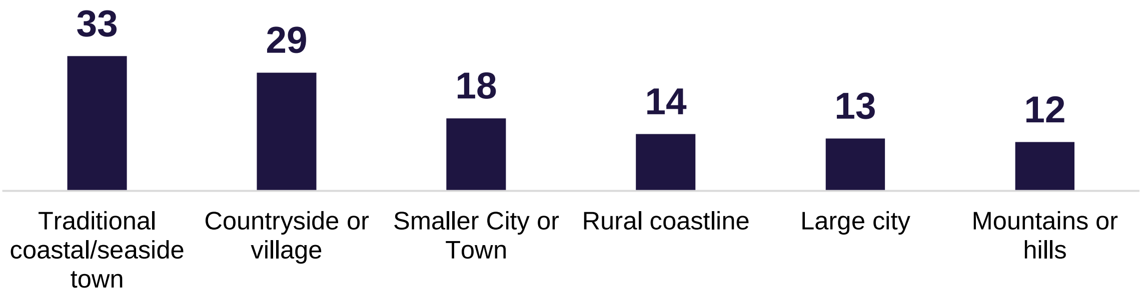
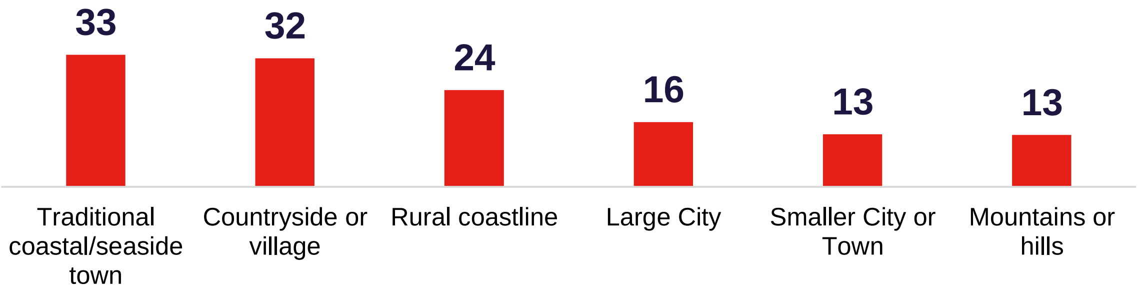


Figure 24. Main type of destination for trip in summer, percentage
Waves 29 and 30, UK



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 29 and 30 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=371; Summer (July to September) n=896
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 ‘camping/caravan’ is the leading accommodation choice, although only narrowly ahead of ‘a private home’, ‘commercial rental’ and ‘hotel/motel/inn’.
- ‘Hotel/motel/ inn’ is the leading accommodation type chosen among summer intenders, although its share remains closely aligned with ‘commercial rental’, ‘camping/caravan’ and ‘a private home’.

Figure 25. Accommodation planning on staying in on next UK overnight trip in spring, net percentage Waves 29 and 30

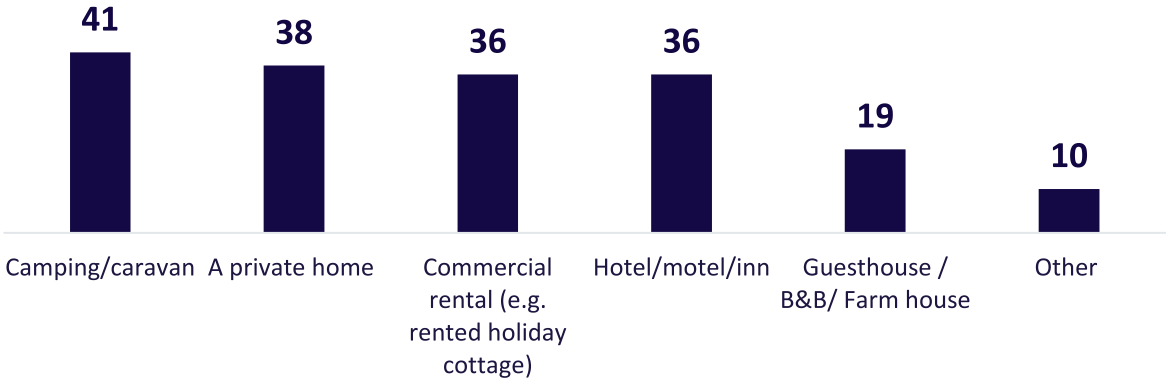
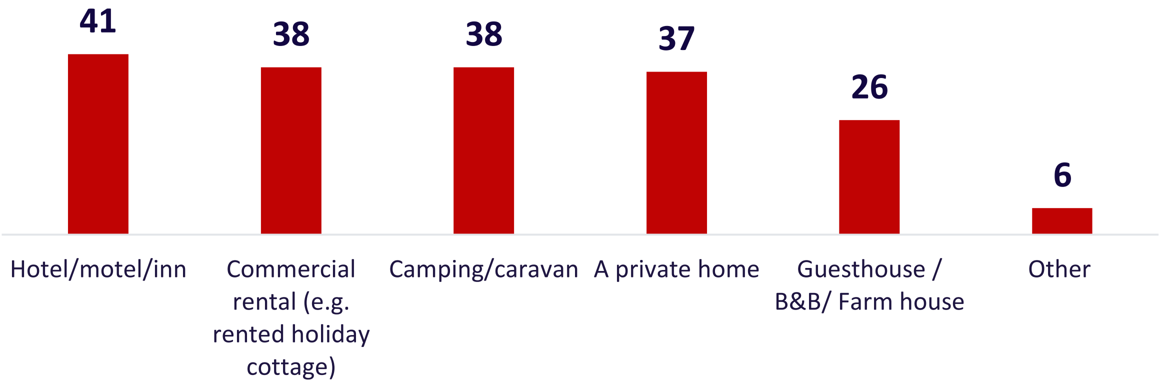


Figure 26. Accommodation planning on staying in on next UK overnight trip in summer, net percentage Waves 29 and 30

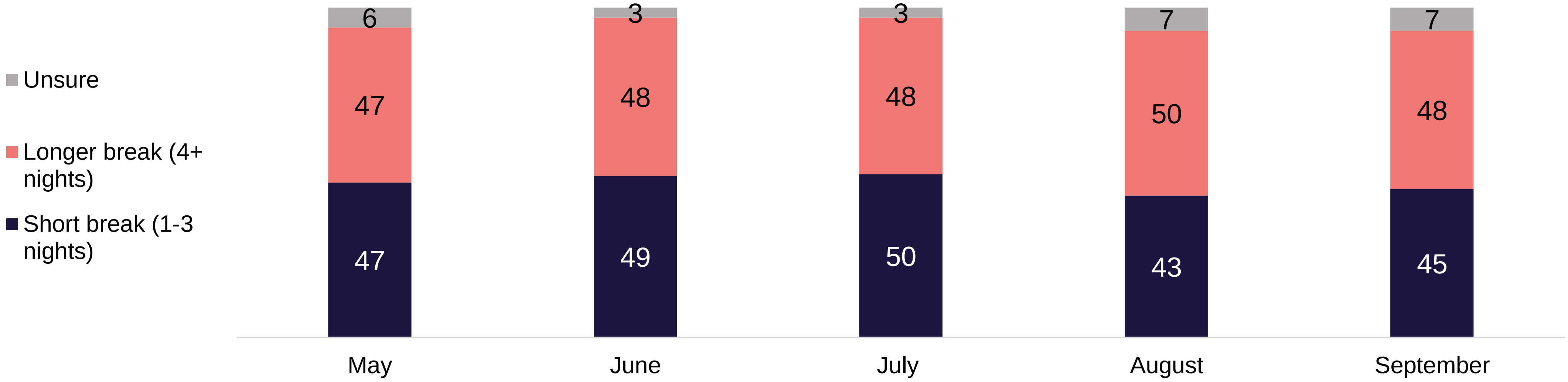


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Waves 29 and 30 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=371; Summer (July to September) n=896
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

Duration of the next overnight trip in UK

- **There's a broadly even split between short breaks and longer breaks of 4+ nights, although there is a slightly higher level of uncertainty evident for trips planned for the later summer period.**

Figure 27. Length of next UK holiday or short break by time period, percentage Waves 29 and 30, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 29 and 30 respondents intending to take next holiday or short break in each time period: May n=170, June n=233, July n=305, August n=336, September n=255

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 63% stating this for spring trips and 65% for summer trips.**
- **'Train' remains 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 30, UK

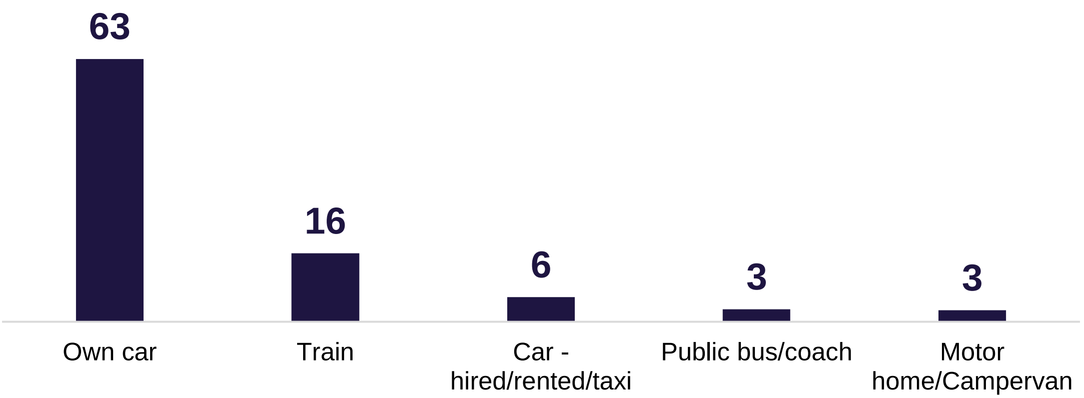
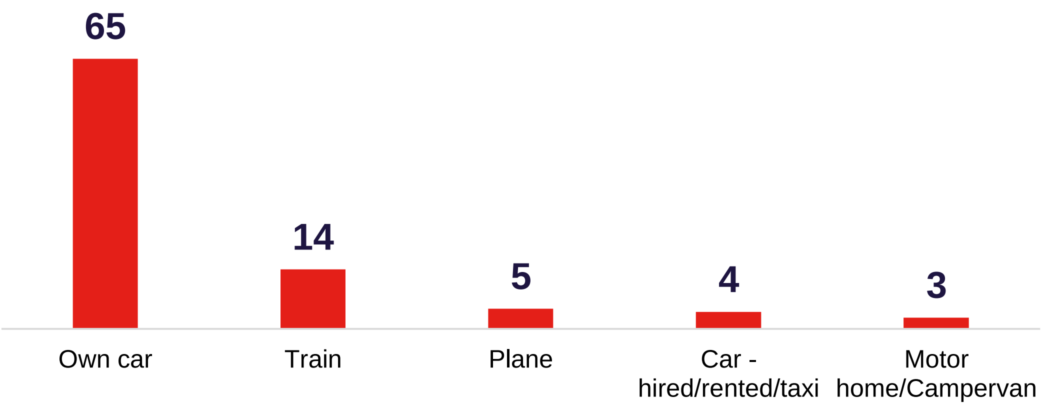


Figure 29. Top 5 main modes of travel to destination for trip in summer, percentage, Wave 30, UK

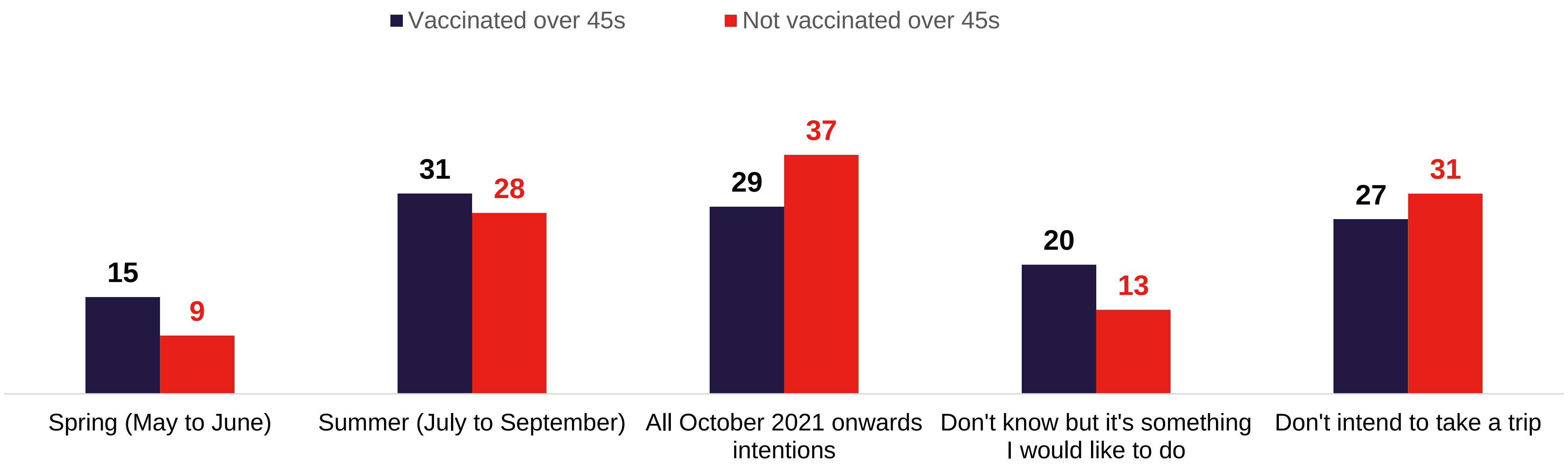


QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 30 respondents planning on taking a holiday or short break in the UK for Spring (April to June) n=241; Summer (July to September) n=441.

Vaccine impact on domestic overnight trip intent

- Those aged 45 and over who claim to have had at least one dose of a Covid-19 vaccine exhibit a greater likelihood to take a spring trip than over 45s that have *not* been vaccinated. This also holds true for summer trips although to a lesser extent.
- Conversely, non-vaccinated over 45s show a greater appetite to go on overnight trips from October 2021 onwards.

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

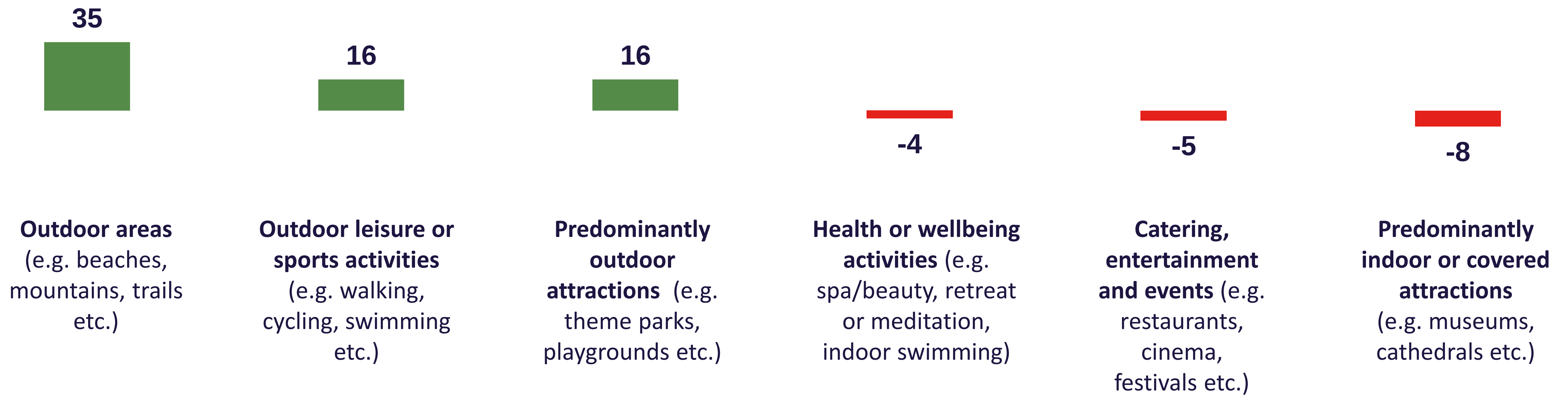


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All vaccinated respondents aged 45+ n=694; Non-vaccinated respondents aged over 45 n=150
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

- Engagement levels for outdoor areas remains largely unchanged this wave and characterised by being likely to attract more visitors than normal over the next few months.
- Intended engagement with indoor activities and areas continues to improve (although still remaining in net negative territory).

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 30, 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 30 respondents n=1,758

3. Business trip Intentions

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

- 11% 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 cited for taking an overnight business trip is for a meeting of 6 or more people, with 1 in 4 (25%) stating this, closely followed by smaller meetings of 5 people or fewer.

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

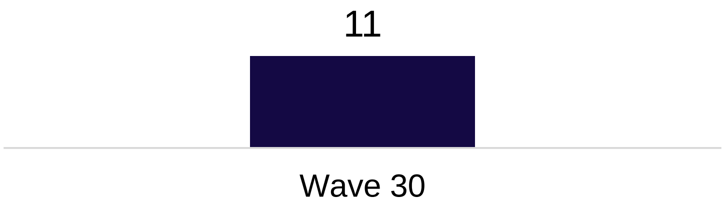
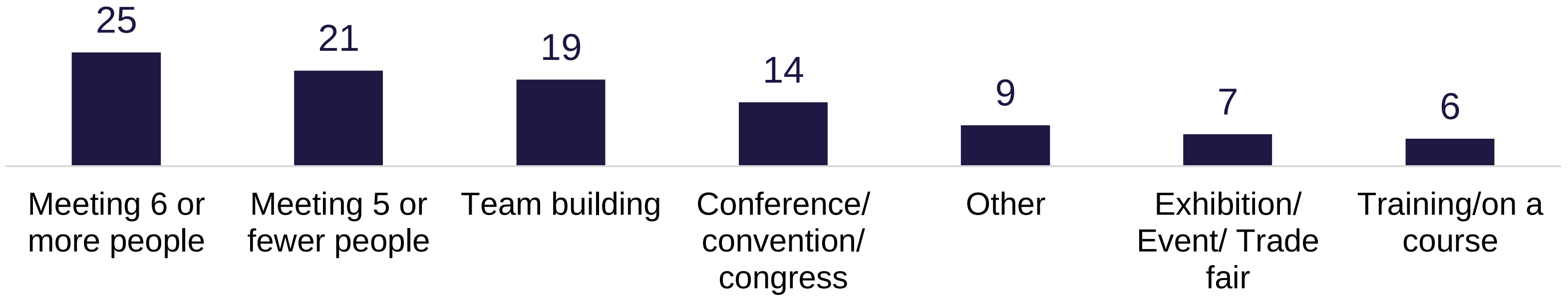


Figure 31b. Reasons for taking an overnight business trip, Percentage, Wave 30, U.K. adults in employment planning a trip



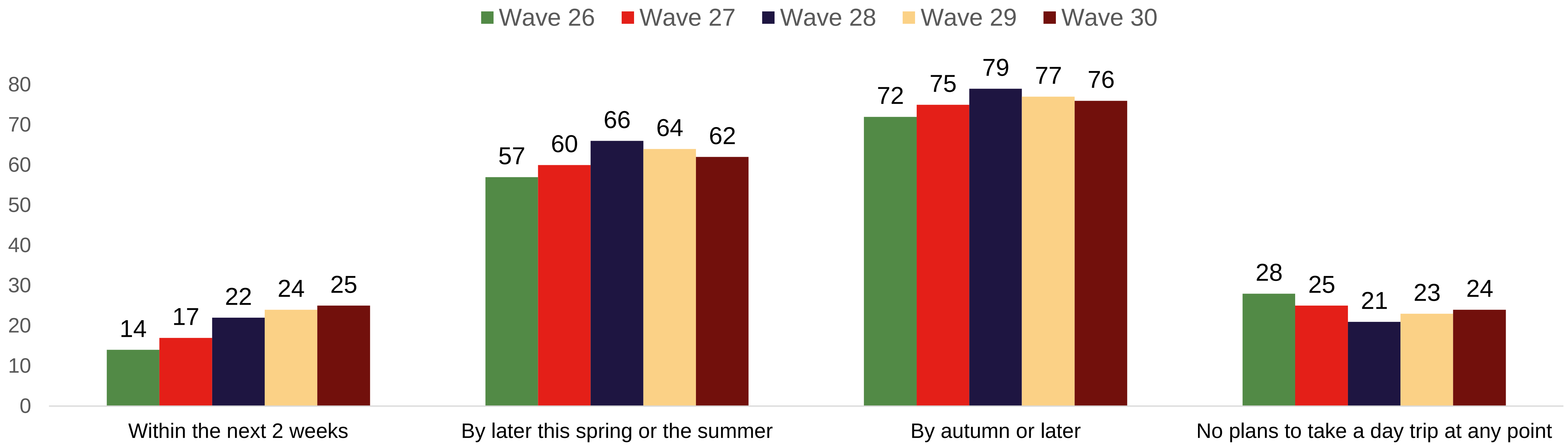
QVB14a/b. Now looking ahead, are you intending to take any overnight business trips in the UK between now and end of the year? VB14b: What would be the main reason for this overnight business trip? Base: Wave 30respondents currently in employment n = 1322. All taking a business trip n=143

4. Day Trip Intentions

Day trip intention overall

- The likelihood to take day trips in the short term continues to increase with 25% of adults anticipating doing so in the next 2 weeks.
- Longer-term day trip intention has dropped marginally over the past two waves, although not significantly.

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

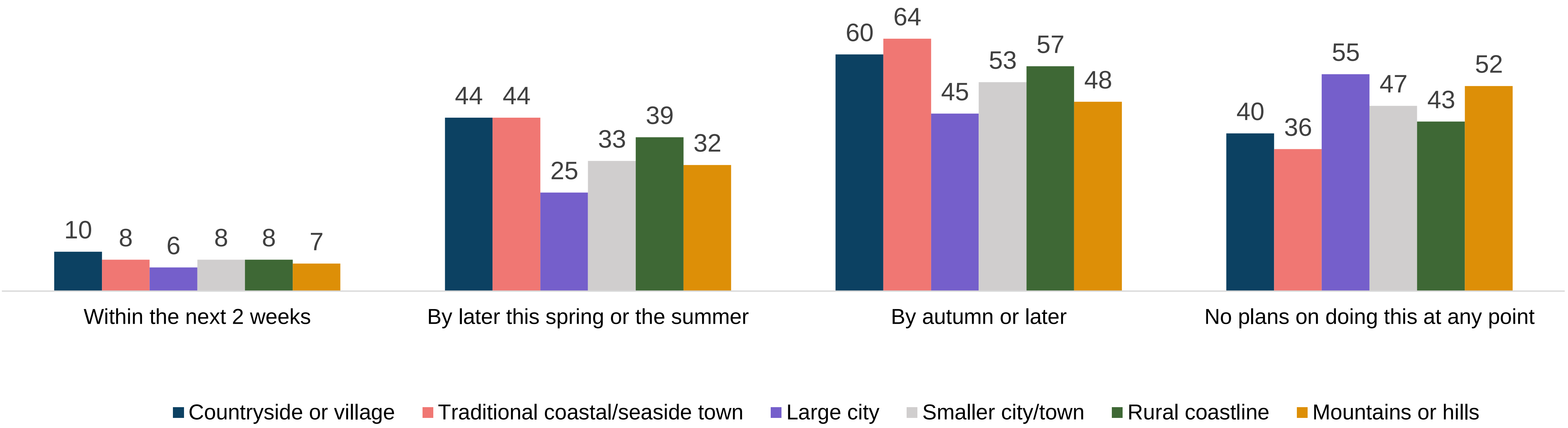


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 30 respondents n=1,758 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.

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', continue to show lower levels of intent especially during the spring and summer periods relative to other destinations, and just over half of UK adults 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 30, UK

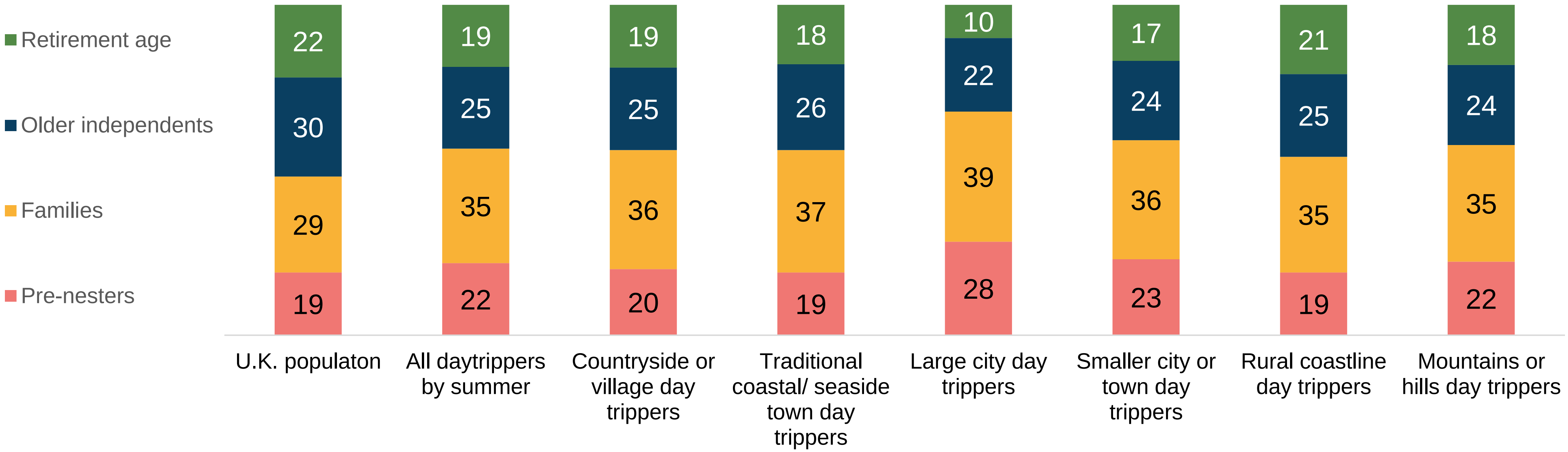


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 30 respondents n=1,758
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.

Life stage of day trip intenders

- **Overall, day trippers have higher representation amongst pre-nesters and families compared to the UK adult population.**
- **The skew towards the younger life stages is most apparent among those citing a preference to visiting a large city.**

Figure 34. Breakdown of day trip intenders* by life stage, percentage, Wave 30, 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 30 respondents: *All day trippers within the next 2 weeks/early spring summer n=1110; All day-trippers Countryside or village day trippers n=777; Traditional coastal/ seaside town day trippers n=804 Large city day trippers n=455 Smaller city or town day trippers n=594 Rural coastline day trippers n=697 Mountains or hills day trippers n=601

Methodology

Methodology

- The findings in this report are based on an online survey conducted amongst a sample of the U.K. adult population.
- In the first stage a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then 'boosted' in Wales and Scotland to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the U.K. overall and within each nation.
- This report presents findings from Wave 30 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-29 where appropriate. Wave 30 fieldwork was conducted between 4th and 9th May 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.