

COVID-19 Consumer Tracker

Wave 39

Published: 16th September 2021
Fieldwork Period: 6th – 10th September 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 6-10 September 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.

- **September/October Intenders:** Residents of the UK who claim their next domestic overnight trip will take place in September and October 2021
- **November 2021-March 2022 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between November and March 2022

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 39	6-10 September

Wave 39: Scorecard of Key Metrics

Key Metrics	Wave 38	Wave 39	Wave Shift
National mood (average score out of 10)	6.8	6.6	-0.2
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	26%	24%	-2
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)	14%	13%	-1
Leading two reasons for not feeling confident about taking a trip in (September/October)	1. Government restrictions 2. Fewer things to do	1. Personal Finances 2. Concerns around catching COVID-19	New 1 and 2
Near-term confidence in taking UK overnight trip (September confident)	60%	61%	+1
Medium-term confidence in taking UK overnight trip (November confident)	56%	56%	No change
Net anticipated number of UK short breaks compared to normal (% more minus fewer)	-6	-4	+2
Net anticipated number of UK longer breaks compared to normal (% more minus fewer)	-10	-8	+2
Proportion going on a UK overnight trip in September/October	21%	25%	+4*
Leading UK overnight destination likely to stay in September/October	South West	South West	No change
Main <i>type</i> of overnight destination likely to stay in September/October	Countryside or Village	Countryside or Village	No change
Main overnight accommodation type likely to stay in September/October	Hotel/motel/inn	Hotel/motel/inn	No change
Proportion going on a UK day trip in next two weeks	28%	26%	-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



VisitBritain



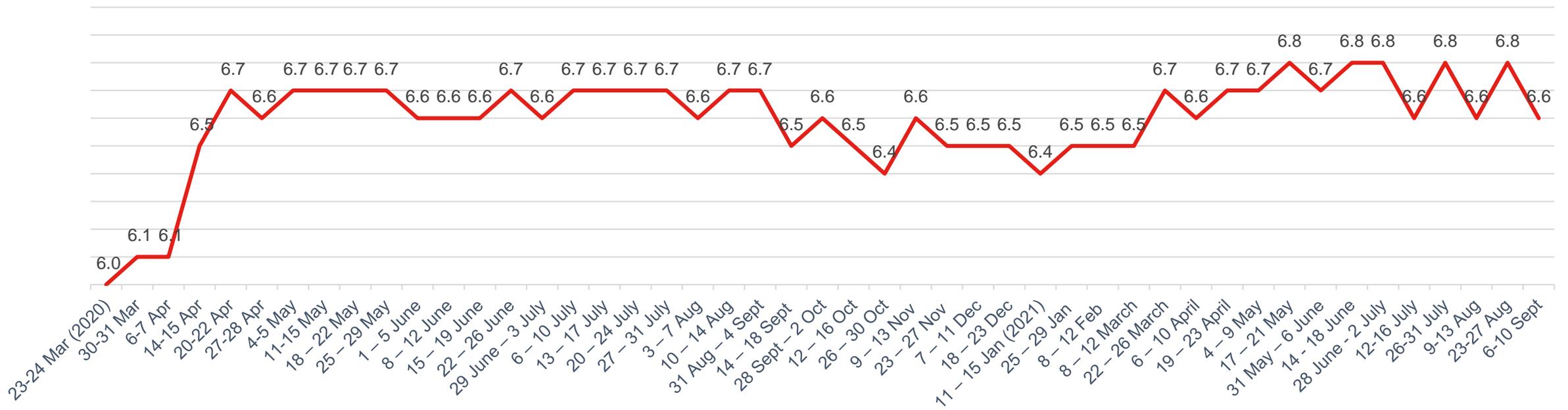
VisitEngland

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 a fall of 0.2 points to 6.6

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

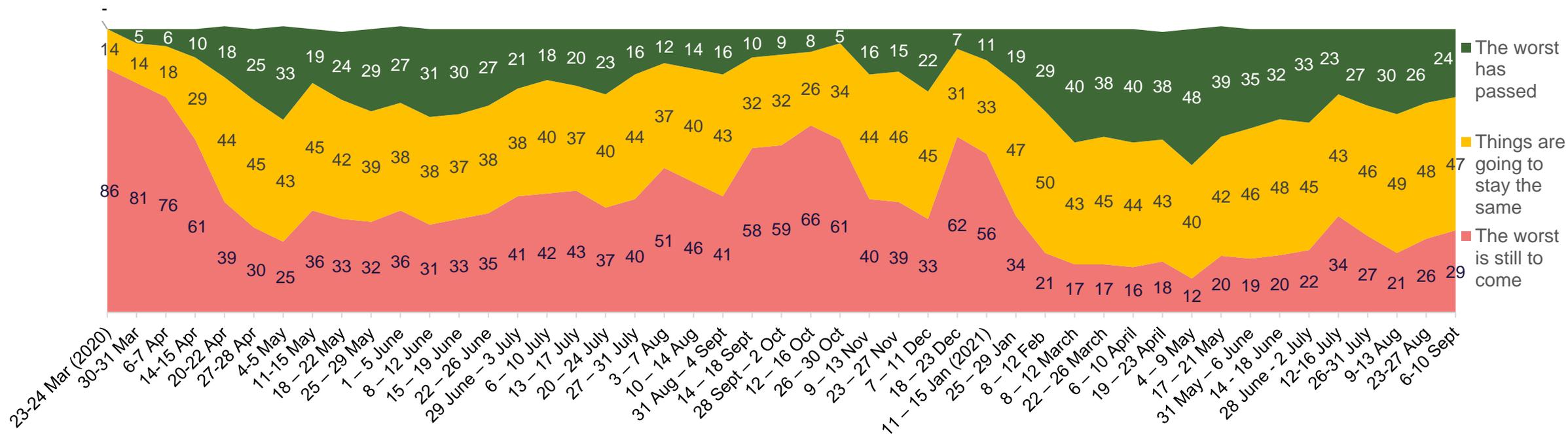


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 39 = 1,762 All others waves n=c,1750. Pre Wave 1, research was conducted by BVA BDRC with base size of c.750

Perceptions of the situation relating to COVID-19

- The proportion of the U.K. public that believe ‘the worst is still to come’ is now higher than ‘the worst has passed’, sitting at 29% and 24% respectively. The proportion stating ‘the worst is still to come’ has risen for the second consecutive wave, and is at its second highest since March this year.
- The U.K. public are most likely to think that ‘things are going to stay the same’, 47% 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 39 = 1,762 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 (13%) expect life to return 'something close to normal' by December, the third consecutive wave of decline.
- 16% of the U.K. public 'never' expect a return to normality – which has increased for the second consecutive wave.

Figure 3. Perceptions of when things will return 'close to normal', cumulative percentage, Wave 39, UK

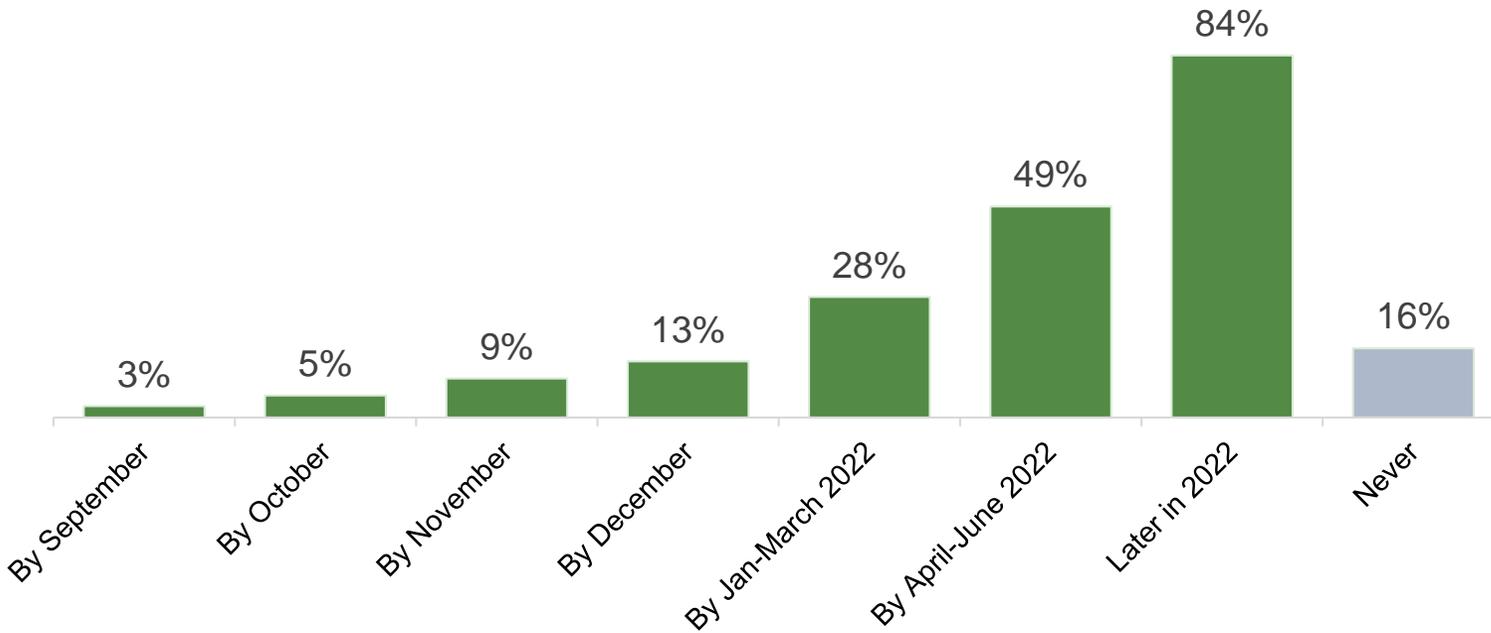
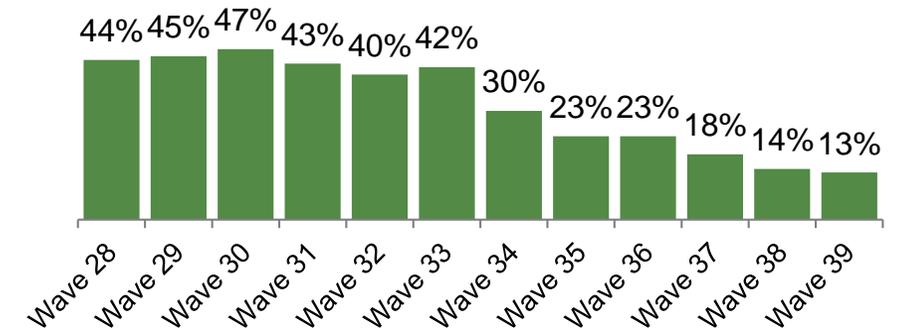


Figure 4. Proportion expecting normality by December, percentage wave-on-wave, UK



Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 39 = 1,762
 *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 this is consistent with the last three waves. Confidence starts to drop from October onwards.

Figure 5. Confidence in taking a UK overnight trip across different time periods, percentage, Wave 39, UK

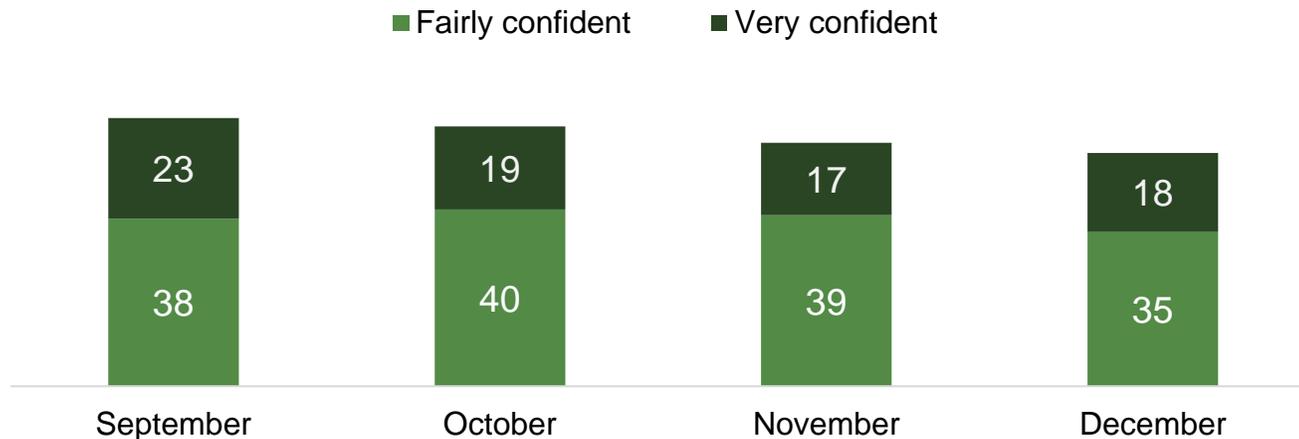
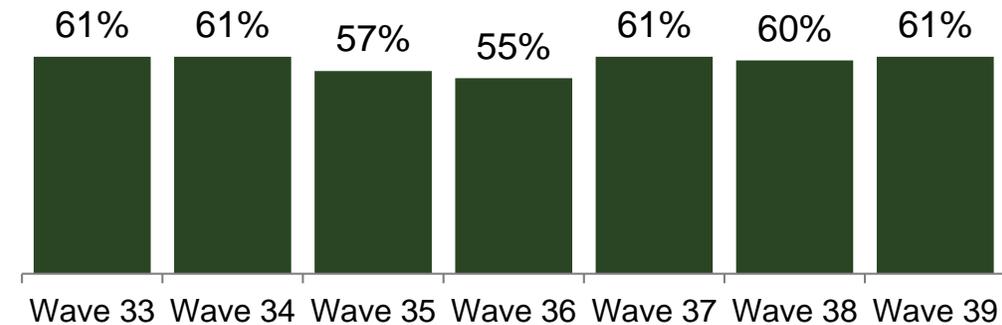


Figure 6. Confidence in taking a UK overnight trip in September 2021, percentage wave-on-wave, UK



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

- ‘Personal finances’ is the top reason people do not feel confident about taking an overnight trip in September/October, 4 percentage points higher than ‘concerns about catching COVID-19’ – the second highest reason.
- Between November 2021 and March 2022 , ‘concerns about catching COVID-19’ is the most influential reason, with ‘restrictions on travel’ and ‘personal finances’ the second and third most influential.

Figure 7. Top 5 reasons for not being confident about travelling in September/October*, percentage Wave 39, UK

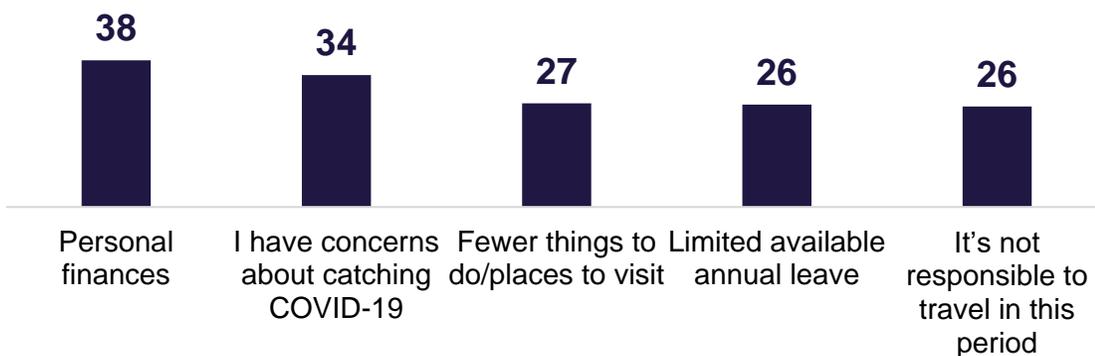
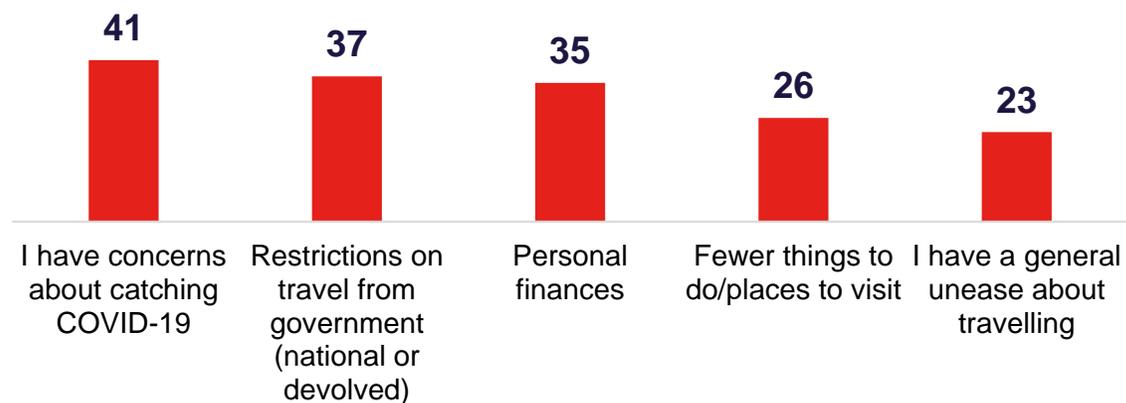


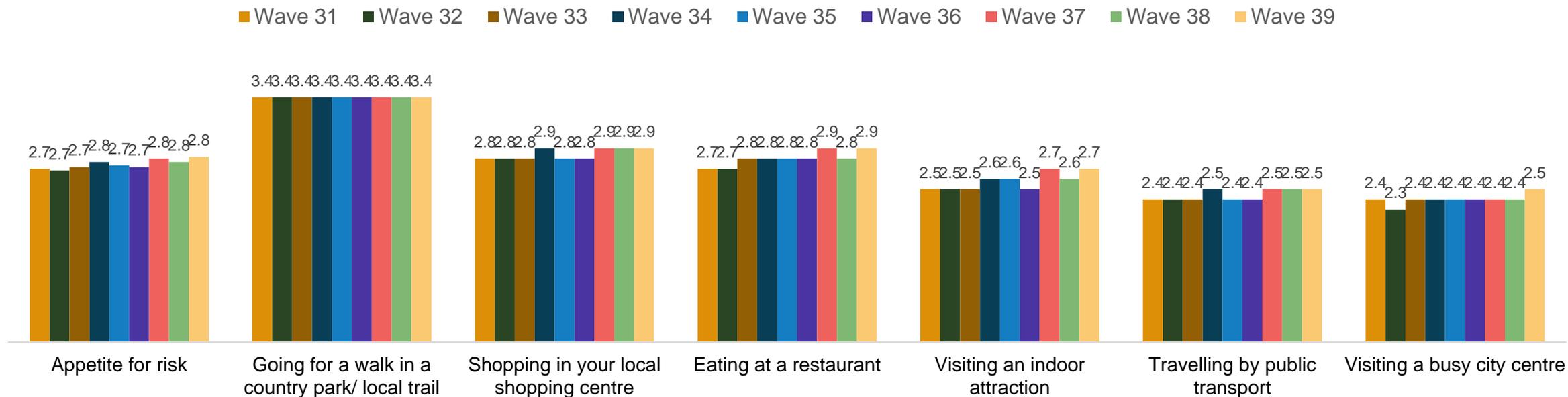
Figure 8. Top 5 reasons for not being confident about travelling in November 2021-March 2022*, percentage Wave 39, UK



The 'Appetite for Risk'

- The Wave 39 'appetite for risk' score is 2.8, consistent with Wave 38 (although higher to 2 decimal places)
- Comfort with 'eating at a restaurant', 'visiting an indoor attraction' and 'visiting a busy city centre' have improved – 'city centre' comfort at its highest to date. 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 39 = 1,762



VisitBritain



VisitEngland

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 in the next 6 months compared to normal, 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 39, UK

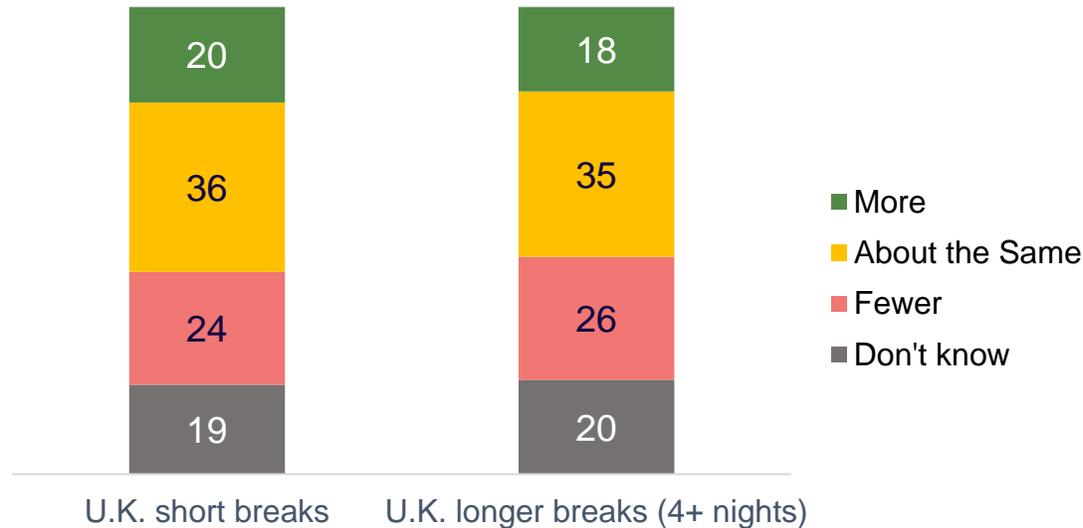
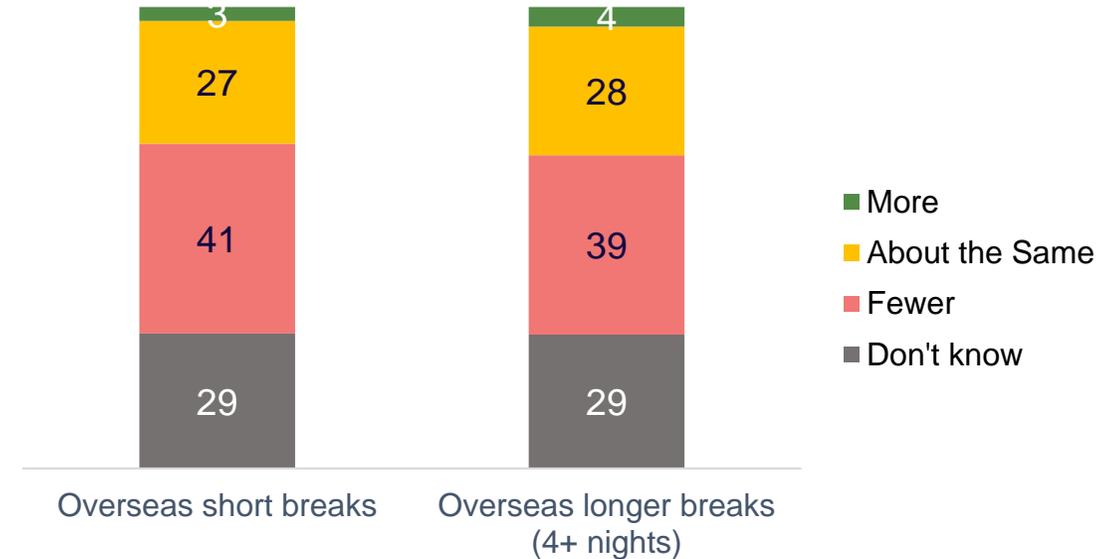


Figure 10b. Number of OVERSEAS overnight trips between now and the end of the year compared to normal, Percentage Wave 39, UK



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 39 = 1,762

*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. This being said, anticipated UK overnight trips have now increased for two consecutive waves.
- There are no signs of a resurgence in overseas travel.

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

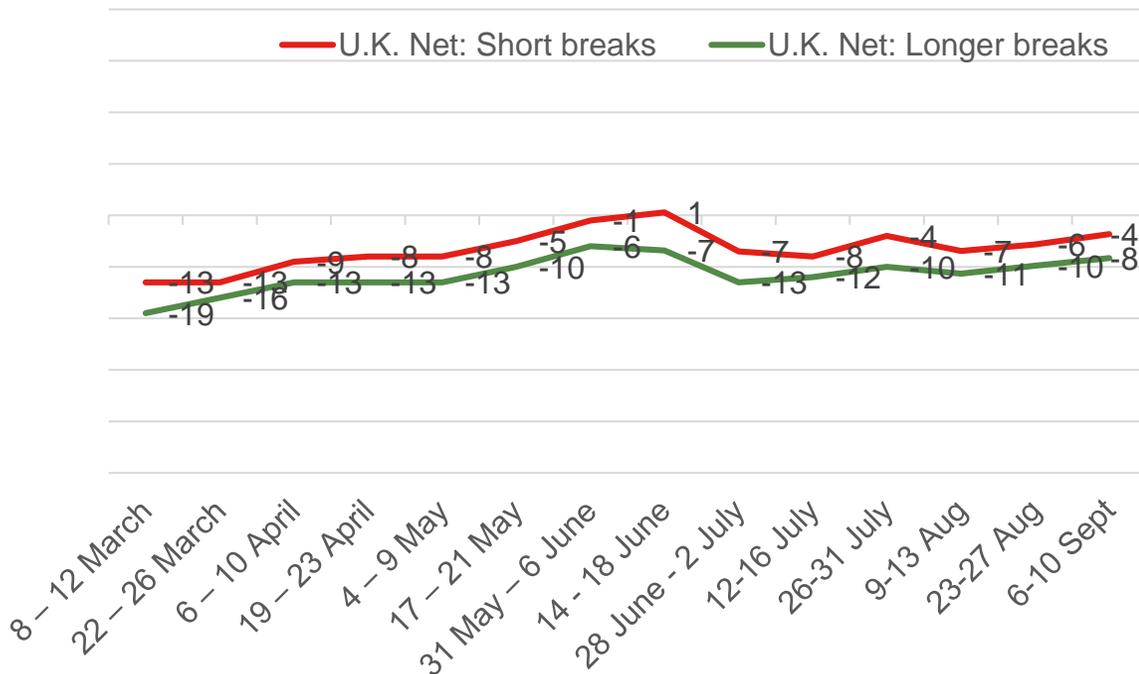
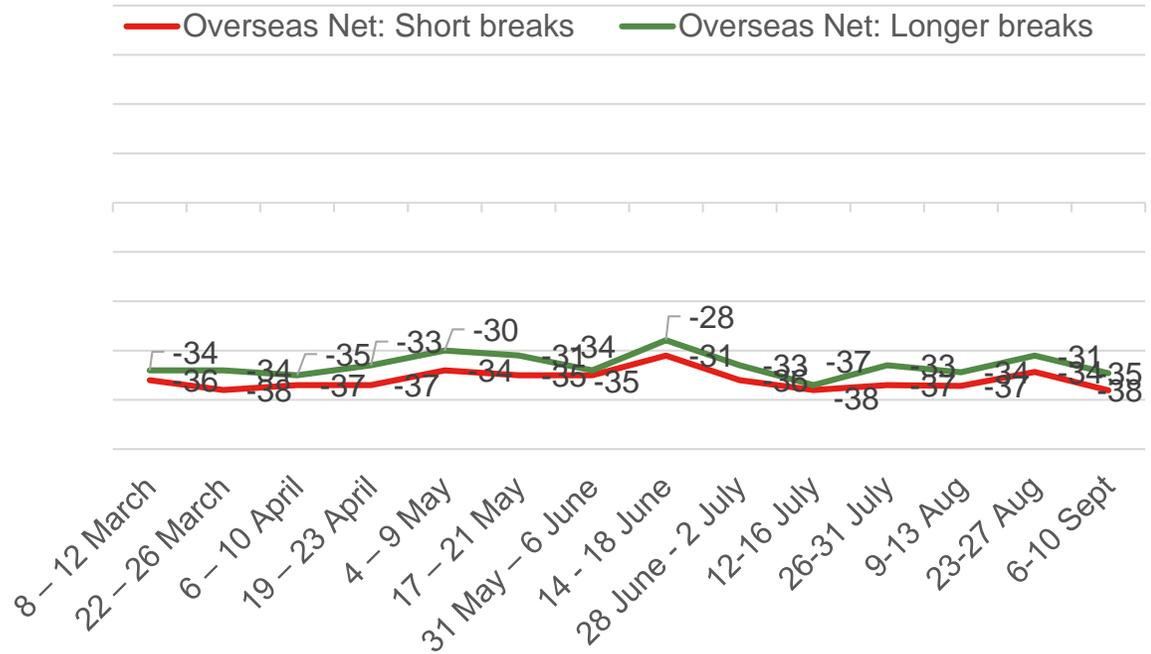


Figure 11. Number of OVERSEAS overnight trips in the next 6 months compared to normal, Net ‘More minus fewer’, Wave-on-wave, UK



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 39 = 1,762

*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

- 22% of U.K. adults claim to have already planned and 16% already *booked* their next domestic overnight trip, both of which are ahead of the equivalent period in 2020.
- 40% are likely to have *planned* a domestic overnight trip by the end of October (compared to 31% in 2020), with around a third (35%) expecting to have one *booked* (compared to 26% in 2020).

Figure 12. When anticipate PLANNING the next UK overnight trip, Percentage Wave 39, UK

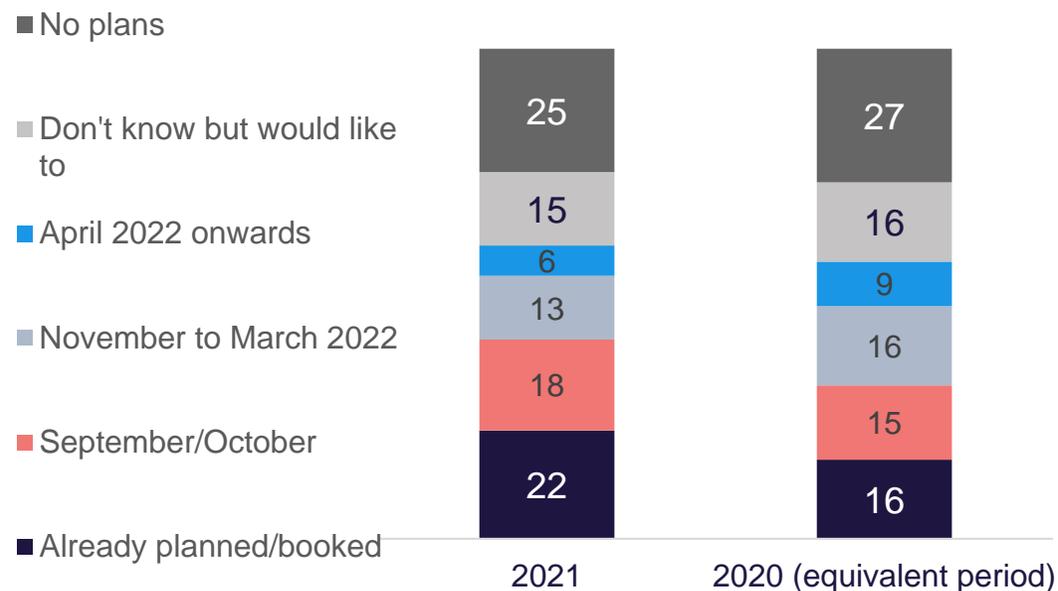
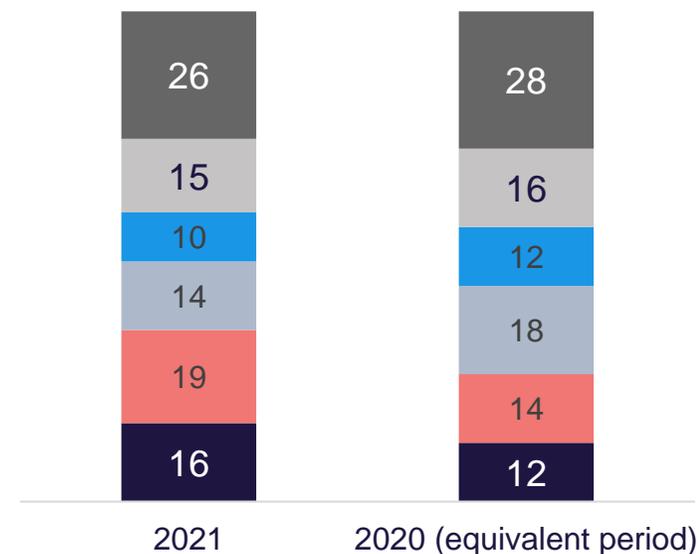


Figure 12. When anticipate BOOKING the next UK overnight trip, Percentage Wave 39, UK



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

- 23% plan on taking an overnight trip by the end of October – 11% in September and 14% in October - all significantly ahead of predictions at the same time 2020.
- 24% plan on taking a trip between November and March 2022, marginally ahead of 2020 intentions (although government restrictions meant that 2020 intentions were not fulfilled).
- 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 39, UK

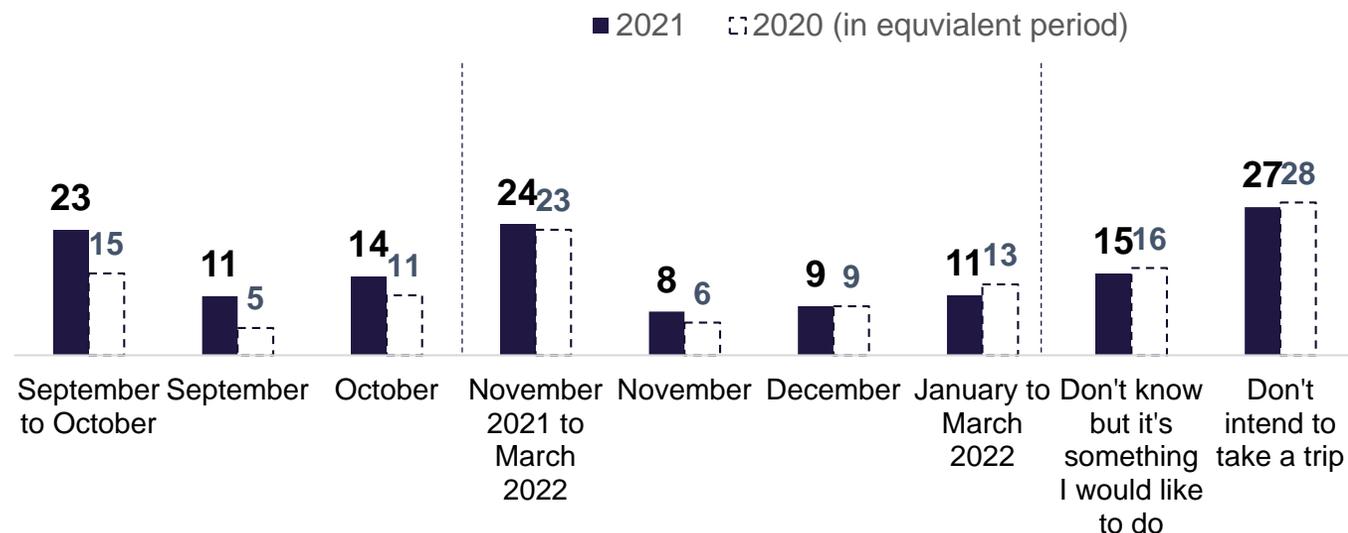
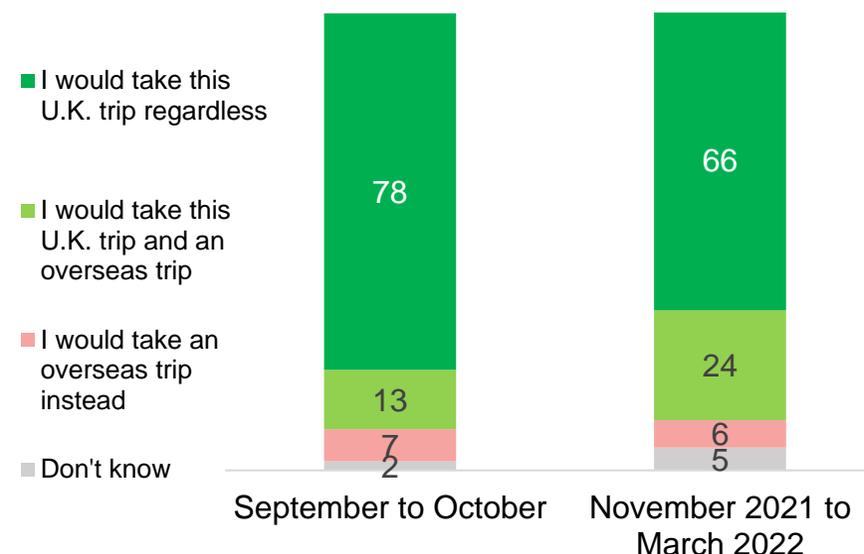


Figure 14b. Impact on U.K. trip if majority of overseas travel restrictions were lifted, percentage Wave 39, UK



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 39 = 1,762

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 39 respondents planning on taking a holiday or short break in the UK in September to October n=372, November 2021 to March 2022 n=238

Planning and booking timeline compared to normal

- The U.K. public are planning their trips slightly in advance of travel than normal.
- Bookings amongst both September/October and Nov 2021-March 2022 intenders are happening significantly closer to the travel date than usual.

Figure 15. PLANNING lead times for September/October or Nov 2021-March 2022 trips compared to normal, percentage Wave 39 U.K.

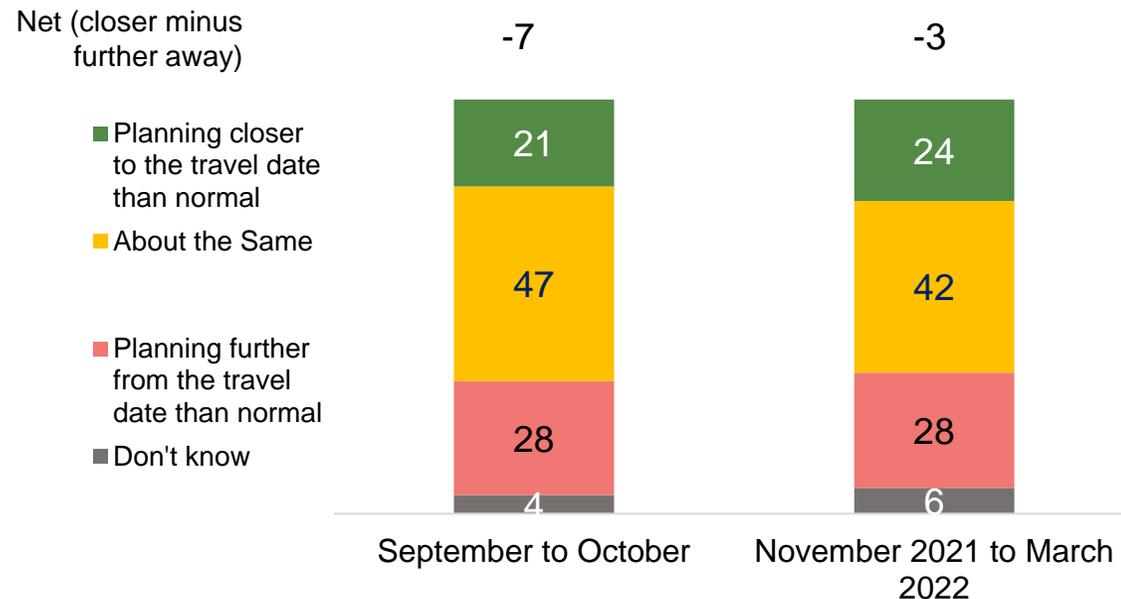
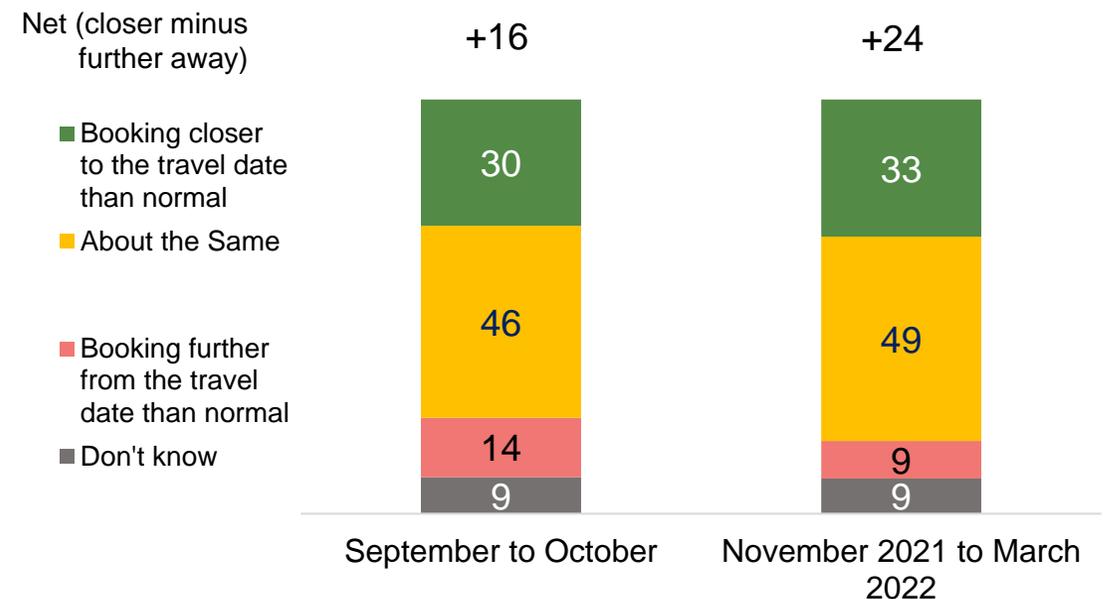


Figure 16. BOOKING lead times for September/October or Nov 2021-March 2022 compared to normal, percentage Wave 39, U.K.



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

- 3 in 5 (60%) of September/October intenders have already planned their forthcoming trip with 46% having already booked it – both of which are slightly higher than in the equivalent period in 2020.
- The proportion of November 2021-March 2022 intenders that have already planned or booked their trip is unsurprisingly lower (27% and 18% respectively), and is marginally higher than in 2020.
- 26% of September/October and 32% of November 2021-March 2022 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 39 for September/October or Nov 2021-March 2022, UK

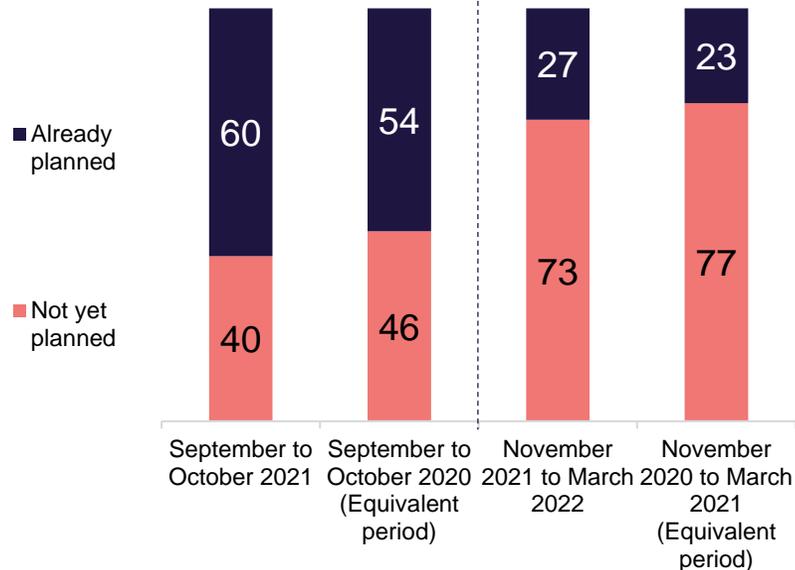


Figure 18. Proportion of Intenders that have already booked their trip, percentage Wave 39 for September/October or Nov 2021-March 2022, UK

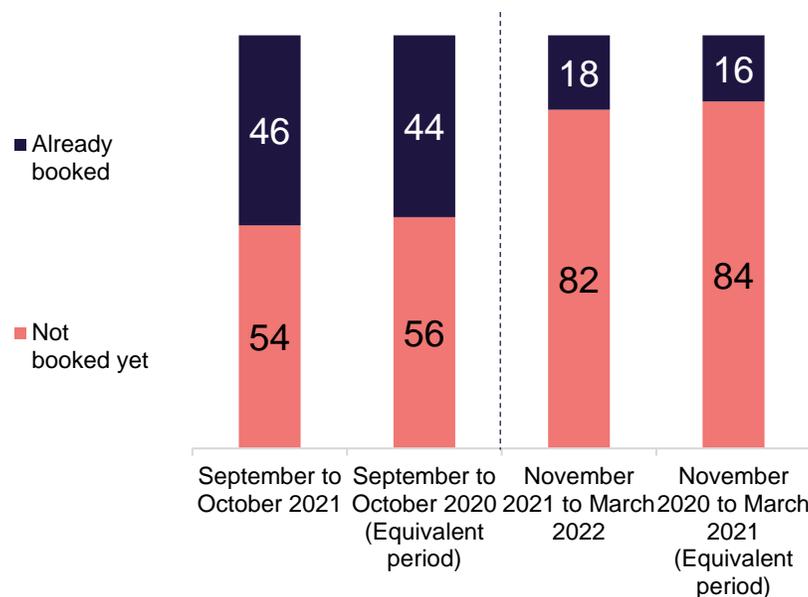
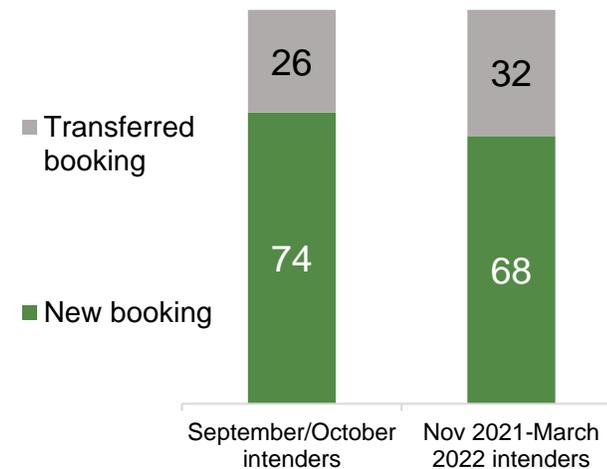


Figure 19. Proportion of next trips that are transferred bookings, percentage Wave 39 for September/October or Nov 2021-March 2022, UK



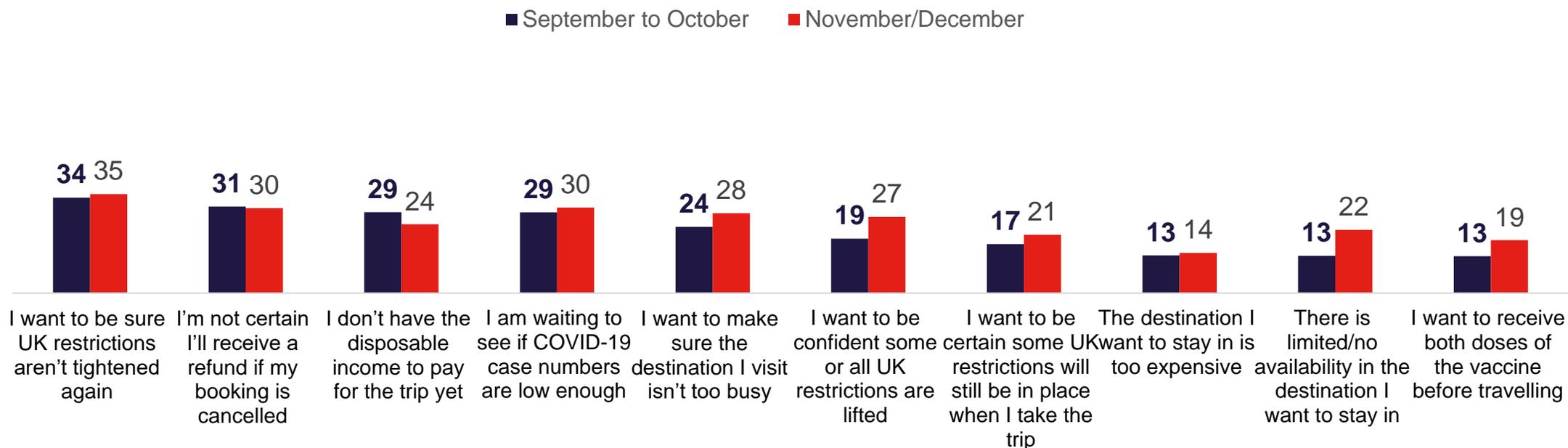
QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB6diii Is this next trip a transferred booking from a trip that was previously cancelled or postponed due to COVID-19?

Base: All Wave 39 respondents planning on taking a holiday or short break in the UK in September to October n=372, November 2021 to March 2022 n=238

Top 7 reasons for not having booked trip

- The most popular reasons for September/October and November/December intenders not yet having booked their trips are ‘I want to be sure restrictions aren’t tightened again’.
- November/December intenders provide far higher scores than in September/October for the remaining reasons, indicating slightly higher uncertainty.

Figure 19b. Top 10 reasons for not having yet booked trip in September/October and November/December, percentage Wave 39, ranked on September/October, UK



VB6div. Which, if any, of the following reasons explain why you are yet to book your next overnight UK trip in [pipe: hVB3]? Base: Wave 39 respondents not confident about taking a break in September to October n=202 and November 2021 to December 2021 *n = 117. (due to question only be asked for trips up until December 2021)

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 both intender groups, with higher influence for the September/October intenders (driven by the higher incidence of older life stages).
- ‘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 September/October and Nov 2021-March 2022, percentage Wave 39, UK



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

Base: All Wave 39 respondents planning on taking a holiday or short break in the UK in September to October n=372, November 2021 to March 2022 n=238

Where planning on staying on next overnight trip in UK

- The South West of England is the leading destination for an overnight domestic trip throughout September and October. At 18%, the South West is significantly preferred to other parts of the UK. Little separates the visitor share of the majority of subsequent destinations in the summer period.
- September/October destination intention is relatively in line with the equivalent period in 2020.
- London leads amongst November 2021-March 2022 intenders, with the South West close behind.
- Notably, London has higher intention than the equivalent period in 2020 – particularly between November and March.

Figure 21. Where planning on staying on next UK overnight trip in September/October, percentage Waves 38 and 39, UK

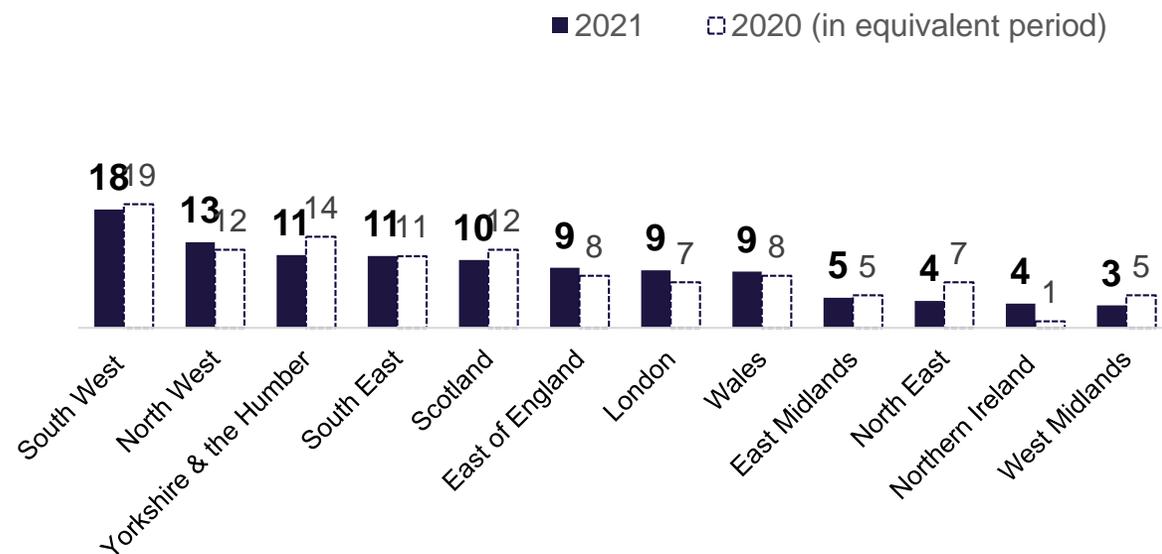
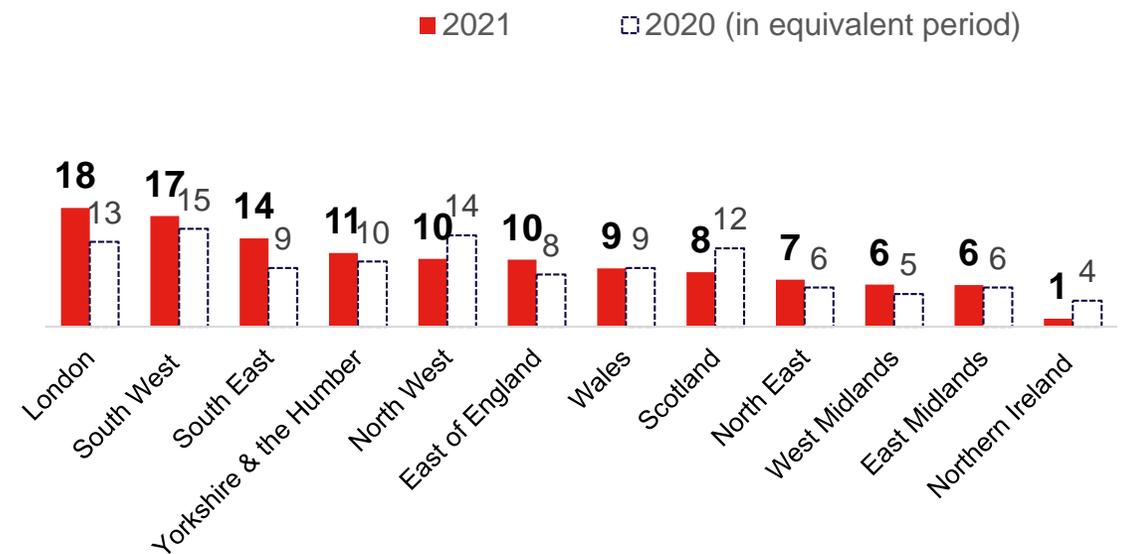


Figure 22. Where planning on staying on next UK overnight trip in November 2021-March 2022, Percentage Waves 38 and 39, UK



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

Base: All Waves 38 and 39 respondents planning on taking a holiday or short break in the UK in September to October n=569, November 2021 to March 2022 n=444 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 'countryside or village' is the preferred destination type for September/October intenders. 'City or large town' and 'Traditional coastal/seaside town' are the next most preferred – 'city or large town' more so than in 2020.
- In the November 2021-March 2022 period, 'a city or large town' is the top destination type, although this is down on the equivalent period in 2020.

Figure 23. Main type of destination for trip in September/October, percentage Waves 38 and 39, UK

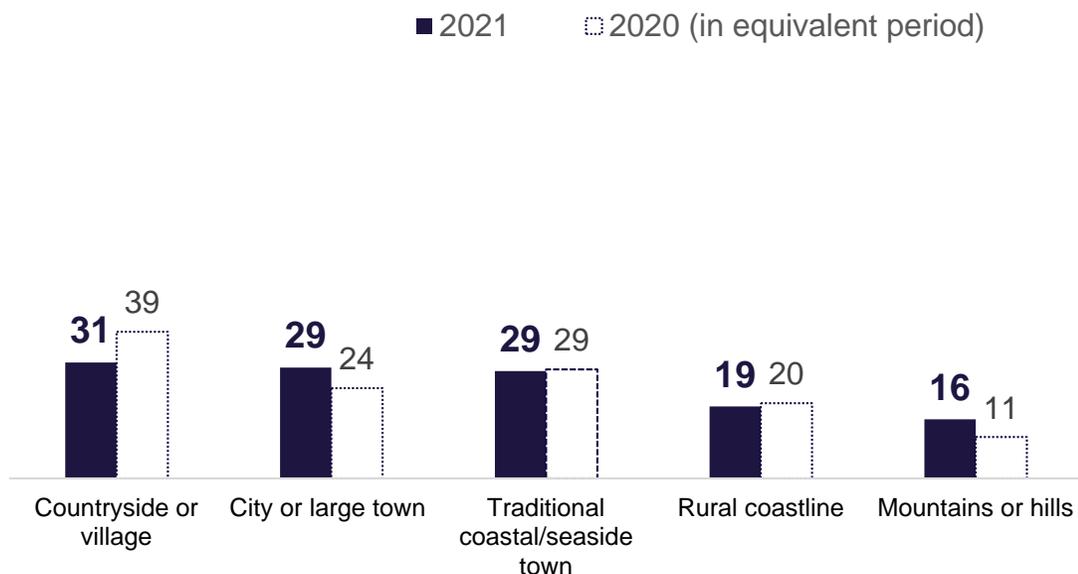
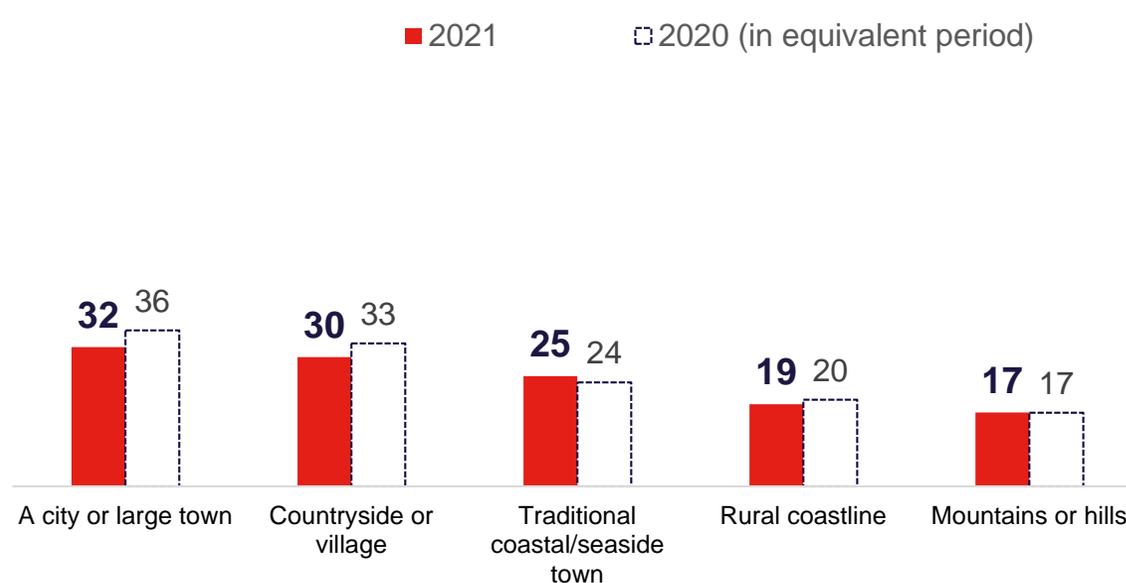


Figure 24. Main type of destination for trip in November 2021-March 2022, percentage Waves 38 and 39, UK



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 38 and 39 respondents planning on taking a holiday or short break in the UK in September to October n=569, November 2021 to March 2022 n=444 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

- As in 2020, 'hotel/motel/inn' is the leading accommodation choice amongst September/October intenders. 'Commercial rental' is the next most preferred.
- For November 2021-March 2022, 'a private home' is the leading accommodation choice, in line with 2020, followed by 'commercial rental'.

Figure 25. Accommodation planning on staying in on next UK overnight trip in September/October, net percentage Waves 38 and 39

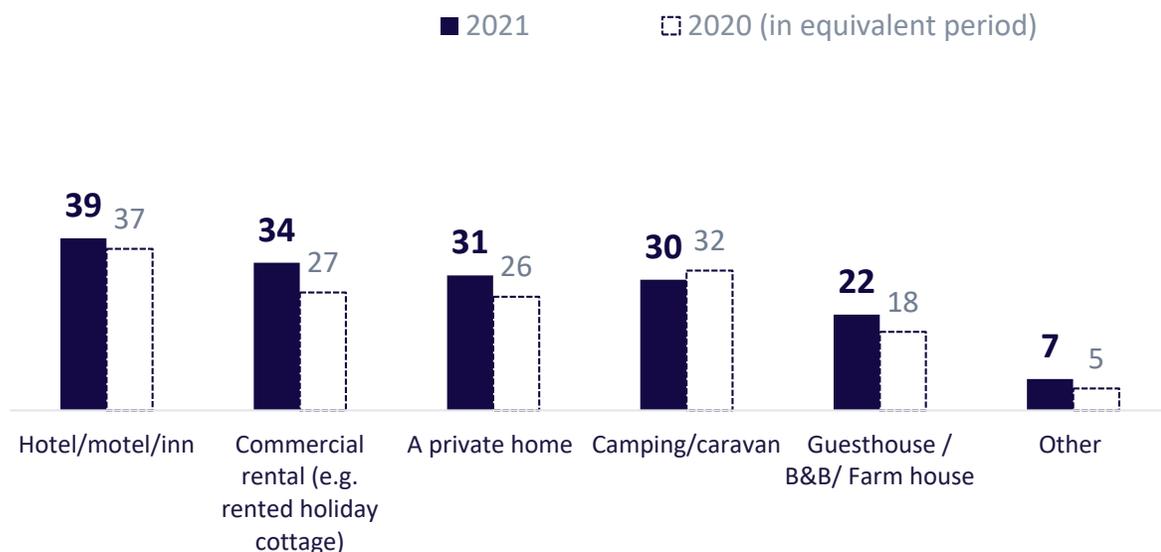
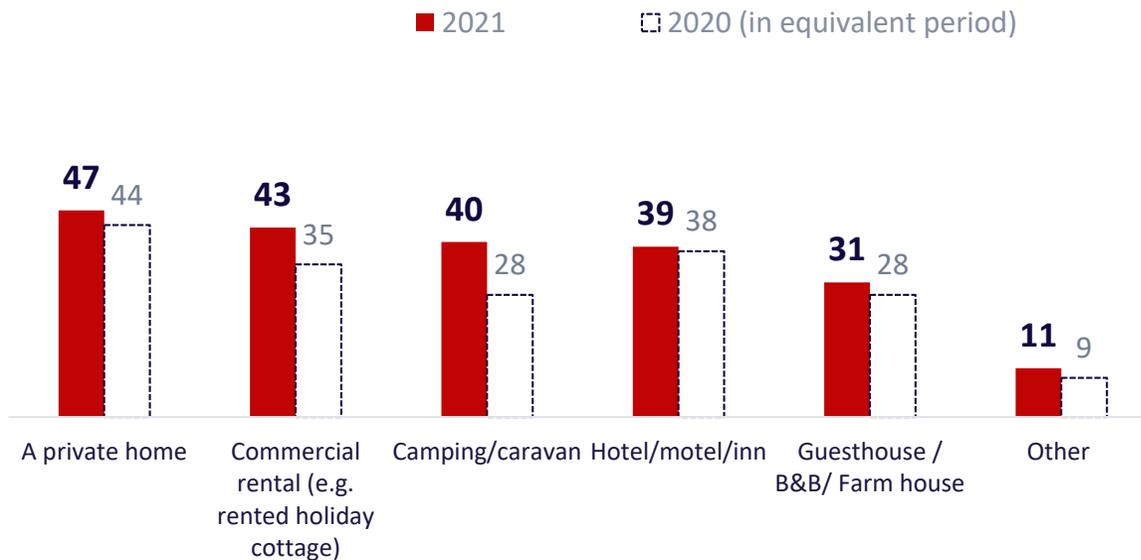


Figure 26. Accommodation planning on staying in on next UK overnight trip in November 2021-March 2022, net percentage Waves 38 and 39



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

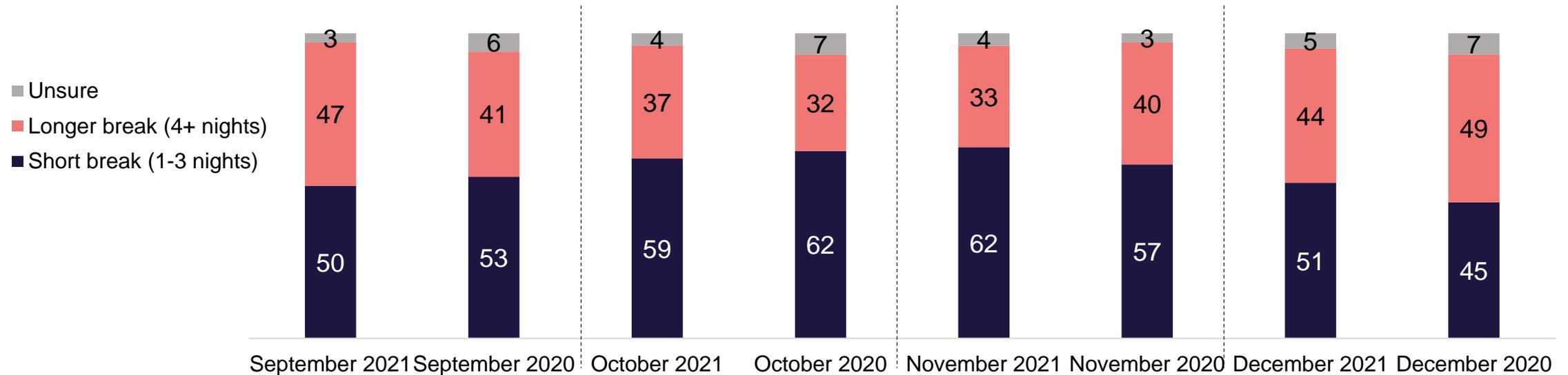
Base: All Waves 38 and 39 respondents planning on taking a holiday or short break in the UK in September to October n=569, November 2021 to March 2022 n=444

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 in September, however short breaks dominate for the remainder of the year.
- Intended trips in September and October 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 38 and 39, UK



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

Base: All Waves 38 and 39 respondents intending to take next holiday or short break in each time period: September n=274, October n = 337, November n = 141, December n = 148

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 63% stating this for September/October trips and 46% for November 2021-March 2022 trips. These are behind levels reported in 2020.
- 'Train' is the second most likely mode of travel to an overnight destination in both time periods, though is more dominant in November 2021-March 2022. The higher incidence in this period is driven predominantly by trips to a 'city or large town'.

Figure 28. Top 5 main modes of travel to destination for trip in September/October, percentage, Wave 39, UK

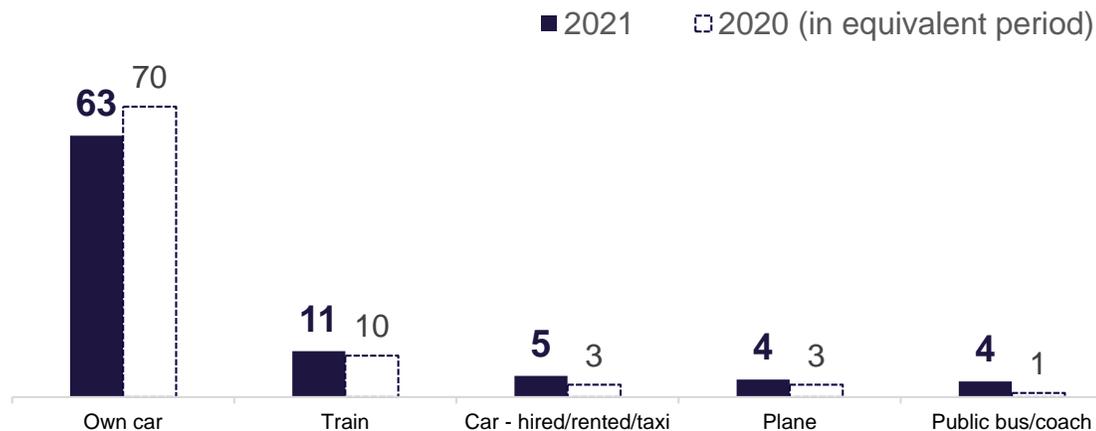
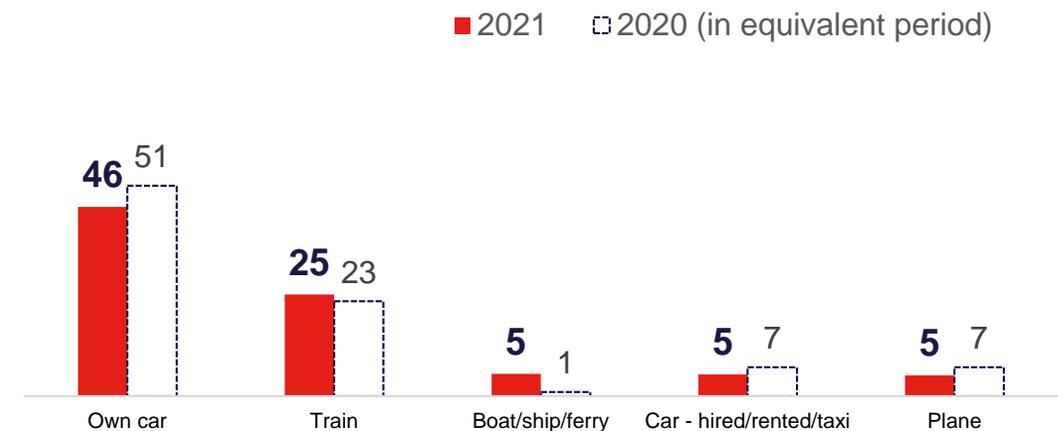


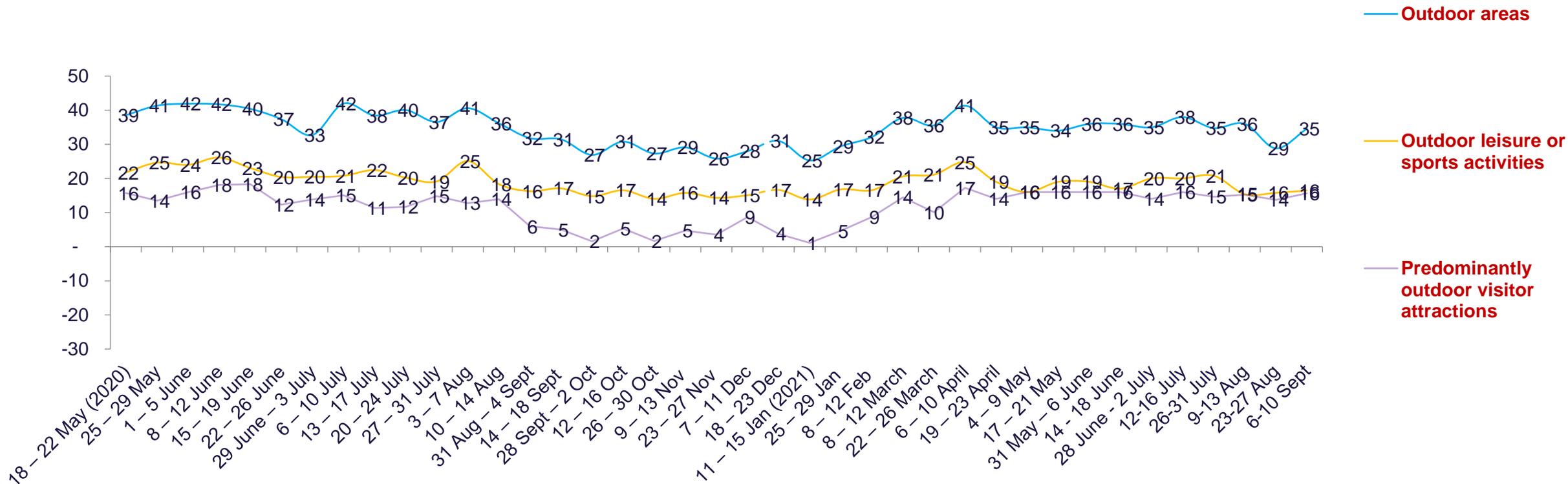
Figure 29. Top 5 main modes of travel to destination for trip in November 2021-March 2022, percentage, Wave 39 UK



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 positive shift in those who are willing to engage in 'outdoor areas' – potentially linked to the change in weather.

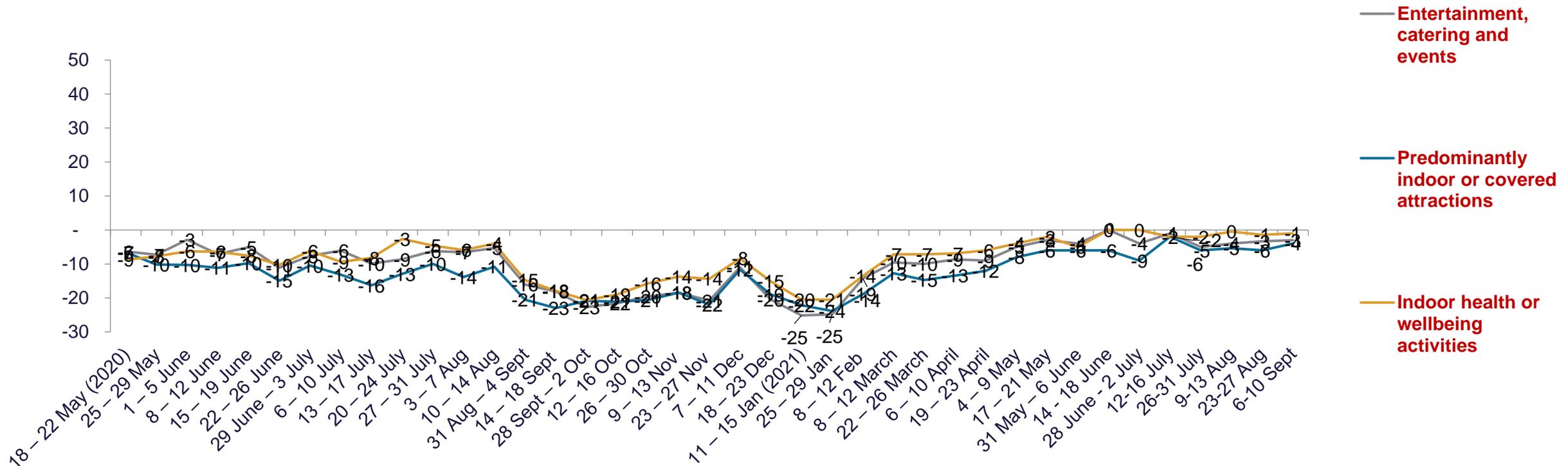
Figure 31. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely', Wave-on-wave, UK



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 39 = 1,762



VisitBritain



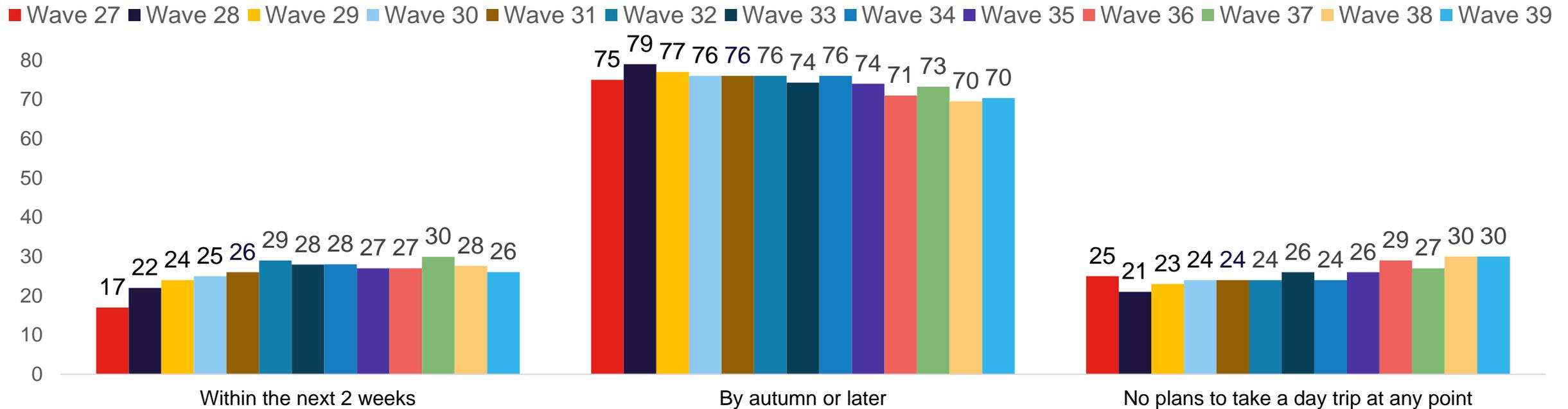
VisitEngland

4. Day Trip Intentions

Day trip intention overall

- The likelihood to take day trips across all time periods decreases slightly following the 'peak summer' period, although intention is relatively consistent with previous waves.

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

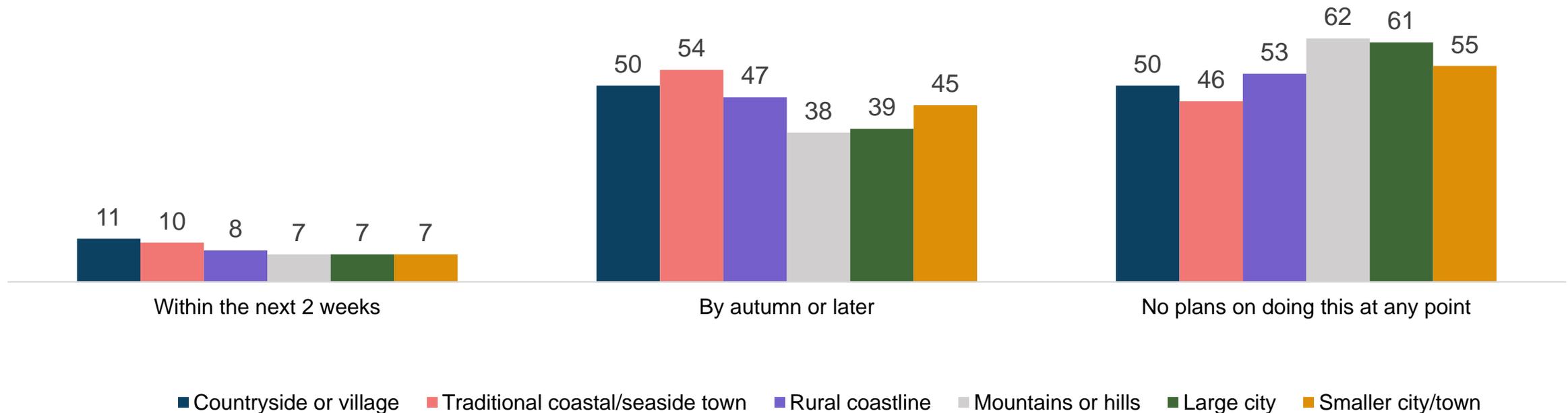


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: All Wave 39 = 1,762
 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.

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 amongst those travelling by autumn or later.

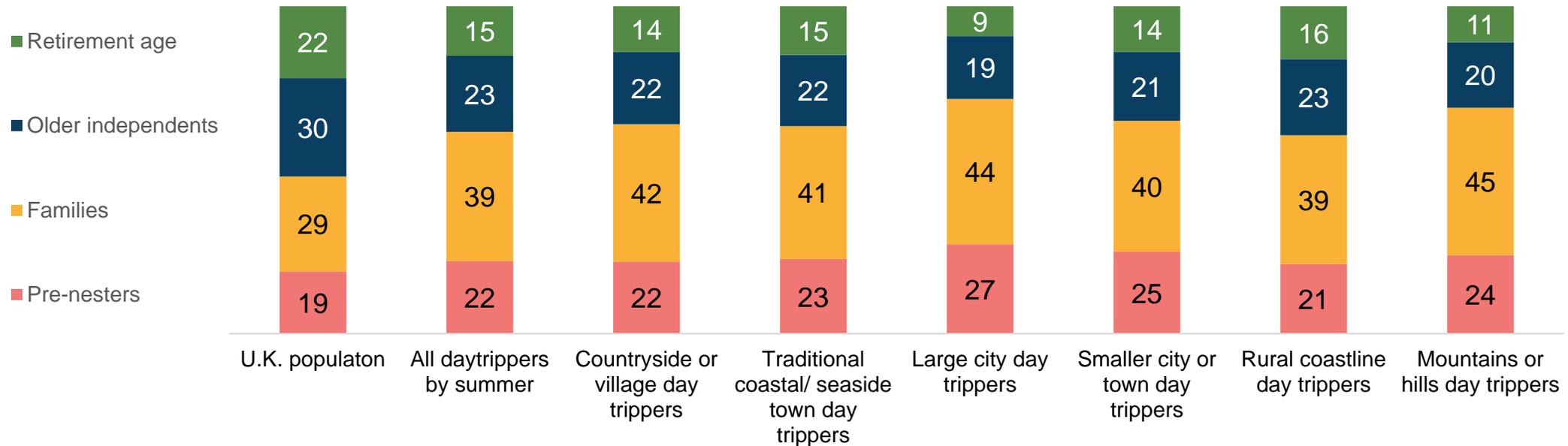
Figure 33. Likelihood to take a day trip by destination type, percentage, Wave 39, UK



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 39, 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/late summer n=779; All day-trippers Countryside or village day trippers n=470; Traditional coastal/ seaside town day trippers n=444 Large city day trippers n=326 Smaller city or town day trippers n=355 Rural coastline day trippers n=361 Mountains or hills day trippers n=348



VisitBritain



VisitEngland

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 39 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-38 where appropriate. Wave 39 fieldwork was conducted between 6-10 September 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.

