# COVID-19 Consumer Tracker

## January 2022

Published: January 2022

Fieldwork Period: 4th – 10th January 2022

**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.
- The survey addresses areas such as: current attitude to travel (incl. concerns around travel and reassurances needed from the tourism sector), intentions of UK residents to travel for day trips, short breaks and holidays, when they plan to book and when they plan to go on their trip, as well as the destination, type of location and accommodation of their intended trip.
- This tracker is based on a UK nationally representative sample of 1,500 adults aged 16+, with additional boosts for Scotland and Wales.
- Fieldwork tends to take place at the start of each month and this wave's fieldwork was conducted between 4th – 10th January 2022.
- 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.

- **January to March 2022 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between January and March 2022
- **April to June 2022 Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between April and June 2022

# January 2022: Scorecard of Key Metrics

| Key Metrics | January 2022 | Change since December 2021 |
|---|---|---|
| National mood (average score out of 10) | 6.7 | +0.1 |
| Perceptions of the situation regarding Covid-19 (% stating ‘worst has passed’) | 33% | +4%* |
| Appetite for risk (average score out of 4) | 2.8 | No change |
| Confidence in ability to take UK overnight trip in January / February / March (% NET confident) | 48% / 47% / 52% | +4%* / +1% / -3% |
| Confidence in ability to take overseas overnight trip in January / February / March (% NET confident) | 32% / 29% / 32% | +3% / -1% / -3% |
| Will take more UK trips in the next 12 months than past 12 months [%] | 32% | No change |
| Will take more overseas trips in the next 12 months than past 12 months [%] | 20% | -1% |
| Proportion intending a UK overnight trip in next 12 months [%] | 58% | +3% |
| Proportion intending an overseas overnight trip in next 12 months [%] | 40% | -4% |
| Top 3 barriers to taking a UK overnight trip from January to March | 1. Restrictions on travel from government 2. Personal finances 3. Concerns about catching COVID-19 | Concerns about catching COVID-19 in Top 3 |
| Top 3 barriers to taking an overseas overnight trip from January to March | 1. The risk of quarantine 2. Restrictions on travel from government 3. Cost/hassle of a COVID-19 test | Cost/hassle of a COVID-19 test in Top 3 |

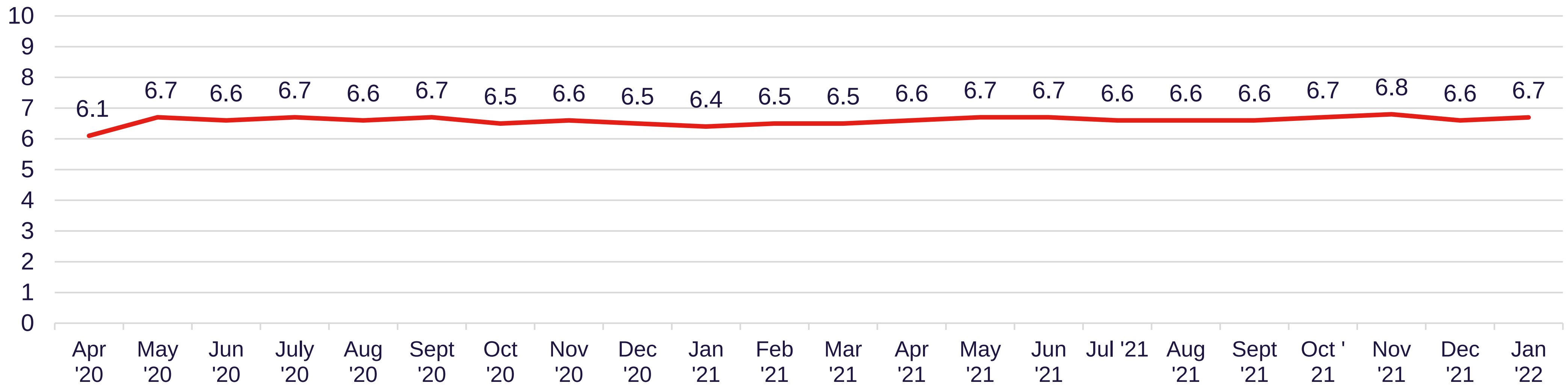
* Represents a significant change on previous wave

# 1. Covid Impact on Attitudes to Travel

# The Current Mood

**Compared with December 2021, the average mood of UK adults has improved slightly by 0.1 points to 6.7 out of 10 – levels are now in line with October 2021.**

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

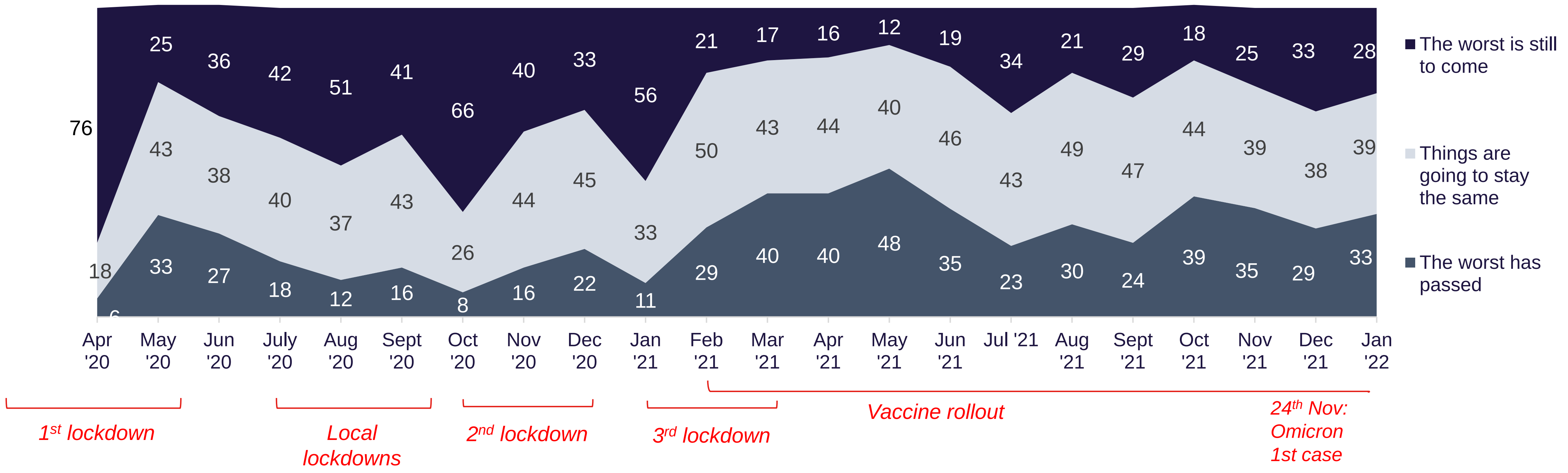



Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. January 2022 = 1,755 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
Note: Fieldwork for each month took place at the start of each month – exact dates vary). October data is taken from BVA BDRC survey.

# Perceptions of the situation relating to COVID-19

**The perception of the current situation in relation to COVID-19 has improved since December 2021 – the UK public who think 'the worst has passed' (33%) now higher than those who feel 'the worst is still to come' (28%).**

**Figure 2. Perception of the situation with regards to COVID-19, Percentage wave-on-wave, UK**

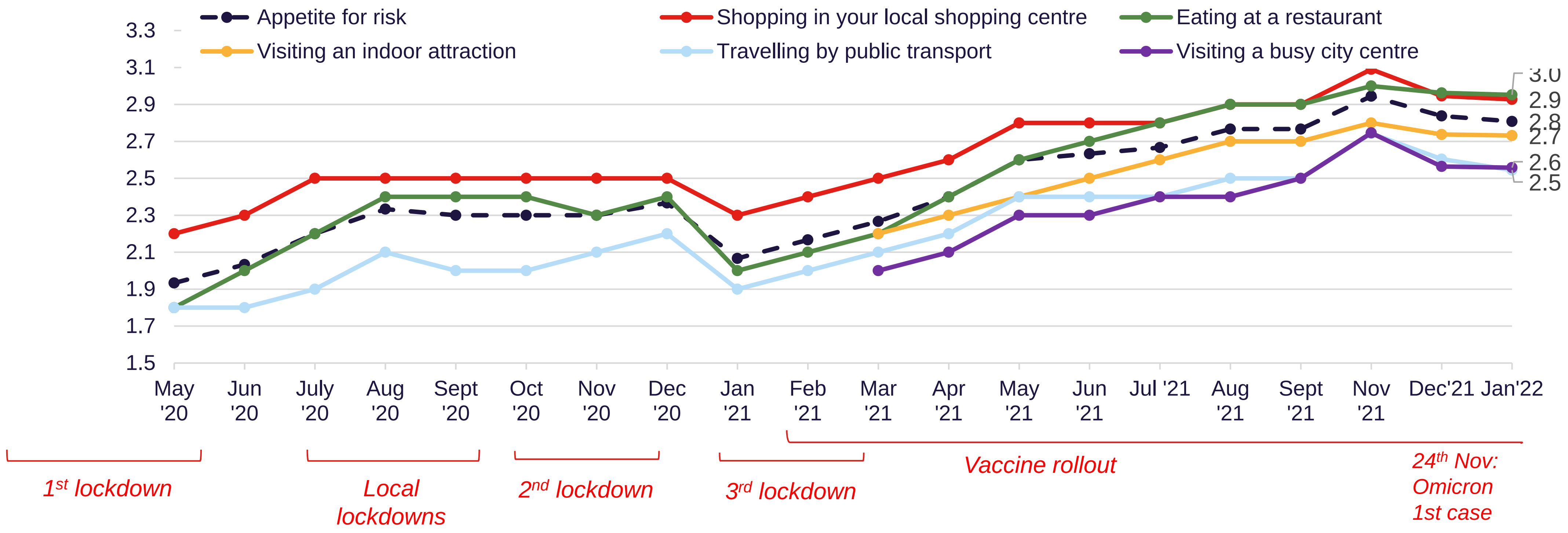



Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion?
Base: All respondents. January 2022 = 1,755 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
Note: Fieldwork for each month took place at the start of each month – exact dates vary). October data is taken from BVA BDRC survey.

# Comfort levels with everyday activities

**The 'appetite for risk' score remains the same as in December 2021 at 2.8 out of 4. Most of the individual activities record no significant changes.**

**Figure 5. 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**

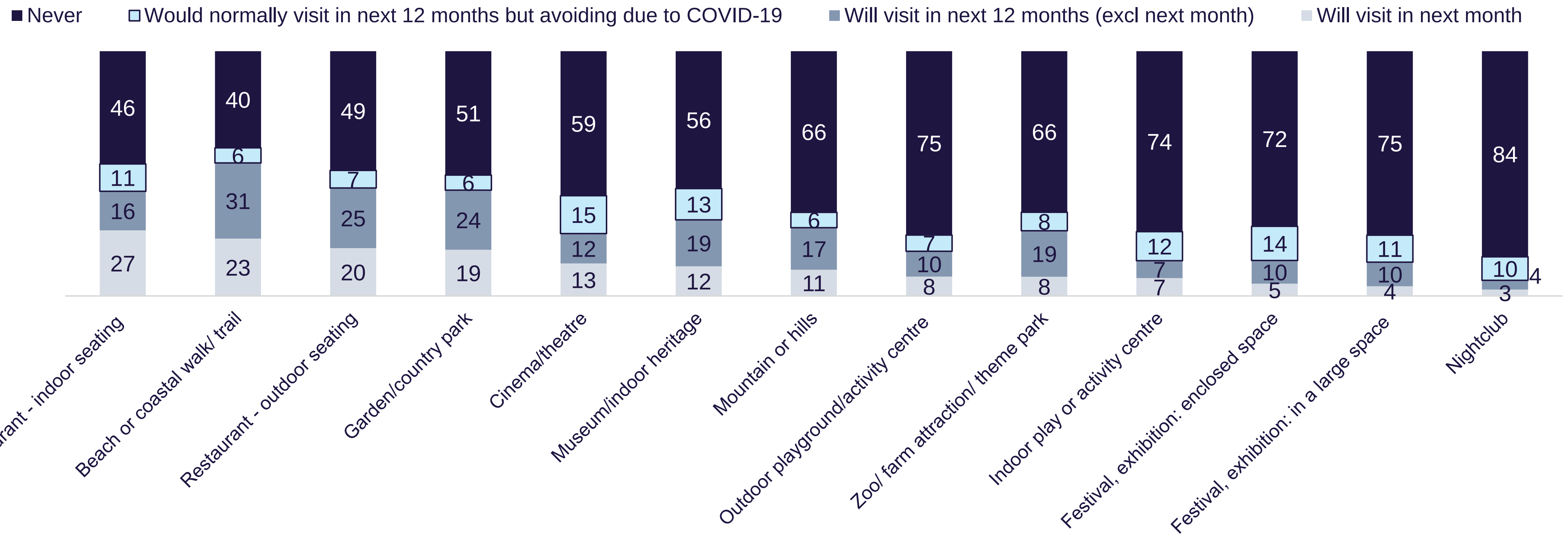



VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents excluding those stating 'don't know' or who wouldn't do activity under any circumstances. Mean average based on those that gave a score of 1-4. January 2022 = 1,755 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
Note: These questions were not asked in October 2021

# Intention to visit leisure places in the UK

**Out of the included places/venues, ‘restaurant with indoor seating’ is the venue most likely to be visited in the next month (27% intending to do so). ‘Cinema/theatre’ is the most likely venue to be avoided in the next 12 months due to COVID-related reasons, while normally would visit it (15% stating this), followed by ‘festivals in an enclosed space’ (14%).**

**Figure 3. Intention to visit leisure venues, Percentage, January 2022, UK**

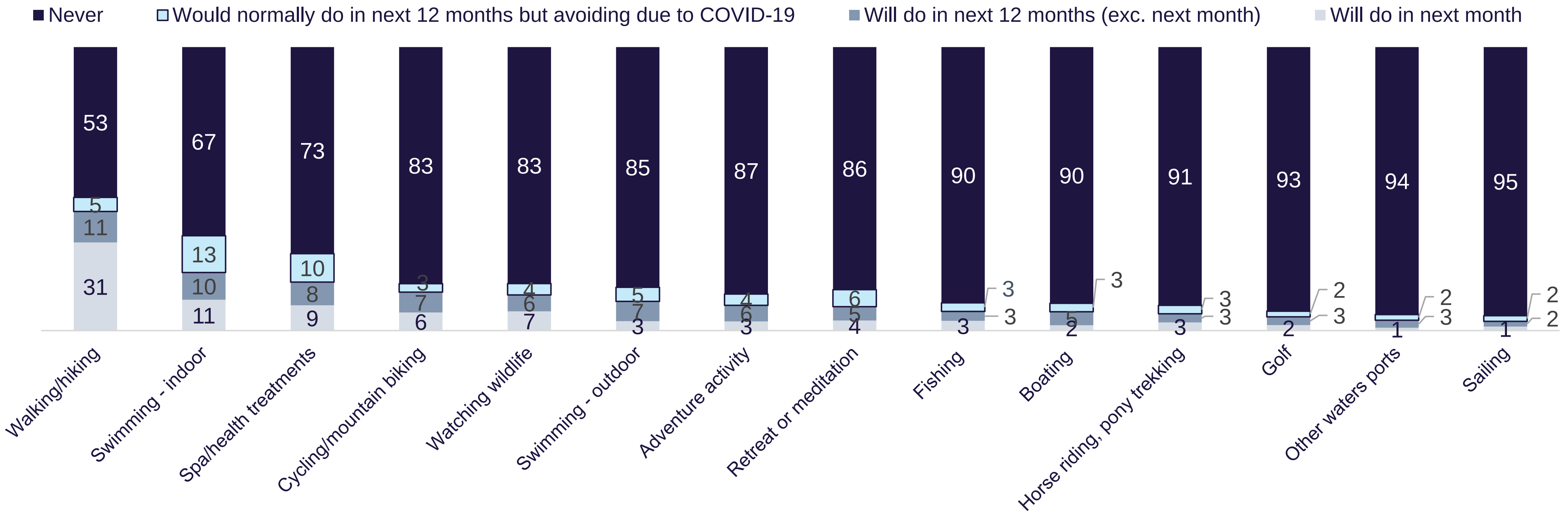



VB9a. Which, if any, of these types of places in the UK are you likely to visit in the next 12 months? VB9b. Which, if any, are you likely to visit in the UK in the next month? VB9c. Which, if any, would you normally visit in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government restrictions, the risk of catching COVID-19 etc.)?
Base: All respondents. January 2022 = 1,755

# Intention to conduct leisure activities in the UK

**'Walking/hiking' is the activity the UK public are most likely to do in the next month (31%). 'Indoor swimming' is the leisure activity most likely to be avoided due to COVID-19, 13% of those who would normally swim indoors stating this.**

Figure 4. Intention to conduct leisure activities, Percentage, January 2022, UK




VB10a. Which, if any, of these types of activities are you likely to do in the UK in the next 12 months? VB10b. Which, if any, are you likely to do in the UK in the next month? Which, if any, would you normally do in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government restrictions, the risk of catching COVID-19 etc.)?
Base: All respondents. January 2022 = 1,755

# Required conditions for indoor leisure / tourism providers

**‘Free cancellation’ is the leading condition that UK adults deem essential for indoor leisure and tourism providers to have in place to encourage a visit (46% stating this), followed by mask wearing by staff (43%) and ‘plentiful hand sanitizers’ (43%).**

**Figure 6. Conditions that are essential for indoor tourism and leisure providers to have in place to visit them in the next few months, Percentage, January 2022, UK, Full list**


| | Nov | Dec | Jan |
|---|---|---|---|
| Net: Financial booking incentives | 64% | 63% | 62% |
| Net: Reduced contamination measures | 61% | 59% | 60% |
| Net: Guest/staff interventions | 54% | 59% | 58% |
| Net: Social distancing measures | 57% | 60% | 57% |

Q63. Which, if any, of the following conditions would be essential for indoor tourism and leisure providers (e.g. indoor visitor attractions, restaurants, hotels etc.) to have in place for you to visit/use them over the next few months? Base: All respondents. January 2022 = 1,755

# 2. Trip Intentions: UK and overseas

# Anticipated number of UK and overseas trips in next 12 months compared to last 12 months

**UK adults expect more UK and overseas trips in the next 12 months compared to the past 12 months, but the projection is better for domestic overnight trips (32% anticipate more UK trips compared to 20% overseas).**

**Figure 7. Number of UK and overseas overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, January 2022, UK**

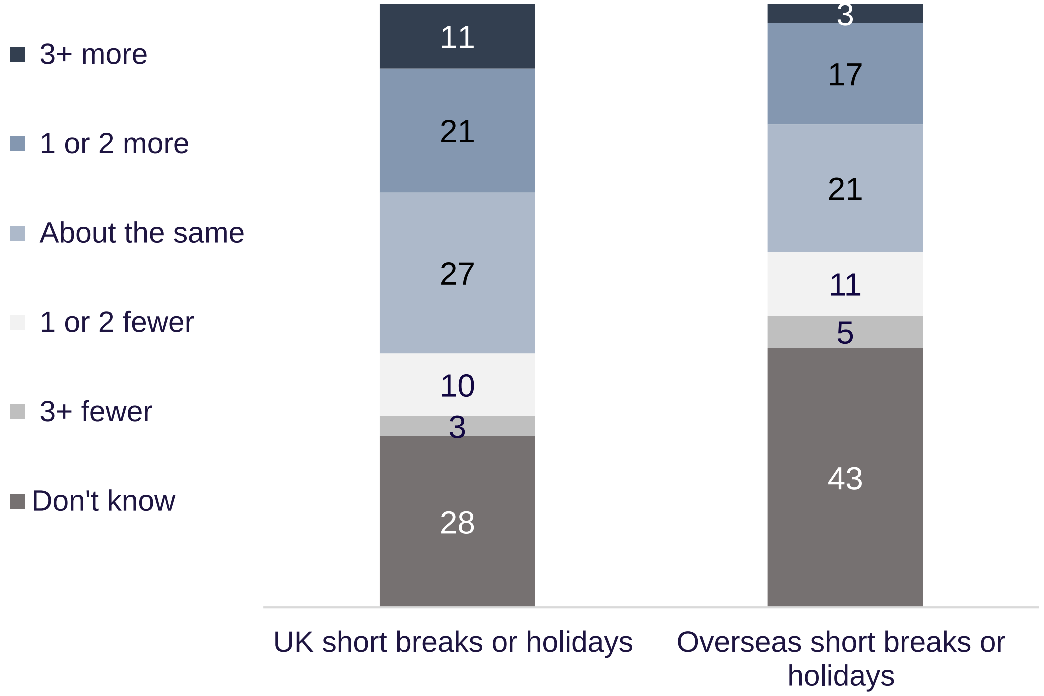
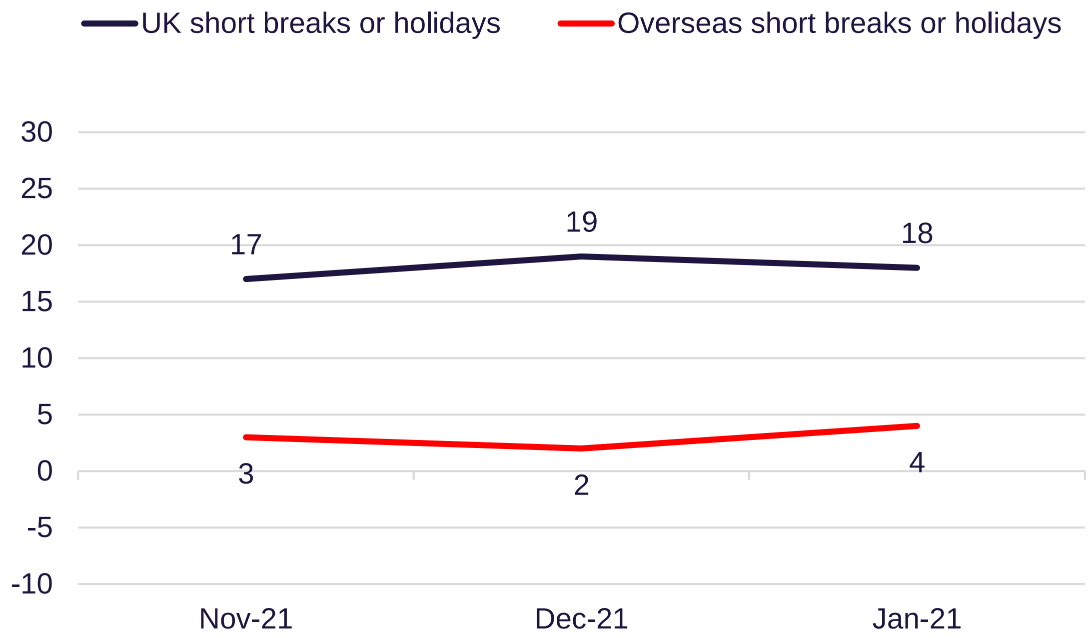



**Figure 7b. Number of UK and overseas overnight trips likely to take in next 12 months compared to the last 12 months, Net 'More minus fewer', Wave-on-wave, UK**

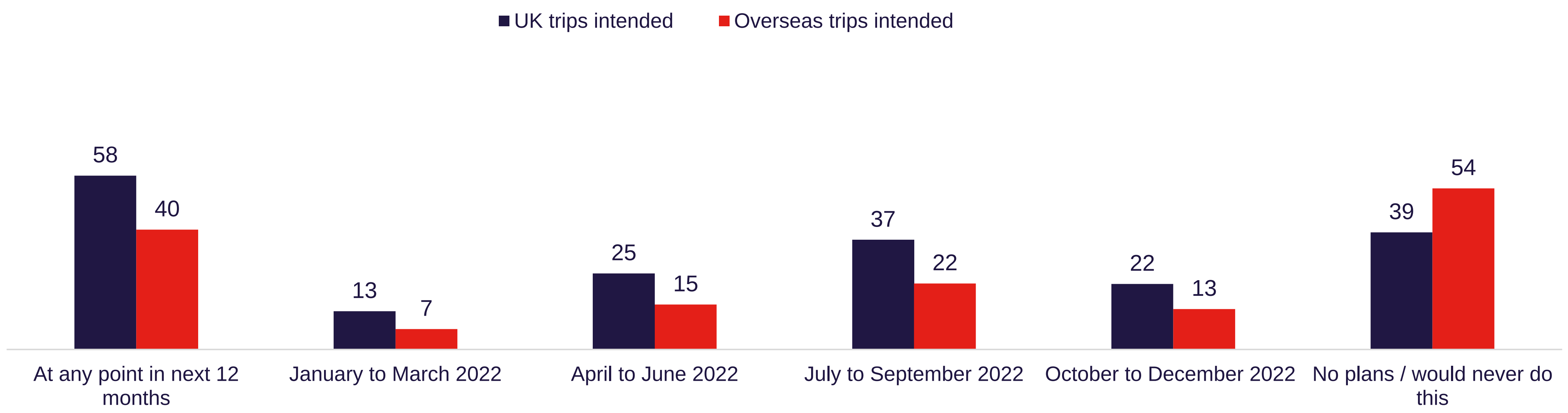



VB1a Thinking about the next 12 months, are you likely to take more, fewer or about the same number of UK and overseas holidays/short breaks as you took in the last 12 months? Base: All respondents. January 2022 = 1,755

# Overnight trips intentions

**Nearly 3 in 5 (58%) of the UK public plan on taking an overnight domestic trip in the next 12 months (by the end of December 2022), which is significantly more than the 40% planning to take an overseas overnight trip in this period.**

**Figure 8a. Proportion anticipating going on any overnight UK and overseas trips, Percentage, January 2022, UK**



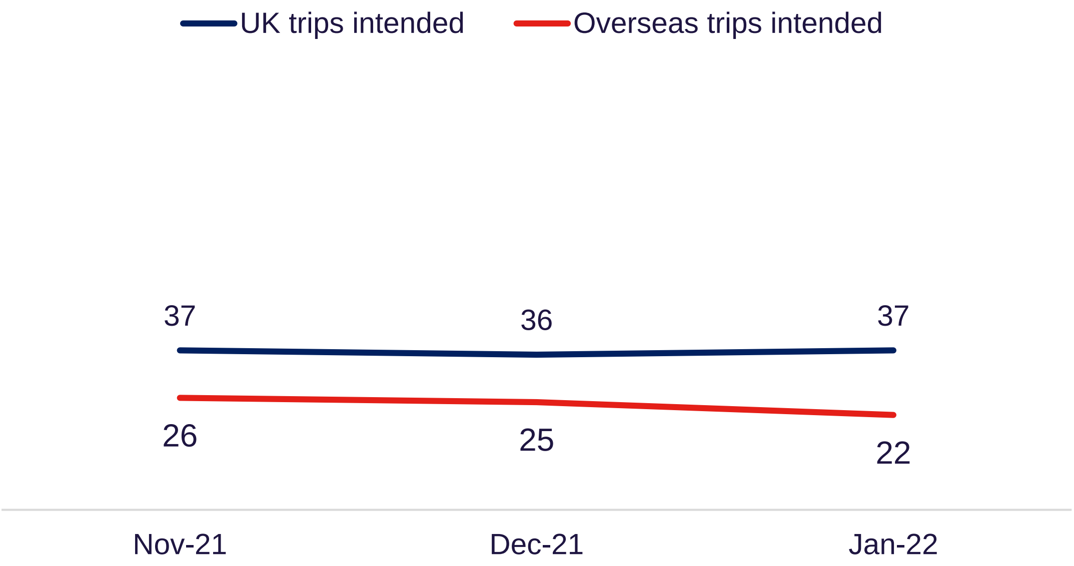

QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All respondents. January 2022 = 1,755 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

# Overnight trips intention trend – Apr-Jun’22 and Jul-Sep’22

**The proportion of UK adults anticipating UK or overseas overnight trips between April to June 2022 and July to September 2022 has stayed relatively constant since November, although there are signs of overseas trip intention dropping.**

**Figure 8b. Proportion anticipating going on any overnight UK and overseas trips, April-June 2022 Percentage, Wave-on-wave, January 2022, UK**


**Figure 8b. Proportion anticipating going on any overnight UK and overseas trips, July-September 2022 Percentage, Wave-on-wave, January 2022, UK**

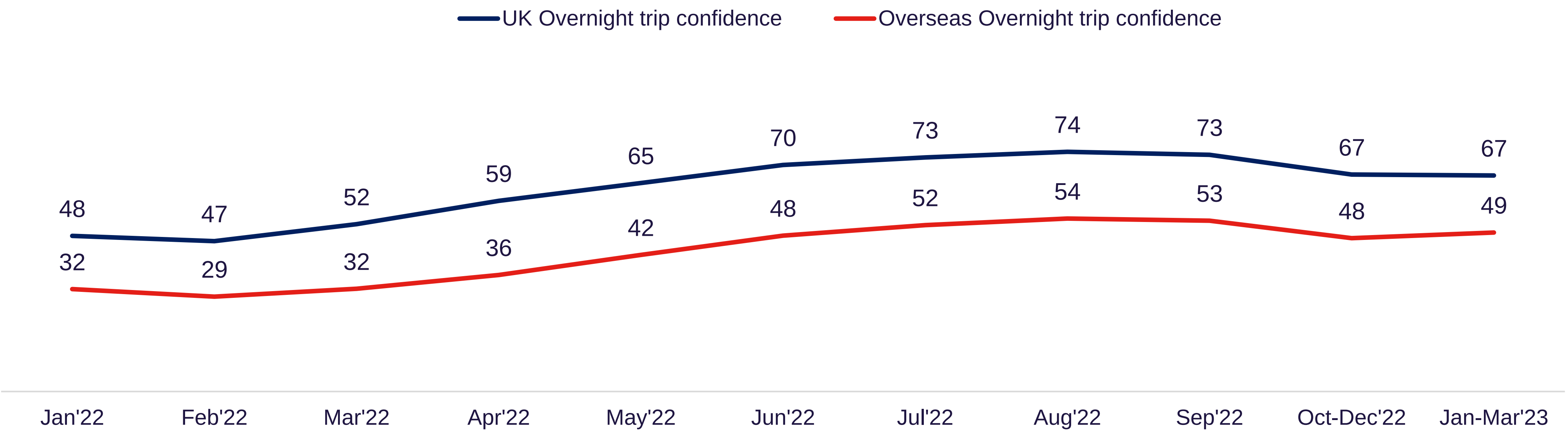



QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All January respondents. Apr-Jun 2022 UK overnight trips = 448 Overseas trips = 288 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

# Confidence in the ability to take overnight UK and Overseas trips

**Just under half of the UK population are confident that a UK holiday or short break would go ahead in January and February, before picking up from March onwards. Confidence for overseas trips is lower than for UK trips, with less than a third being confident in the ability to take an overnight trip abroad in the next 3 months.**

**Figure 9. Confidence in taking a UK  and Overseas overnight trip across different time periods, NET Confident (Very confident + fairly confident) Percentage, January 2022, UK**




VB7a.  We'd like you to imagine that you have booked a UK holiday or short break in each of the time periods listed below.
How confident are you that you would be able to go on these UK trips in these months? VB7d.  We'd like you to imagine that you have booked an overseas holiday or short break in each of the time periods listed below. How confident are you that you would be able to go on these UK trips in these months?
Base: All respondents. January 2022 = 1,755

# Perceived barriers to taking overnight UK and Overseas trips between Jan’22 and Mar’22

**The main perceived barriers to taking an overnight trip in the UK between January and March are ‘restrictions on travel from government’ and ‘personal finances’ (24% stating each). For overseas trips, ‘risk of quarantine’ is top at 27%, followed by ‘restrictions on travel from the government’ close behind (25%).**

**Figure 11. Barriers for taking an overnight UK trip in January 2022 to March 2022, Percentage, January 2022, UK**

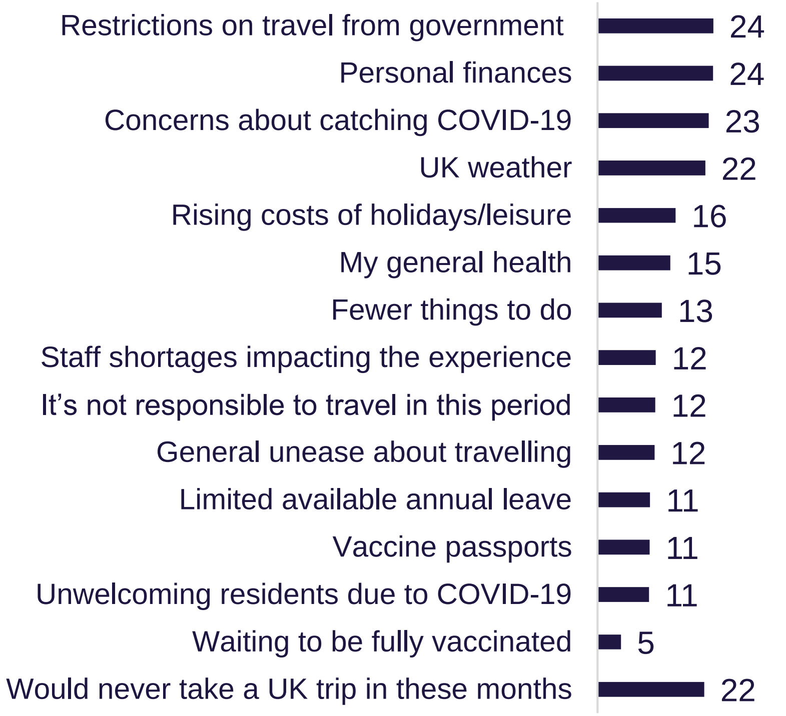
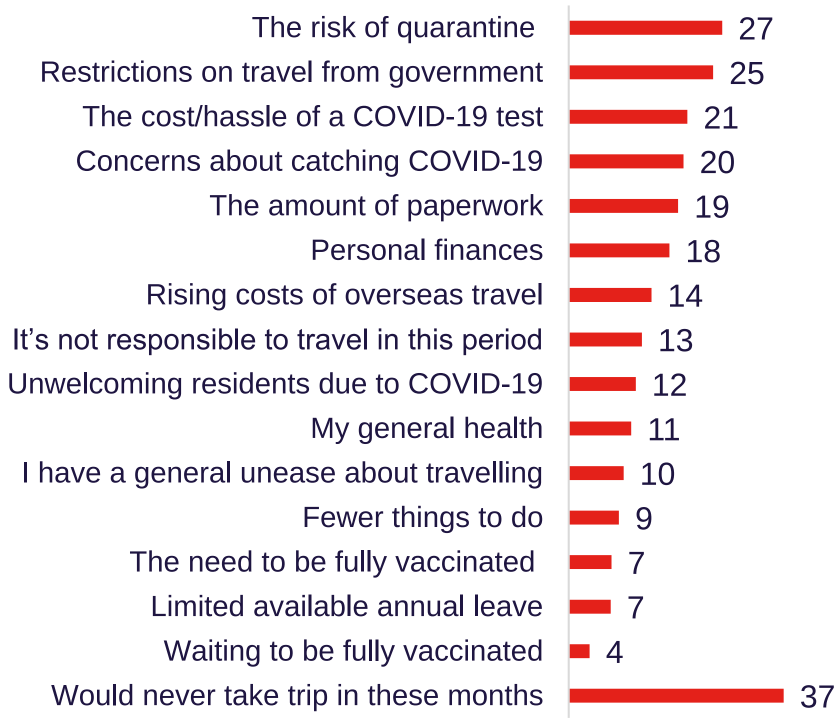



**Figure 12. Barriers for taking an overnight OVERSEAS trip in January 2022 to March 2022, Percentage, January 2022, UK**




VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in <INSERT TIME FRAME BELOW>? VB7e. Which, if any, of the following factors do you see as potential barriers to you taking an OVERSEAS short break or holiday in?
Base: All asked each question Base: All asked each question. January to March n=877

# Perceived barriers to taking overnight UK and Overseas trips between Apr’22 and Jun’22

**‘Restrictions on travel from the government’ is perceived to be the biggest barrier to taking overnight UK trips between April and June, 28% stating this, followed closely by ‘personal finances’ (27%). For overseas trips, the ‘risk of quarantine’ and ‘restrictions on travel from the government’ are the top 2 biggest barriers – 29% and 28% respectively.**

**Figure 13. Barriers for taking an overnight UK trip April to June 2022, Percentage, January 2022, UK**

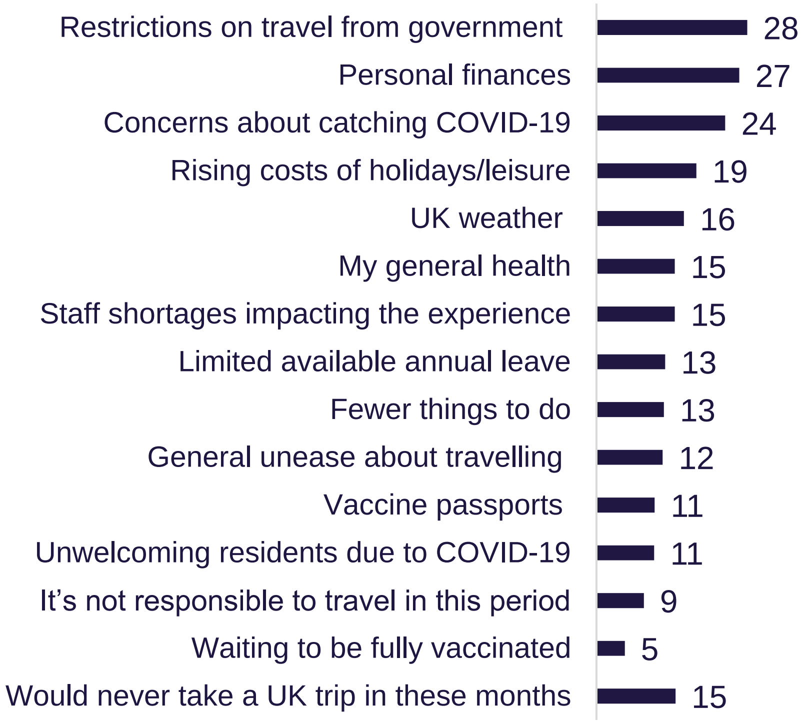
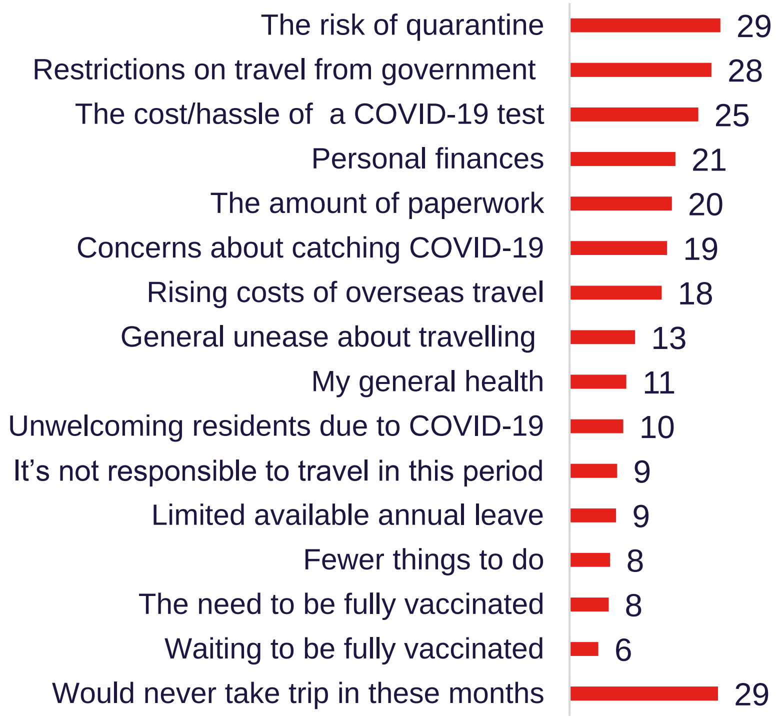



**Figure 14. Barriers for taking an overnight OVERSEAS trip April to June 2022, Percentage, January 2022, UK**



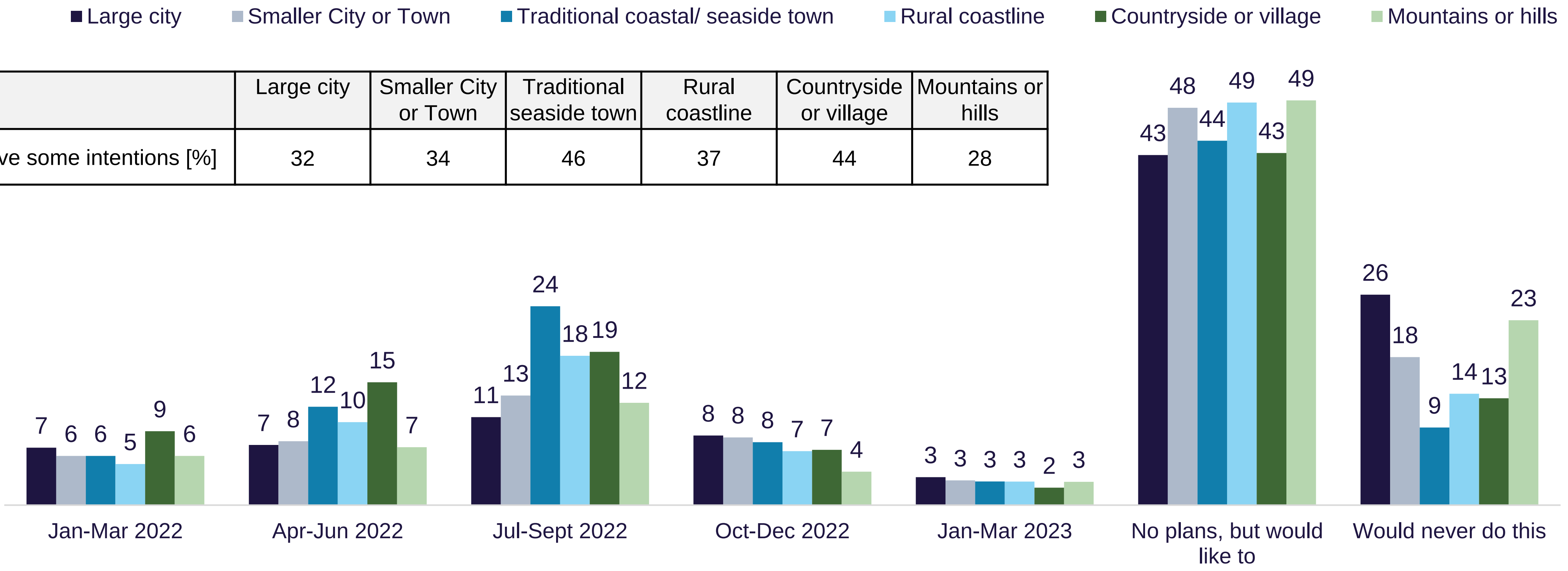

VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in <INSERT TIME FRAME BELOW>? VB7e. Which, if any, of the following factors do you see as potential barriers to you taking an OVERSEAS short break or holiday in? Base: All asked each question. April to June n=879

# Overall UK overnight trips intentions by destination

**Overnight domestic trip intention peaks in July to September 2022, most notably for a ‘traditional coastal/seaside town’– 24% planning on taking a trip there. In April to June 2022 – the period with the second highest volume of trips, ‘countryside or village’ is the most preferred destination type at 15%.**

**Figure 15. Overnight trips intentions in next year by destination type, Percentage, January 2022, UK**

| | Large city | Smaller City or Town | Traditional seaside town | Rural coastline | Countryside or village | Mountains or hills |
|---|---|---|---|---|---|---|
| Have some intentions [%] | 32 | 34 | 46 | 37 | 44 | 28 |




VB6g. Now thinking of all potential overnight trips (not just the next one), when, if at all, are you likely to take a UK holiday or short break to the following types of places? January 2022= 1,755

# 3. Next Domestic Trip
# - Overnight and Day Trips

# Planning and booking time for next UK / overseas overnight trips

**The majority of January UK and overseas trips have already been planned with over half already booked.**

**Figure 16. When anticipate PLANNING the next January-March 2022 UK and overseas overnight trip, Percentage of those not yet booked these trips, January 2022, UK**

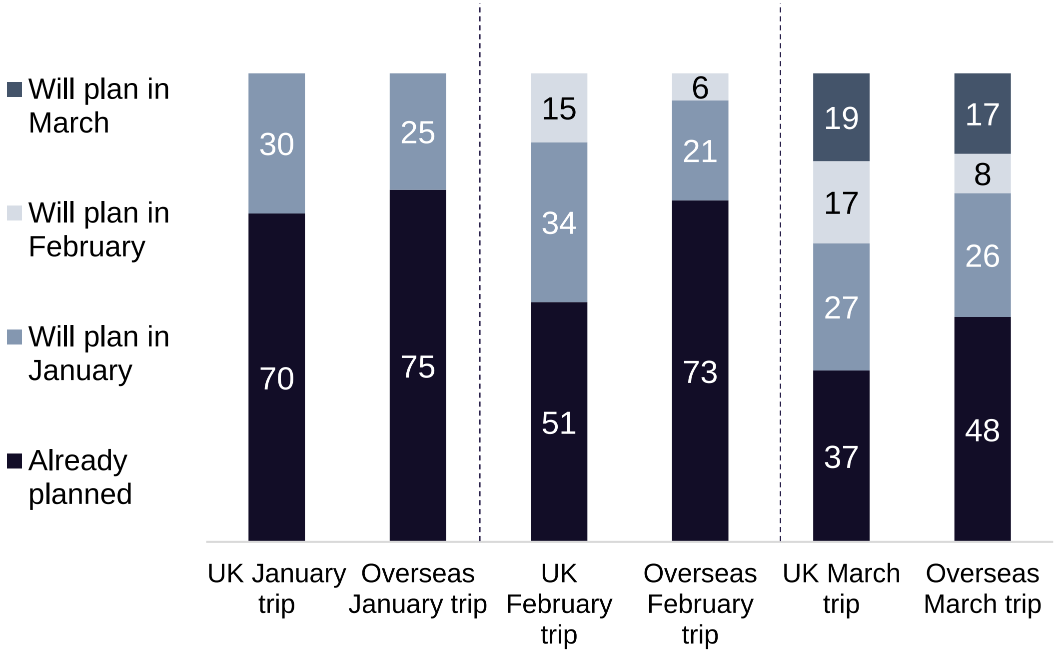
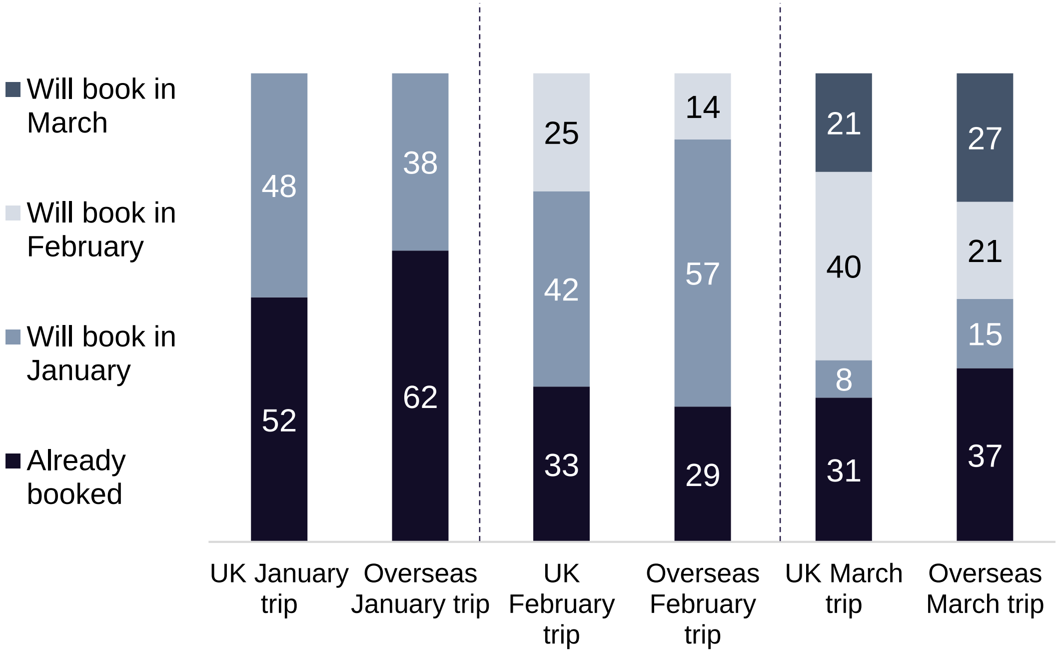



**Figure 17. When anticipate BOOKING the next January-March 2022 UK and overseas overnight trip, Percentage of those not yet booked these trips, January 2022, UK**




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? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip

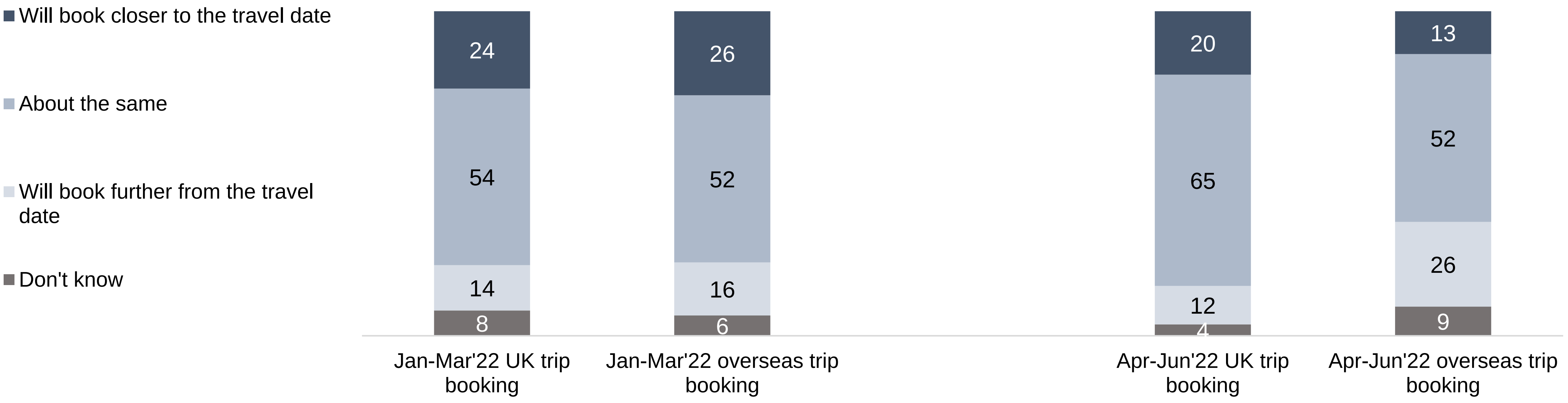
Base: January UK trips n=44*, January Overseas trips n=27*; February UK trips n=84, February Overseas trips n=39*; March UK trips n=89, March overseas trips n=51.

*Low base size

# Booking lead times for the next overnight trips, vs pre-pandemic

**The next overnight Jan-Mar’22 trips for both overseas and the UK are more likely to be booked closer to the travel date than further from the travel date. For Apr-Jun UK trips, booking is also expected to be closer to the travel date.**

**Figure 18. Anticipated booking lead times for Jan-Mar’22 and Apr-Jun’22 trips compared to before the pandemic, Percentage, January 2022, UK**

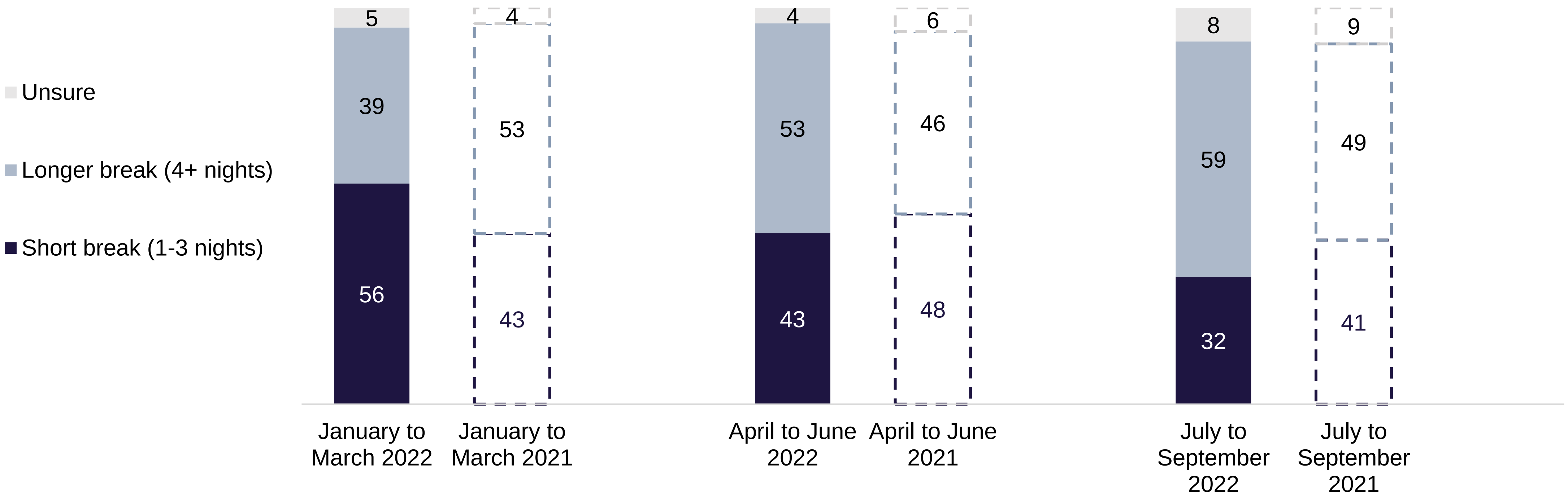



VB2f/h. Roughly how much time is there likely to be between you booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2(III)> and the first day of your trip?V2e/g. Compared to before the pandemic, when are you likely to book your UK/overseas trips? *Lead times are based on trips that have not yet been booked
Base : Jan-Mar 2022 UK trip intenders n=217; Jan-Mar 2022 overseas trip intenders n=117; Apr-Jun 2022 UK trip intenders n=334; Apr-Jun 2022 overseas trip intenders n=192

# Duration of the next overnight trip in UK

**Overnight UK trips planned for Jan-March 2022 are more likely to be short breaks than longer breaks of 4+ nights. From April to September 2022 through to the summer (July to September), longer breaks are more likely.**

**Figure 19. Length of next UK holiday or short break by time period, Percentage, January 2022, UK**




QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All January 2022 respondents intending to take next holiday or short break in each time period: January to March 2022 n=217; April to June 2022 n=334; July to September 2022 n=344. January to March 2021 n=81; April to June 2021 n=250; July to September 2021 n=293

# Where planning on staying on the next overnight trip in the UK

**London is the preferred UK overnight destination for trips between January and March 2022 (20% of intenders planning a trip there compared to 14% a year ago), while this shifts to the South West of England for April to June 2022 (22% planning a trip there which is the same as last year).**

**Figure 20. Where planning on staying on next UK overnight trip in January to March 2022, Percentage, December 2021 and January 2022, UK**

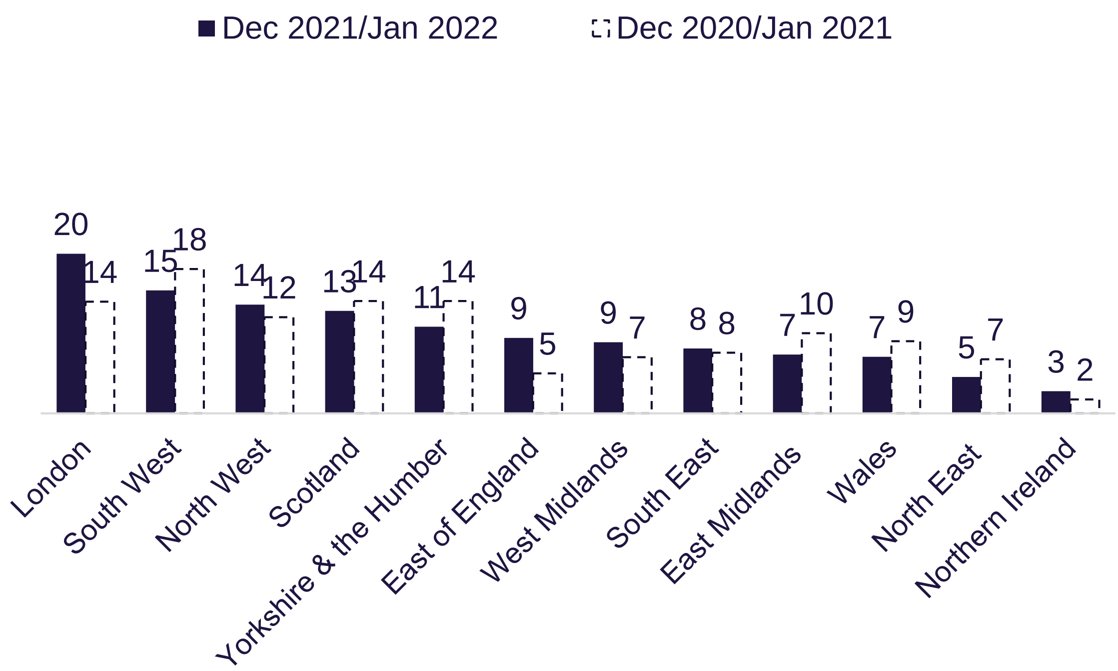
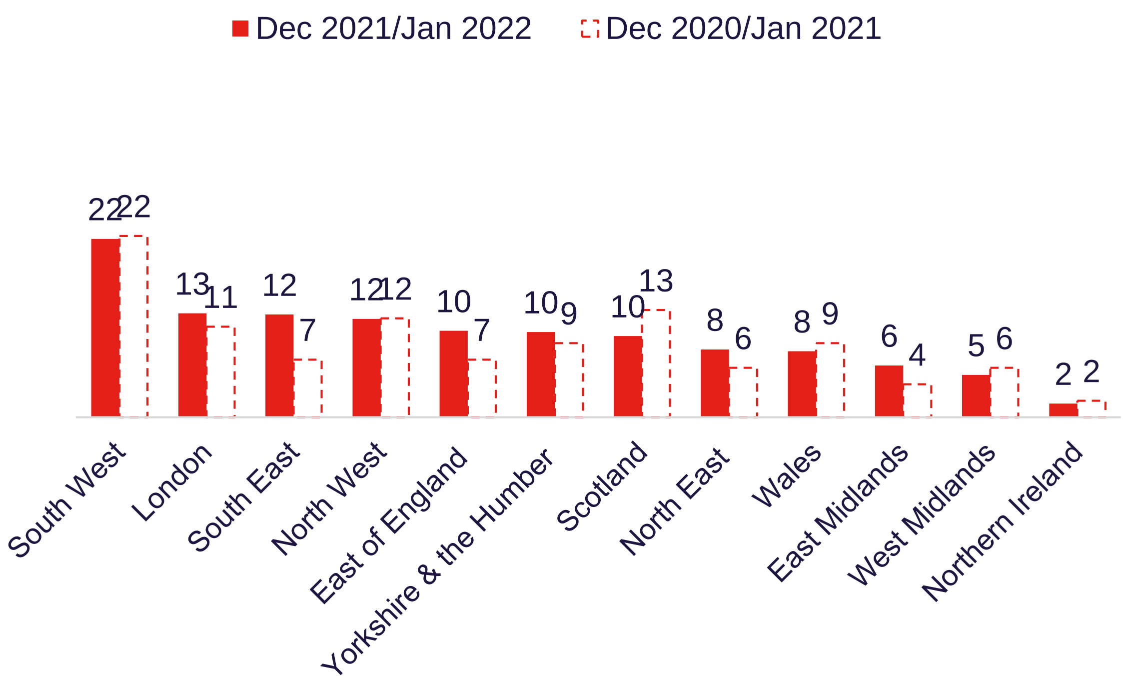



**Figure 21. Where planning on staying on next UK overnight trip in April to June 2022, Percentage, December 2021 and January 2022, UK**




QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All December 2021 and January 2022 respondents planning on taking a holiday or short break in the UK between January to March 2022 n=451; April to June 2022 n=633; December 2020 and January 2021 respondents: January to March 2021 n=224, April to June 2021 n=526.
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.

# Main mode of transport for the next overnight trip in the UK

**Across both time periods, ‘own car’ is by far the leading main mode of transport for travelling to an overnight destination, followed by ‘train’ and then ‘plane’.**

**Figure 22. Top 5 main modes of travel to destination for trip in January to March 2022, Percentage, December 2021 and January 2022, UK**

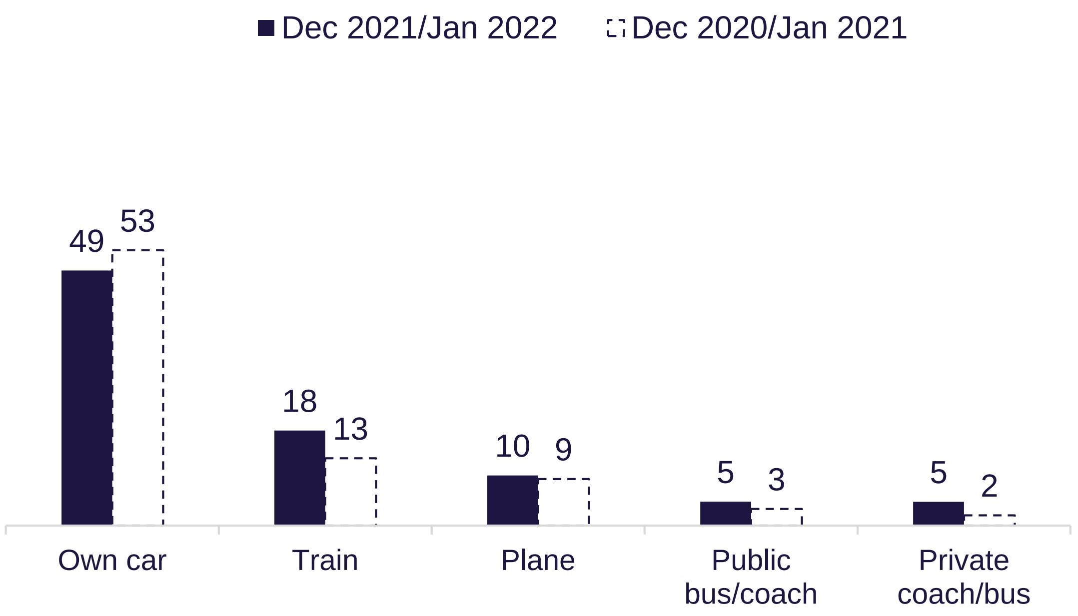
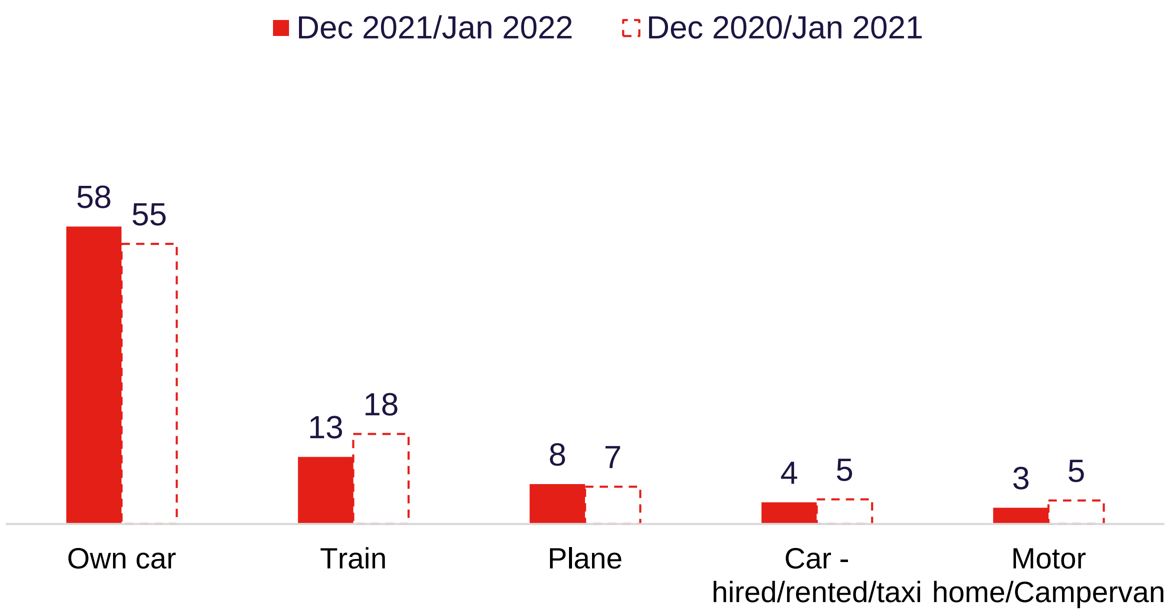



**Figure 23. Top 5 main modes of travel to destination for trip in April to June 2022, Percentage, December 2021 and January 2022, UK**




QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All December 2021 and January 2022 respondents planning on taking a holiday or short break in the UK between January to March 2022 n=451; April to June 2022 n=633; December 2020 and January 2021 respondents: January to March 2021 n=227, April to June 2021 n=526

# Accommodation type for the next overnight trip in the UK

**‘A hotel/motel/inn’ is the leading accommodation choice between January and March 2022 (at 47%) with ‘a private home’ and ‘commercial rental’ close behind (at 42%). Between April and June 2022, ‘camping/caravan’ is the leading accommodation choice (at 43%).**

**Figure 24. Accommodation planning on staying in on next UK overnight trip in January to March 2022, Net Percentage, December 2021 and January 2022, UK**

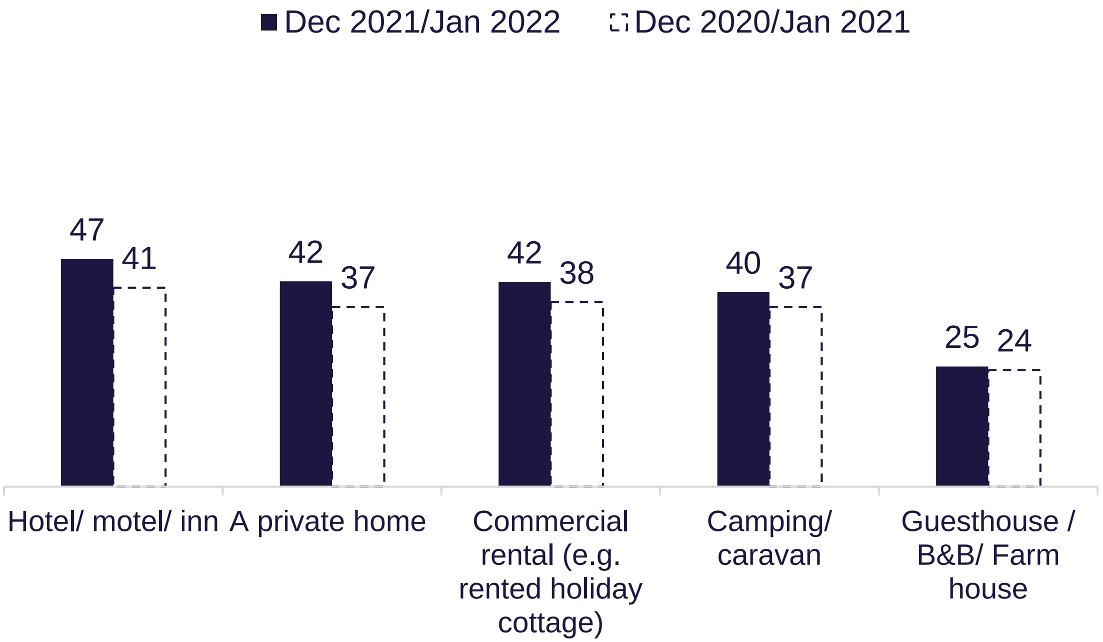
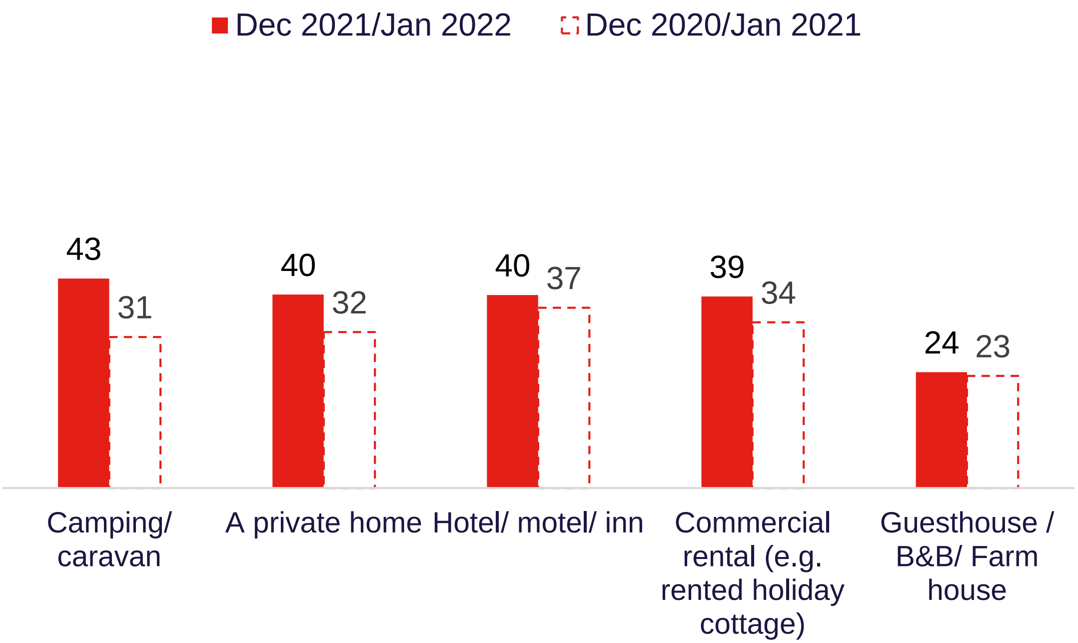



**Figure 25. Accommodation planning on staying in on next UK overnight trip in April to June 2022, Net Percentage, December 2021 and January 2022, UK**

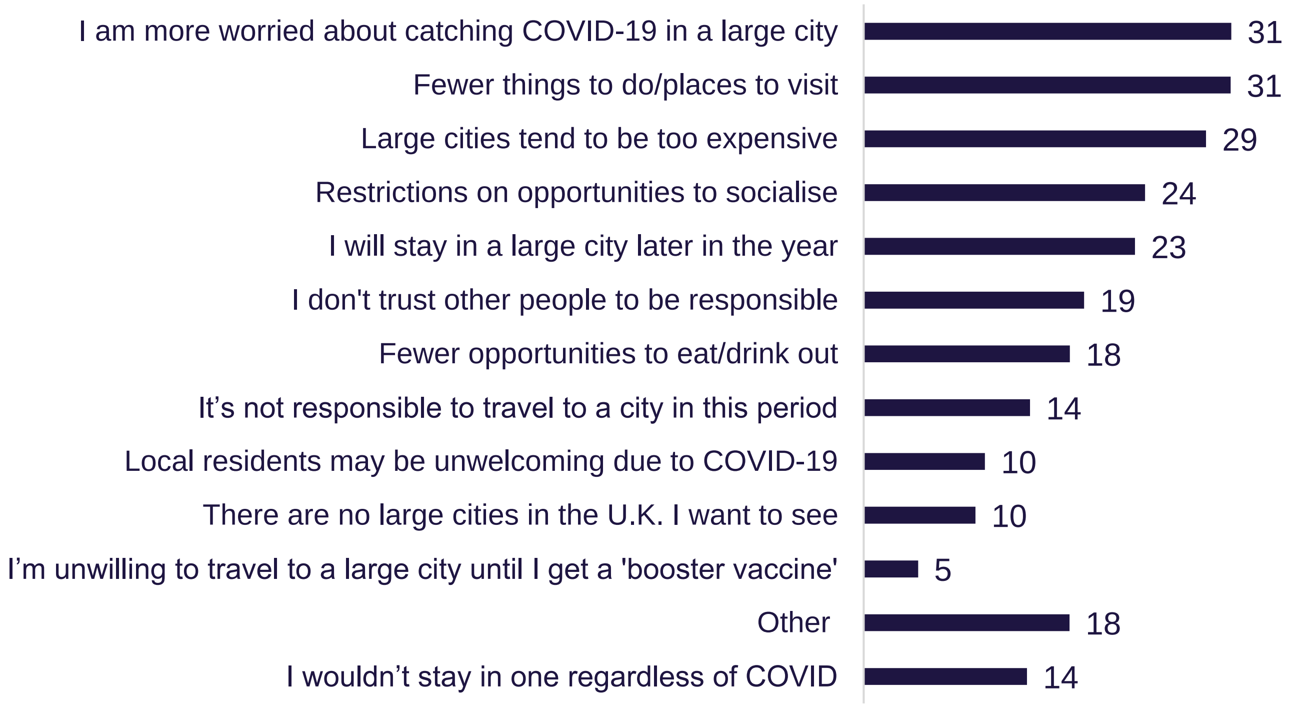



QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All December 2021 and January 2022 respondents planning on taking a holiday or short break in the UK between January to March 2022 n=451; April to June 2022 n=633; December 2020 and January 2021 respondents: January to March 2021 n=227, April to June 2021 n=526
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation

# Reasons for not staying in a city on the next UK trip

**Among the January to March 2022 intenders not planning on visiting a large city, ‘worried about catching COVID-19 in a large city’ (32%) and ‘fewer opportunities to do/places to visit’ (also 31%) are the leading reasons.**

Figure 28: Reasons for not staying in a city amongst January to March intenders, Percentage, January 2022, UK

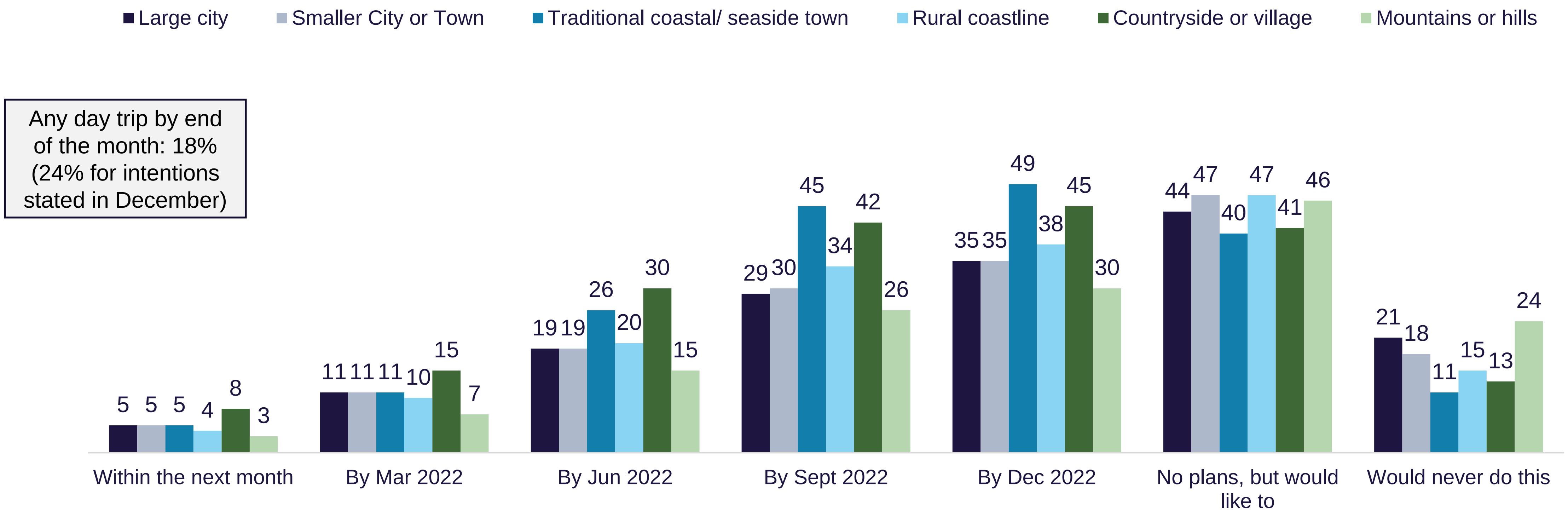



VB5b. You indicated you don’t plan on staying in a large city during your next UK holiday or short break in <INSERT MONTH FROM VB2A>. Why is this? Base: All January 2022 respondents that don’t plan on staying in a city on their next UK trip between January and March n=148
Multiple choice question. Totals may exceed 100%

# Next UK day trip intention by destination type

**18% of UK adults intend to take any type of day trip by the end of the month. 'Countryside or village' is the destination type most likely to generate a day trip by June 2022, while 'traditional coastal/seaside town' becomes the most popular destination by September.**

**Figure 29. Next UK day trip intention between January 2022 and December 2022, Cumulative percentages, January 2022, UK**




QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? January 2022 = 1,755

# 4. Overnight Business Trip Intentions

# Intentions for overnight business trips in the next three months

**16% of UK adults in employment plan on taking an overnight business trip in the next 3 months (down 4 percentage points on December 2021). 'Team building' is the leading reason for taking one.**

**Figure 30. Proportion anticipating an overnight business trip in next 3 months, Percentage, January 2022, UK adults in employment**

*79% of UK adults interviewed are in employment*

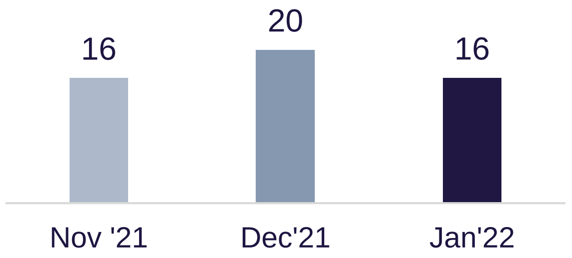
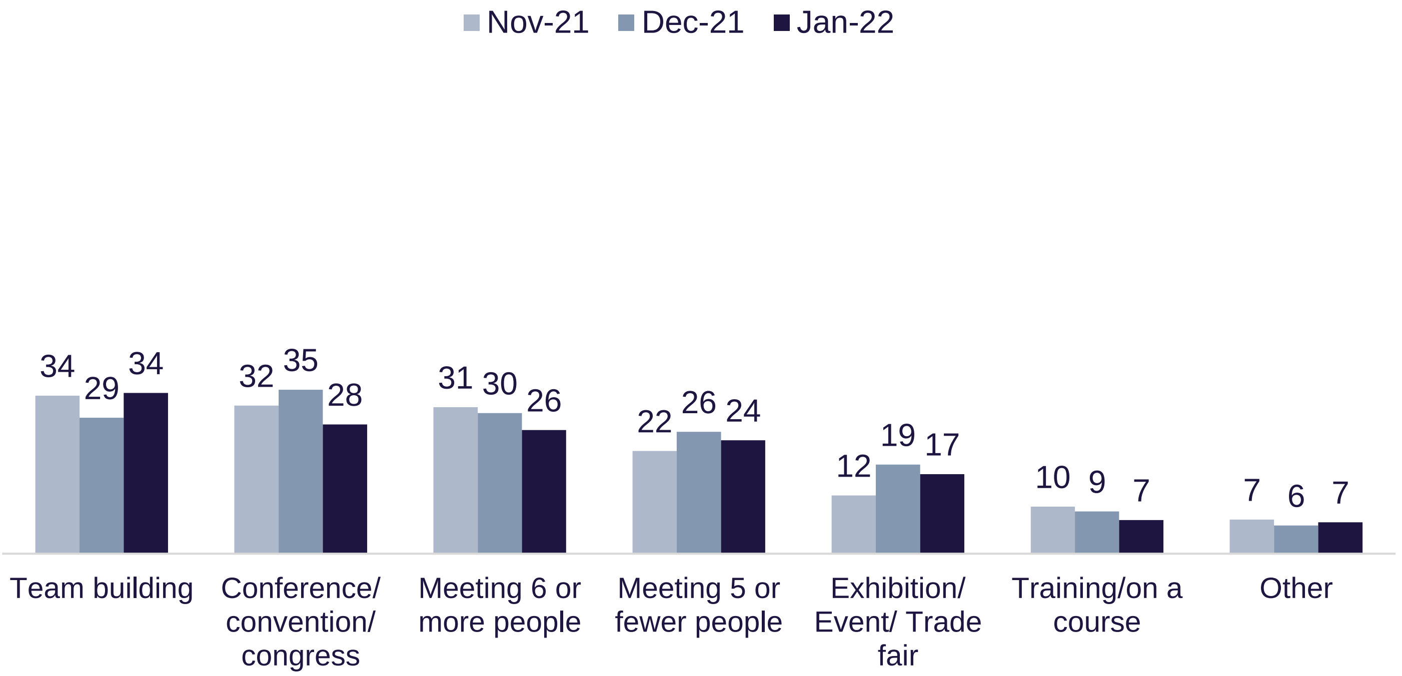



**Figure 31. Reasons for taking an overnight business trip in next 3 months, Percentage, January 2022, UK adults in employment planning a trip**



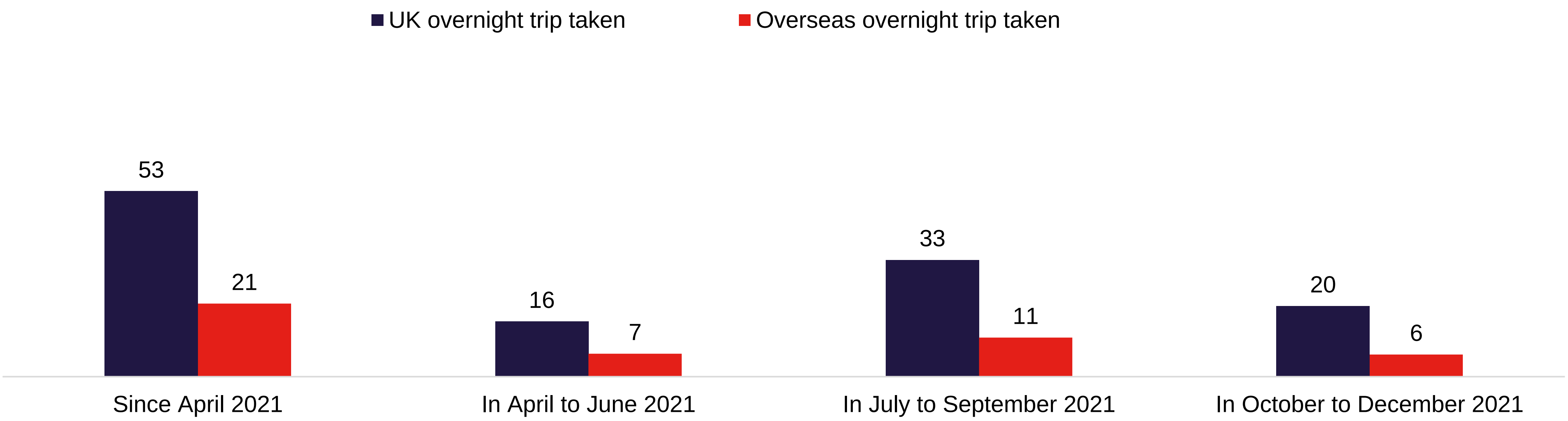

VB14a. Now looking ahead again, are you intending to take any overnight business trips in the UK in the next three months? Please only answer yes if the overnight business trips are not a feature of your job. For example, if you are a long-distance lorry driver, airline crew or delivery service, an overnight stay would be a feature of the job so you would answer 'no'. Please also answer 'no' if your only overnight business trip is a regular trip to your main place of work (e.g. a weekly or monthly trip to your office).Multiple choice question. Totals may exceed 100% as some respondents anticipate more than one business reason.
VB14b: What would be the main reason for this overnight business trip? Base: January respondents currently in employment n = 1251. All taking a business trip n=228

# 5. Past UK vs Overseas Trips

# Proportion taken a UK and overseas trip since April 2021

**Just over half (53%) of UK adults have taken an overnight UK trip since April, more than twice as many as have taken an overseas overnight trip in that period (21%). Both types of trips are most likely to have been taken between July and September.**

Figure 32. Proportion taken an overnight UK or overseas trip in below time period, Percentage, January 2022, UK




VB13a/v. Now reflecting on your recent behaviour, have you taken an overnight short break or holiday in the UK/overseas since the start of April 2021?
VB13a2/g. In which of these months have you taken an overnight short break or holiday in the UK since the start of April 2021?
Base: All respondents. January 2022= 1,755
Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip

# Where stayed and purpose of last UK overnight trip

**The South West of England was the most popular destination for trips since September 2021, 17% of trip takers having stayed there. Holiday / leisure was the most dominant purpose for the overnight UK trip.**

**Figure 33. Destination of overnight trips taken in UK since September 2021, Percentage, January 2022, UK**

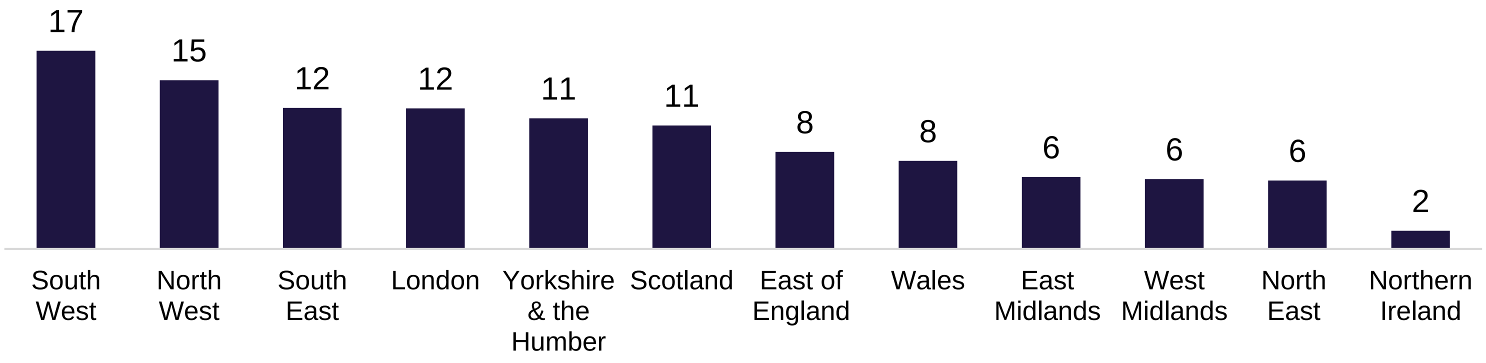
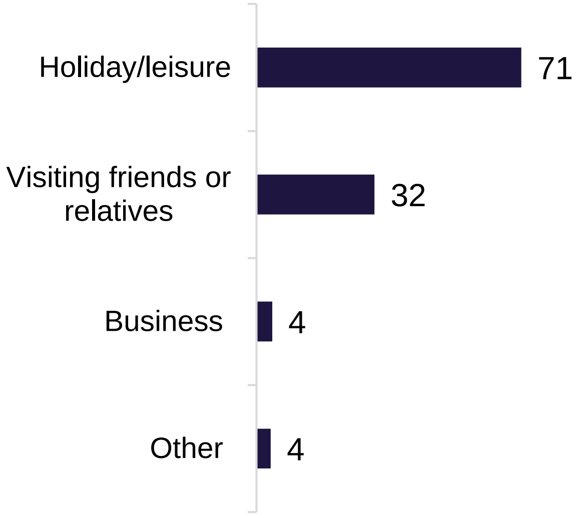



**Figure 34. Purpose of overnight UK trip taken since September, Percentage, January 2022, UK**




VB13c. Where in the UK did you stay on your most recent trip in <INSERT MOST RECENT MONTH>? VB13e. And which of the following best describe the purpose/s of your most recent trip in <INSERT MOST RECENT MONTH >?
Base: All January 2022 respondents that took an overnight trips since September n=514
Note: Multiple choice questions. Totals may exceed 100% as some respondents stayed in more than one location or travelled for more than one purpose

# Methodology

# Methodology

- This report presents findings from the January 2022 wave of the COVID-19 consumer sentiment tracker, with comparisons to previous months where appropriate.
- The survey is conducted online, among a sample of the UK adult population.
- In the first stage, a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then ‘boosted’ for Wales and Scotland to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the UK overall and within each nation.
- January 2022 fieldwork was conducted between 4-10 January 2022.

# 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.