

COVID-19 Consumer Tracker

February 2022

Published: 15th February 2022
Fieldwork Period: 1st – 7th February 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 1st – 7th February 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.

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

February 2022: Scorecard of Key Metrics

Key Metrics	February 2022	Change since January 2022
National mood (average score out of 10)	6.6	-0.1
Perceptions of the situation regarding Covid-19 (% stating 'worst has passed')	52%	+19*
Appetite for risk (average score out of 4)	2.9	+0.1
Confidence in ability to take UK overnight trip in February / March (% NET confident)	64% / 65%	+17* / +13*
Confidence in ability to take overseas overnight trip in February / March (% NET confident)	46% / 46%	+17* / +14*
Will take more UK trips in the next 12 months than past 12 months [%]	35%	+3
Will take more overseas trips in the next 12 months than past 12 months [%]	20%	No change
Proportion intending a UK overnight trip in next 12 months [%]	59%	+1
Proportion intending an overseas overnight trip in next 12 months [%]	43%	+3
Top 3 barriers to taking a UK overnight trip from February to March	1. Personal finances 2. UK weather 3. Rising costs of holidays/leisure	UK weather and rising costs of holidays/leisure in Top 3
Top 3 barriers to taking an overseas overnight trip from February to March	1. Personal finances 2. Risk of quarantine 3. Restrictions on travel from government	Personal finances and Risk of quarantine in Top 3

* Represents a statistically significant change on previous wave



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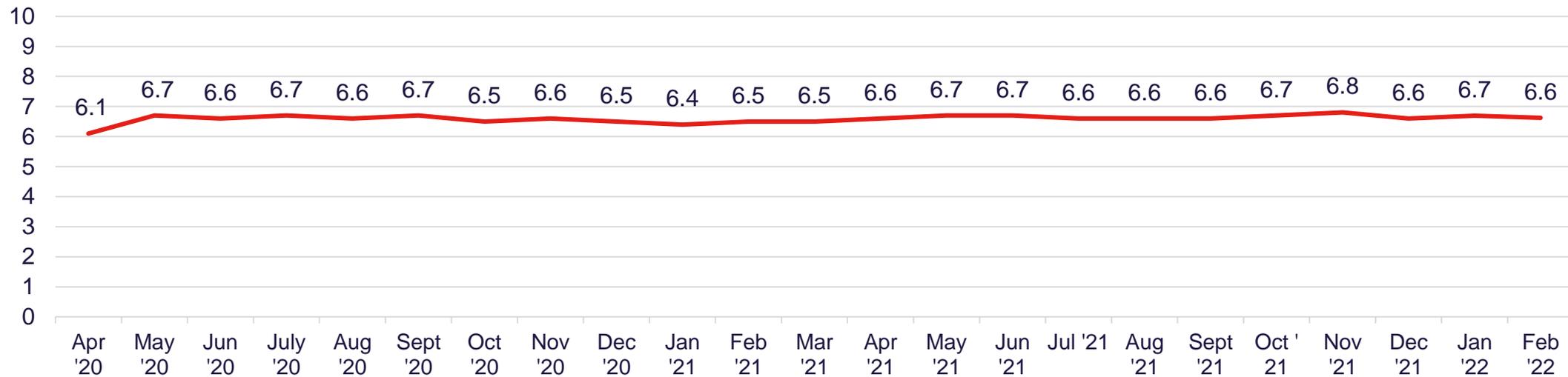
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1. Covid Impact on Attitudes to Travel

The Current Mood

The average mood of UK adults remains at similar levels seen throughout 2020 and 2021, averaging at 6.6 out of 10.

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



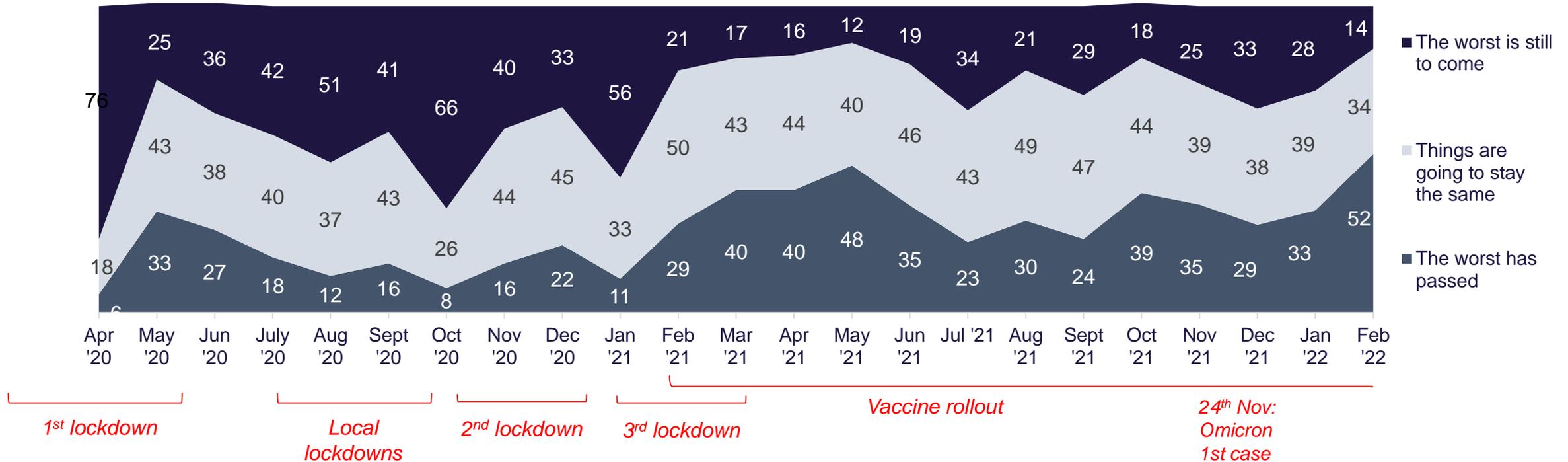
Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. February 2022 = 1,756 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750

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 January 2022. Proportion of those who think 'the worst has passed' (52%) is now significantly larger than % of those who feel 'the worst is still to come' (14%).

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

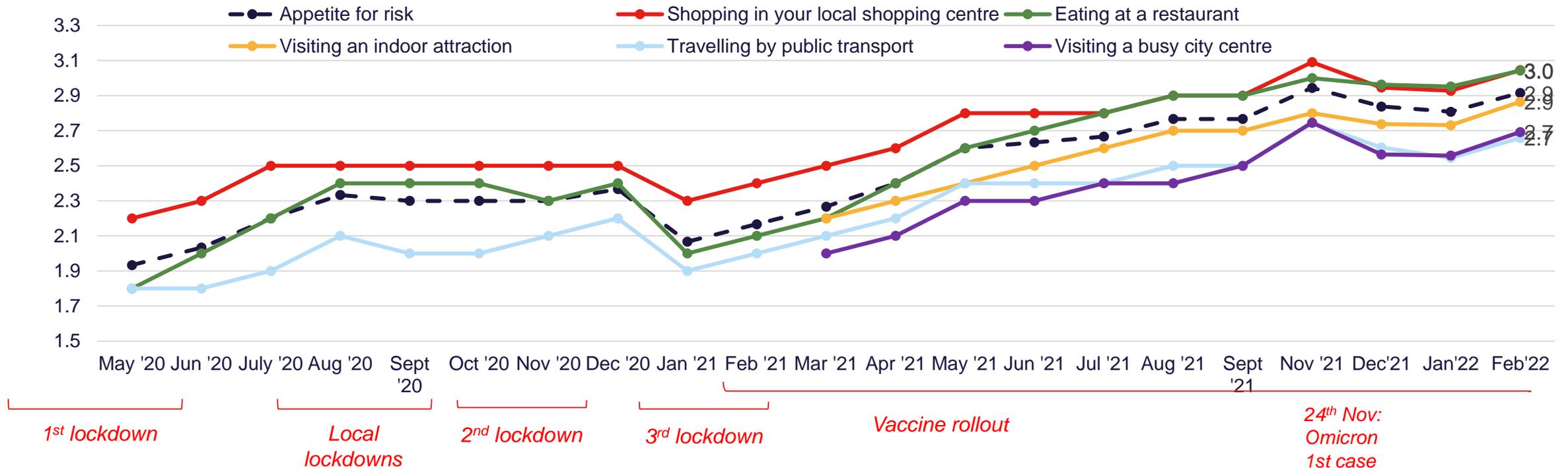


Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion?
 Base: All respondents. February 2022 = 1,756 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of 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 has slightly increased from 2.8 in January 2022 to 2.9 (out of 4). There is an indication of increases across most of the activities from January to February 2022.

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

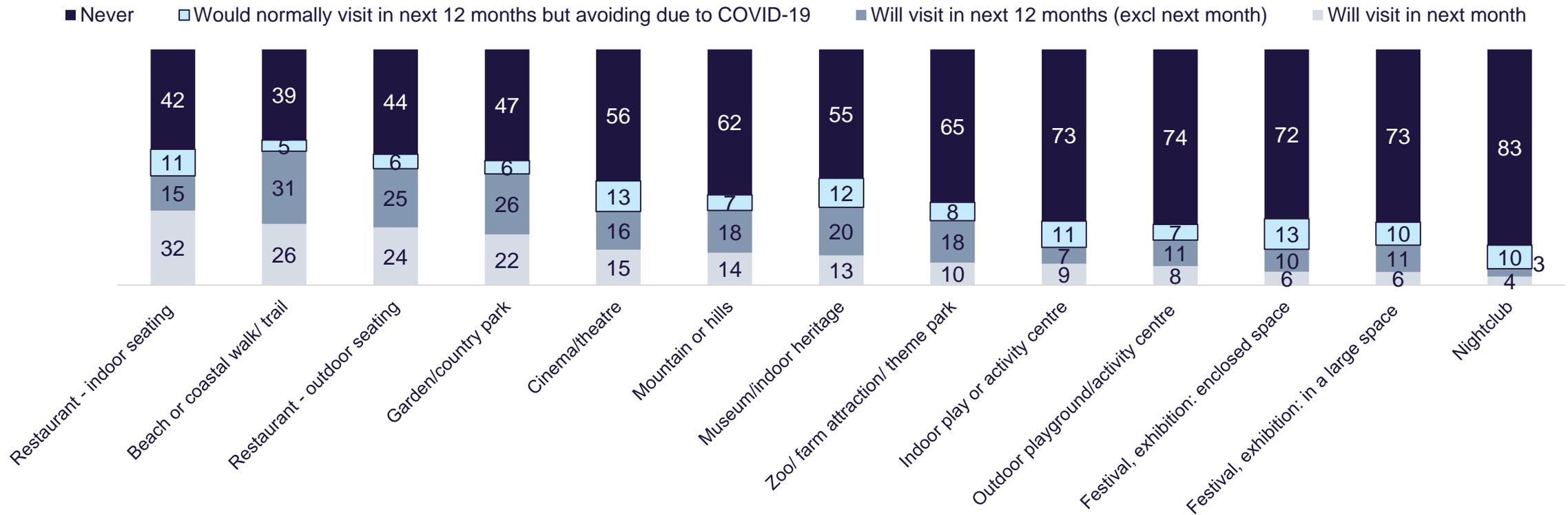


VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
 Base: All respondents excluding those stating 'don't know' or who wouldn't do activity under any circumstances. Mean average based on those that gave a score of 1-4. February 2022 = 1,756 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 (32% intending to do so). 'Cinema/theatre' and 'festival/exhibitions in an enclosed space' are the venues most likely to be avoided in the next 12 months due to COVID-related reasons (13% stating this).

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



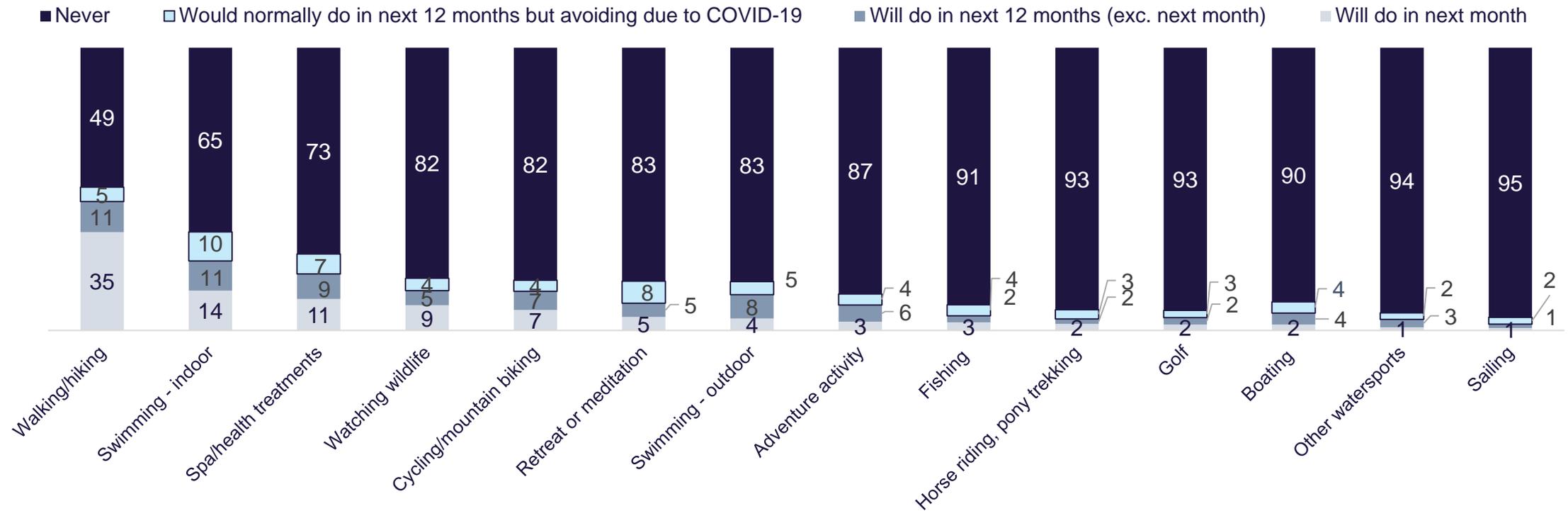
VB9a. Which, if any, of these types of places in the UK are you likely to visit in the next 12 months? VB9b. Which, if any, are you likely to visit in the UK in the next month? VB9c. Which, if any, would you normally visit in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government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

Base: All respondents. February 2022 = 1,756

Intention to conduct leisure activities in the UK

Out of the activities included, 'walking/hiking' is the most likely activity for the next month (35%). 'Indoor swimming' is the activity most likely to be avoided due to COVID-19, 10% of those who would normally swim indoors stating this.

Figure 4. Intention to conduct leisure activities, Percentage, February 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. February 2022 = 1,756

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). ‘Guest/staff interventions’ and ‘social distancing measures’ are less mentioned in Feb’22 than in Jan’22 (*this is possibly linked to lifting of restrictions in England on 27th January*)

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, February 2022, UK, Full list



	Nov	Dec	Jan	Feb
Net: Financial booking incentives	64%	63%	62%	63%
Net: Reduced contamination measures	61%	59%	60%	60%
Net: Guest/staff interventions	54%	59%	58%	53%
Net: Social distancing measures	57%	60%	57%	52%

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. February 2022 = 1,756



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2. Trip Intentions: UK and overseas

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

The Net number (more minus fewer) of intended trips in the next 12 months compared to the past 12 months has increased from January, especially for domestic overnight trips, from 18% in January to 24% in February.

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

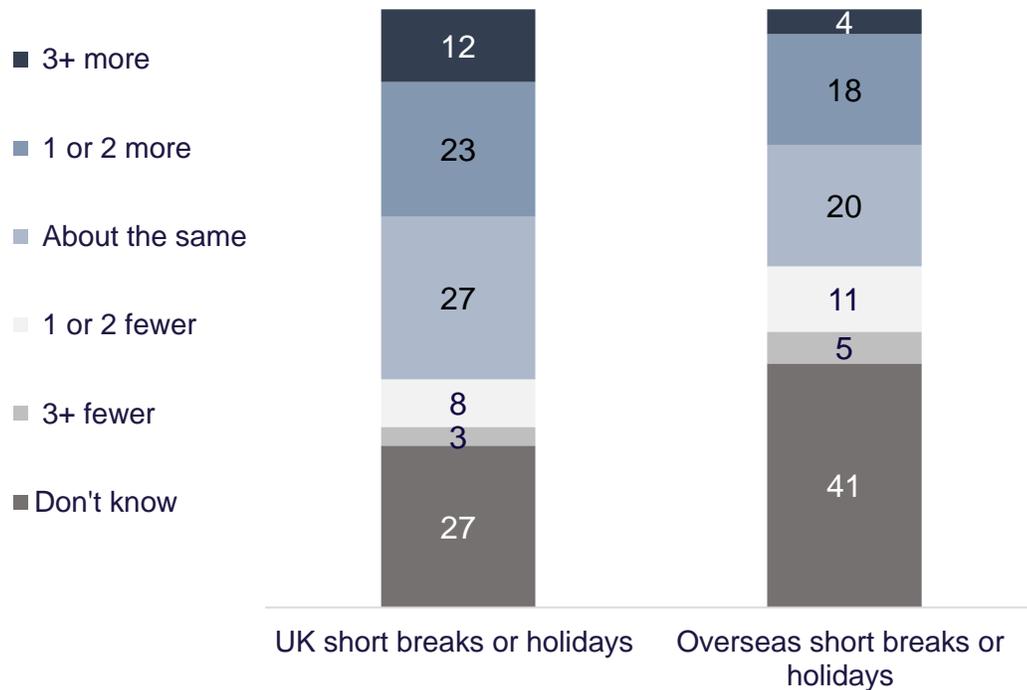


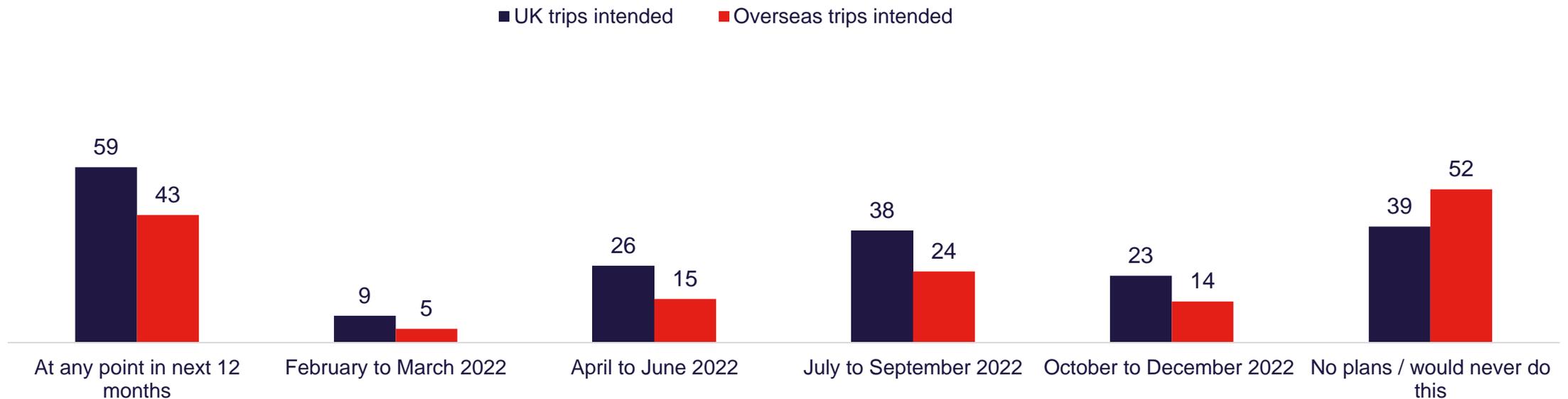
Figure 7b. Number of UK and overseas overnight trips likely to take in next 12 months compared to the last 12 months, Net 'More minus fewer', Wave-on-wave, UK



Next overnight trips intentions

Nearly 3 in 5 (59%) of UK adults plan on taking their next overnight domestic trip in the next 12 months, significantly more than the 43% planning to take an overnight overseas trip in this period. Next trip intention is highest for July to September 2022.

Figure 8a. Proportion anticipating going on overnight UK and overseas trips, Percentage, February 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. February 2022 = 1,756 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

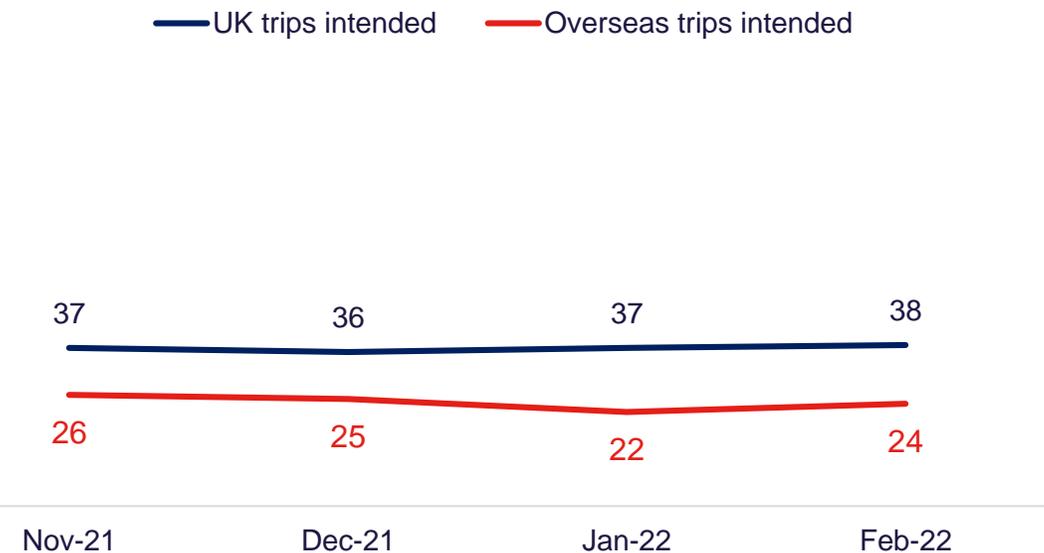
Next overnight trips intention trend – Apr-Jun'22 and Jul-Sep'22

The proportion of UK adults anticipating next UK or overseas overnight trips between April to June 2022 and July to September 2022 has remained more or less stable since November 2021.

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



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

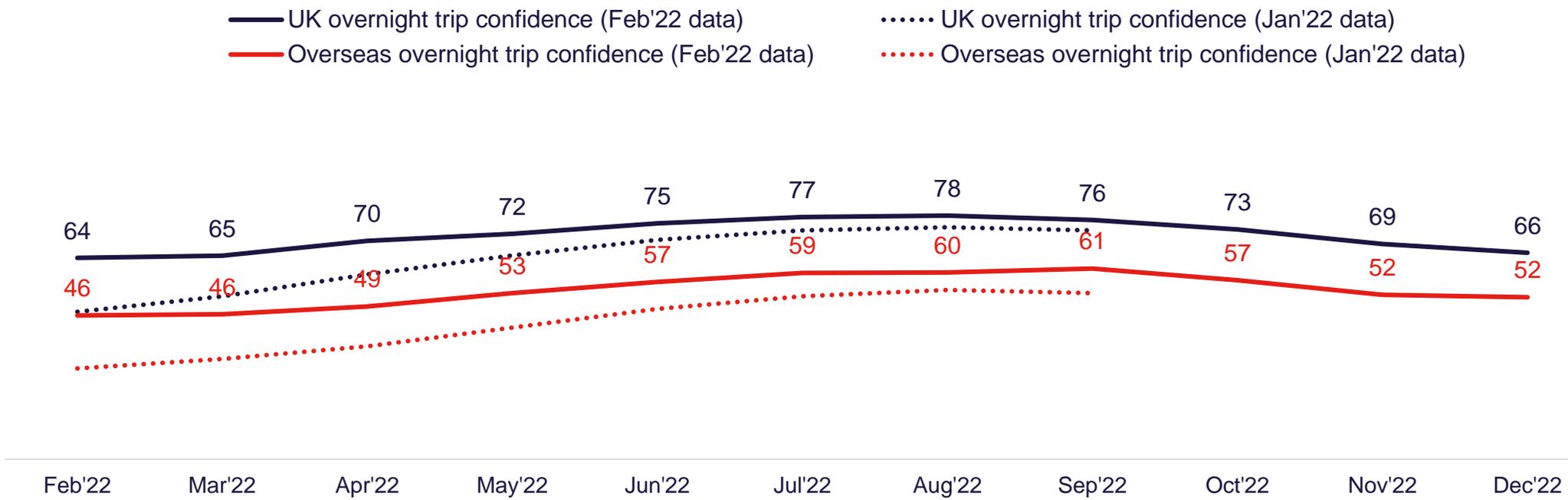


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are 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 February respondents. Apr-Jun 2022 UK overnight trips = 462 Overseas trips = 249; July-Sept 2022 UK overnight trips = 669 Overseas trips = 419 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 an overnight trip

In February, the confidence levels are higher than in January, especially for trips in the next three months. Confidence for overseas trips is lower than for UK trips, however, it has also increased compared to previous wave.

Figure 9. Confidence in taking a UK and Overseas overnight trip across different time periods, NET Confident (Very confident + fairly confident) Percentage, January and February 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. February 2022 = 1,756

Perceived barriers to taking overnight UK and Overseas trips between Feb'22 and Mar'22

The main perceived barriers to taking an overnight trip in the UK between February and March are 'personal finances' (30%) and 'UK Weather' (26%). For overseas trips, 'personal finances' and 'risk of quarantine' are the top 2 biggest barriers, both at 23%. Compared to January, 'personal finances' is more mentioned in February.

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

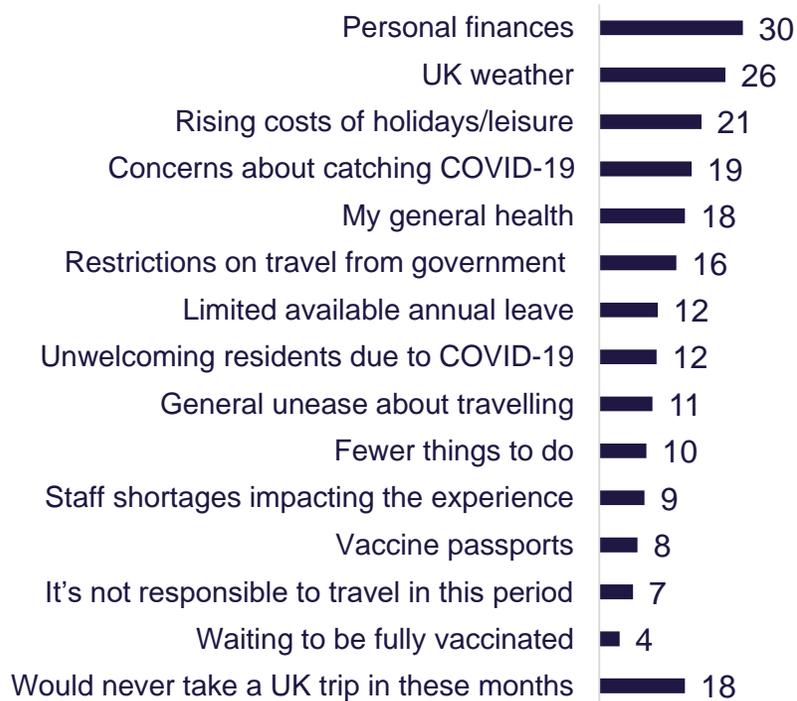
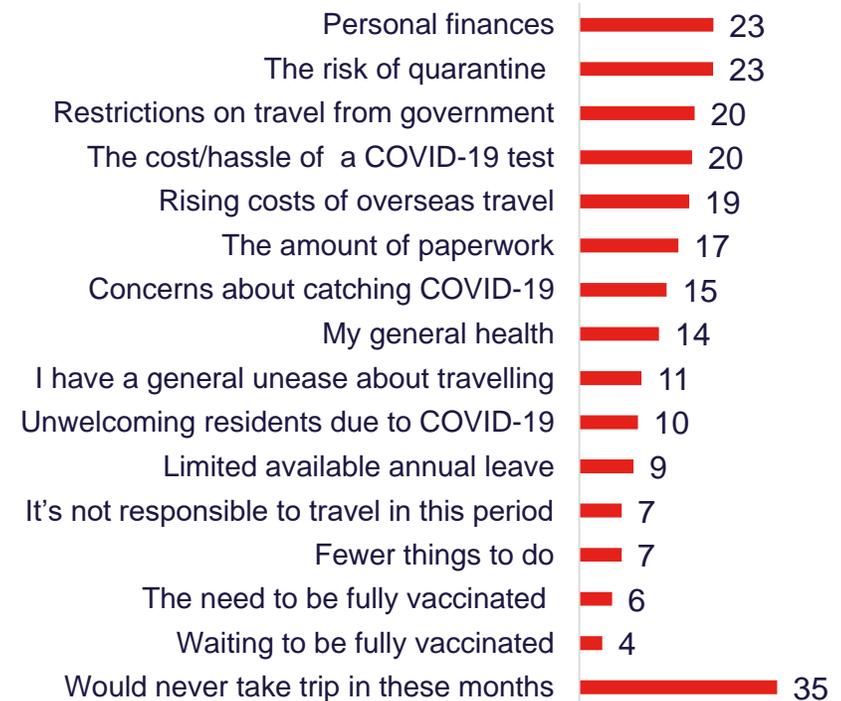


Figure 12. Barriers for taking an overnight OVERSEAS trip in February 2022 to March 2022, Percentage, February 2022, UK



VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in February to March 2022?
 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. February to March n=881

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

'Personal finances' are also increasingly perceived to be the biggest barrier to taking overnight UK trips between April and June (33% stating this), followed by 'rising costs of holiday/leisure' (25%). For overseas trips, the 'personal finances' and 'risk of quarantine' are again the top 2 barriers (28% and 26% respectively).

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



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



COVID-19 influence on choice of destination - among next 12 months trip intenders

As a result of Covid-19, 24% of UK adults say they will 'avoid destinations with lots of people / Stay in less populated places' when choosing a destination for their UK overnight trip in the next 12 months. They also plan to 'take UK trips at less busy times'.

Figure 15a. COVID-19 influence on choice of destination/s for UK holidays and short breaks, Percentage, February 2022, UK, Full list

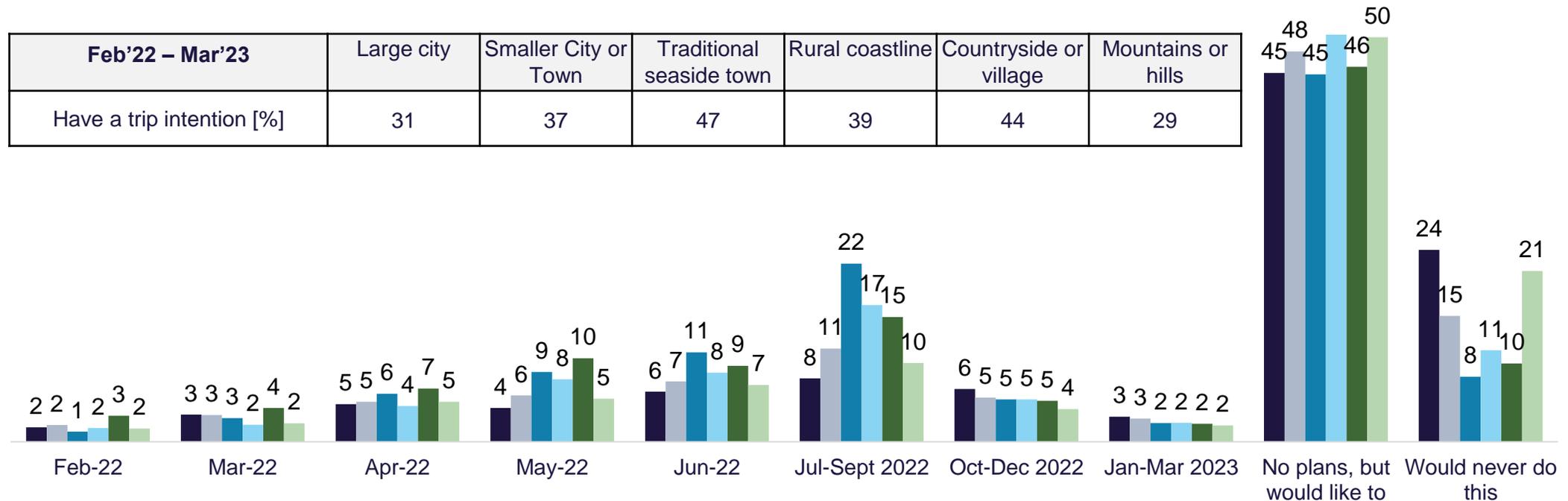


All potential UK overnight trips intentions by destination

Overnight domestic trip intention peaks in July to September 2022, most notably for a ‘traditional coastal/seaside town’– 22% planning on taking an overnight trip there.

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

■ Large city
 ■ Smaller City or Town
 ■ Traditional coastal/ seaside town
 ■ Rural coastline
 ■ Countryside or village
 ■ Mountains or hills



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? February 2022= 1,756 *The months were asked as individual months in this wave for Feb-Mar and Apr-Jun 2022



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3. Next Domestic Trip - Overnight and Day Trips

Planning and booking time for next UK / overseas overnight trips

The majority of February UK and overseas trips have already been planned with more than half having already been booked. The majority of March trips have also been planned, with around 2 in 5 already booked.

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

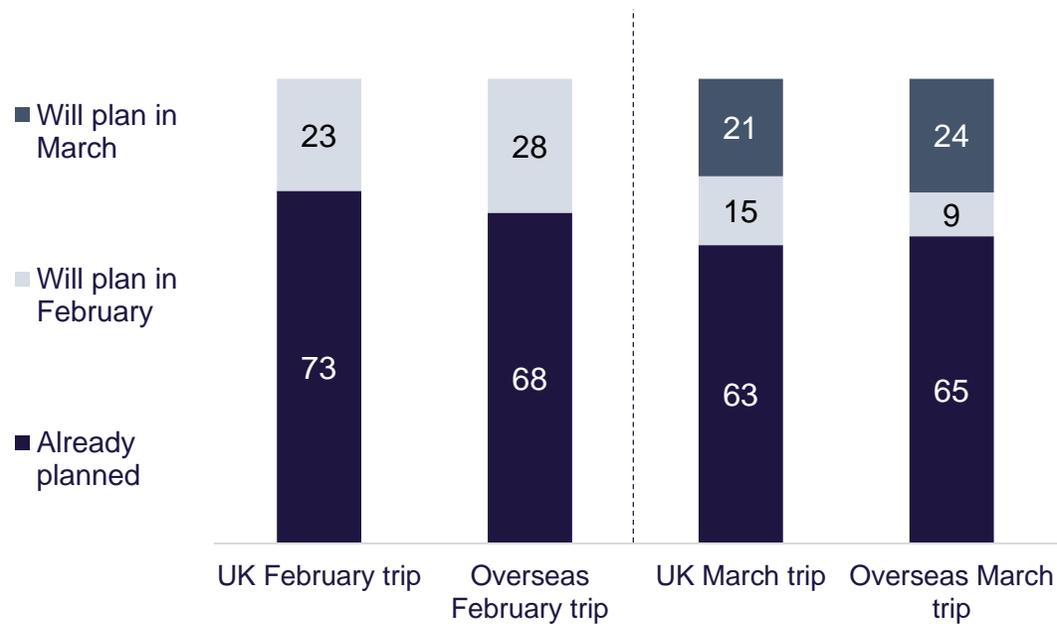
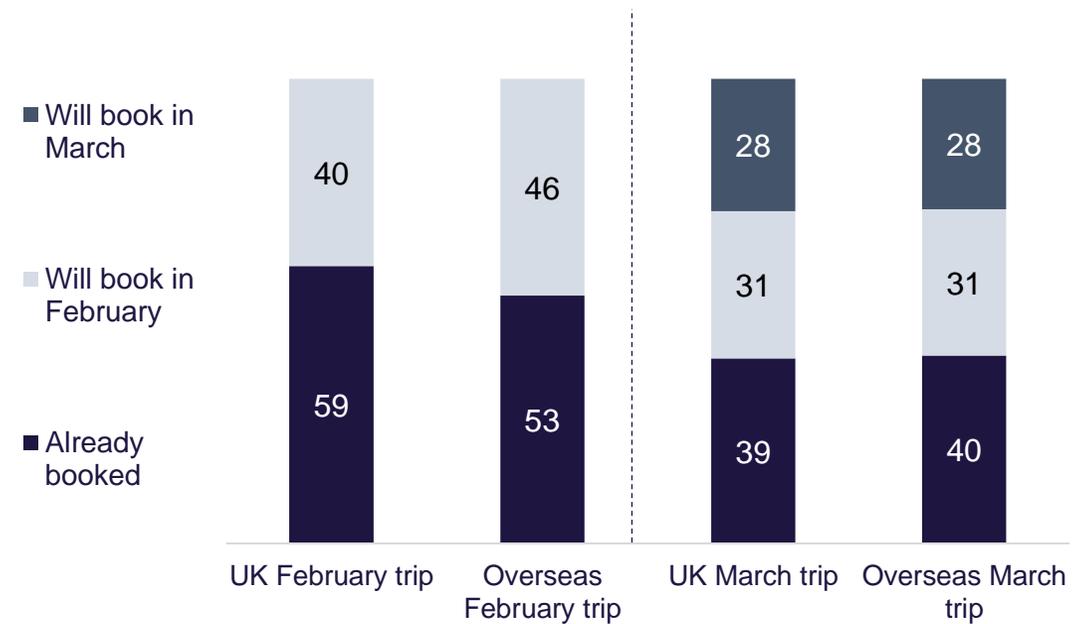


Figure 17. When anticipate **BOOKING** the next **February-March 2022** UK and overseas overnight trip, Percentage of those not yet booked these trips, February 2022, UK



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

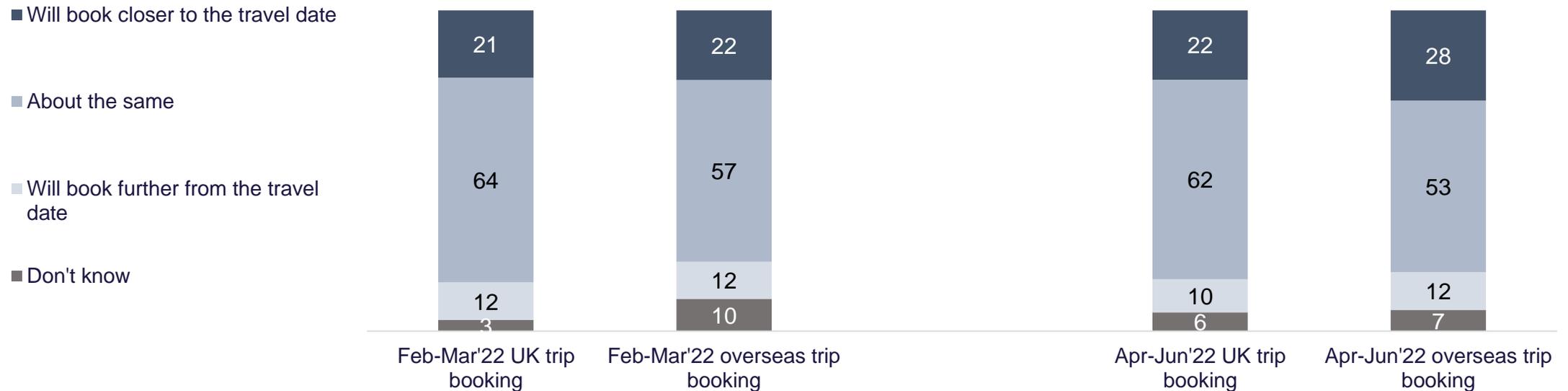
Base: February UK trips n=78, February Overseas trips n=35*; March UK trips n=97, March overseas trips n=37*.

*Low base size

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

The next overnight trips in periods Feb-Mar'22 and Apr-Jun'22 for both overseas and the UK are more likely to be booked closer to the travel date, compared to pre-pandemics.

Figure 18. Anticipated booking lead times for Feb-Mar'22 and Apr-Jun'22 trips compared to before the pandemic, Percentage, February 2022, UK

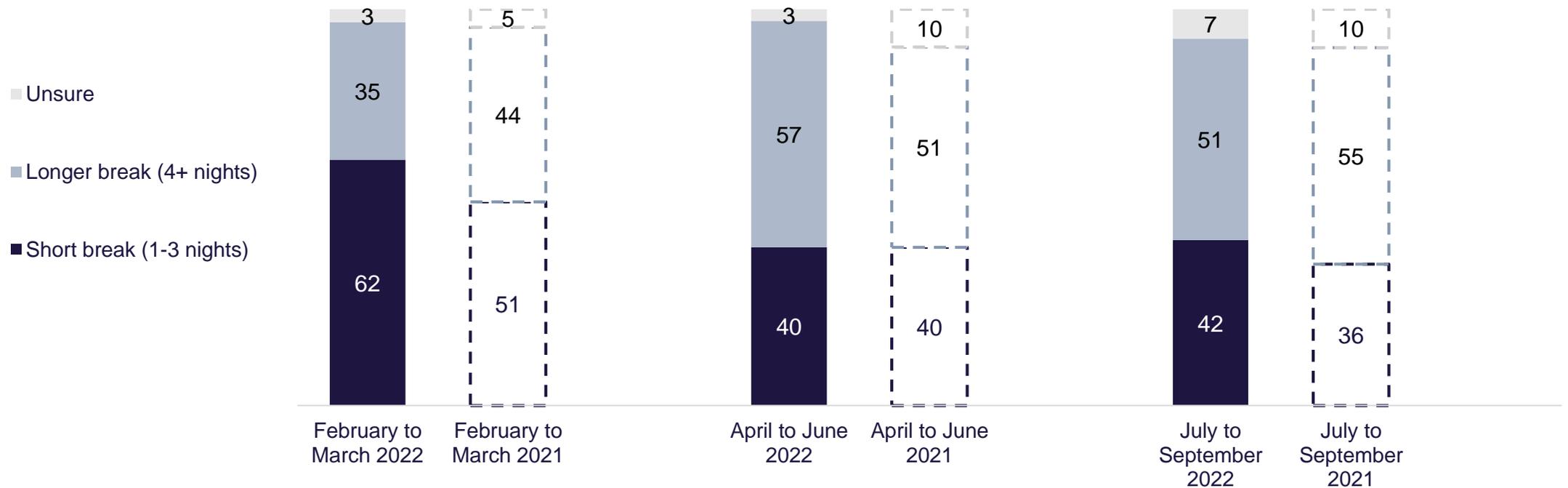


VB2f/h. Roughly how much time is there likely to be between you booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2(III)> and the first day of your trip? V2e/g. Compared to before the pandemic, when are you likely to book your UK/overseas trips? *Lead times are based on trips that have not yet been booked
 Base : Feb-Mar 2022 UK trip intenders n=175; Feb-Mar 2022 overseas trip intenders n=72; Apr-Jun 2022 UK trip intenders n=372; Apr-Jun 2022 overseas trip intenders n=223

Duration of the next overnight trip in UK

Overnight UK trips planned for Feb-Mar'22 are more likely to be short breaks than longer breaks of 4+ nights. From April to September 2022 through to the summer longer breaks are more likely.

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



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

Base: All February 2022 respondents intending to take next holiday or short break in each time period: February to March 2022 n=175; April to June 2022 n=372; July to September 2022 n=400. February to March 2021 n=52; April to June 2021 n=209; July to September 2021 n=345

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

London is the most preferred UK overnight destination for trips between February and March 2022 (19% of intenders planning a trip to London), while for April to June 2022, the top destination is the South West of England (19% planning a trip there, down from 29% at the same time last year).

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

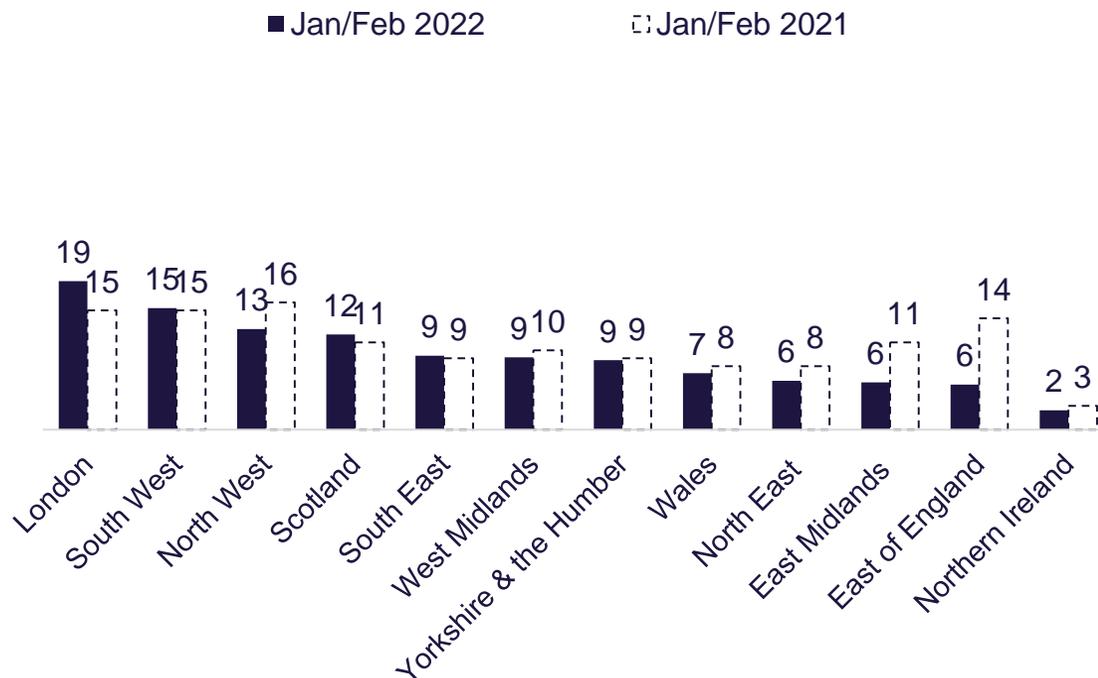
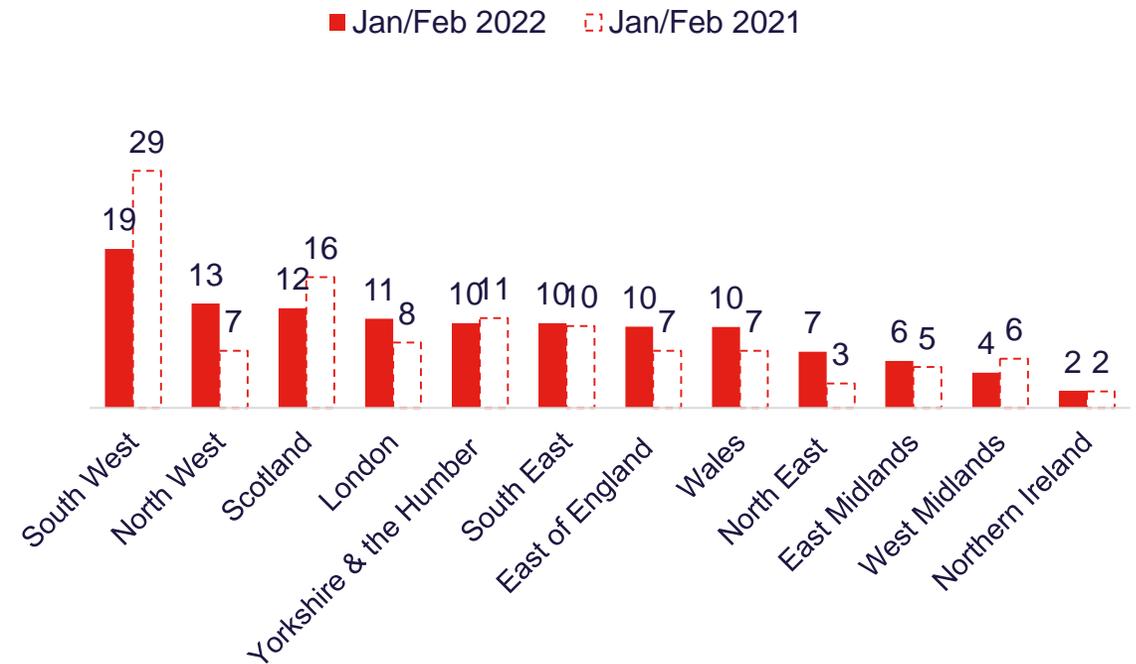


Figure 21. Where planning on staying on next UK overnight trip in April to June 2022, Percentage, January and February 2022, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <insert month>?

Base: All January and February 2022 respondents planning on taking a holiday or short break in the UK between February to March 2022 n=348; April to June 2022 n=706; January and February 2022 respondents: February to March 2021 n=113, April to June 2021 n=434.

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'.

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

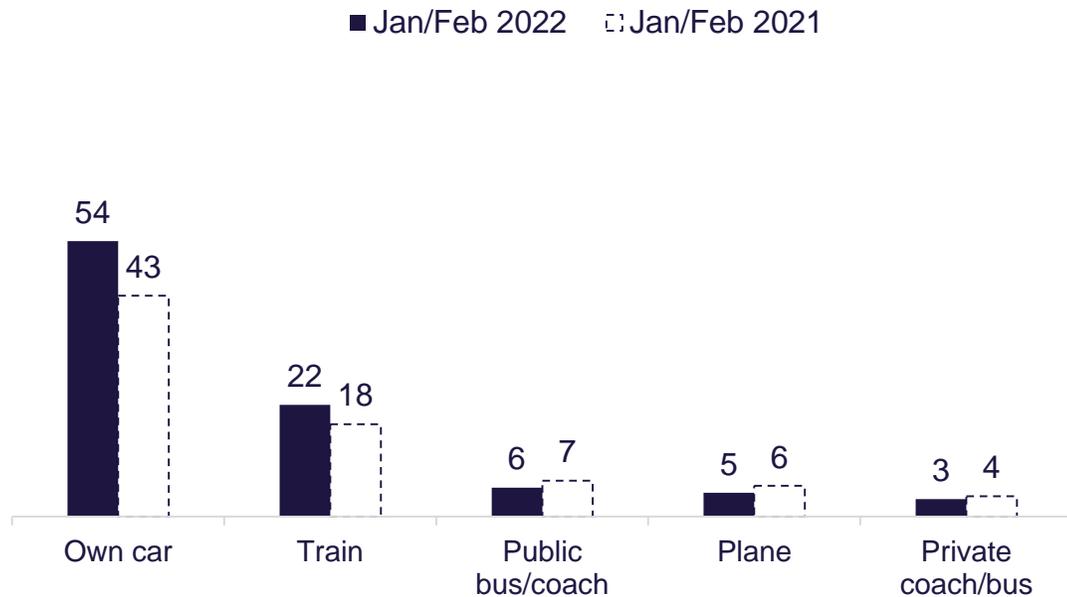
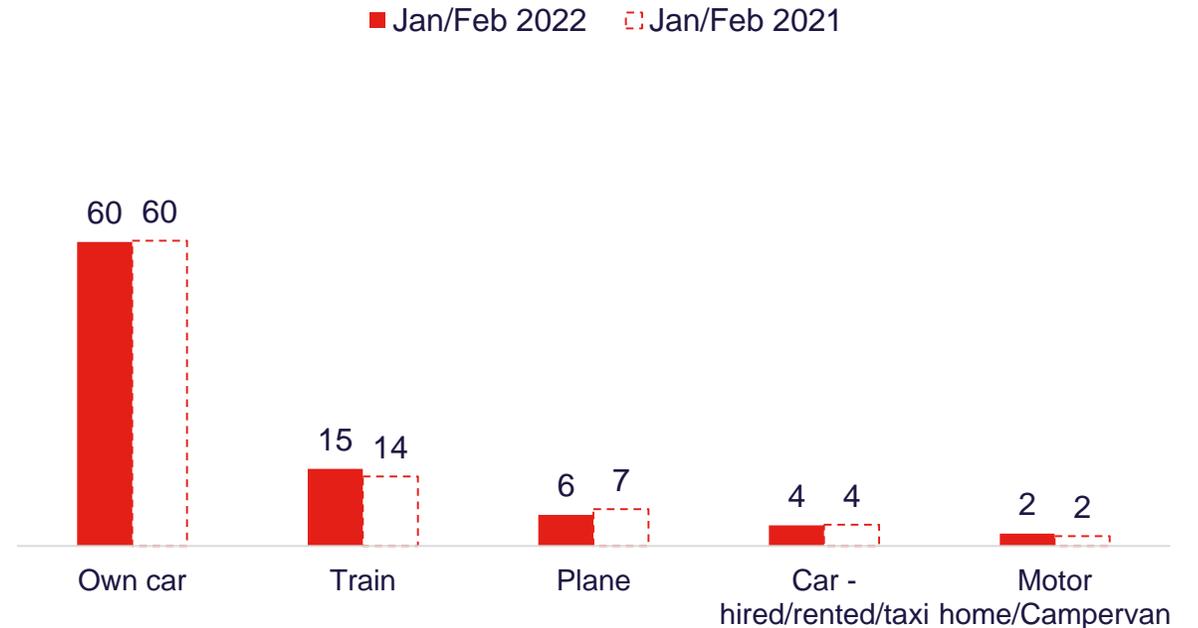


Figure 23. Top 5 main modes of travel to destination for trip in April to June 2022, Percentage, January and February 2022, UK



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?

Base: All January and February 2022 respondents planning on taking a holiday or short break in the UK between February to March 2022 n=348; April to June 2022 n=706;

January and February 2021 respondents: February to March 2021 n=113, April to June 2021 n=434

Accommodation type for the next overnight trip in the UK

‘A hotel/motel/inn’ is the leading accommodation choice for a trip between February and March 2022, at 48% showing an increase of 14% vs Jan/Feb last year.

Between April and June 2022, ‘a private home’ is the leading accommodation choice (at 39%).

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

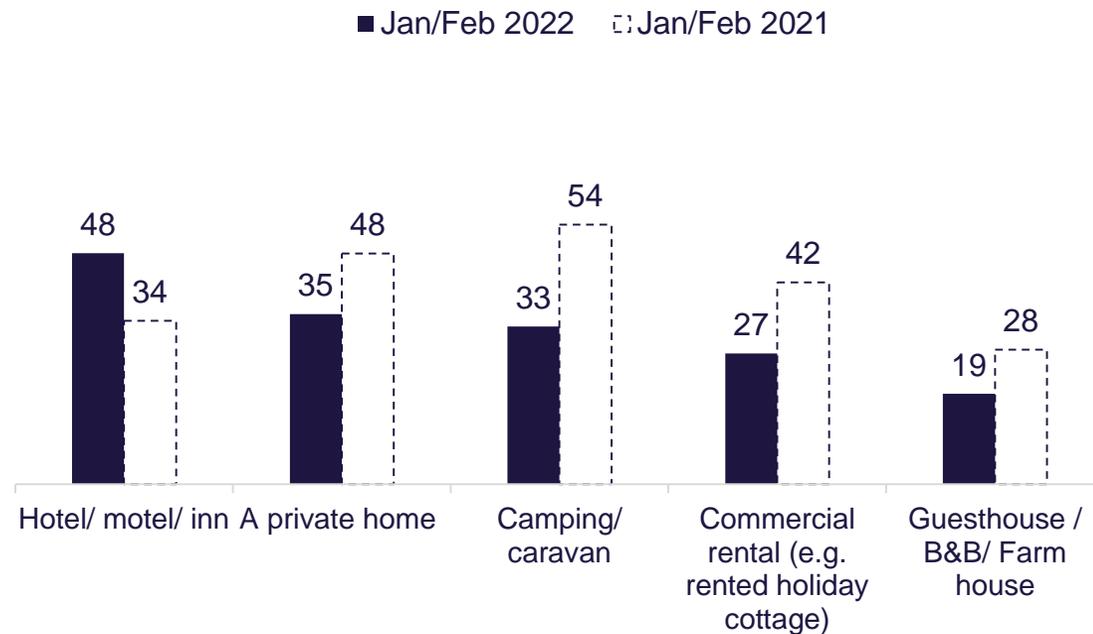
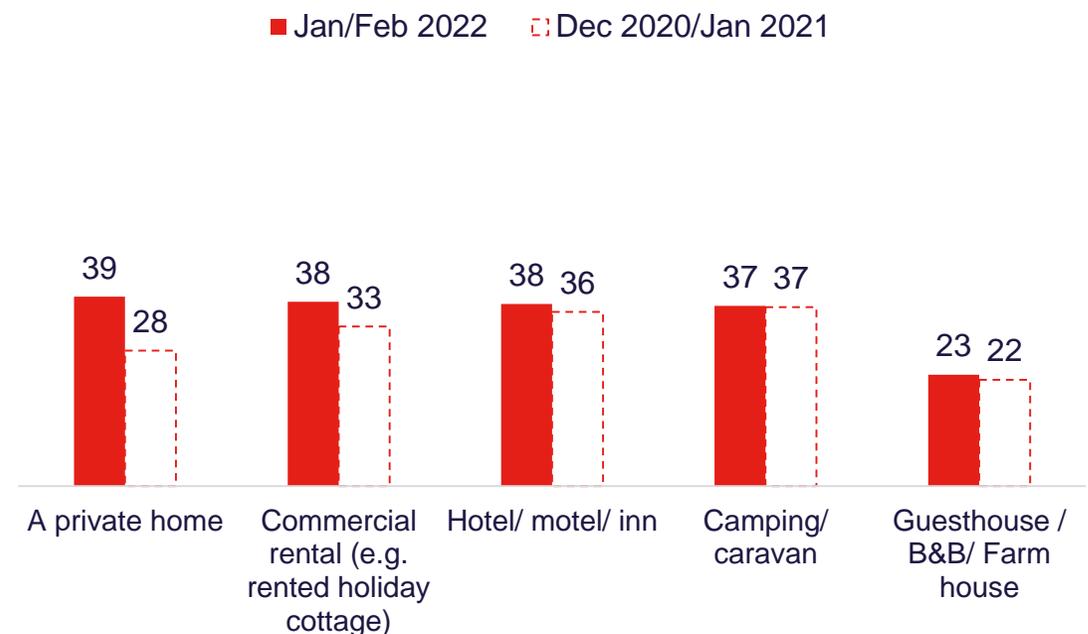


Figure 25. Accommodation planning on staying in on next UK overnight trip in April to June 2022, Net Percentage, January and February 2022, UK



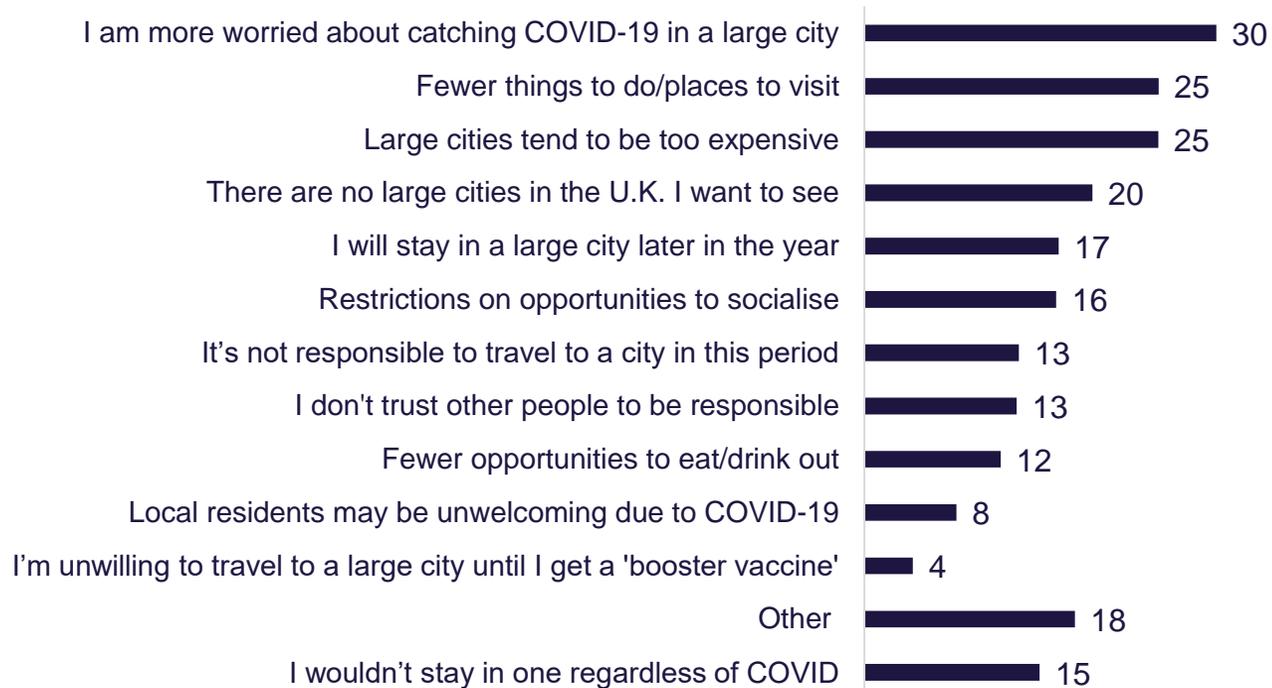
QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?

Base: All January and February 2022 respondents planning on taking a holiday or short break in the UK between February to March 2022 n=348; April to June 2022 n=706; January and February 2021 respondents: February to March 2021 n= 113, April to June 2021 n= 434 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 February to March 2022 Intenders not planning on visiting a large city, 'worried about catching COVID-19 in a large city' (30%) remains the leading reason, followed by 'fewer things to do/places to visit' (25%) and 'large cities being too expensive' (25%).

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



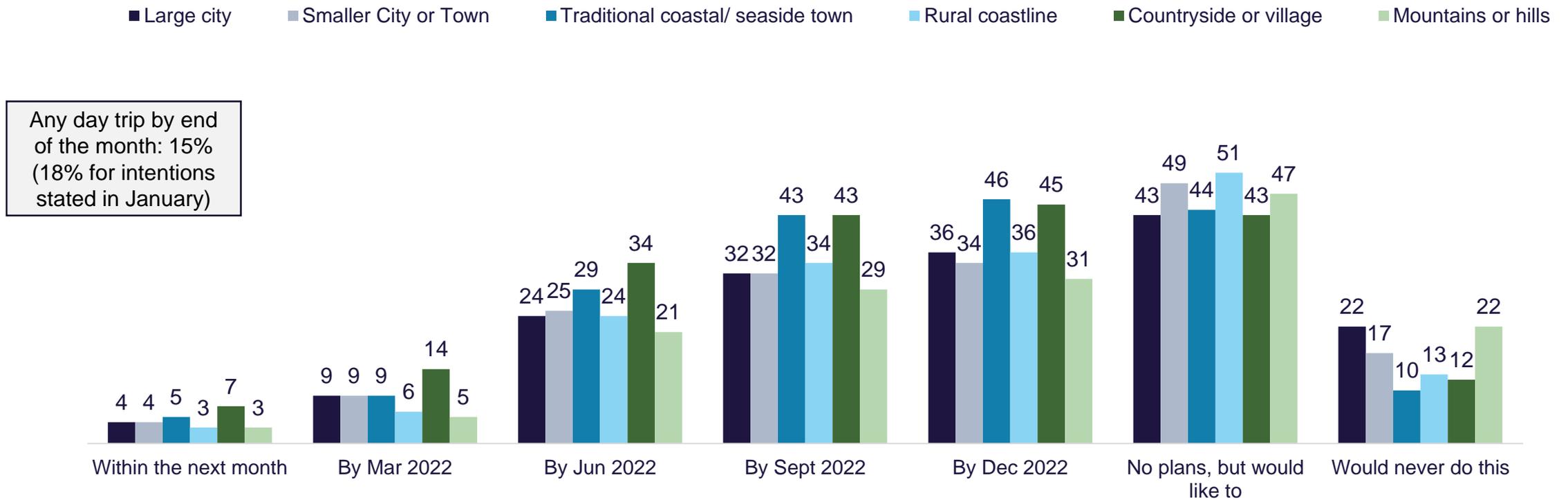
VB5b. You indicated you don't plan on staying in a large city during your next UK holiday or short break in February to March 2022. Why is this? Base: All February 2022 respondents that don't plan on staying in a city on their next UK trip between February and March n=130.

Multiple choice question. Totals may exceed 100%

UK day trip intention by destination type

15% 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' gains popularity by September.

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





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4. Overnight Business Trip Intentions

Intentions for overnight business trips in the next three months

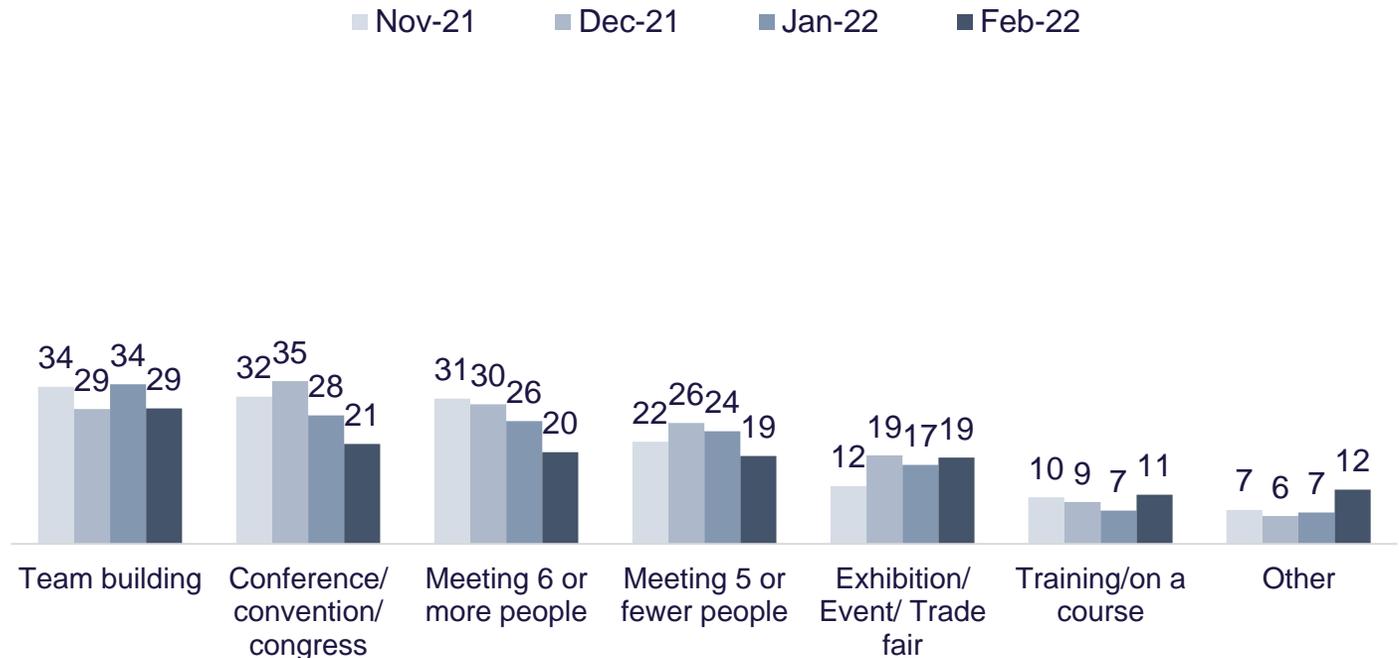
15% of UK adults in employment plan on taking an overnight business trip in the next 3 months (relatively consistent with January). 'Team building' is the leading reason for taking one.

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

81% of UK adults interviewed are in employment



Figure 31. Reasons for taking an overnight business trip in next 3 months, Percentage, February 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: February respondents currently in employment n = 1382. All taking a business trip n=207



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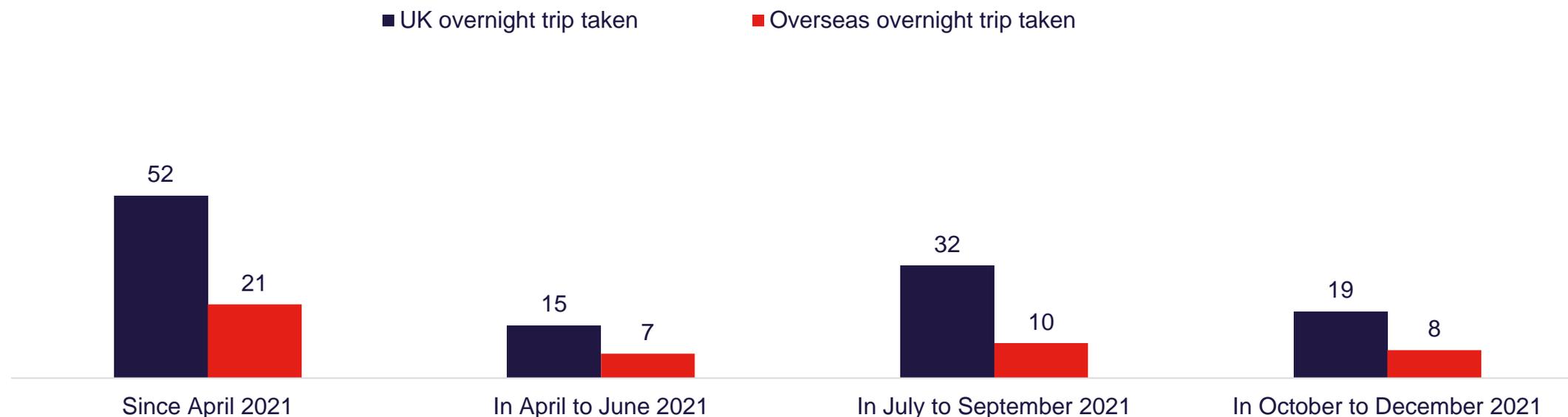
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5. Past UK vs Overseas Trips

Proportion taken a UK and overseas trip since April 2021

Just over half (52%) 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 (32% and 10% respectively).

Figure 32. Proportion taken an overnight UK or overseas trip in below time period, Percentage, February 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. February 2022= 1,756

Multiple choice question. Totals may exceed 100% as some respondents anticipate taking more than one trip

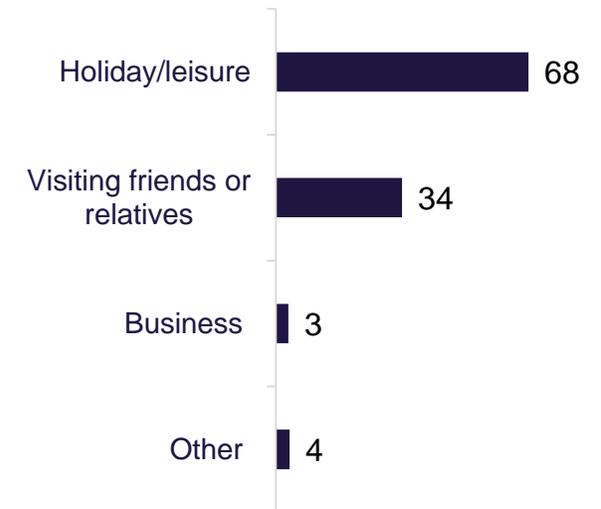
Where stayed and purpose of last UK overnight trip

The South West of England was the most popular destination for trips since September 2021, 16% of trip takers having stayed there. Holiday / leisure was the most dominant purpose for the overnight UK trip (68% taken trips for this reason).

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



Figure 34. Purpose of overnight UK trip taken since September, Percentage, February 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 February 2022 respondents that took an overnight trips since September n=571

Note: Multiple choice questions. Totals may exceed 100% as some respondents stayed in more than one location or travelled for more than one purpose



VisitBritain



VisitEngland

Methodology

Methodology

- This report presents findings from the February 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.
- February 2022 fieldwork was conducted between 1-7 February 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.

