

COVID-19 Consumer Tracker

Wave 38

Published: 3rd September 2021

Fieldwork Period: 23rd - 27th August 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 23 – 27 August 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.

- **Summer Intenders:** Residents of the UK who claim their next domestic overnight trip will take place in late August (23rd to 31st) and September 2021
- **Autumn Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between October and December 2021

Where comparable questions exist, this report also includes benchmark data from 2020. The data shown is taken from fieldwork conducted in the equivalent period in 2020.

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

Wave 38: Scorecard of Key Metrics

Key Metrics	Wave 37	Wave 38	Wave Shift
National mood (average score out of 10)	6.6	6.8	+0.2
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	30%	26%	-4*
Appetite for Risk: Comfort in undertaking a range of activities (1-4 comfort score)	2.8	2.8	No change
Normality score (proportion expecting normality by December)	18%	14%	-4*
Leading two reasons for not feeling confident about taking a trip in Summer (August-September)	1. Concerns around catching COVID-19 2. Personal finances	1. Personal finances 2. Concerns around catching COVID-19	Change
Near-term confidence in taking UK overnight trip (September confident)	61%	60%	-1
Medium-term confidence in taking UK overnight trip (October confident)	62%	59%	-3
Net anticipated number of UK short breaks compared to normal (% more minus fewer)	-7	-6	+1
Net anticipated number of UK longer breaks compared to normal (% more minus fewer)	-11	-10	+1
Proportion going on a UK overnight trip in summer (Late August/September)	22%	17%	NA
Leading UK overnight destination likely to stay in Summer (Late August/September)	South West	South West	No change
Main <i>type</i> of overnight destination likely to stay in Summer (Late August/September)	Traditional coastal/seaside town	Traditional coastal/seaside town	No change
Main overnight accommodation type likely to stay in Summer (Late August/September)	Hotel/motel/inn	Hotel/motel/inn	No change
Proportion going on a UK day trip in next two weeks	30%	28%	-2
Place/activity likely to attract highest engagement compared to normal	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	Predominantly indoor or covered attractions;	Predominantly indoor or covered attractions;	No change

- **Represents a significant change on previous wave**
- **** Comparison not valid due to different time frames across waves**
- **NA – Time frame has decreased since last wave so comparison not relevant**



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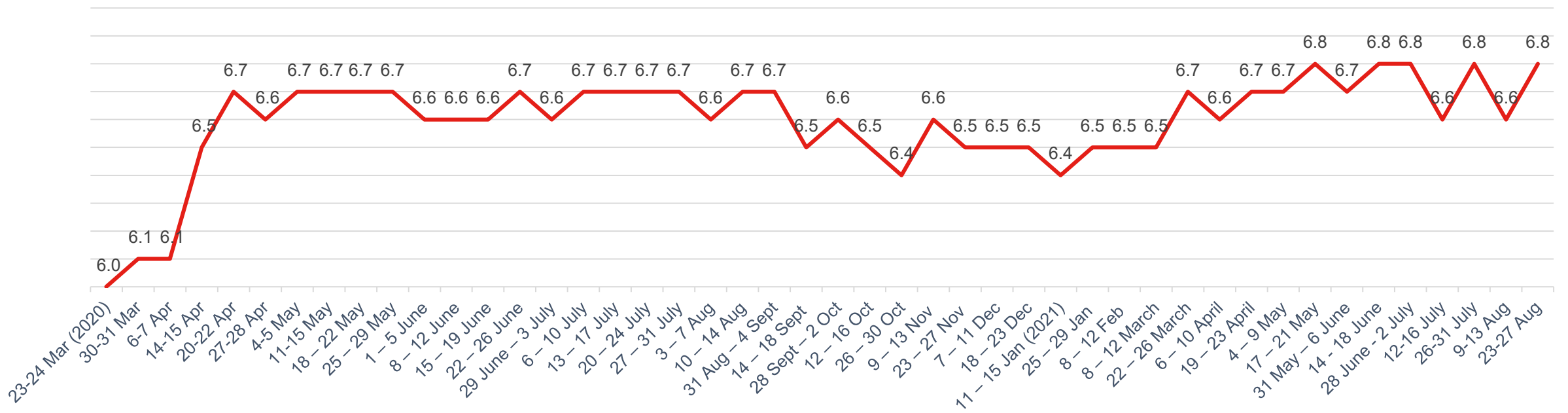
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1. The National Mood

The National Mood

- The average mood of U.K. adults has been changeable over the last two months; the latest wave sees an improvement of 0.2 points to 6.8

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

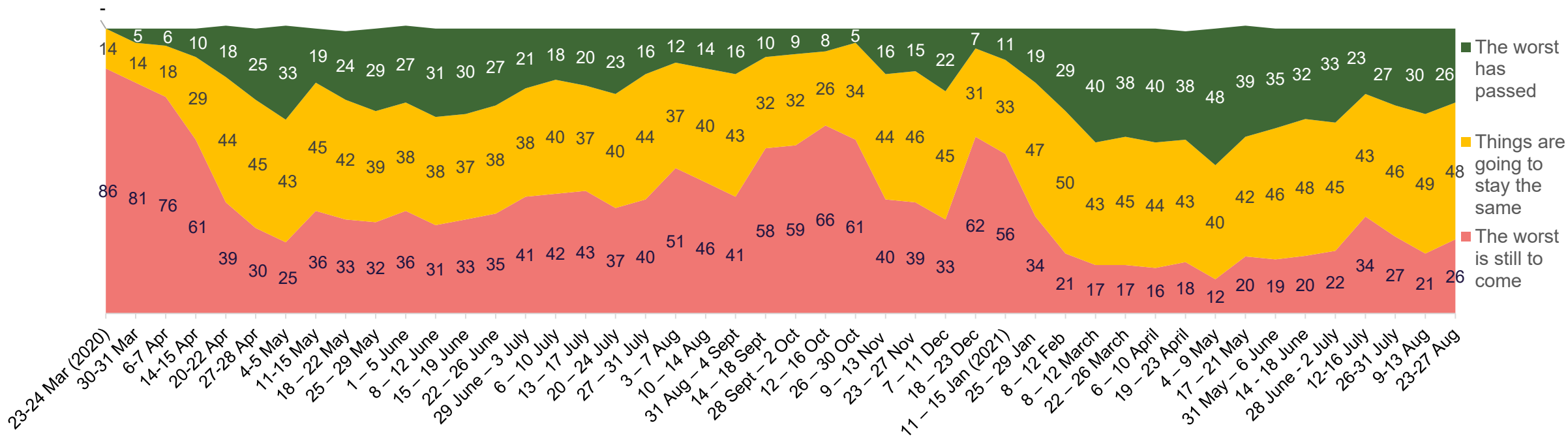


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 38 = 1,758 All others waves n=c,1750. Pre Wave 1, research was conducted by BVA BDRC with base size of c.750

Perceptions of the situation relating to COVID-19

- The proportion of the U.K. public that believe ‘the worst has passed’ and ‘the worst is still to come’ are now in line with each other, both positioned at 26%.
- The U.K. public are most likely to think that ‘things are going to stay the same’, 48% stating this – a figure that has been fairly consistent since the start of January

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 38 = 1,758 All others waves n=c,1750. Pre Wave 1, research was conducted by BVA BDRC with base size of c.750

Perceptions of when things will 'return close to normal'

- Only a minority of U.K. adults (14%) expect life to return 'something close to normal' by December, the second consecutive wave of decline.
- 15% of the U.K. public 'never' expect a return to normality – which has increased slightly since wave 37.

Figure 3. Perceptions of when things will return 'close to normal', cumulative percentage, Wave 38, UK

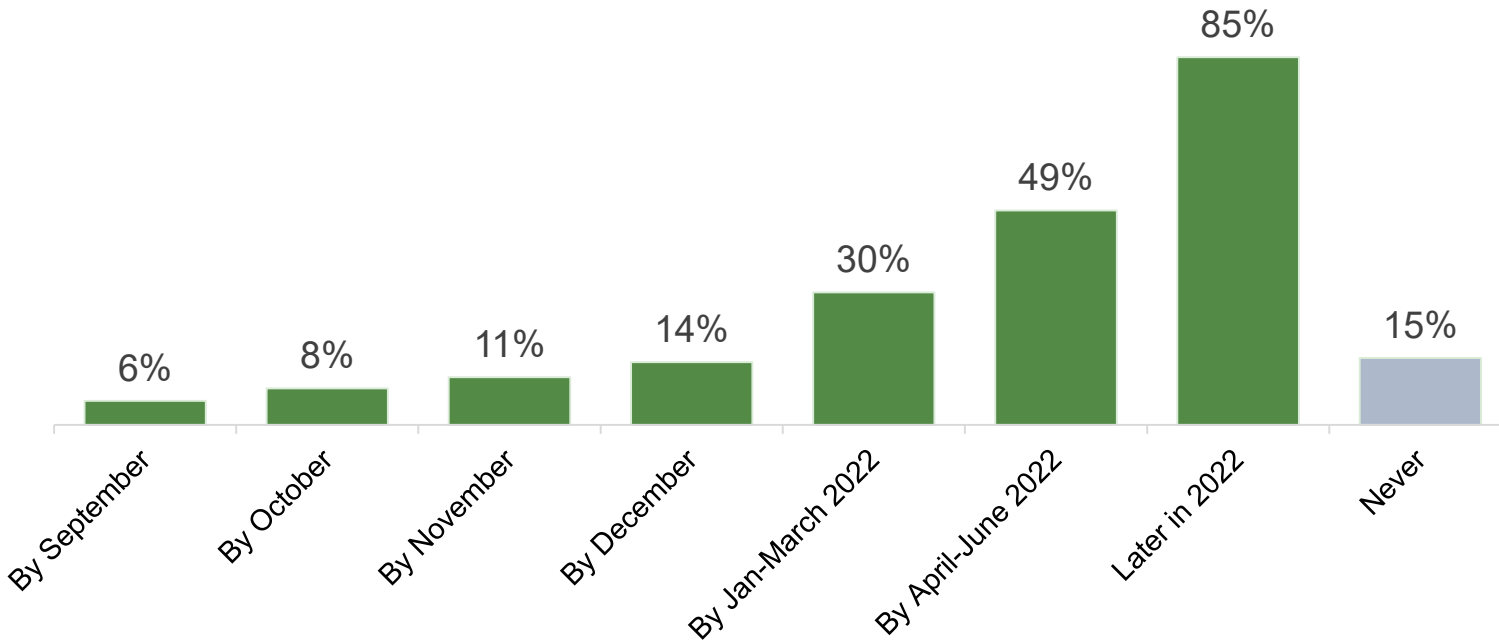
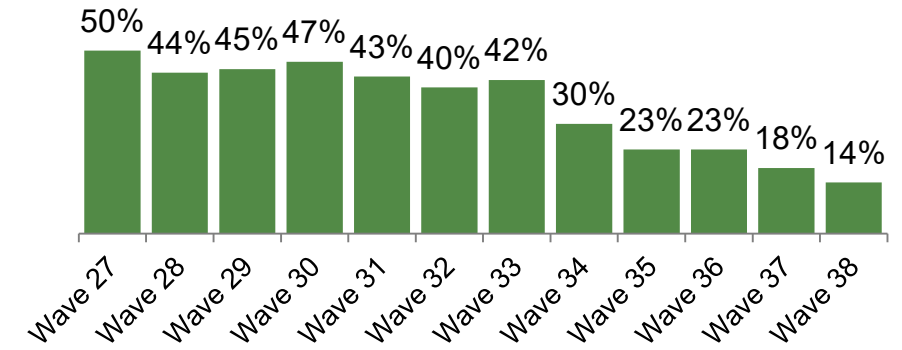


Figure 4. Proportion expecting normality by December, percentage wave-on-wave, UK



Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 38 = 1,758
 *New options added to the questionnaire in Wave 34 means a potential increased bias to later time frame responses from Wave 34 onwards

Confidence in the ability to take overnight trips in UK

- 3 in 5 of the U.K. public are confident that an overnight domestic trip would go ahead in September and October, dropping in November and December.
- Broadly speaking, confidence levels have decreased since Wave 37.

Figure 5. Confidence in taking a UK overnight trip across different time periods, percentage, Wave 38, UK

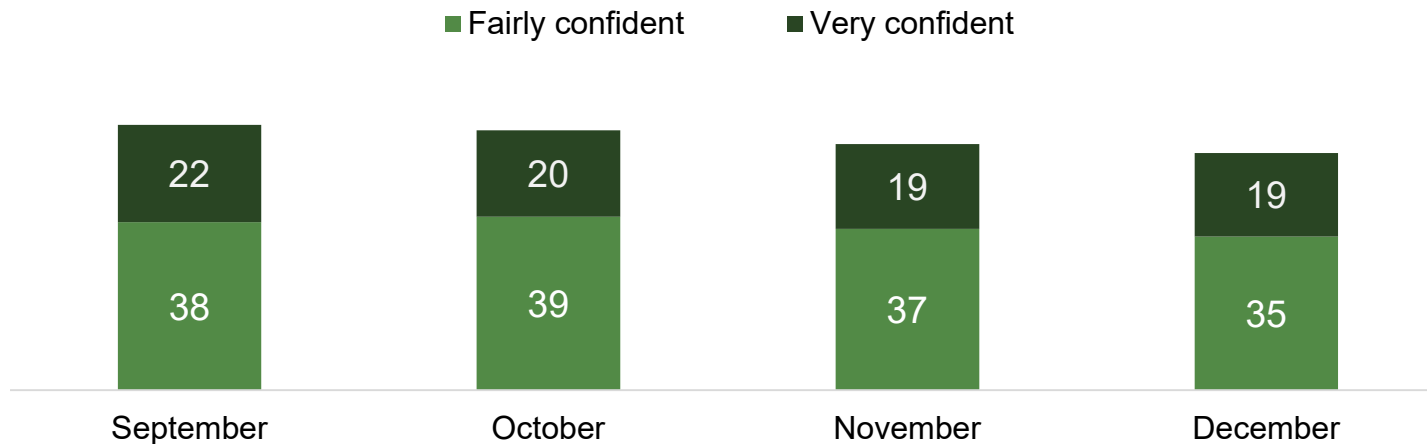
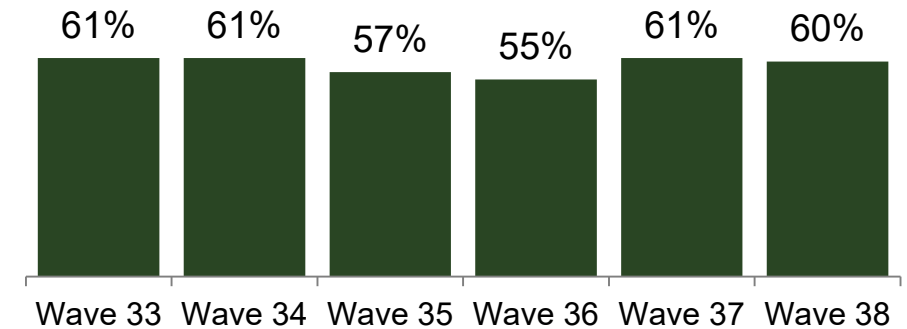


Figure 6. Confidence in taking a UK overnight trip in August 2021, percentage wave-on-wave, UK



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

- ‘Personal finances’ becomes the top reason people do not feel confident about taking an overnight trip during summer for Wave 38, a rise on last wave and 5 percentage points higher than ‘concerns about catching COVID-19’ – the second highest reason.
- In autumn, ‘concerns about catching COVID-19’ is the most influential reason and this has risen by 12 percentage points since Wave 37.

Figure 7. Top 5 reasons for not being confident about travelling in Summer*, percentage Wave 38, UK

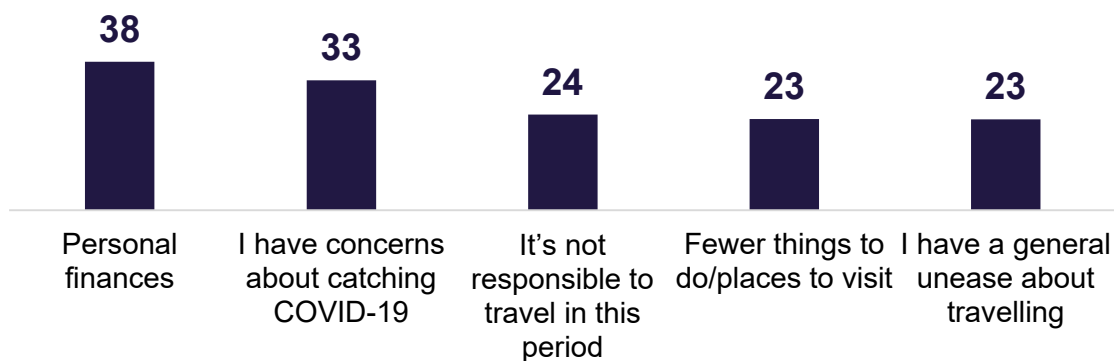
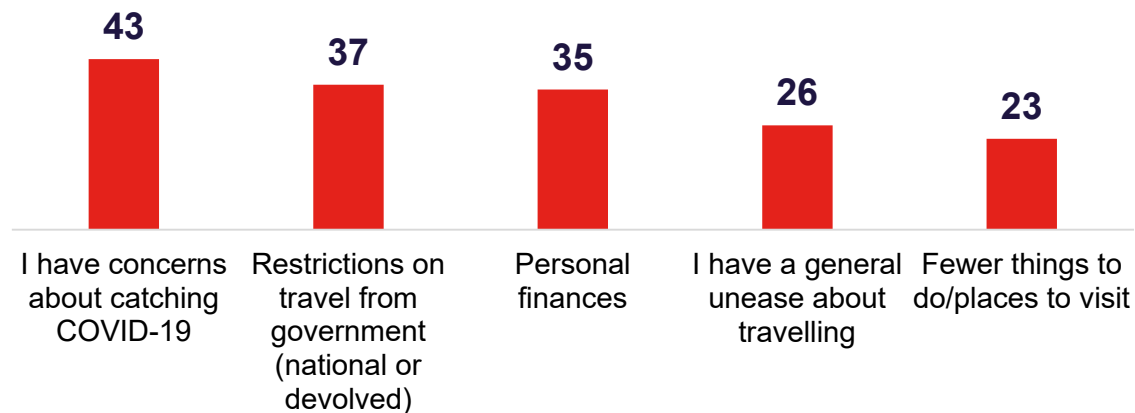


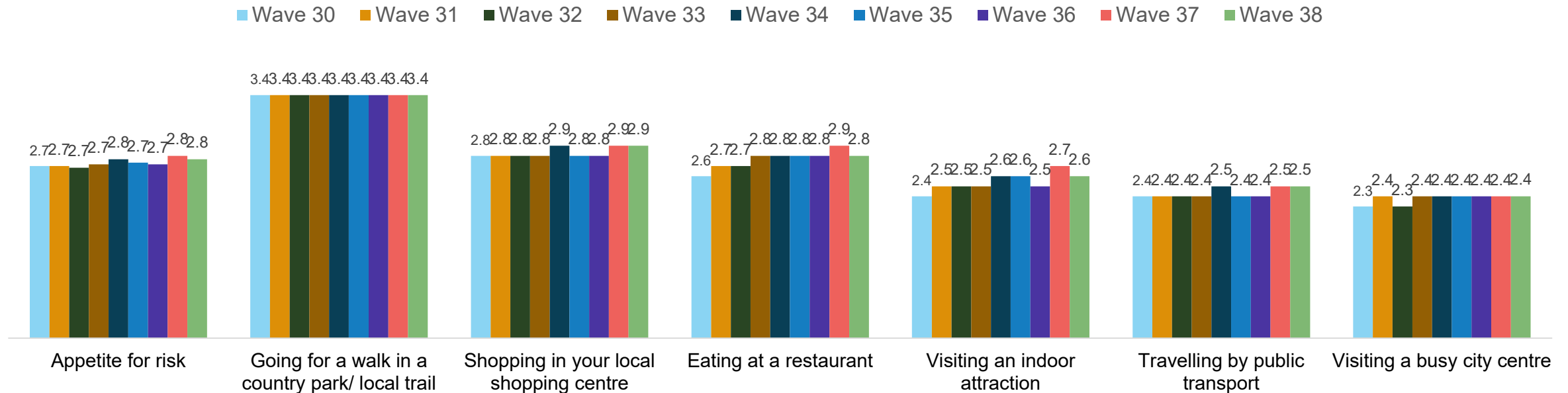
Figure 8. Top 5 reasons for not being confident about travelling in Autumn*, percentage Wave 38, UK



The 'Appetite for Risk'

- For the second consecutive wave, the 'appetite for risk' score is 2.8.
- Since Wave 37, comfort with 'eating at a restaurant' and 'visiting an indoor attraction' have dropped slightly after improvements made last wave. Comfort with all other activities remains consistent with last wave.

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 38 = 1,758



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2. Overnight Trip Intentions

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

- Over half of UK residents anticipate more or about the same number of U.K. short breaks or longer breaks compared to normal (consistent with wave 37), with the remainder anticipating fewer or currently unsure.
- Anticipated overseas trips continue to be significantly below normal.

Figure 10a. Number of U.K. overnight trips between now and the end of the year compared to normal, Percentage Wave 38, UK

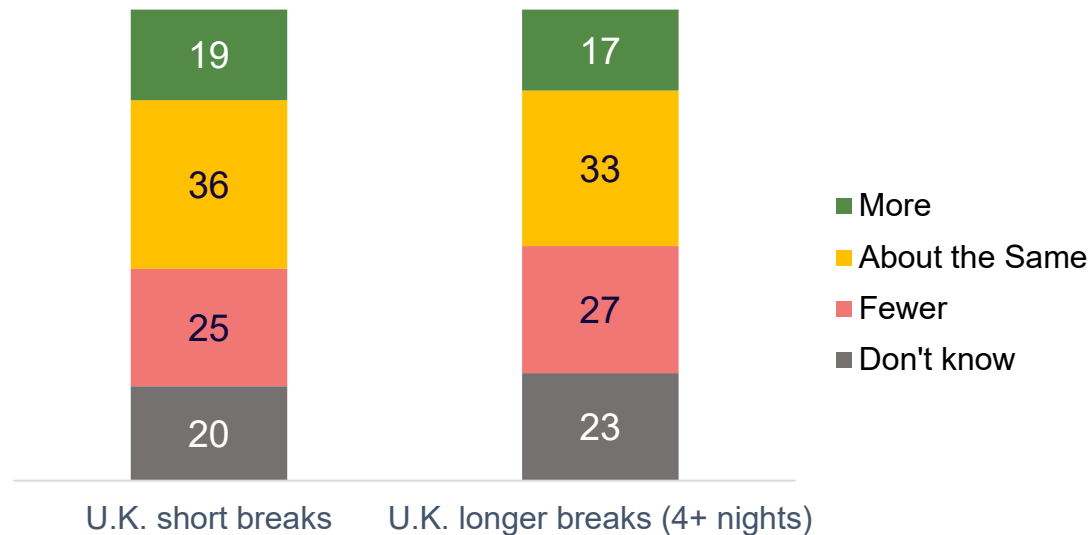
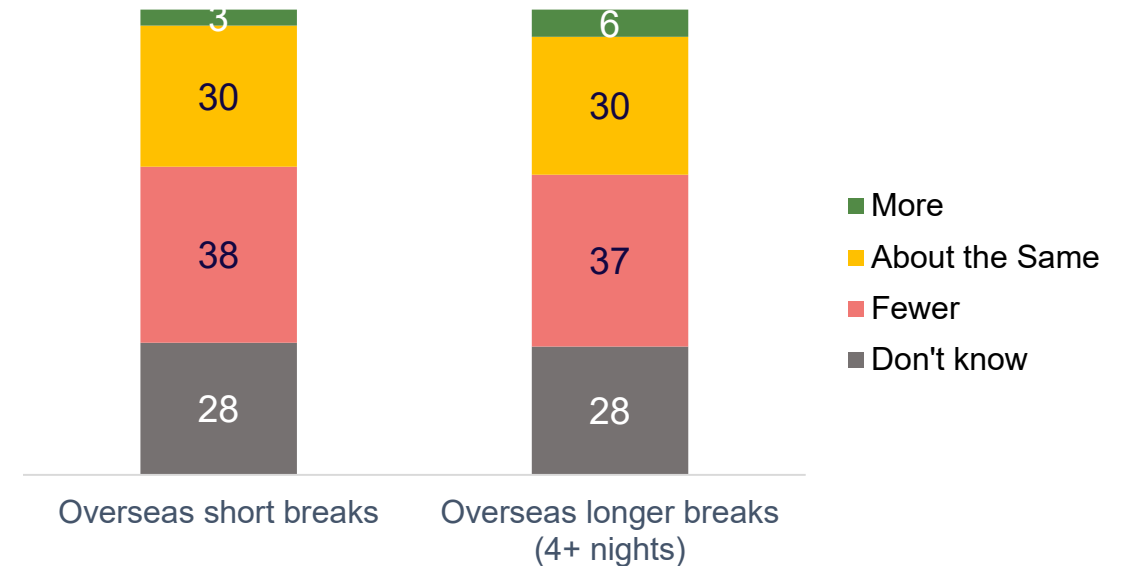


Figure 10b. Number of OVERSEAS overnight trips between now and the end of the year compared to normal, Percentage Wave 38, UK



QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of UK holidays/short breaks in the next 6 months? Base: All respondents. Wave 38 = 1,758

*Note: Questionnaire changed in Wave 34 from 'by the end of the year' to 'next six months'

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

- Overall, the number of anticipated trips for ‘short breaks’ and ‘longer breaks of 4+ nights’ remain below ‘normal’ levels – ‘longer breaks’ more so.
- Anticipated overseas trips remains significantly below normal.
- This being said, both UK and Overseas holidays have seen improvements on Wave 37.

Figure 10. Number of U.K. overnight trips in the next 6 months compared to normal, Net ‘More minus fewer’, Wave-on-wave, UK

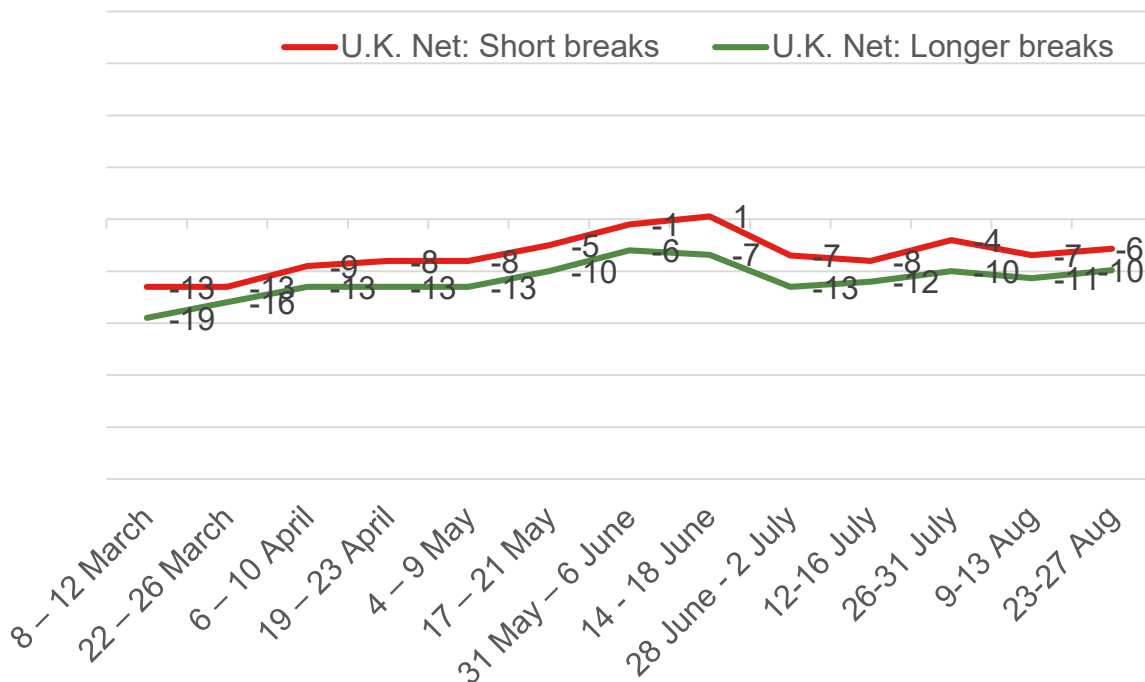
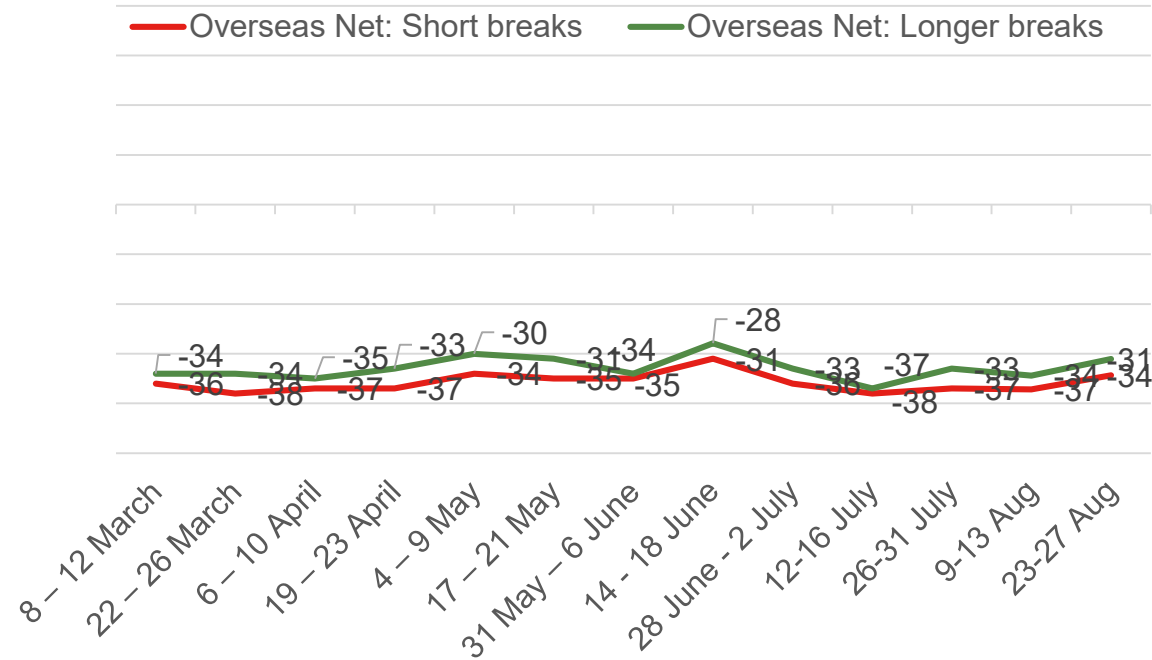


Figure 11. Number of OVERSEAS overnight trips in the next 6 months compared to normal, Net ‘More minus fewer’, Wave-on-wave, UK



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 38 = 1,758

*Note: Questionnaire changed in Wave 34 from ‘by the end of the year’ to ‘next six months’

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

- 21% of U.K. adults claim to have already planned and 15% already *booked* their next domestic overnight trip, both of which are ahead of the equivalent period in 2020.
- 36% are likely to have *planned* a domestic overnight trip by the end of summer (compared to 33% in 2020), with around 1 in 4 (28%) expecting to have one *booked* (also 28% in 2020).

Figure 12. When anticipate PLANNING the next UK overnight trip, Percentage Wave 38, UK

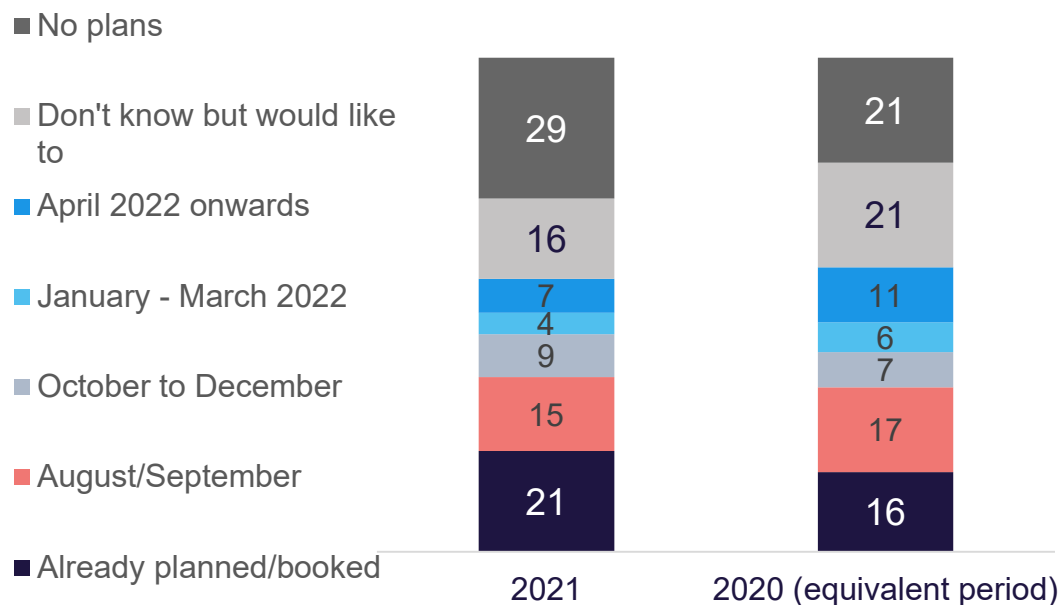
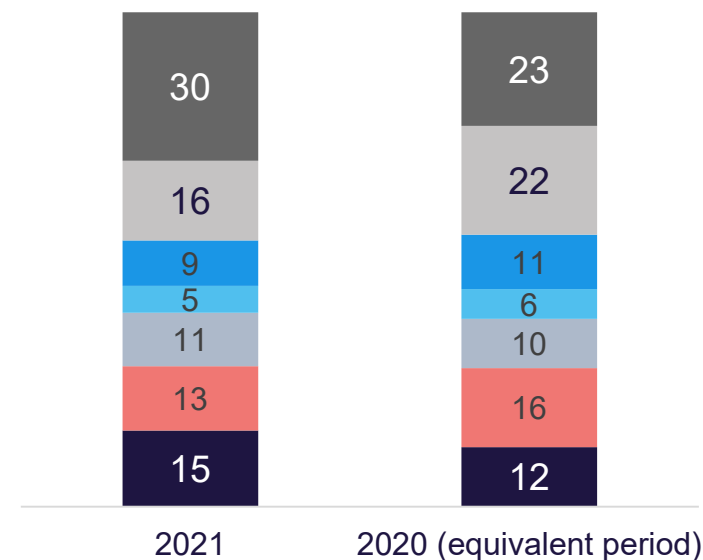


Figure 12. When anticipate BOOKING the next UK overnight trip, Percentage Wave 38, UK



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

- 12% of U.K. adults anticipate taking an overnight domestic trip this September – ahead of the proportion that planned to do so this time last year. 22% plan on taking an overnight trip this Autumn – marginally ahead of predictions in 2020. Not
- The vast majority would continue to take their planned U.K. trip even if all overseas travel restrictions were lifted.

Figure 14. Proportion anticipating going on any overnight UK trips, percentage Wave 38, UK

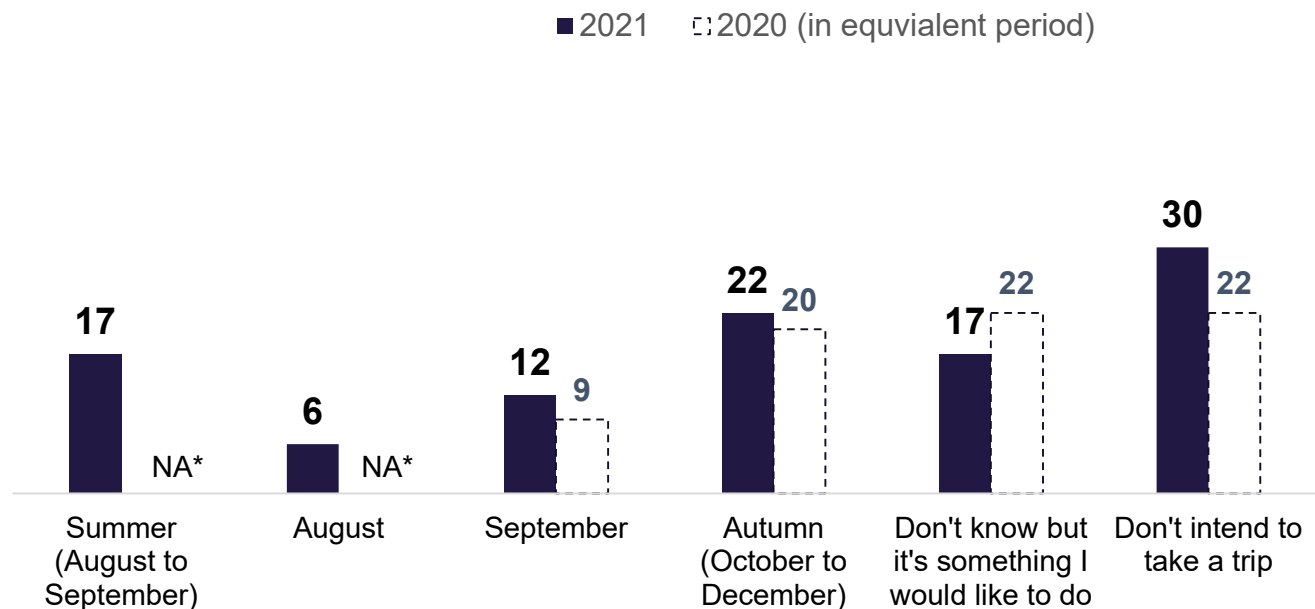
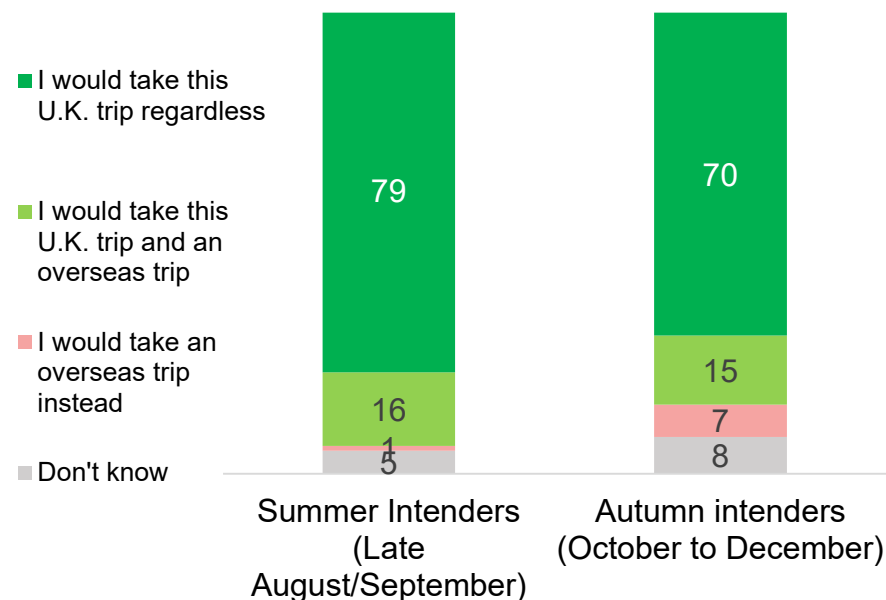


Figure 14b. Impact on U.K. trip if majority of overseas travel restrictions were lifted, percentage Wave 38, UK



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 38 = 1,758

Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods. 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 38 respondents planning on taking a holiday or short break in the UK in Summer (Late August/September) n=287, Autumn (October to December) n=274

*Equivalent periods not shown due to different fieldwork periods boosting August in 2020

Planning and booking timeline compared to normal

- The U.K. public are planning their summer and autumn trips relatively in line with normal.
- Bookings amongst both summer and autumn intenders are happening significantly closer to the travel date than usual.

Figure 15. **PLANNING** lead times for Summer or Autumn trips compared to normal, percentage Wave 38, U.K.

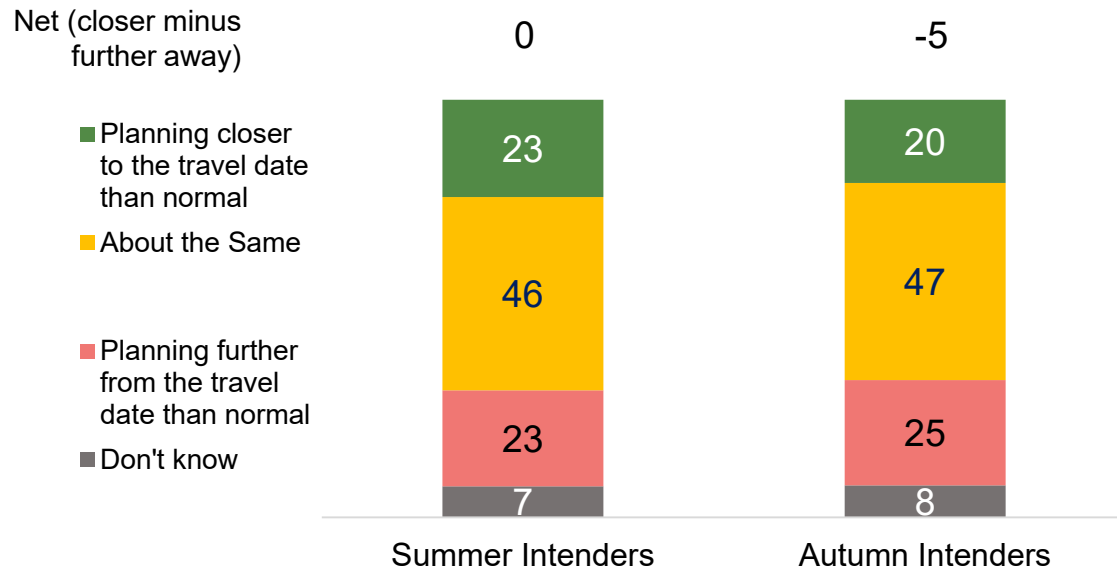
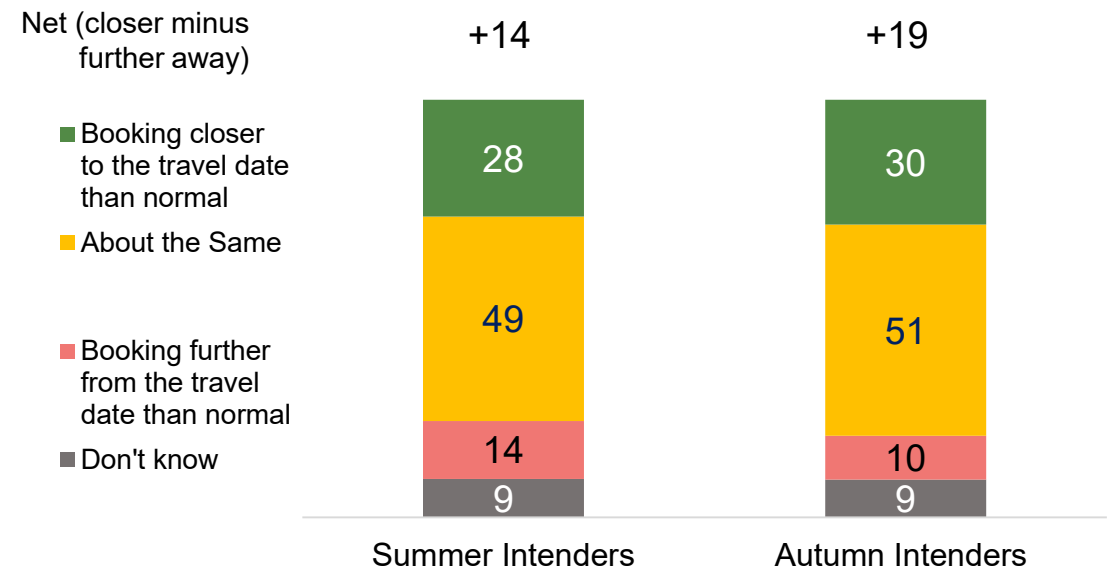


Figure 16. **BOOKING** lead times for Summer or Autumn trips compared to normal, percentage Wave 38, U.K.



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

- 3 in 5 (62%) of summer intenders have already planned their forthcoming trip with 53% having already booked it – both having increased on Wave 37, and slightly higher than in the equivalent period in 2020.
- The proportion of autumn intenders that have already planned or booked their trip is unsurprisingly lower than summer (39% and 29% respectively), but also significantly higher than in 2020.
- 26% of summer and 31% of autumn 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 38 for Summer and Autumn, UK

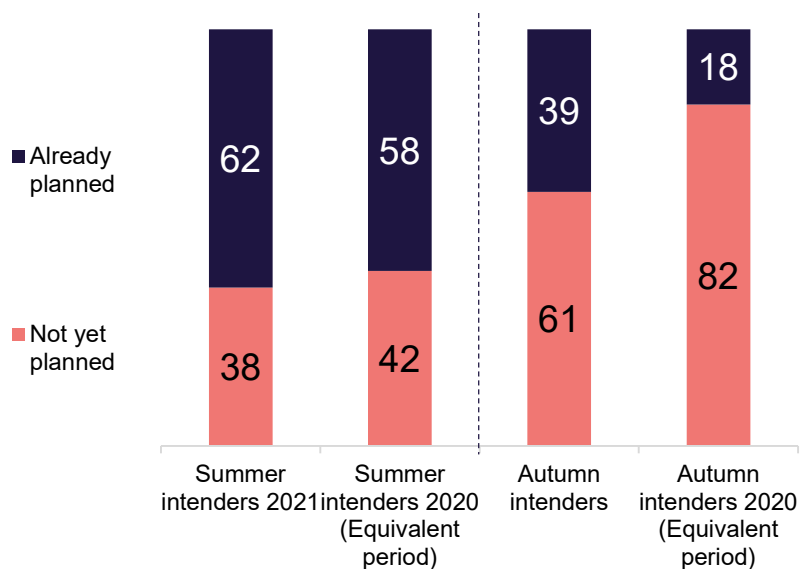


Figure 18. Proportion of Intenders that have already booked their trip, percentage Wave 38 for Summer and Autumn, UK

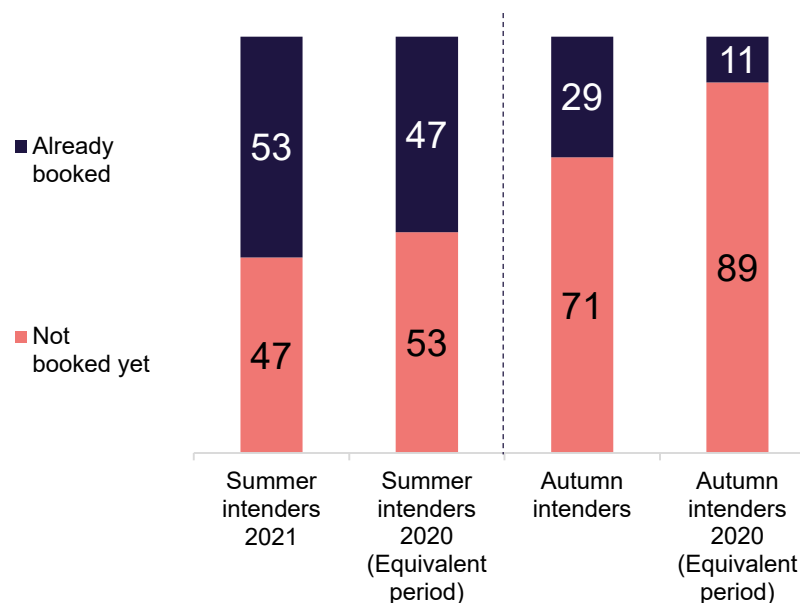
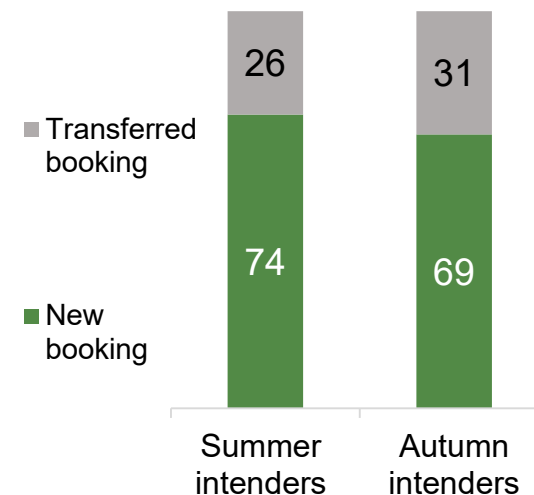


Figure 19. Proportion of next trips that are transferred bookings, percentage Wave 38 for Summer and Autumn, UK



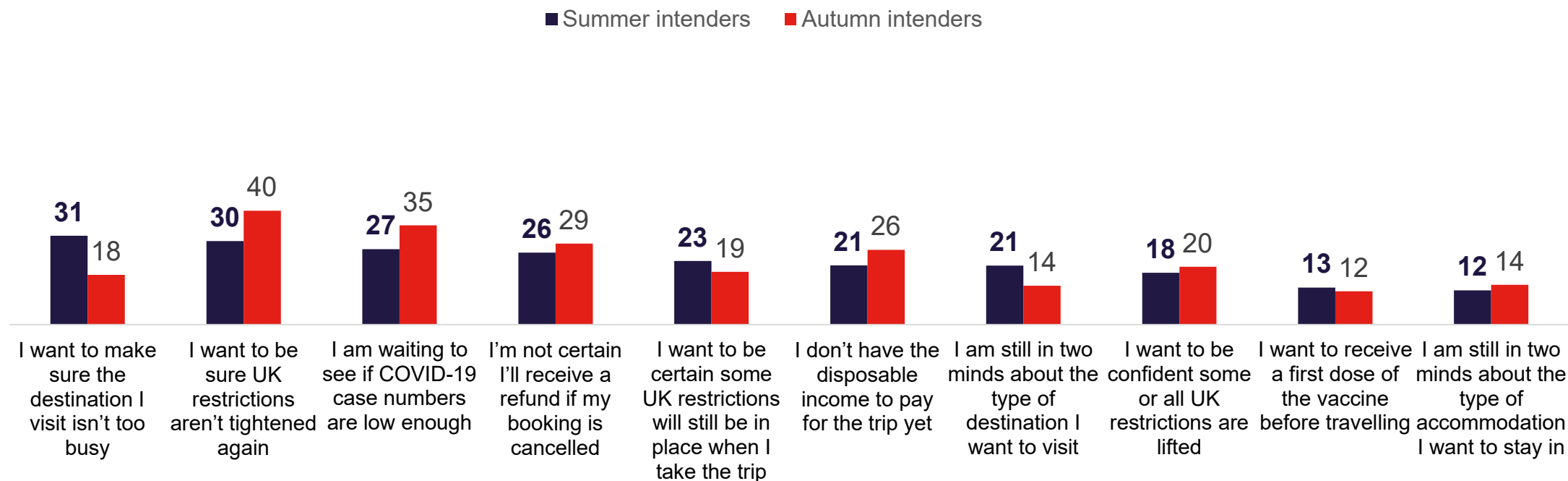
QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB6diii Is this next trip a transferred booking from a trip that was previously cancelled or postponed due to COVID-19?

Base: All Wave 38 respondents planning on taking a holiday or short break in the UK in Summer (Late August/September) n=287, Autumn (October to December)

Top 7 reasons for not having booked trip

- The most popular reasons for summer and autumn intenders not yet having booked their trips are ‘I want to be sure restrictions aren’t tightened again’ (particularly dominant for autumn intenders) and ‘I want to make sure the destination I visit isn’t too busy’ (most influential for summer intenders). A range of other reasons are provided, ranging from ‘waiting for lower case numbers’ to ‘uncertainty around receiving a refund’.

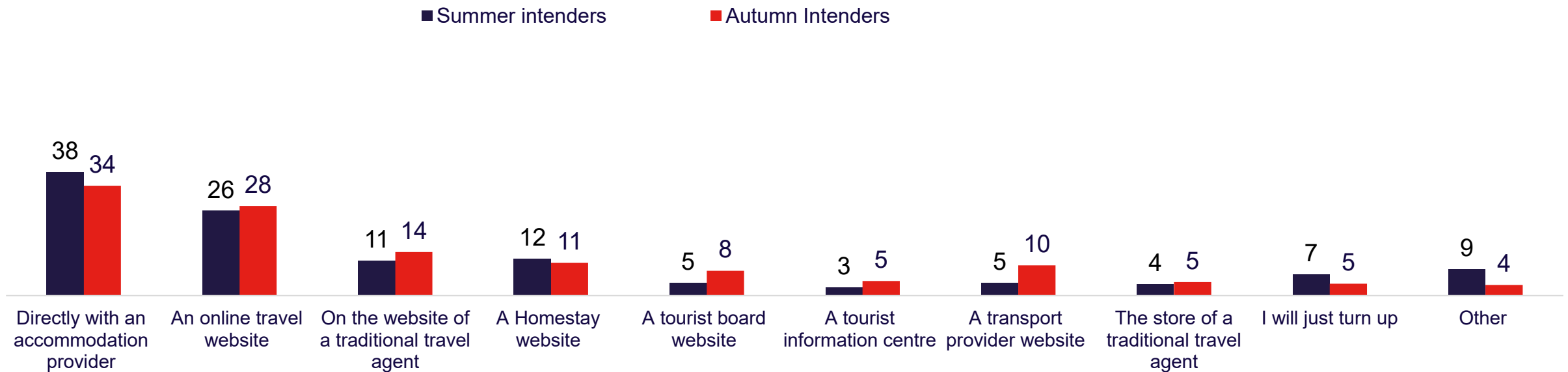
Figure 19b. Top 10 reasons for not having yet booked trip in Summer and Autumn, percentage Wave 38, ranked on summer, UK



Ideal method of booking accommodation for next overnight trip in UK

- ‘Directly with an accommodation provider’ remains the leading anticipated method of booking accommodation for summer and autumn intenders
- ‘An online travel website’ is the second leading anticipated method of booking accommodation in both time periods

Figure 19a. Accommodation booking channel for next trip in Summer and Autumn, percentage Wave 38, UK



VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip.

Base: All Wave 38 respondents planning on taking a holiday or short break in the UK in Summer (Late August/September) n= 287, Autumn (October to December) n=274

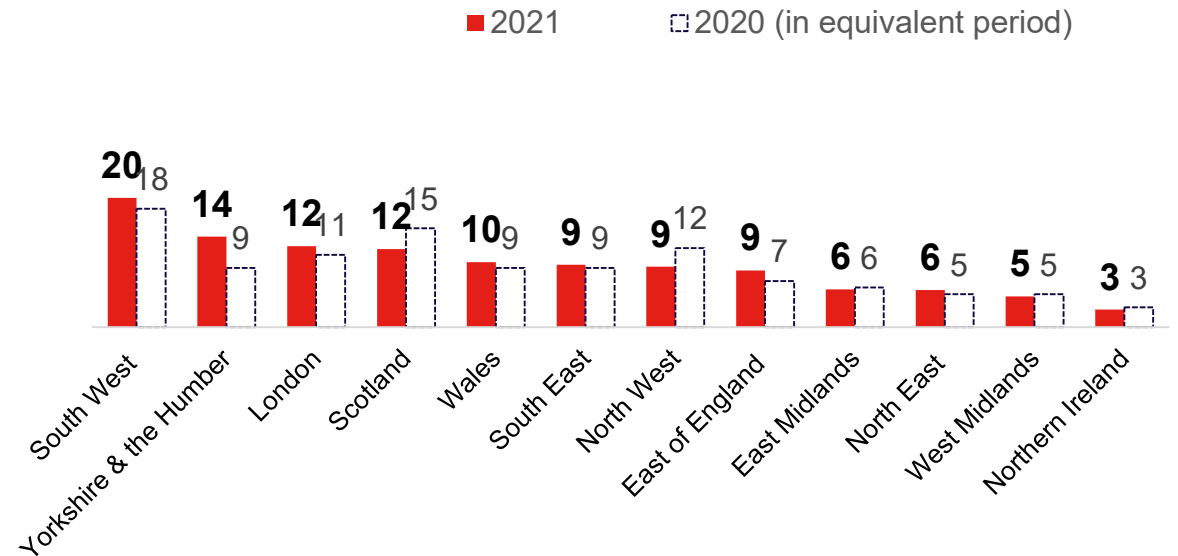
Where planning on staying on next overnight trip in UK

- The South West of England remains the leading destination for an overnight domestic trip for the remainder of this summer. At 19%, the South West is significantly preferred to other parts of the UK. In line with previous waves, little separates the visitor share of the majority of subsequent destinations in the summer period.
- Summer destination intention is relatively in line with the equivalent period in 2020, although London continues to over-index.
- The South West also leads amongst autumn intenders – Yorkshire and the Humber, London, and Scotland are the next most popular.

Figure 21. Where planning on staying on next UK overnight trip in Summer, percentage Waves 37 and 38, UK



Figure 22. Where planning on staying on next UK overnight trip in Autumn, Percentage Waves 37 and 38, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?

Base: All Waves 37 and 38 respondents planning on taking a holiday or short break in the UK for Summer (Late August/September) n=658, Autumn (October-December) n =

548 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

- A 'traditional coastal/seaside town' is the preferred destination type for summer intenders - consistent with the last five waves of research. 'Countryside or village' and 'city or large town' are the next most preferred – the former significantly lower than in the equivalent period in 2020; the latter higher.
- In the autumn period, 'a city or large town' is the top destination type, higher than in the equivalent period in 2020.

Figure 23. Main type of destination for trip in summer, percentage Waves 37 and 38, UK

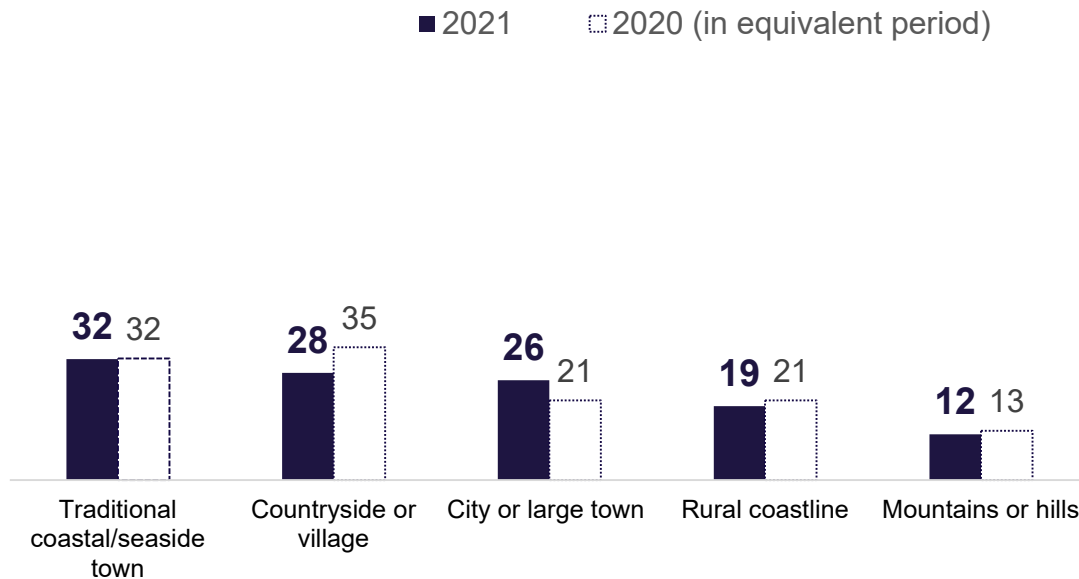
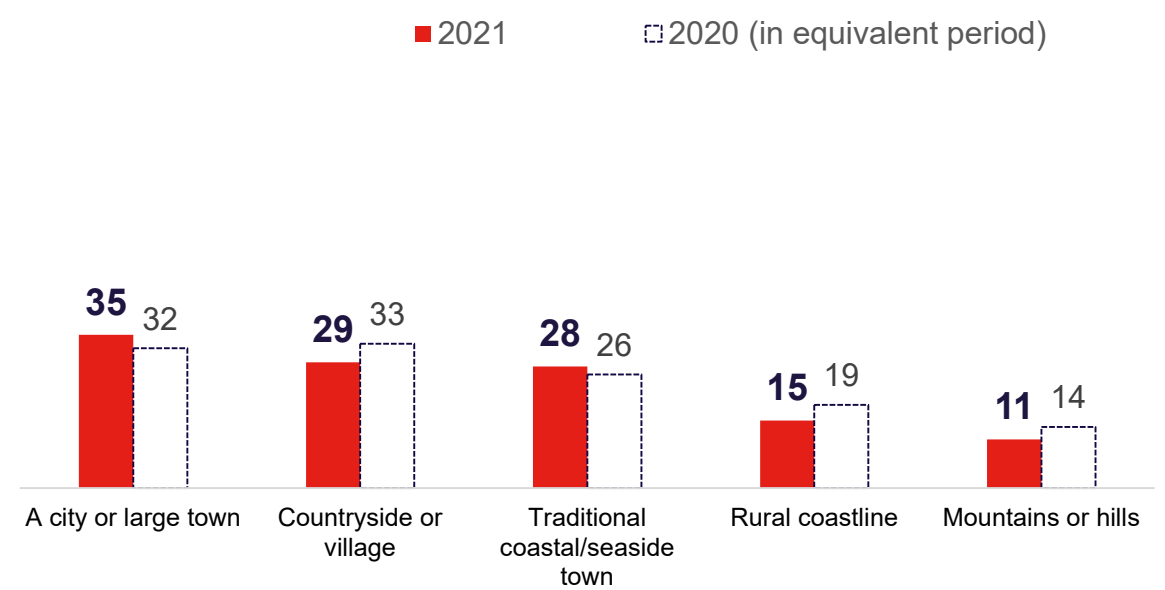


Figure 24. Main type of destination for trip in autumn, percentage Waves 37 and 38, UK



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 37 and 38 respondents planning on taking a holiday or short break in the UK for Summer (Late August/September) n=658, Autumn (October-December) n = 548

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

- ‘Hotel/motel/inn’ is the leading accommodation choice amongst summer intenders and consistent with the previous wave, significantly higher than in the equivalent period in 2020.
- For the autumn period, ‘hotel/motel/inn’ is also leading accommodation choice, followed by ‘commercial rental’ and ‘a private home’.

Figure 25. Accommodation planning on staying in on next UK overnight trip in summer, net percentage Waves 37 and 38

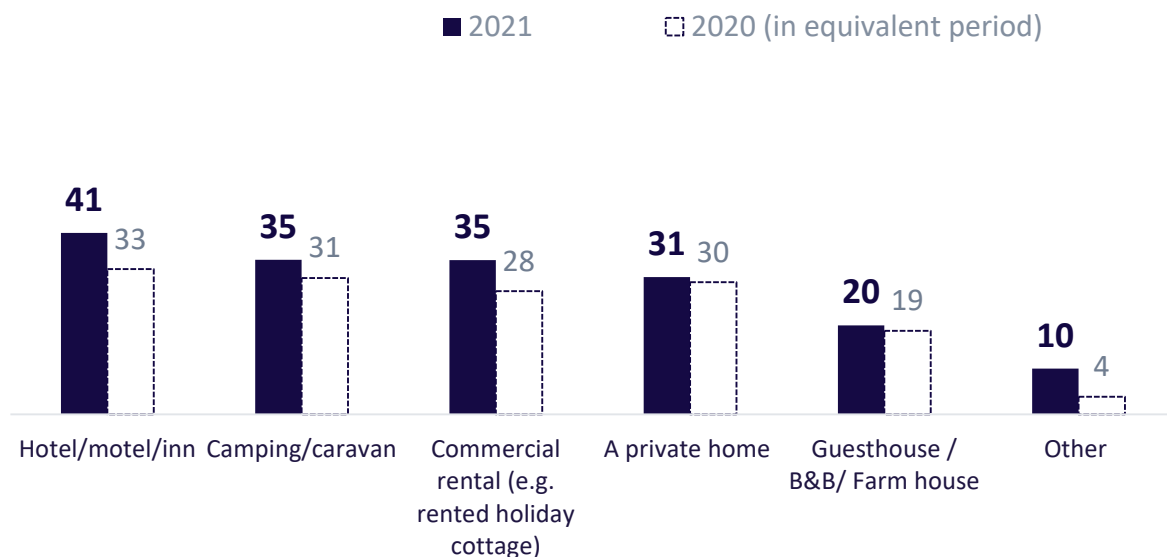
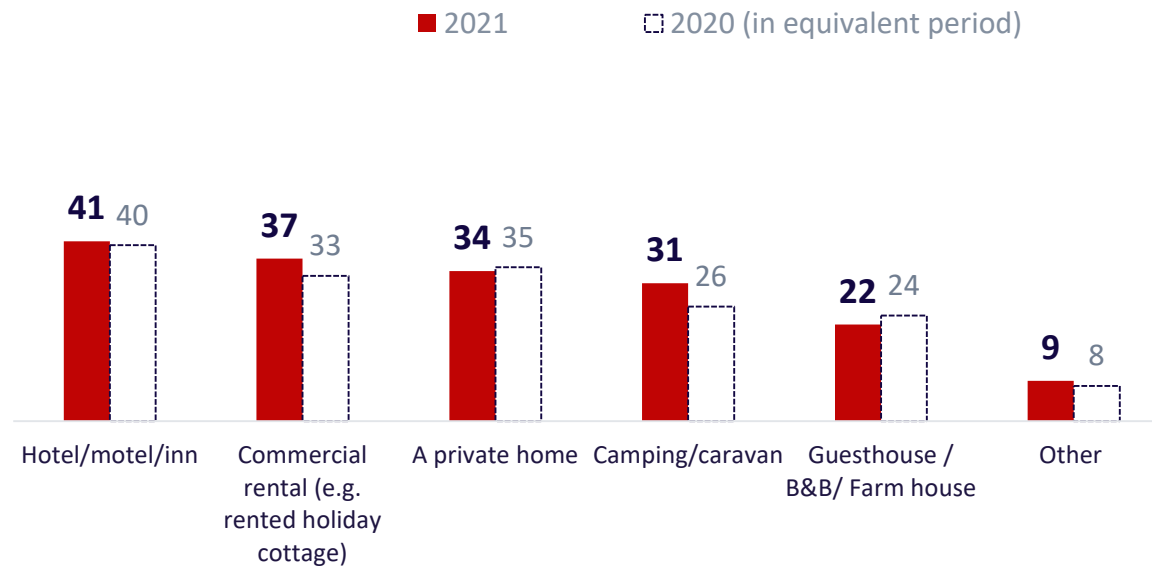


Figure 26. Accommodation planning on staying in on next UK overnight trip in autumn, net percentage Waves 37 and 38



QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?

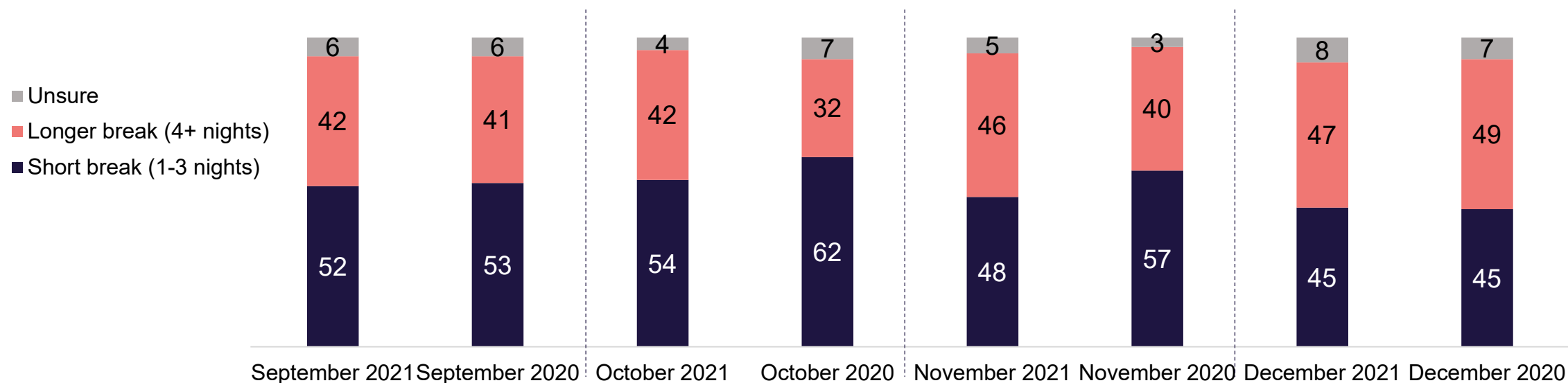
Base: All Waves 37 and 38 respondents planning on taking a holiday or short break in the UK for Summer (Late August/September) n=658, Autumn (October-December) n = 548

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 is a relatively even split between short breaks and longer breaks for intended overnight trips from September through to the end of the year, with a large number uncertain towards the end of the year.
- Consistent with previous waves, intended trips in 2021 are more likely to be longer breaks than in 2020.

Figure 27. Length of next UK holiday or short break by time period, percentage Waves 37 and 38, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?

Base: All Waves 37 and 38 respondents intending to take next holiday or short break in each time period: August n=277, September n=381, October n = 291, November n = 126, December n = 131

Main mode of transport for next overnight trip in UK

- Across both time periods, 'own car' is by far the leading main mode of transport for travelling to an overnight destination, with 66% stating this for summer trips and 53% for autumn trips. This is relatively in line with what was considered in 2020.
- '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 Summer, percentage, Wave 38, UK

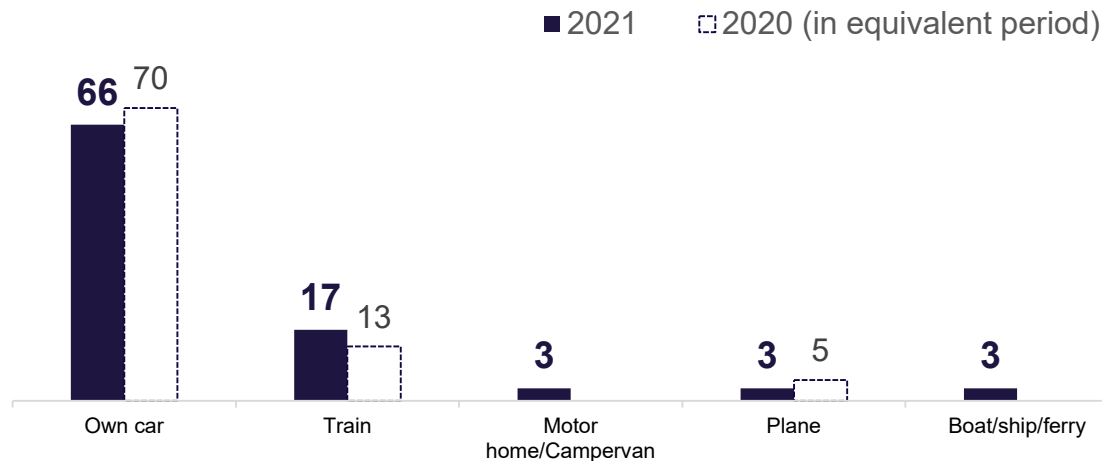
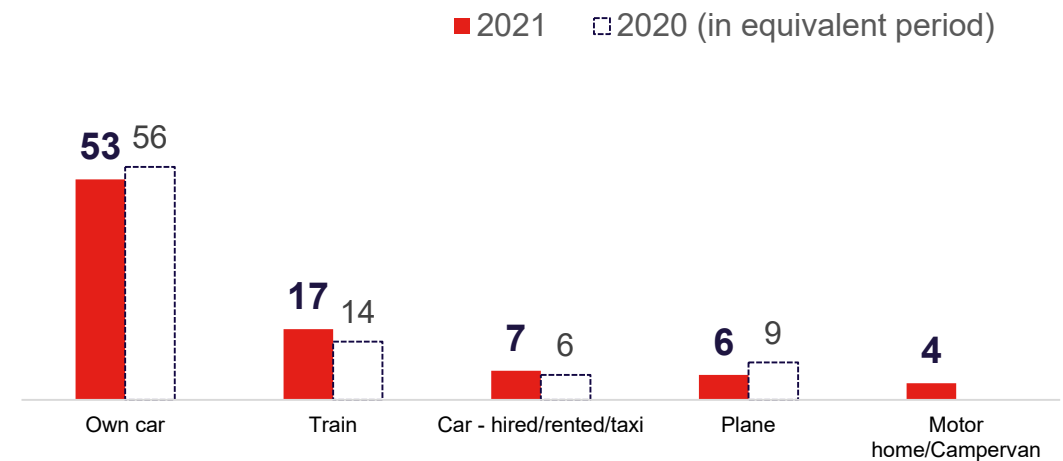


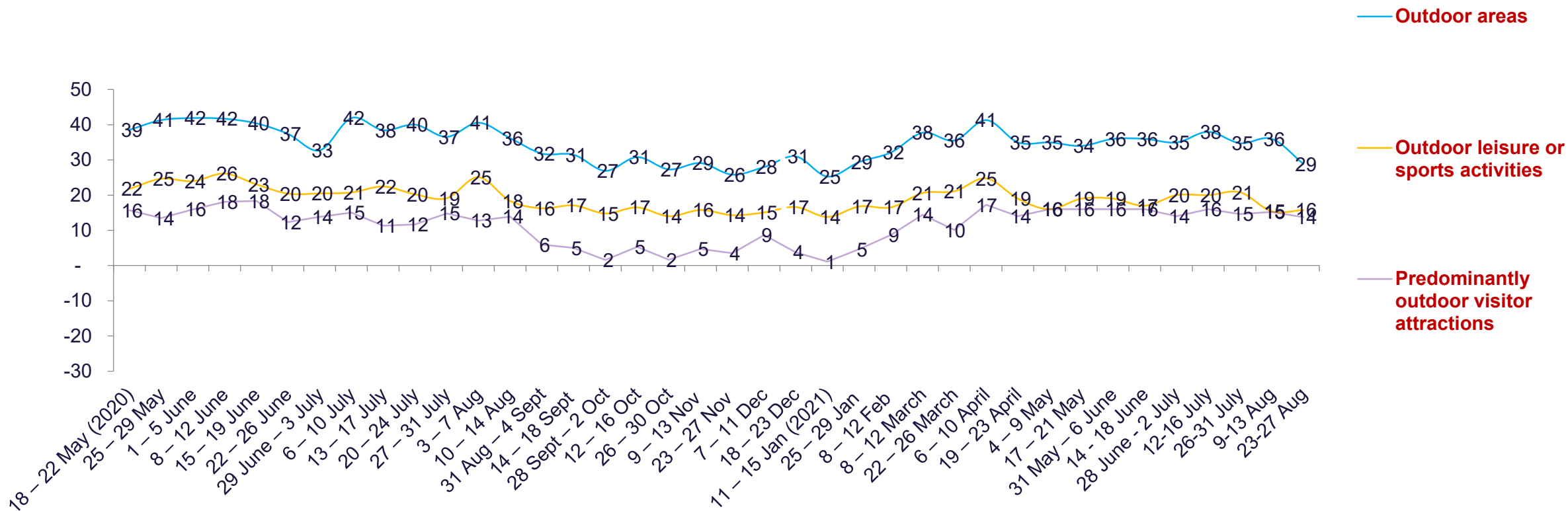
Figure 29. Top 5 main modes of travel to destination for trip in Autumn, percentage, Wave 38 UK



Outdoor leisure activity engagement in the next few months

- Engagement levels with outdoor activities and spaces remain significantly ahead of normal. Nevertheless, there is a negative shift in those who are willing to engage in 'outdoor areas' – potentially linked to the change in weather.

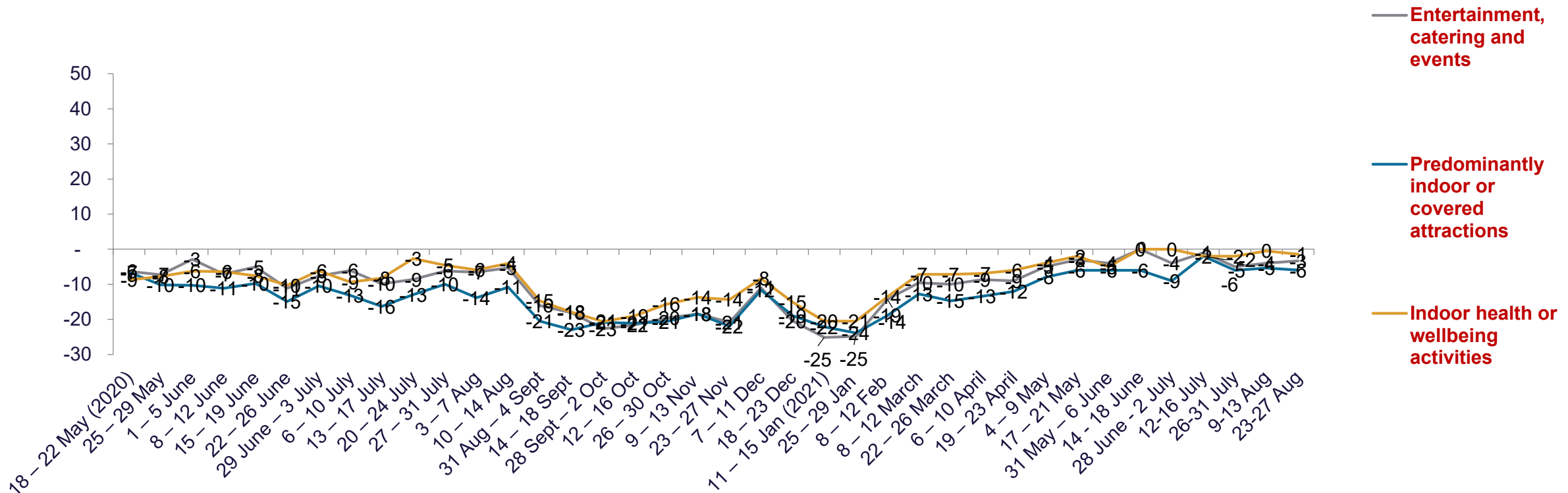
Figure 31. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely', Wave-on-wave, UK



Indoor leisure activity engagement in the next few months

- Although intentions are still 'net negative', engagement with indoor activities and spaces remain close to 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-on-wave, 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 38 = 1,758



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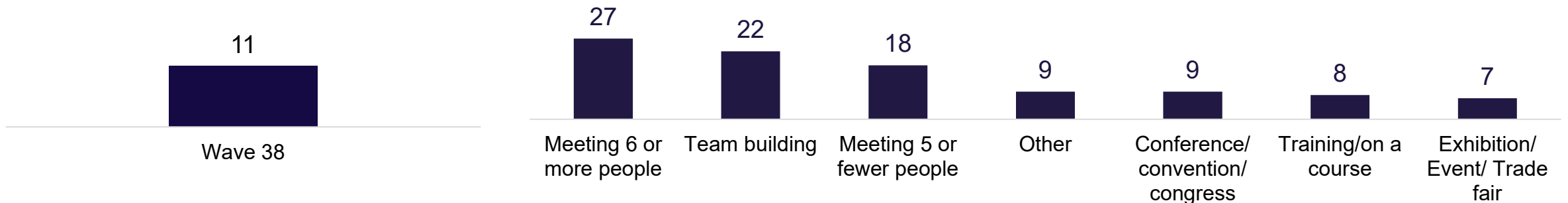
3. Business trip Intentions

Intentions for overnight business trips between now and the next 6 months

- 11% of U.K. adults in employment say they are intending to take a domestic overnight business trip over the next 6 months
- ‘Meetings with 6 or more people’ is the leading reason for an overnight business trip (27%). This is followed by ‘team building’ in second place (22%) and ‘meetings with 5 or fewer people’ in third (18%).

Figure 30a. Proportion anticipating an overnight business trip by end of 2021, Percentage, Wave 38, U.K. adults in employment

Figure 31b. Reasons for taking an overnight business trip, Percentage, Wave 38, U.K. adults in employment planning a trip





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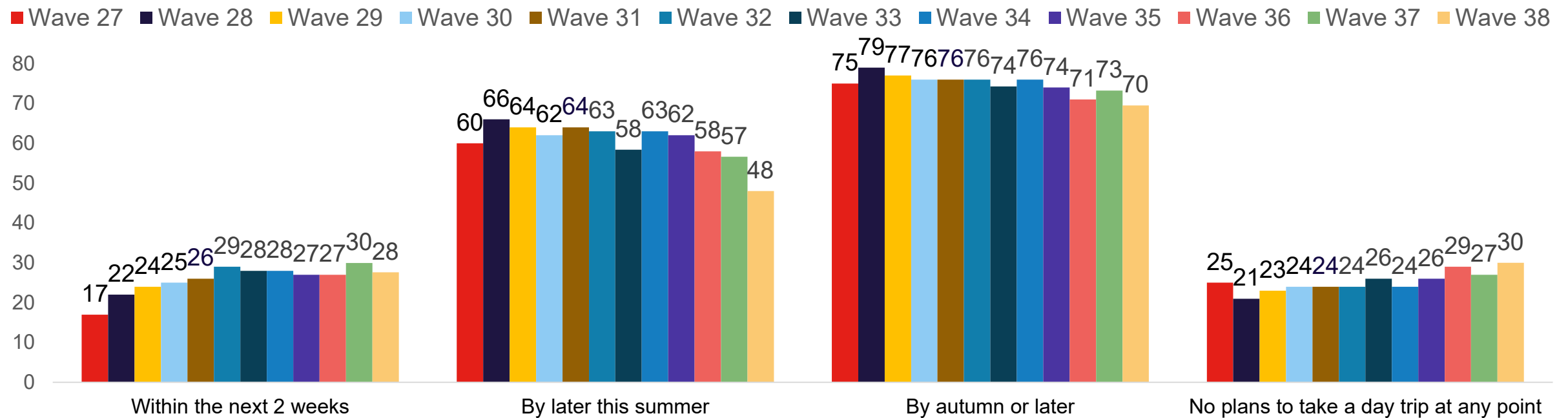
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4. Day Trip Intentions

Day trip intention overall

- The likelihood to take day trips across all time periods decreases slightly, particularly as we edge closer to the end of the summer period.

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

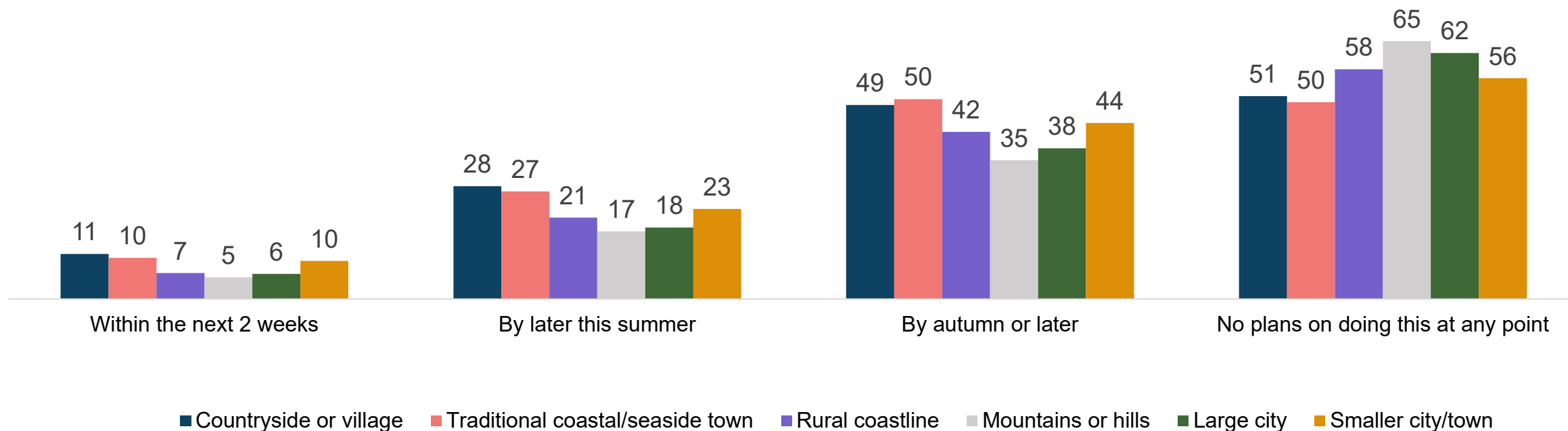


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: All Wave 38 = 1,758
 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.

Day trip intention by destination type

- The destinations of choice for day trippers are more likely to be rural or coastal in nature.
- Day trips to 'large cities' and 'mountains and hills' by autumn index the lowest compared to other destination types, while 'smaller cities/towns' look set to be more popular among those travelling by autumn or later.

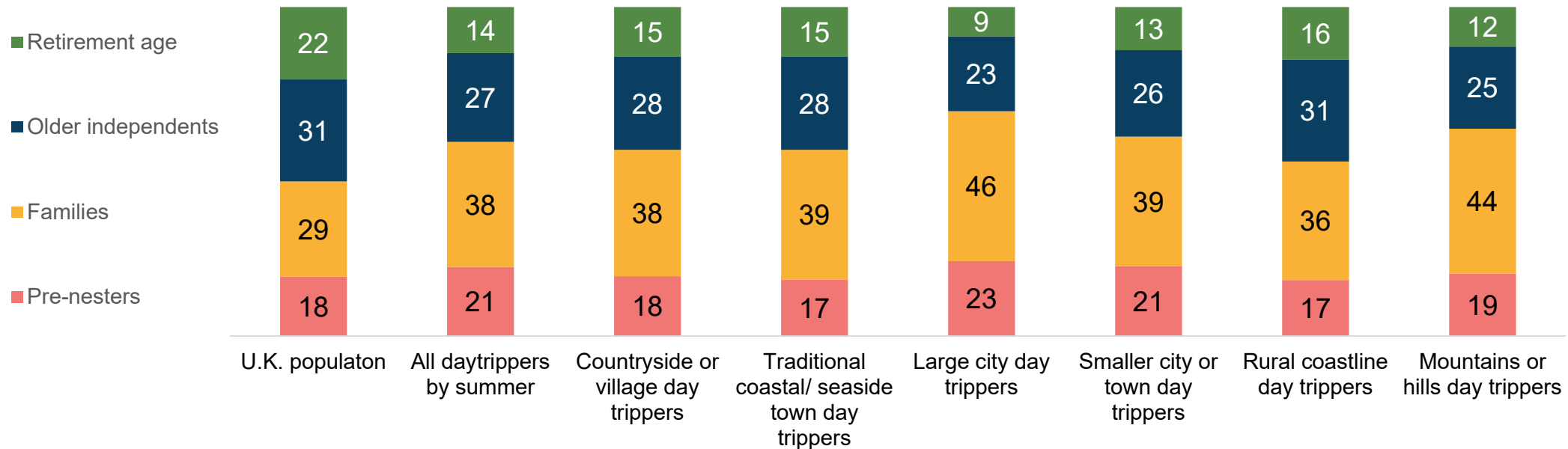
Figure 33. Likelihood to take a day trip by destination type, percentage, Wave 38, UK



Life stage of day trip intenders

- Overall, day trippers have higher representation amongst pre-nesters and families compared to the UK adult population.
- Consistent with previous reporting, the skew towards younger life stages is most apparent among those planning a day trip to a large city, where nearly 3 in 4 are pre-nesters and families.

Figure 34. Breakdown of day trip intenders* by life stage, percentage, Wave 38, 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 38 respondents: *All day trippers within the next 2 weeks/summer n=892; All day-trippers Countryside or village day trippers n=516; Traditional coastal/ seaside town day trippers n=516 Large city day trippers n=333 Smaller city or town day trippers n=409 Rural coastline day trippers n=378 Mountains or hills day trippers n=328



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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 38 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-37 where appropriate. Wave 38 fieldwork was conducted between 23-27 August 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.

