COVID-19 Consumer Tracker

Wave 32

Published: 10th June 2021

Fieldwork Period: 31st May – 6th June

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 31 May – 6 June 2021.
- The results are made publicly available and updated each wave at the following website:

  https://www.visitbritain.org/covid-19-consumer-sentiment-tracker

Definitions used within this report

In this report we look at the profiles and attitudes of a number of separate audiences depending on when they intend to take an overnight domestic trip. For ease of reference, the time periods have been given seasonal labels, although we appreciate these may not necessarily correspond with strict meteorological definitions.

- **Spring Intenders:** Residents of the UK who claim their next domestic overnight trip will take place in June 2021
- **Summer Intenders:** Residents of the UK who claim their next domestic overnight trip will take place between July and September 2021

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	
Wave 8	6 – 10 July	Wave 21	7 – 11 December	Wave 34	
Wave 9	13 – 17 July	Wave 22	18 – 23 December	Wave 35	
Wave 10	20 – 24 July	Wave 23	11 – 15 January	Wave 36	
Wave 11	27 – 31 July	Wave 24	25 – 29 January	Wave 37	
Wave 12	3 – 7 August	Wave 25	8 – 12 February	Wave 38	
Wave 13	10 – 14 August	Wave 26	8 – 12 March		

Wave 32: Scorecard of Key Metrics

Key Metrics	Wave 31	Wave 32	Wave Shift
National mood (average score out of 10)	6.8**	6.7	-0.1
Perceptions of the situation regarding Covid-19 (% stating ‘worst has passed’)	39%	35%	-4*
Appetite for Risk: Comfort in undertaking a range of activities (1-4 comfort score)	2.7	2.7	No change
Normality score (proportion expecting normality by December)	43%	40%	-3
Leading two reasons for not feeling confident about taking a trip in Spring (June)	1. Restrictions on travel from government 2. Fewer things to do/places to visit	1. Restrictions on travel from government 2. Fewer things to do/places to visit	No change
Near-term confidence in taking UK overnight trip (June confident)	45%	42%	-3
Medium-term confidence in taking UK overnight trip (July/August confident)	54%/60%	48%/56%	-6*/-4*
Anticipated number of UK short breaks compared to normal (% more/the same)	52%	55%	+3
Anticipated number of UK longer breaks compared to normal (% more/the same)	50%	52%	+2
Proportion going on a UK overnight trip in Summer (July - September)	34%%	35%	+1
Leading UK overnight destination likely to stay in Summer (July - September)	South West	South West	No change
Main *type* of overnight destination likely to stay in Summer (July - September)	Traditional coastal/seaside town	Traditional coastal/seaside town	No change
Main overnight accommodation type likely to stay in Summer (July - September)	Camping/caravan	Commercial rental	No change
Proportion going on a UK day trip in next two weeks	26%	29%	+3*
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

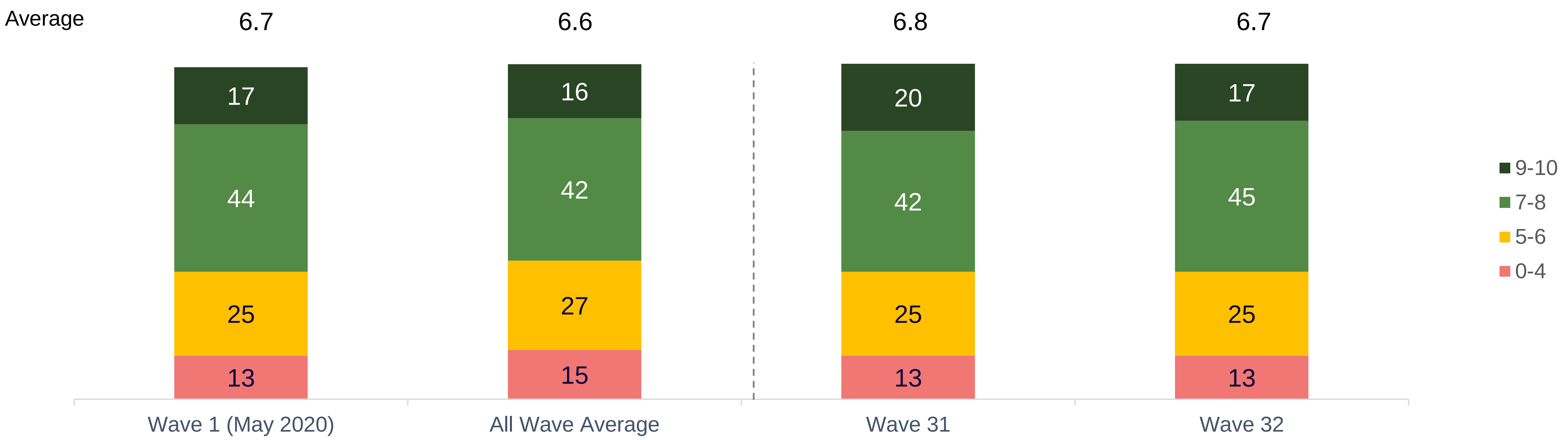
*** Represents a significant change on previous wave**
**** Please note this figure was previously reported incorrectly as 6.7 in Wave 31**

1. The National Mood

The National Mood

- The average mood of U.K. adults remains marginally above the ‘all wave average’, at 6.7 out of 10, but has dropped slightly since Wave 31.
- At 6.8, the slight fall is driven by fewer U.K. adults rating their mood as 9-10 out of 10.

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

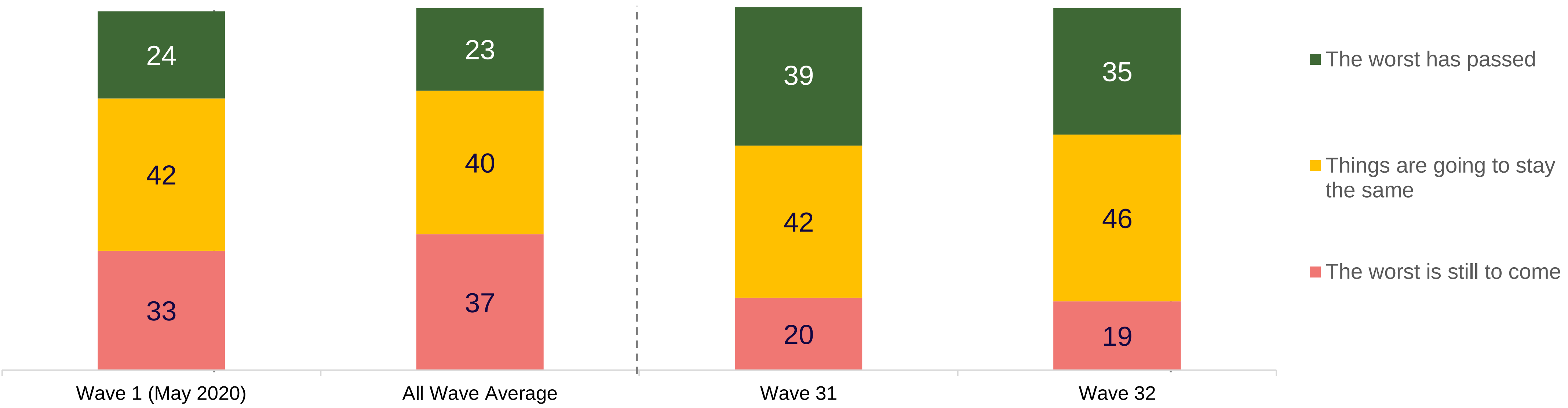


Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. Wave 32 n=1,757
Wave average is based on Wave 1 to Wave 31.

Perceptions of the situation relating to COVID-19

- **The proportion who believe 'the worst has passed' in relation to COVID-19 has dropped 4 percentage points in Wave 32, following a 9 point drop in Wave 31 (a combined fall of 13 points from Wave 30 to Wave 32).**
- **That said, the public remain significantly more likely to state 'the worst has passed' than 'the worst is still to come', and still demonstrate significantly more optimism than the 'all wave average'.**

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 32 n=1,757 Wave average is based on Wave 1 to Wave 31.

Perceptions of when things will 'return close to normal'

- Only a small minority expect life to return 'something close to normal' by this summer – 9% by July, 15% by August and 26% by September – figures that have each dropped since Wave 31.
- 40% expect normality by the end of the year, a fall of 3 percentage points from Wave 31.

Figure 3. Perceptions of when things will return 'close to normal', cumulative percentage, Wave 32, UK

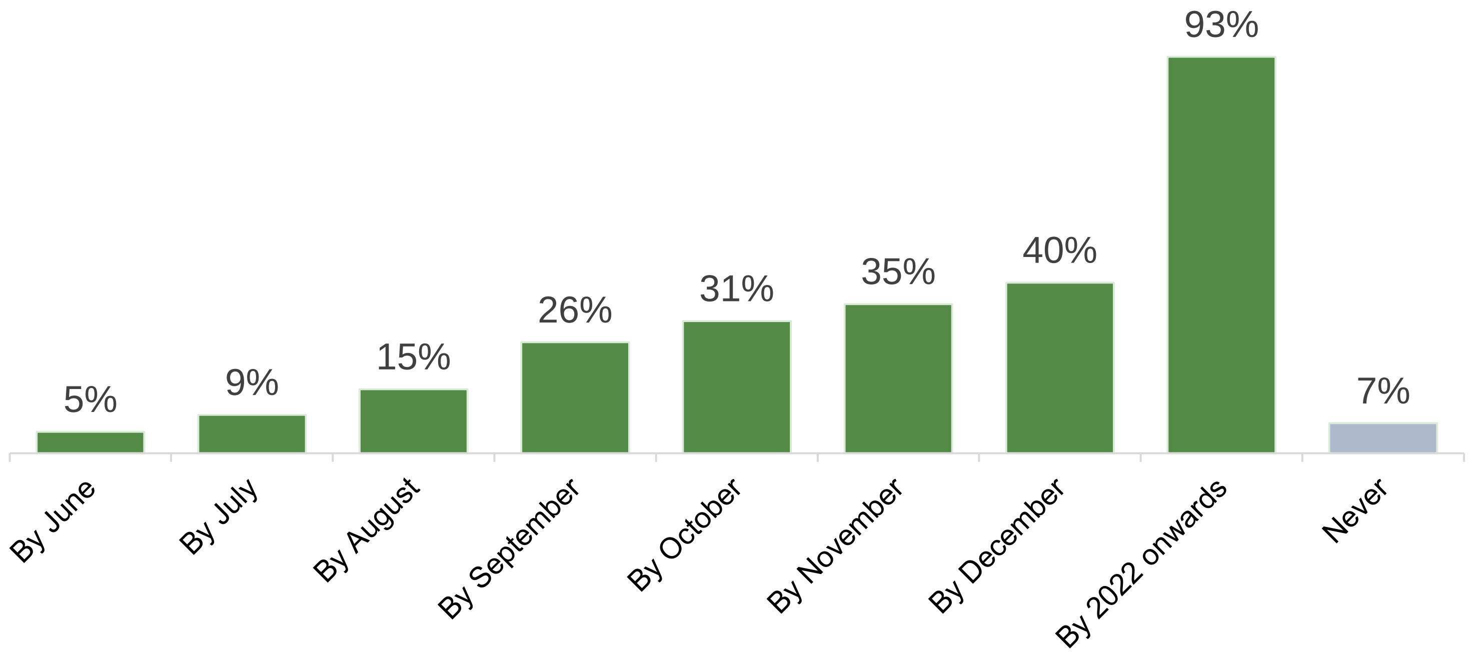
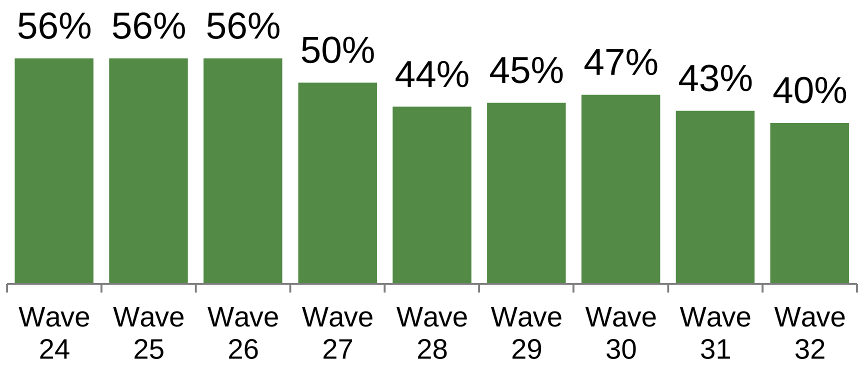


Figure 4. Proportion expecting normality by December, percentage wave-on-wave, UK



Q16: Given what you know today, when do you think life will return to something close to normal? Base: All respondents. Wave 32 n=1,757

Confidence in the ability to take overnight trips in UK

- **42% of U.K. adults are currently confident that an overnight domestic trip would go ahead in June, 48% in July and 56% in August. At 60%, September is the last month that confidence levels increase – from October they are either constant or slightly lower.**
- **Compared to Wave 31, confidence levels have dropped for each month, marking a reversal from the increases witnessed in previous waves.**

Figure 5. Confidence in taking a UK overnight trip across different time periods, percentage, Wave 32, UK

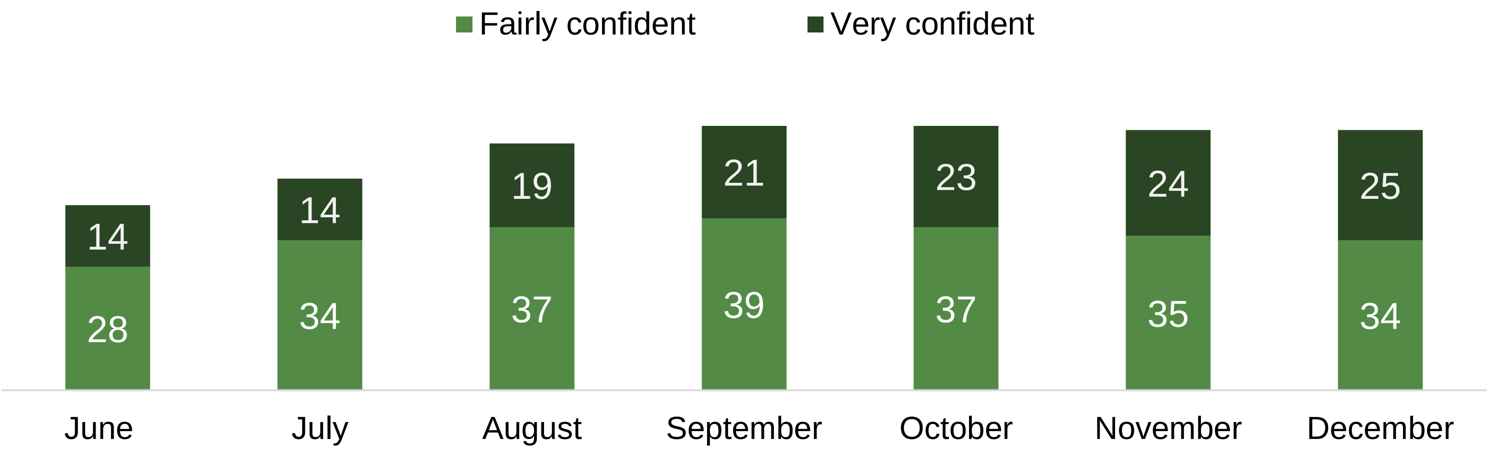
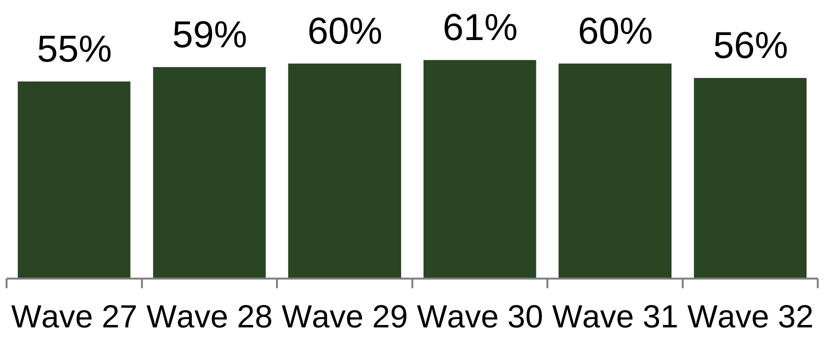


Figure 6. Confidence in taking a UK overnight trip in August 2021, percentage wave-on-wave, UK



QVB7anew. We'd like you to imagine that you have booked a UK holiday or short break in each of the time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips? Base: All respondents. Wave 32 n=1,757

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

- **‘Restrictions on travel from government’ is the top reason people do not feel confident about taking an overnight trip during spring, 4 percentage points ahead of ‘fewer things to do/places to visit’ and ‘personal finances’.**
- **‘Restrictions from government’ is also the leading reason cited by those lacking confidence in taking summer trips, and has increased significantly since Wave 31 (from 34% to 47%).**

Figure 7. Top 5 reasons for not being confident about travelling in Spring*, percentage Wave 32, UK

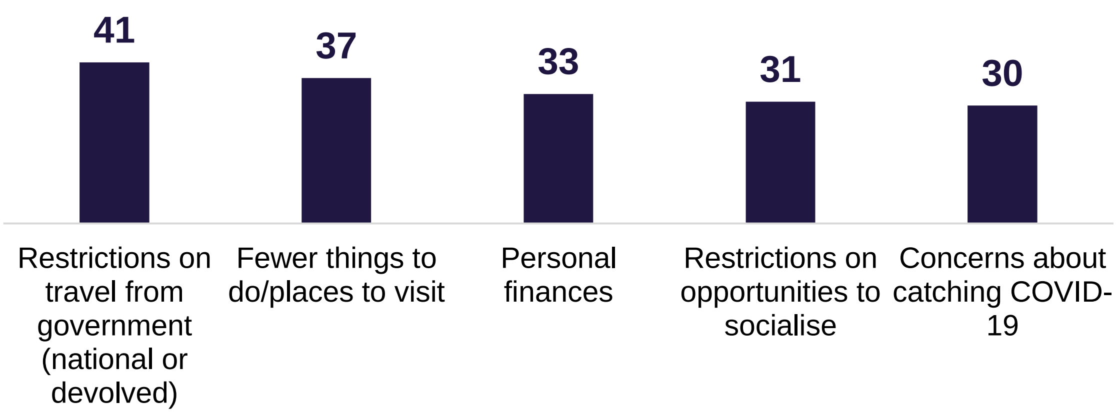
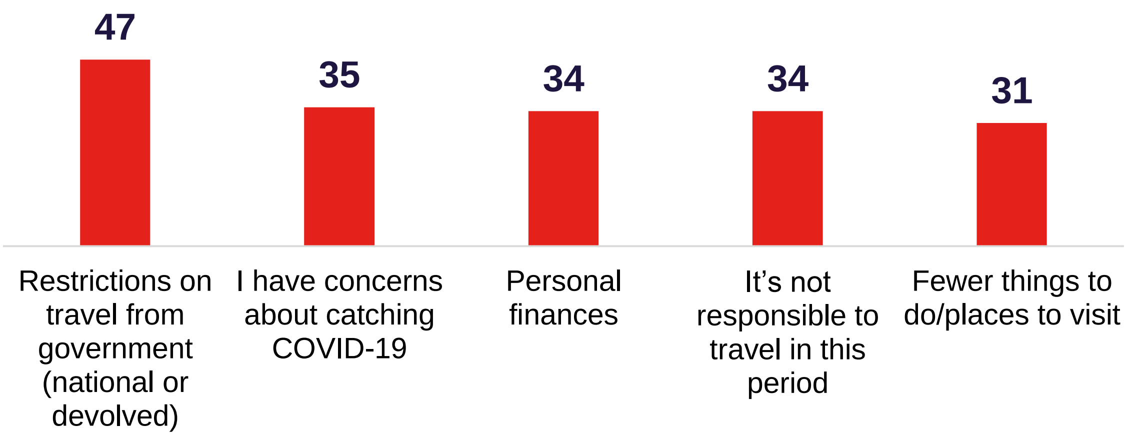


Figure 8. Top 5 reasons for not being confident about travelling in Summer*, percentage Wave 32, UK

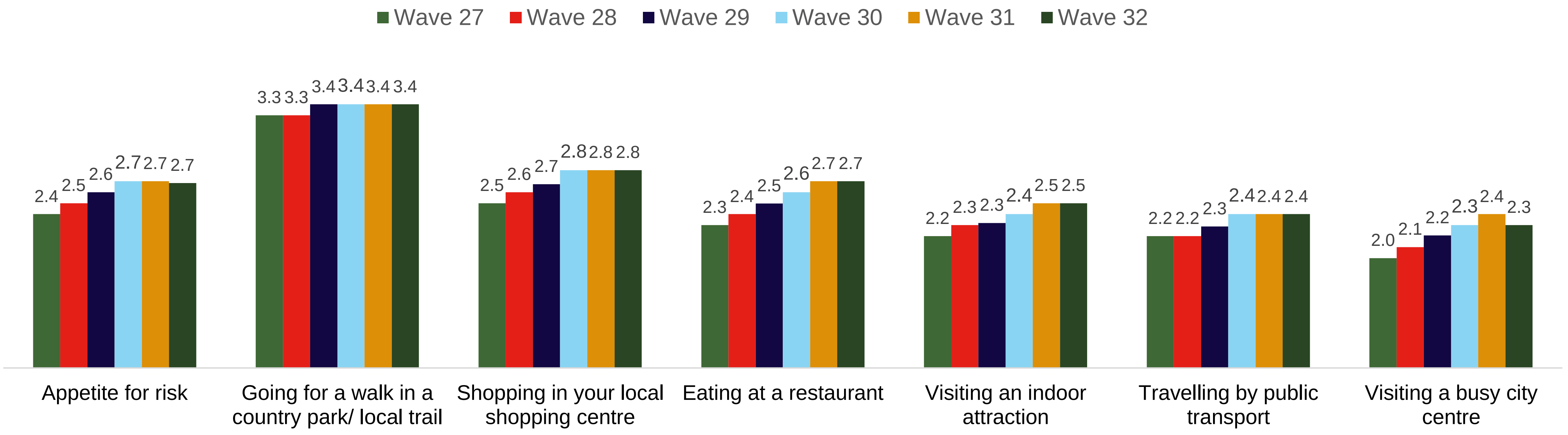


QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a UK short break or holiday? Base: Wave 32 respondents not confident about taking a break in Spring n=157 and Summer n=470. *Spring is defined as June, Summer is defined as July to September

The 'Appetite for Risk'

- **This wave's 'appetite for risk' score is 2.7, unchanged from the last wave.**
- **Unlike in recent waves, there have been no increases in comfort levels for any individual activities – comfort with 'visiting a busy city centre' marginally falling**

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 32 n=1,757

2. Overnight Trip Intentions

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

- Despite falling 'travel confidence', the proportion of U.K. adults anticipating more or about the same number of U.K. breaks compared to normal is higher than in Wave 31. Notably, the anticipated number of *short breaks* is now 'statistically net: neutral' (23% expecting more and 24% expecting fewer) – the first time this has been the case this year.
- Anticipated overseas trips continue to be significantly below normal.

Figure 10. Number of U.K. overnight trips between now and the end of the year compared to normal, Percentage Wave 32, UK

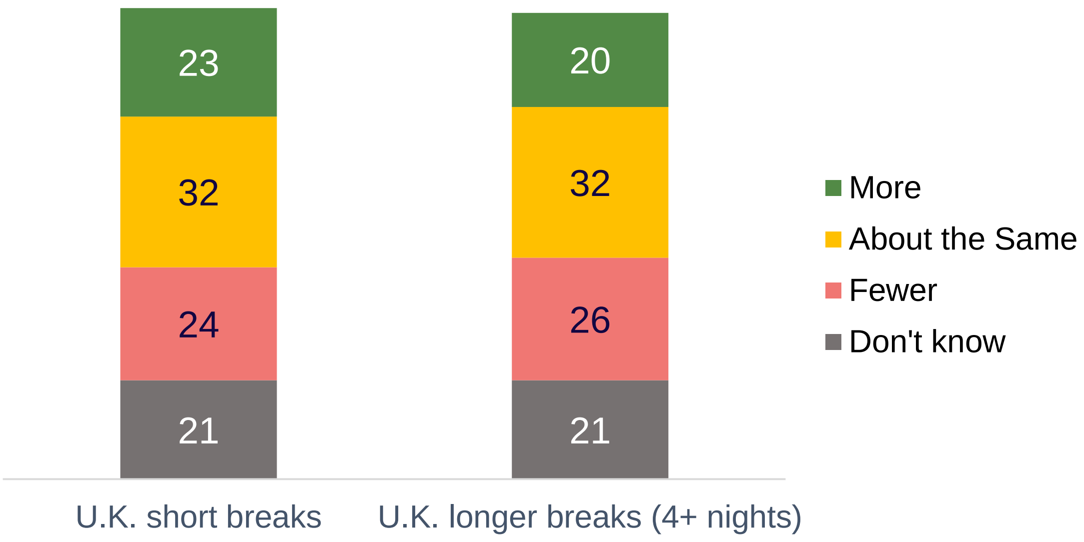
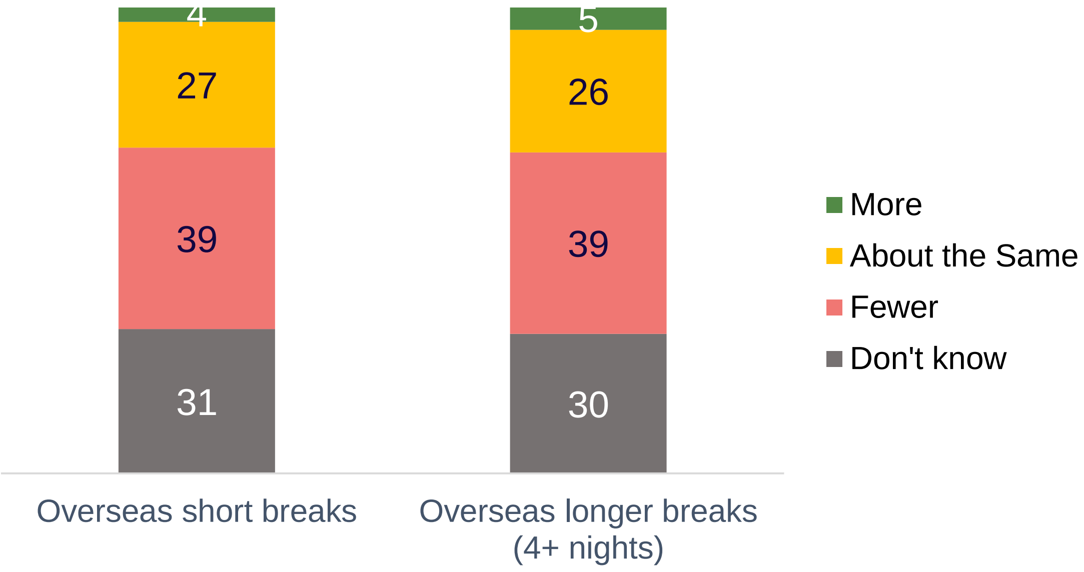


Figure 11. Number of OVERSEAS overnight trips between now and the end of the year compared to normal, Percentage Wave 32, UK



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 32 n=1,757

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

- 26% of U.K. adults claim to have already planned and 21% already *booked* their next domestic overnight trip, both of which have risen by 2 percentage points since Wave 31.
- 38% are likely to have planned a domestic overnight trip by the end of spring, with almost a third (31%) expecting to have one booked.

Figure 12. When anticipate TO PLAN the next UK overnight trip, percentage Wave 32, UK

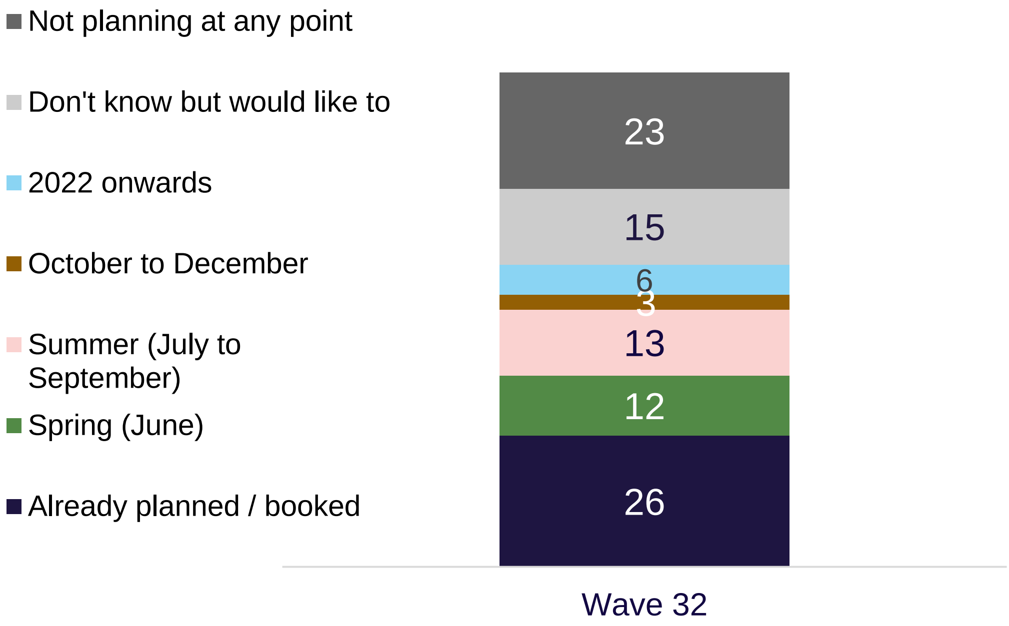
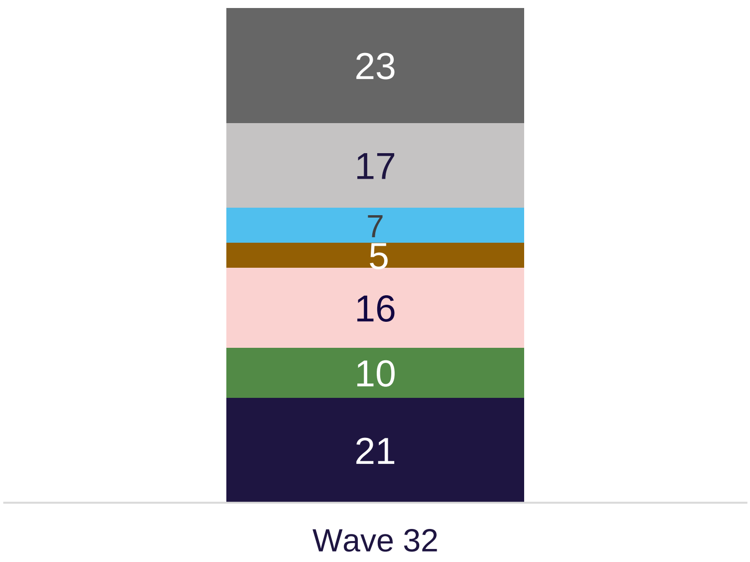


Figure 13. When anticipate BOOKING the next UK overnight trip, Percentage Wave 32, UK



QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Wave 32 n=1,757 . *Winter = January to March; Spring = June; Summer = July to September

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

- **Nearly half (49%) of U.K. adults anticipate taking an overnight domestic trip by the end of 2021. 10% plan to do so this spring June), 35% in the summer and 25% between October and December. Intent has marginally risen for trips from summer onwards.**
- **The vast majority would continue to take their planned U.K. trip even if all overseas travel restrictions were lifted, although this is less the case later in the year.**

Figure 14. Proportion anticipating going on <u>any</u> overnight UK trips, percentage Wave 32, UK

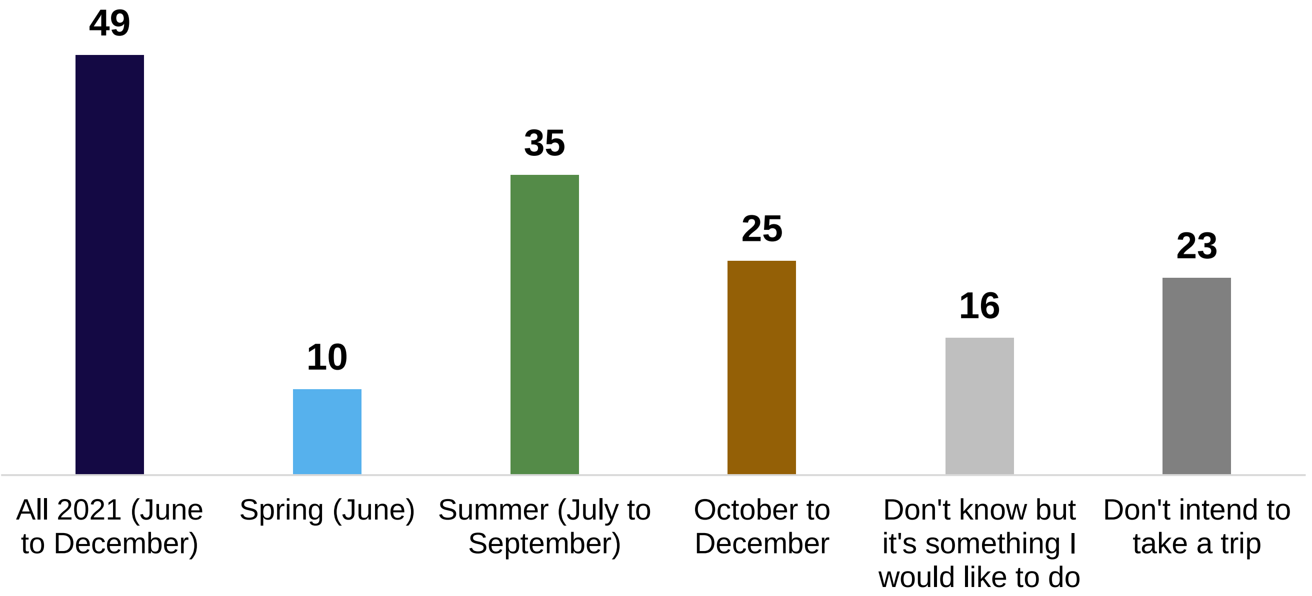
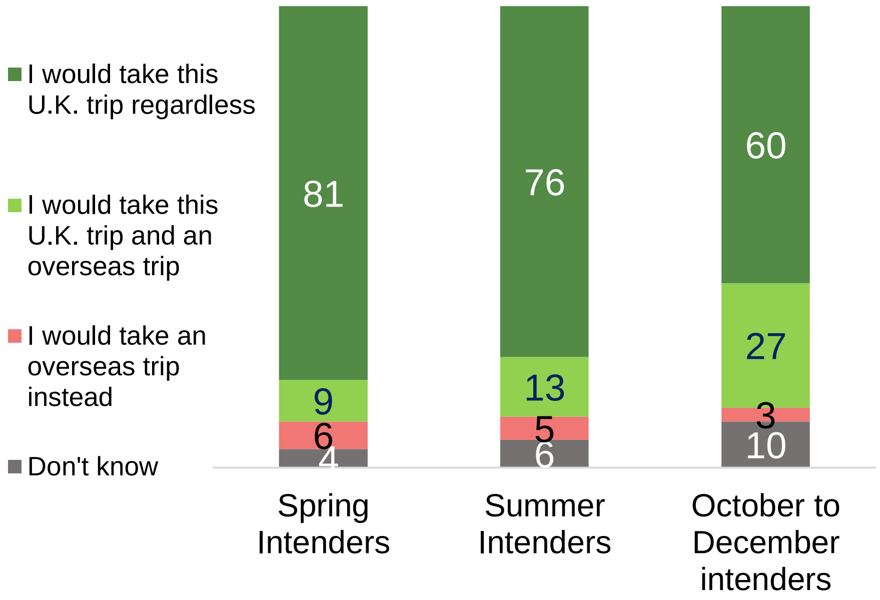


Figure 14b. Impact on U.K. trip if majority of overseas travel restrictions were lifted, percentage Wave 32, UK



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 32 n=1,757
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 32 respondents planning on taking a holiday or short break in the UK in Spring (June) n=168; Summer (July to September) n=527; October to December n=164

Planning and booking timeline compared to normal

- The *planning* phase of spring trips is currently in line with normal behaviour (on a net score basis) while for summer trips it is happening further in advance.
- The 'net' position among both spring and summer intenders indicates that the *booking* of trips is happening closer to the travel date than usual.

Figure 15. PLANNING lead times for Spring or Summer trips compared to normal, percentage Wave 32, U.K.

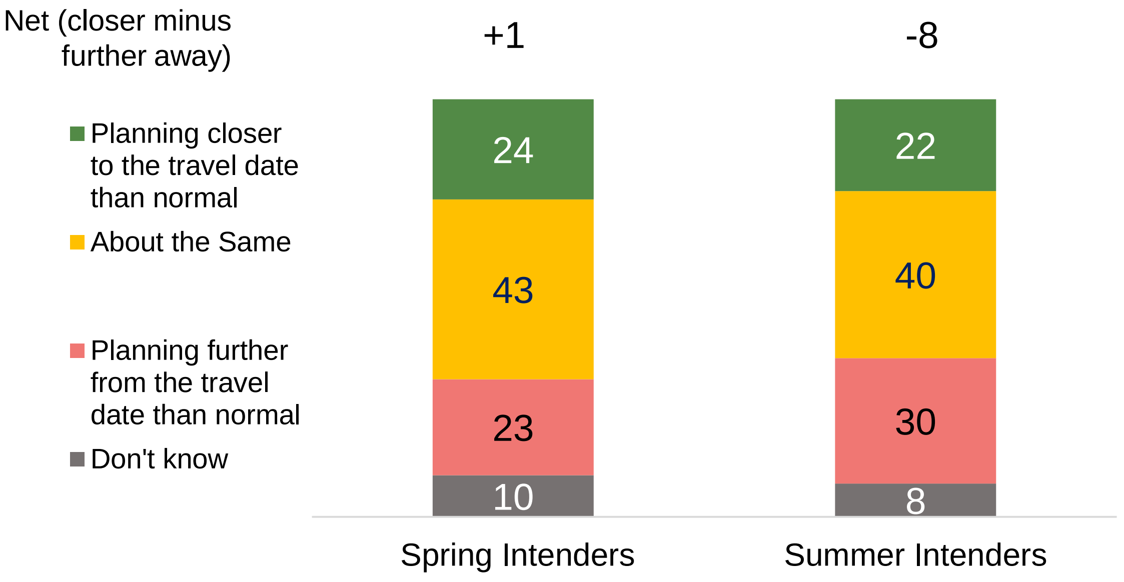
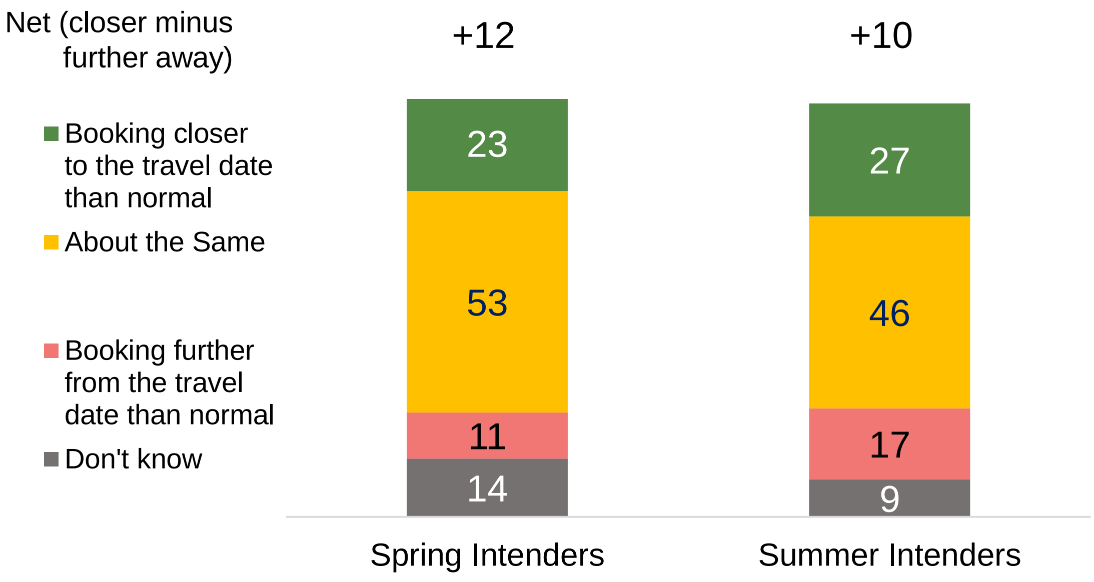


Figure 16. BOOKING lead times for Spring or Summer trips compared to normal, percentage Wave 32, U.K.



VB6diic. Compared to normal, when did or will you plan and book your next UK trip?
Base: All Wave 32 respondents planning on taking a holiday or short break in the UK in Spring (June) n=168; Summer (July to September) n=527

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

- **7 in 10 (71%) spring intenders have already planned their forthcoming trip with 61% having already booked it (a marginal increase on 70% and 60% in Wave 31).**
- **The proportion of summer intenders that have already planned (50%) or booked (41%) their trip has also increased since Wave 31 (up from 42% and 35% respectively).**
- **30% of spring and 21% of summer overnight trips are transferred bookings that were previously cancelled or postponed due to Covid.**

Figure 17. Proportion of Intenders that have already *planned* their trip, percentage Wave 32 for Spring and Summer, UK

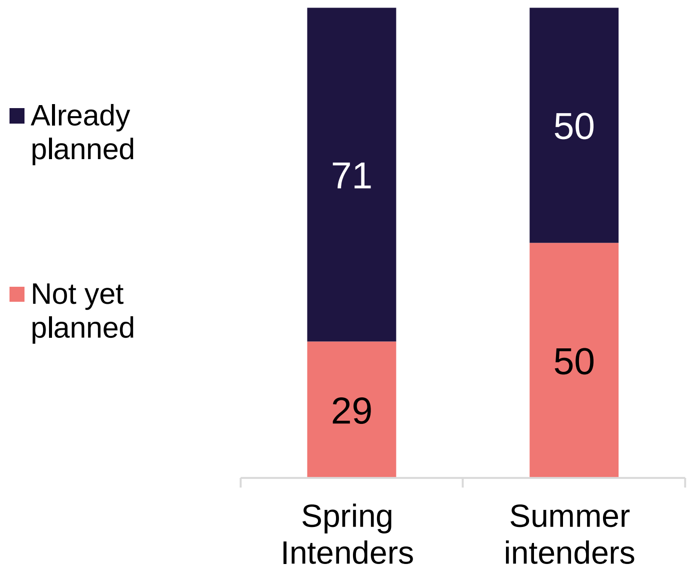


Figure 18. Proportion of Intenders that have already *booked* their trip, percentage Wave 32 for Spring and Summer, UK

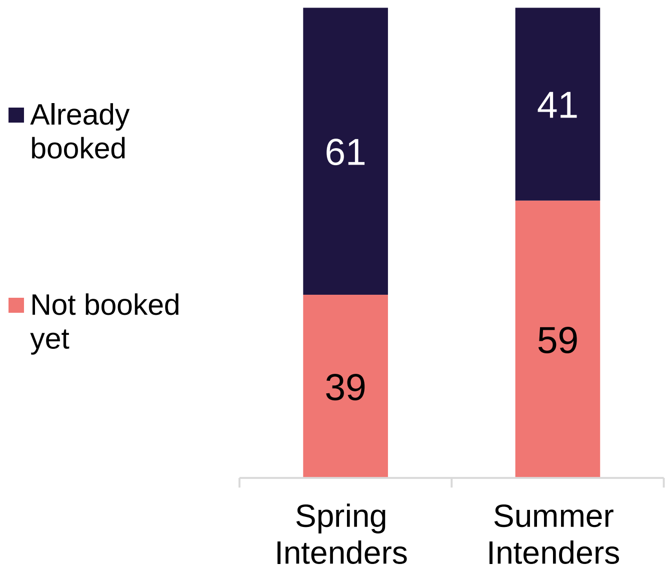
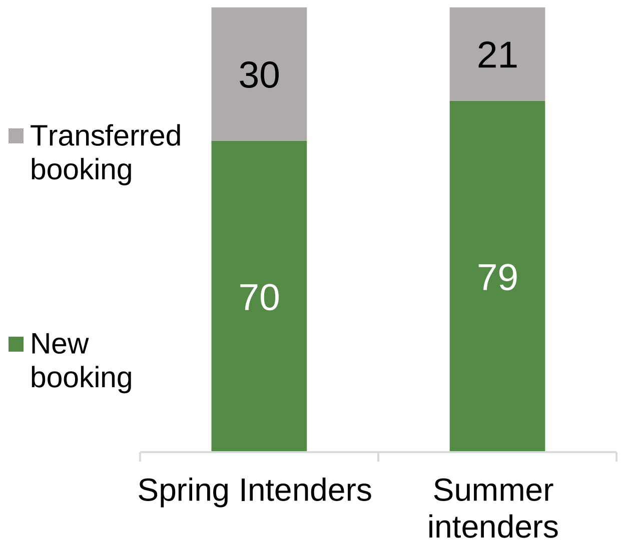


Figure 19. Proportion of next trips that are *transferred bookings*, percentage Wave 32 for Spring and Summer, UK

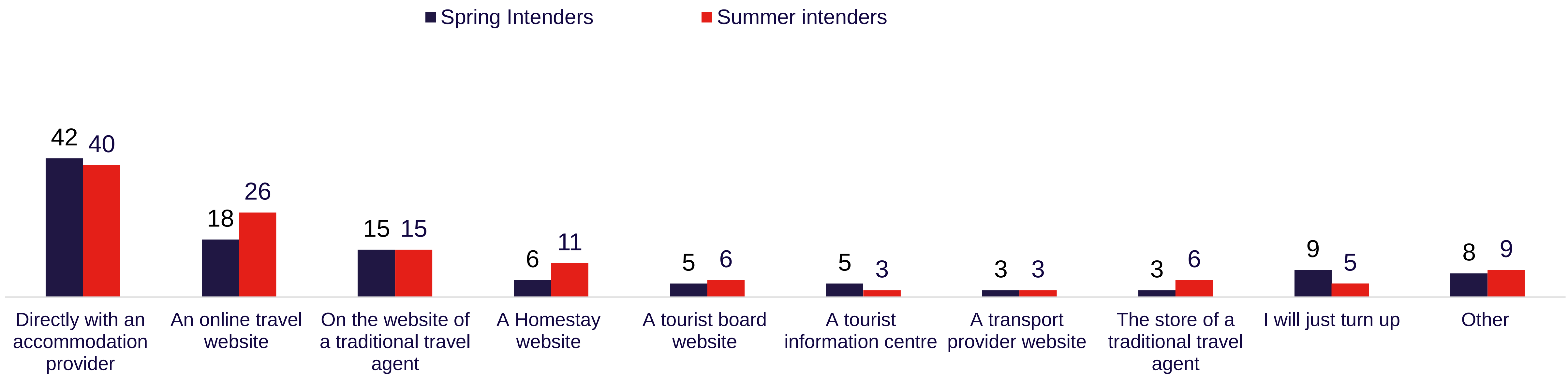


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB6diii Is this next trip a transferred booking from a trip that was previously cancelled or postponed due to COVID-19?
Base: All Wave 32 respondents planning on taking a holiday or short break in the UK in Spring (June) n=168; Summer (July to September) n=527

Ideal method of booking accommodation for next overnight trip in UK

- **‘Directly with an accommodation provider’ remains the leading anticipated method of booking accommodation across both spring and summer. An ‘online travel website’ is the next most preferred booking channel, followed by ‘on the website of a traditional travel agent’.**

Figure 19a. Accommodation booking channel for next trip in Spring and Summer, percentage Wave 32, UK



VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip.
Base: All Wave 32 respondents planning on taking a holiday or short break in the UK in Spring (June) n=168; Summer (July to September) n=527

Where planning on staying on next overnight trip in UK

- **The South West of England remains the lead destination for an overnight domestic trip during both the spring and summer periods – preferred by more than twice as many intenders as any other destination.**
- **In line with previous waves, little separates the visitor share of the majority of subsequent destinations.**

Figure 21. Where planning on staying on next UK overnight trip in Spring, percentage Waves 31 and 32, UK

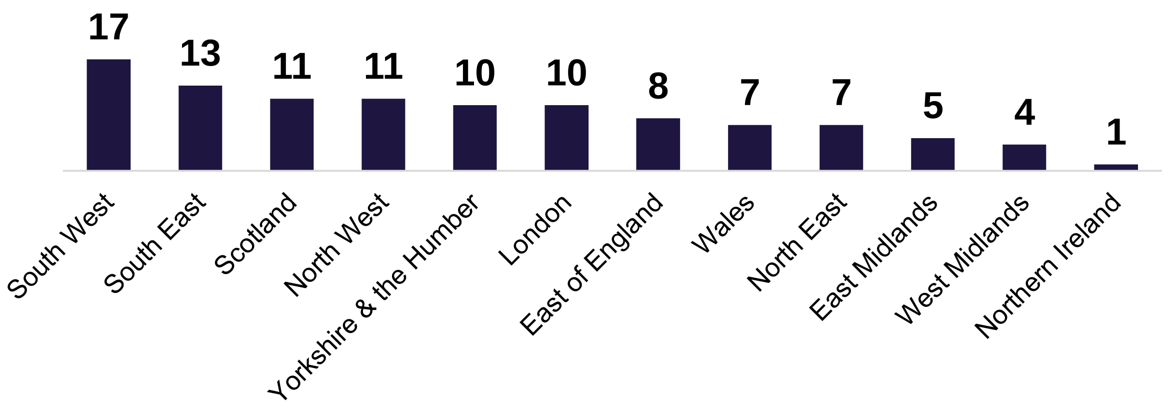
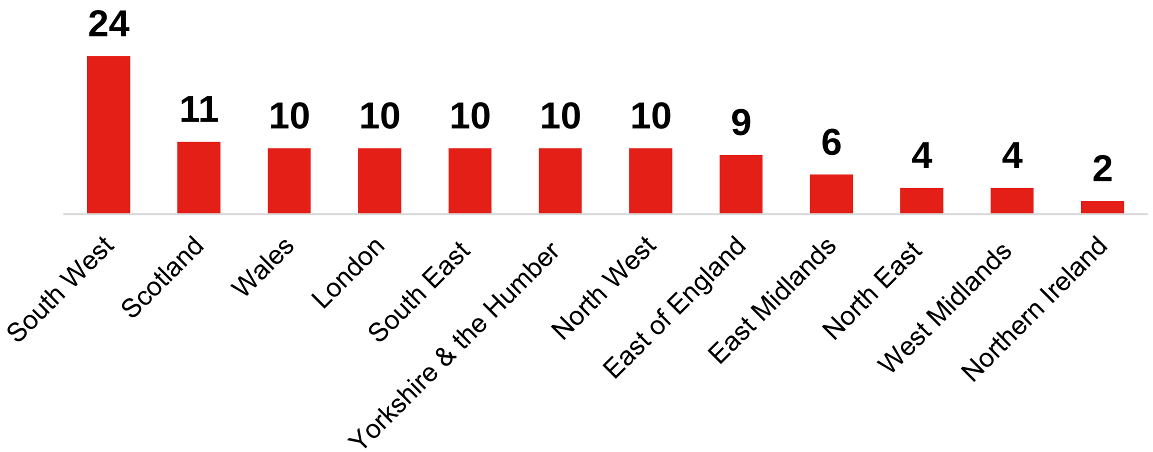


Figure 22. Where planning on staying on next UK overnight trip in Summer, Percentage Waves 31 and 32, UK



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All Waves 31 and 32 respondents planning on taking a holiday or short break in the UK for Spring (June) n=263; Summer (July to September) n=975
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

- **Over a third (34%) of spring intenders are likely to stay in a ‘countryside or village’, marginally preferred to a ‘traditional coastal/seaside town’ – significantly ahead of all other destination types.**
- **In the summer, ‘traditional coastal/seaside town’ is the leading destination type, significantly ahead of ‘countryside or village’ and ‘rural coastline’ in 2nd and 3rd.**

Figure 23. Main type of destination for trip in spring, percentage
Waves 31 and 32, UK

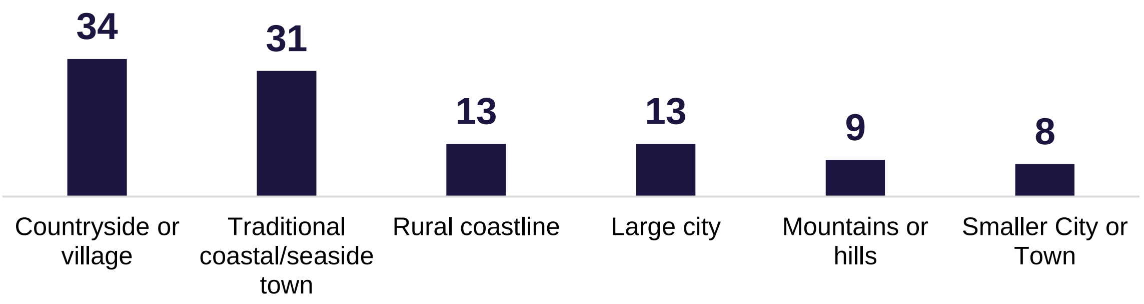
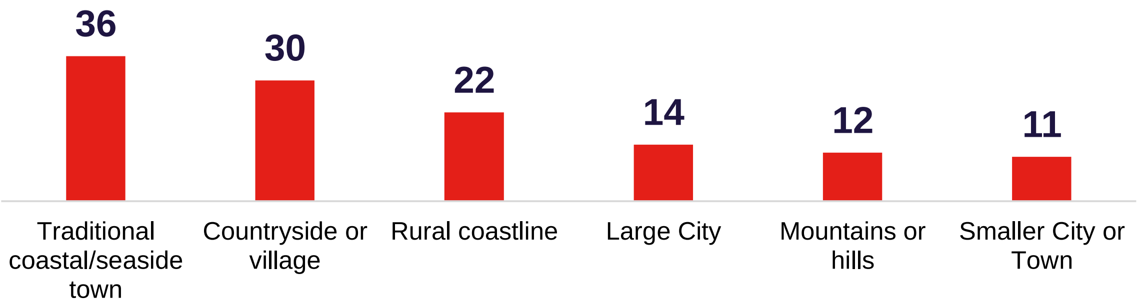


Figure 24. Main type of destination for trip in summer, percentage
Waves 31 and 32, UK



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 31 and 32 respondents planning on taking a holiday or short break in the UK for Spring (June) n=263; Summer (July to September) n=975
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

- Consistent with Wave 32, ‘camping/caravan’ is the leading accommodation choice amongst spring intenders, although only marginally ahead of a ‘hotel/motel/inn’, with ‘a private home’ and ‘commercial rental’ relatively close behind.
- ‘Commercial rental’ is the leading choice amongst summer intenders, marginally ahead of ‘camping/caravan’.

Figure 25. Accommodation planning on staying in on next UK overnight trip in spring, net percentage Waves 31 and 32

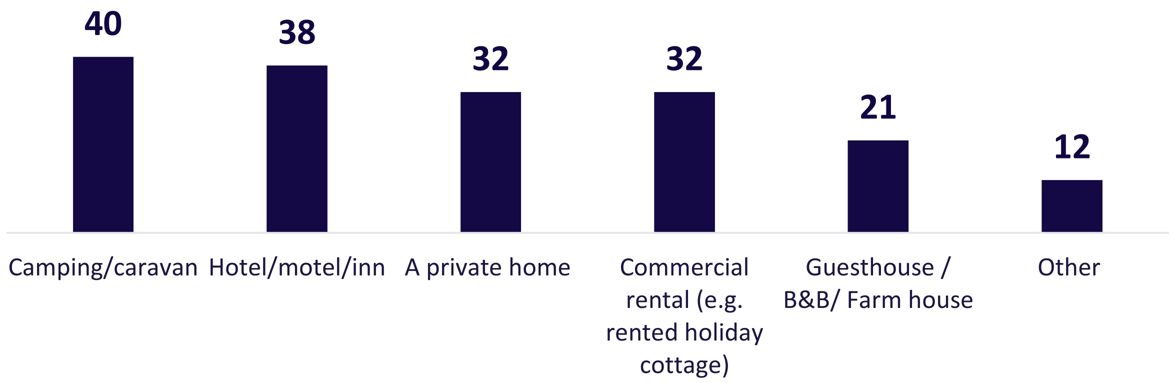
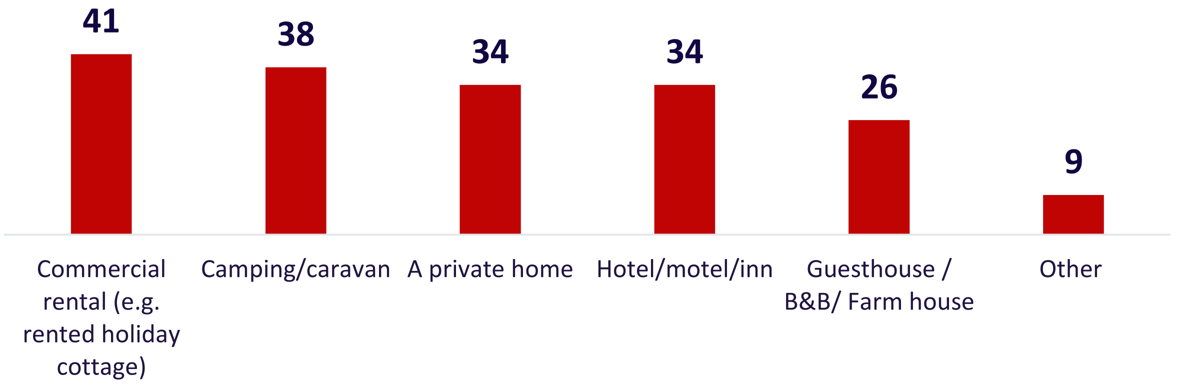


Figure 26. Accommodation planning on staying in on next UK overnight trip in summer, net percentage Waves 31 and 32

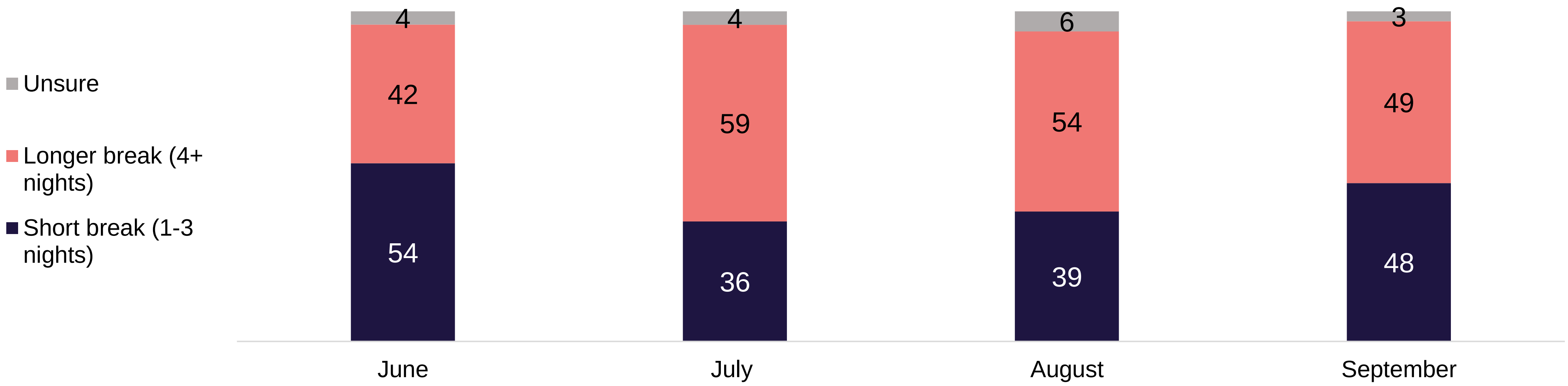


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All Waves 31 and 32 respondents planning on taking a holiday or short break in the UK for Spring (June) n=263; Summer (July to September) n=975
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.

Duration of the next overnight trip in UK

- **Overnight domestic trips planned in the spring (June) are predominantly short breaks, with longer breaks significantly more likely in July and August, and an even split in September.**

Figure 27. Length of next UK holiday or short break by time period, percentage Waves 31 and 32, UK



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All Wave 31 and 32 respondents intending to take next holiday or short break in each time period: June n=263, July n=319, August n=379, September n=277

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 64% stating this for spring trips and 66% for summer trips.
- ‘Train’ remains the second most likely mode of travel to an overnight destination in both time periods.

Figure 28. Top 5 main modes of travel to destination for trip in spring, percentage, Wave 32, UK

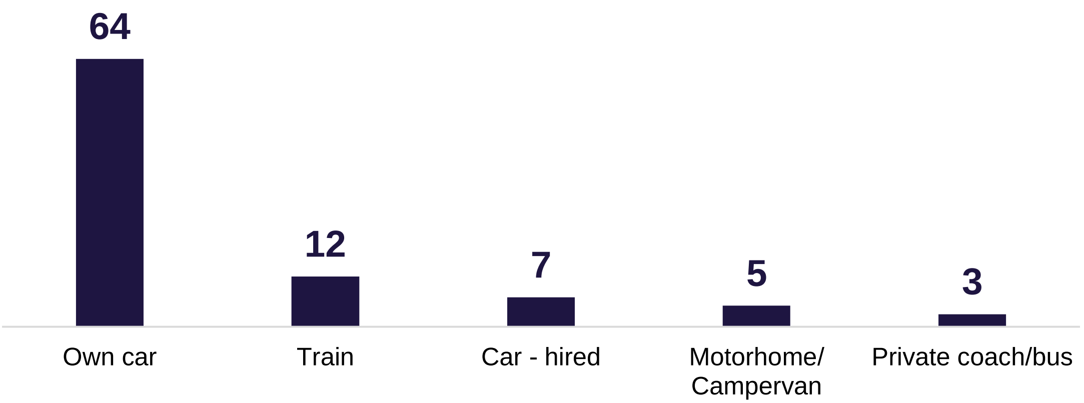
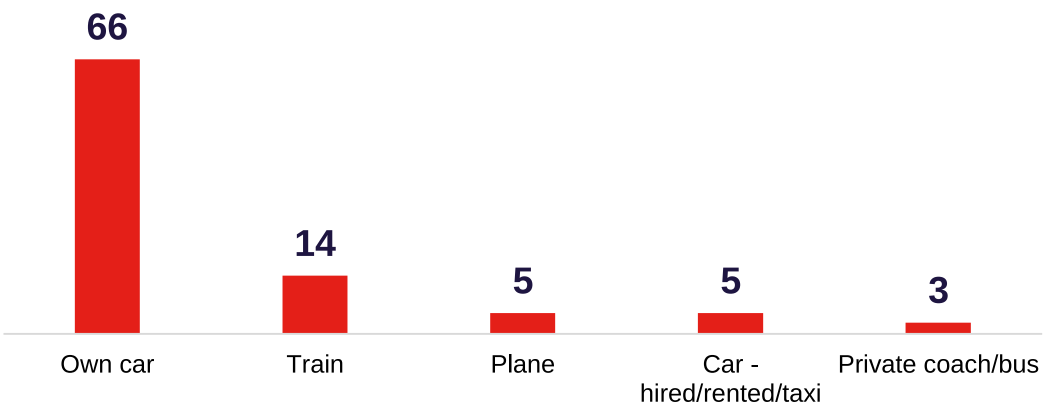


Figure 29. Top 5 main modes of travel to destination for trip in summer, percentage, Wave 32, UK

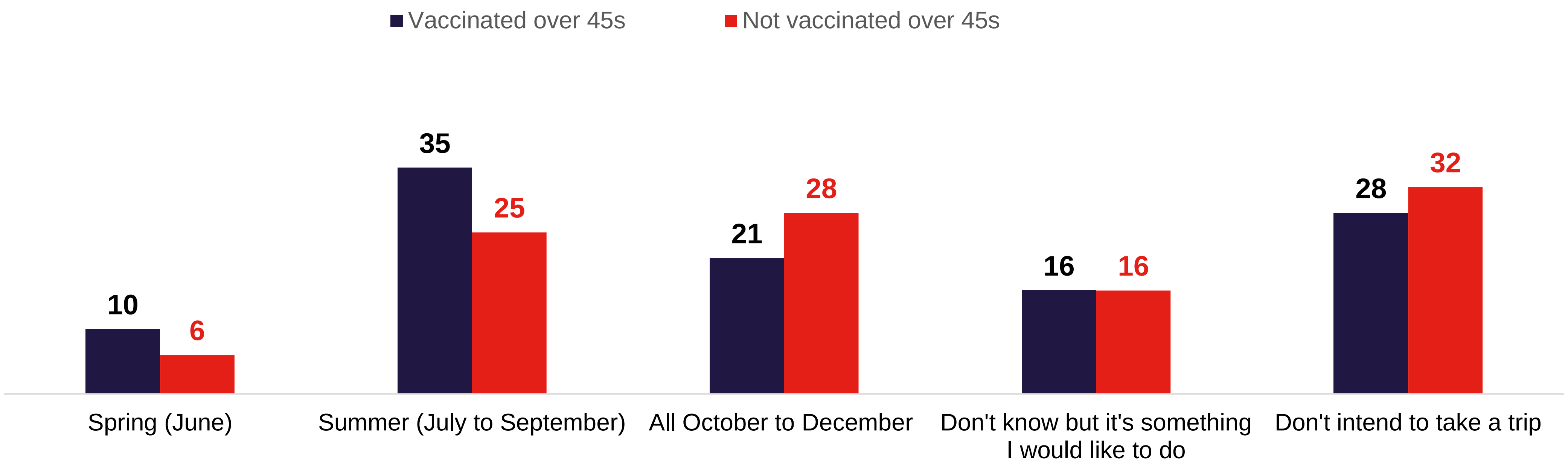


QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All Wave 32 respondents planning on taking a holiday or short break in the UK for Spring (June) n=168; Summer (July to September) n=527.

Vaccine impact on domestic overnight trip intent

- **U.K. adults aged over 45 and who claim to have had at least one dose of a Covid-19 vaccine exhibit a greater likelihood to take either spring or summer overnight trips than over 45s that have *not* been vaccinated.**
- **Trip intent later in the year (between October and December) is higher for *unvaccinated* over 45s, who are also more likely to state ‘I don’t intend to take a trip’.**

Figure 30. Proportion anticipating going on any overnight UK trip by vaccine status, Percentage Wave 32, UK

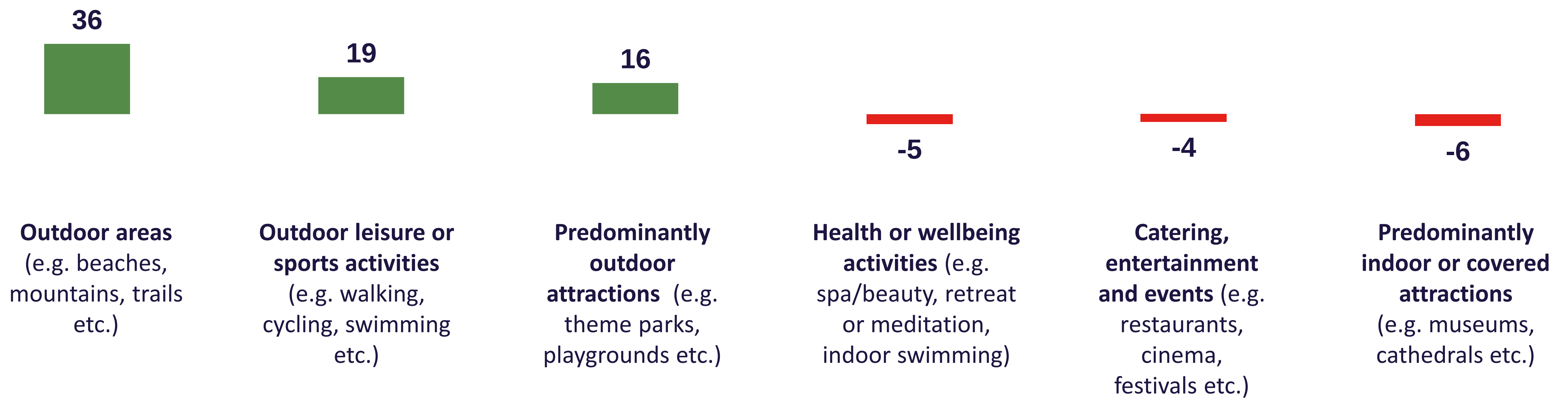


QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? Base: All vaccinated respondents aged 45+ n=694; Non-vaccinated respondents aged over 45 n=150
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.

Leisure activity engagement in the next few months

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

Figure 31. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: 'more likely' minus 'less likely', Wave 32, 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 32 respondents n=1,757

3. Business trip Intentions

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

- 12% of U.K. adults in employment say they are intending to take a domestic overnight business trip between now and the end of the year
- 'Meetings' dominate the leading reasons, with 25% planning to take a meeting of 6 people or more, and 23% 5 people or fewer

Figure 30a. Proportion anticipating an overnight business trip by end of 2021, Percentage, Wave 32, U.K. adults in employment

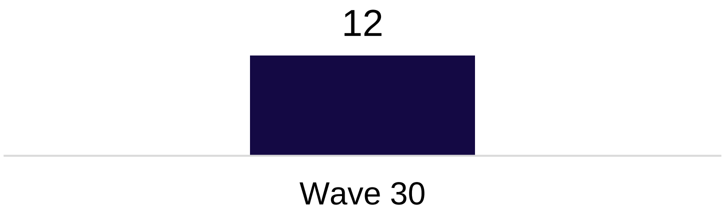
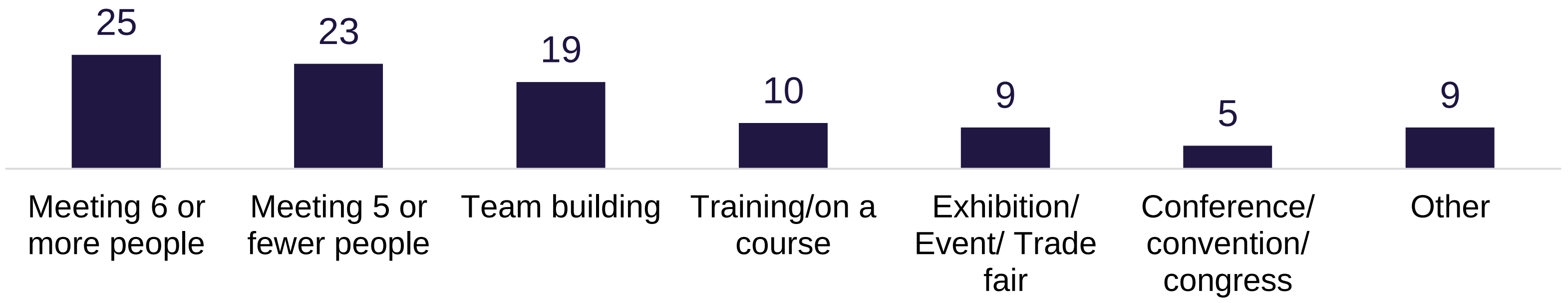


Figure 31b. Reasons for taking an overnight business trip, Percentage, Wave 32, U.K. adults in employment planning a trip



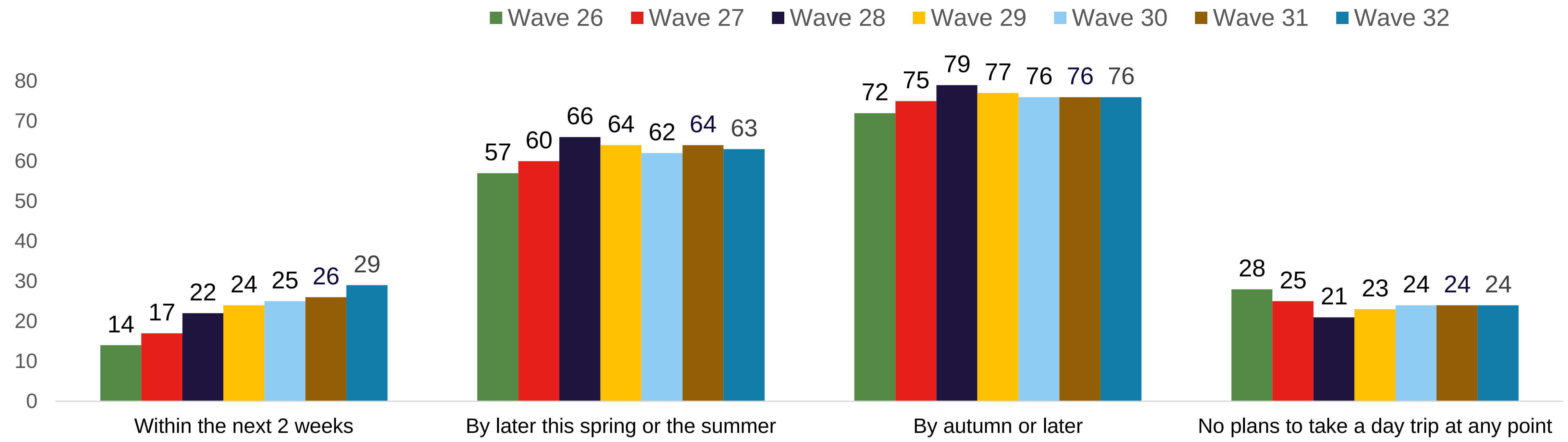
QVB14a/b. Now looking ahead, are you intending to take any overnight business trips in the UK between now and end of the year? VB14b: What would be the main reason for this overnight business trip? Base: Wave 32 respondents currently in employment n = 1322. All taking a business trip n=157

4. Day Trip Intentions

Day trip intention overall

- **The likelihood to take day trips continues to increase in the short term with 29% of adults anticipating doing so in the next 2 weeks – the 6th consecutive wave of growth.**
- **Medium and longer-term day trip intention remains relatively consistent with previous waves.**

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

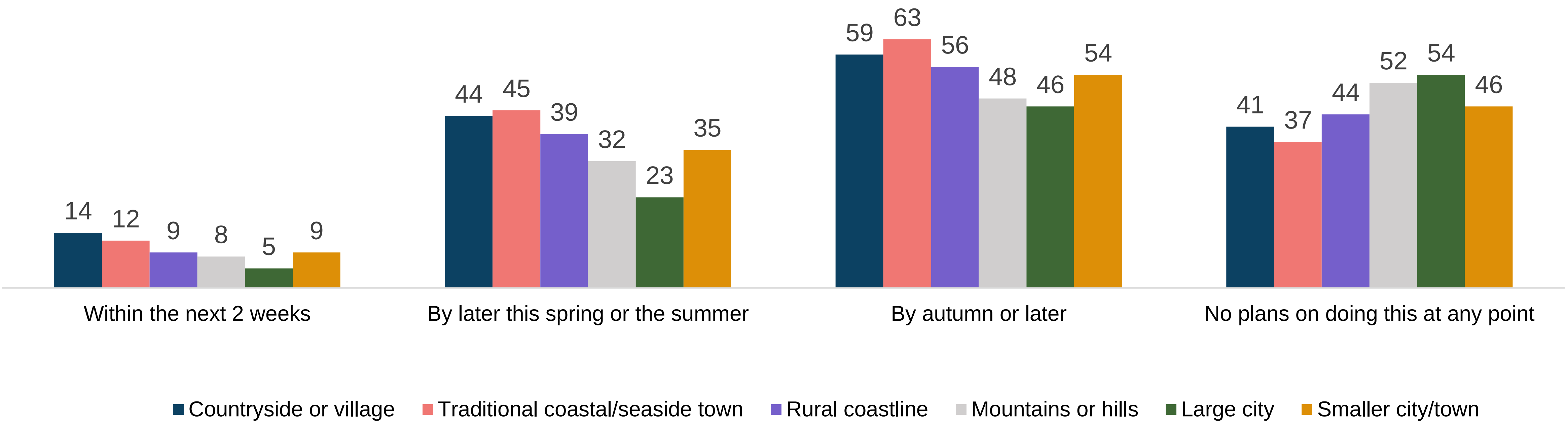


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 32 respondents n=1,757 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.

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 by the autumn continue to index the lowest out of all destination types.

Figure 33. Likelihood to take a day trip by destination type, percentage, Wave 32, UK

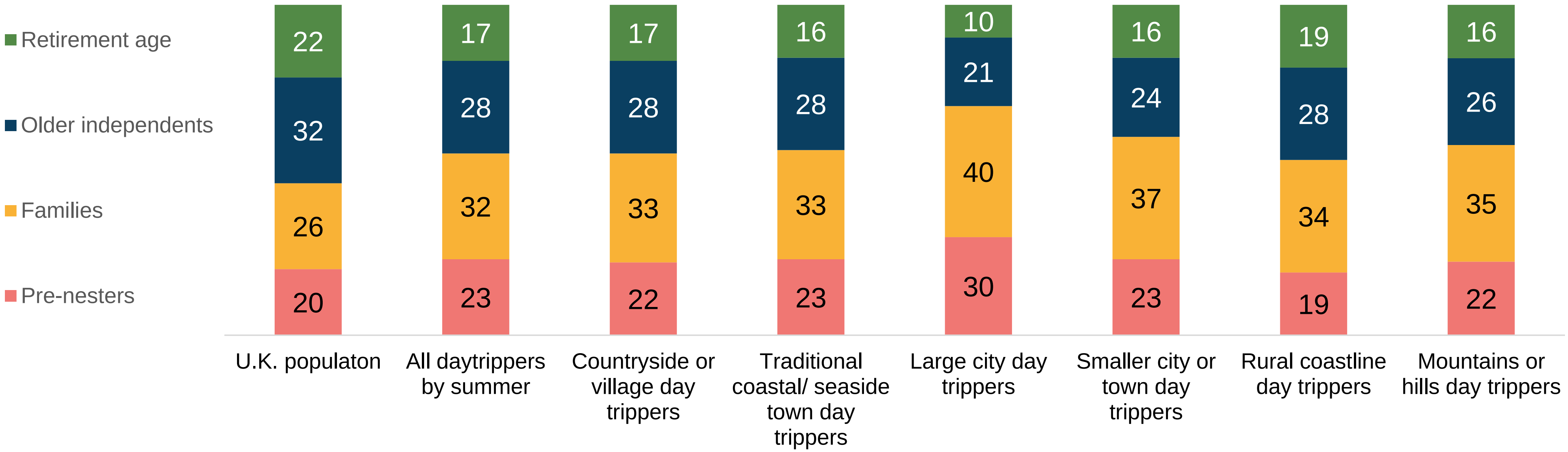


QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 32 respondents n=1,757
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.

Life stage of day trip intenders

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

Figure 34. Breakdown of day trip intenders* by life stage, percentage, Wave 32, 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 32 respondents: *All day trippers within the next 2 weeks/early spring summer n=1136; All day-trippers Countryside or village day trippers n=768; Traditional coastal/ seaside town day trippers n=797 Large city day trippers n=422 Smaller city or town day trippers n=623 Rural coastline day trippers n=687 Mountains or hills day trippers n=589

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 32 of the COVID-19 consumer sentiment tracker, with comparisons to Waves 1-30 where appropriate. Wave 32 fieldwork was conducted between 31st May and 6th June 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.