Introduction

VisitEngland, VisitScotland and Visit Wales have commissioned a weekly Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays both within the U.K. and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.

The survey addresses: the likelihood of U.K. residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken and the type of reassurances they're seeking from the sector.

The tracker is based on a U.K. nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales. The survey was repeated weekly for 13 consecutive weeks from 18th May to 4th August, and then fortnightly from 31st August onwards.

The findings in this report are based on aggregating data from Waves 22-25 (fieldwork periods being: Wave 22: 17th December to 23rd December 2020; Wave 23: 11th January to 19th January 2021; Wave 24: 25th January to 29th January 2021; Wave 25: 8th February to 13th February 2021)

Comparisons to previous reports in the series are also made, where appropriate.
In this report we look at the profiles and attitudes of a number of separate audiences. In an attempt to understand the impact of the vaccine on trip-taking, the first chapter looks at two ‘vaccine groups’

- **Retirees that have received the vaccine**
- **Retirees that have not received the vaccine**

The focus on retirees is to understand the impact of taking the vaccine on trip behaviour without ‘age-related’ factors potentially skewing results. That said, please note age biases may still exist (e.g. older or medically vulnerable retirees being more likely to have had the vaccine than younger retirees without any pre-existing health conditions).

The subsequent chapters in this report are more ‘forward looking’ primarily focusing on domestic overnight trip intent during the coming months. For ease of reference, some time periods have been given seasonal labels, although we appreciate these may not necessarily correspond with meteorological definitions.

The definitions used include:

- **Spring intenders**: U.K. adults who claim their next domestic overnight trip will take place sometime between April and June 2021. Any notable differences within this period have been drawn out in the commentary
- **Summer intenders**: U.K. adults who claim their next domestic overnight trip will take place sometime between July and September 2021.
Definitions used within this report (2)

In the ‘city or large town’ chapter, the following definitions have been used:

– **City or large town intenders:** Spring intenders planning on taking an overnight trip to a city or large town this spring

– **Non-city or large town intenders:** Spring intenders not planning on taking an overnight trip to a city or large town this spring

In the ‘accessibility’ chapter, we have used the below definitions:

– **Health condition or impairment:** U.K. adults with a long-term illness, mobility impairment, partially sighted, partial hearing loss, learning difficulties, deaf or blind.

– **No health condition of impairment:** U.K. adults claiming to have none of the above health conditions/impairments

Commentary within this section also underlines the impact on findings when ‘health condition or impairment’ is controlled by age. This is achieved by looking only at respondents from a pre-nester or family life stage.
Definitions used within this report (3)

The following accommodation definitions are used:

- Hotel/Motel/Inn
- Guest house/B&B/Farmhouse
- Commercial accommodation: Rental holiday flat/apartment or Rented holiday home
- Private home: Second home/time share or Friends/relative’s home or In someone else’s private home on a commercial basis (e.g. Airbnb)
- Caravan/Camping/Glamping: Touring caravan or Campervan/Motorhome or Static Caravan or Tent or Glamping/Alternative
- Other accommodation: Hostel or other type of accommodation

To deliver clearer profiles, we also segment by life stage. Life stages are preferable to ‘age’ as they better describe someone’s life situation. For the purpose of this report, we have used the following:

- **Pre-nesters:** Aged 16-34 without children in household
- **Families:** Aged 16-64 with children in household
- **Older independents:** Aged 35-64 with no children in household
- **Retirement age:** Aged 65+.
Definitions used within this report (4)

This report also includes an additional six segments produced to understand how audiences differ *attitudinally* in relation to COVID-19. These are defined below:

- **Cautious but Content**
  - The most concerned about catching COVID-19, but generally settled and content with a restrained life-style. Risk, luxury, overnight travel and high-end aspirations do not feature for these steady-state individuals. They will not return to travel until it’s absolutely safe to do so.

- **Currently Constrained**
  - Worry about catching COVID-19 has brought a temporary halt to trip-taking for these financially confident and ambitious early adopters. They are unlikely to travel until the risk of catching COVID-19 has been significantly reduced.

- **Struggling**
  - Hit hard by COVID-19, active decisions about financial risk or aspirational spending are a luxury they cannot afford – the funds simply aren’t available. They are also more concerned than average about catching COVID-19.

- **Protective but Pragmatic**
  - Characterised by ‘everything in moderation’ across spending, finances and leisure time; an approach that reflects their attitude to COVID-19 and the need to balance the health of the nation with the health of the economy. Will only travel if they feel it is responsible to do so.

- **Less to Lose**
  - Spontaneous and optimistic for the future, even though their current circumstances are fairly limiting. They believe that we should learn to live with COVID-19. Fewer barriers to domestic travel than other segments, but financial constraints may limit the scope of their spend.

- **Life Goes On**
  - Protecting the economy should now be the focus for these well-off individuals who are willing to ‘speculate to accumulate’ and pay a premium for top notch experiences. The risks of the COVID-19 virus have been overstated in their estimation. The main barrier to travel is lack of things to do on their trip – they are not particularly concerned about catching the virus.
Definitions used within this report (5)

- **Multiple Trip-takers**: UK adults that plan on taking an overnight domestic trip in both the Spring and Summer periods.
- **Spring intenders**: UK adults who intend to take their next domestic overnight trip between April and June.
- **Summer Intenders**: UK adults who intend to take their next domestic overnight trip between July and September.
- **‘Persuadables’**: UK adults who would like to take a domestic overnight trip but don’t know when they might take it.
- **Non-planners**: UK adults who don’t have any domestic overnight trips planned.

In the final chapter we look at the profiles and attitudes of a number of nuanced audiences:
1. The impact of the vaccine
Vaccine take-up and intentions

- As of mid-February, 15% of U.K. adults had received the first dose of a COVID-19 vaccine, rising to 44% amongst 'retirees'.
- The vast majority of the population intend to have the vaccine – around 7 in 10 as soon as they can, dropping to around 1 in 2 pre-nesters and 3 in 5 families.

Figure 1. Vaccine take-up and intentions, Percentage, Wave 25, U.K.

Q8: How do you think you will respond when a vaccine becomes available? Base: All U.K. respondents. n=1,760; Pre-nesters n=465; Families n=488; Older Independents n=463; Retirees n=341. Note: Vaccine numbers fall out naturally and may not reflect government figures.

* Figures below 3% not shown
Mood and perceptions of the situation in relation to COVID-19

- Retirees tend to be more positive than other life stage in terms of mood and perceptions of the worst having passed in relation to COVID-19. Retirees that have had the vaccine are even more positive – 20% reporting a current mood of 9-10 out of 10 (compared to 14% of retirees that have not had the vaccine and 13% of the population), and 84% thinking the worst has passed or things are going to stay the same (compared to 78% and 79% respectively).

Figure 3. Current mood out of 10 by life stage, Percentage, Wave 25, U.K.

Figure 4. Perception of the situation with regards to COVID-19 by life stage, Wave 25, Percentage, U.K.

Q7: Regarding the situation of Coronavirus in the U.K. and the way it is going to change in the coming month, which of the following best describes your opinion? Base: All U.K. respondents. n=1,760; Retirees that have had the vaccine n=146; Retirees that have not had the vaccine n=195
Retirees are relatively uncomfortable conducting most indoor everyday activities regardless of whether they have had the vaccine. However, retirees that have had the vaccine are more comfortable ‘eating at a restaurant’ and ‘travelling by public transport’ than retirees that haven’t had the vaccine, – comfort with ‘travelling by public transport’ on a par with the general population.

Despite a correlation with higher comfort levels the vaccine does not appear to have changed the balance of segments, all retirees continuing to fall into ‘risk-averse’ audiences such as ‘cautious but content’ and ‘currently constrained’.

Figure 5. Level of comfort conducting activities by vaccine status, Net very and fairly comfortable, Percent, Wave 25, U.K.

Figure 6. Breakdown of population by COVID segments by life stage, Percentage, Wave 25, U.K.
Confidence in the ability to take a U.K. short break or holiday

- Retirees are less confident than the wider population that a planned U.K. short break or holiday would go ahead, regardless of whether they have had the vaccine. However, the vaccine does appear to give travel confidence a boost from June onwards.

Figure 7. Confidence in taking a U.K. overnight trip across a range of different months by vaccine status, Net percentage very and fairly confident, Wave 25, U.K.

QVB7anew. We’d like you to imagine that you have booked a U.K. 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? All U.K. respondents. n=1,760; Retirees that have had the vaccine n=146; Retirees that have not had the vaccine n=195
Reasons for not feeling confident taking trips in the U.K.

- Retirees that have had the vaccine are significantly less likely than retirees that have not had the vaccine to cite ‘I have concerns about catching COVID-19’ as a reason for low confidence in spring trips going ahead. They are more likely to cite reasons relating to restrictions and ‘local residents being unwelcoming/it’s not responsible to travel’. This suggests that loosening restrictions and positive messaging around travel may increase their confidence further.

Figure 8. Reasons for not being confident about travelling from April to June by retiree vaccine status, Percentage, Wave 25, U.K.
2. Profiling Trip Intenders
When anticipating going on an overnight U.K. short break or holiday

- 13% of U.K. adults plan on taking an overnight domestic short break or holiday in ‘spring’ (between April and June this year), with the balance of trips leaning more heavily towards the end of the period – around half planned in June. 28% intend to take a trip in the ‘summer’ (between July and September this year) - August and September (both 13%) generating more trips than July (8%). 7% of U.K. adults plan on taking an overnight trip in spring and summer.

Figure 9. Proportion anticipating a trip in each time period, Percentage, Wave 25, U.K.

Figure 10. Proportion that are planning an overnight trip in spring and summer by vaccine status, Percentage, Wave 25, U.K.
Planned or booked the next U.K. holiday or short break

- Over 2 in 5 (42%) of Spring Intenders have already planned their next trip, with 3 in 10 having booked it. The incidence of planning is higher in April, although booking is relatively consistent across the period.
- Only 17% of summer intenders have started planning their next trip, with 11% having booked it.

Figure 11. Proportion of Intenders that have already planned their trip, Percentage Wave 25, U.K.

<table>
<thead>
<tr>
<th></th>
<th>Spring Intenders</th>
<th>Summer Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already planned</td>
<td>42</td>
<td>17</td>
</tr>
<tr>
<td>Not yet planned</td>
<td>58</td>
<td>83</td>
</tr>
</tbody>
</table>

Figure 12. Proportion of Intenders that have already booked their trip, Percentage Wave 25, U.K.

<table>
<thead>
<tr>
<th></th>
<th>Spring Intenders</th>
<th>Summer Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Already booked</td>
<td>30</td>
<td>11</td>
</tr>
<tr>
<td>Not booked yet</td>
<td>70</td>
<td>89</td>
</tr>
</tbody>
</table>

QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? Base: Spring Intenders n=230 Summer intenders n=245
Purpose of next U.K. trip

- ‘Holidays’ make up the majority of trips in both the spring and summer. However, there is a spike in ‘visits to friends or relatives’ (VFR) in April – 26% compared to 19% in May and 14% in June.

Figure 13. Purpose of next holiday or short break in UK, Percentage, Waves 24-25, U.K.

QVB6f. Which of the following best describes the purpose of this trip? QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?

Base: April intenders n=100; May intenders n=142; June intenders n=192; Summer intenders n=674. Spring split into individual months to reflect highest incidence of VFR trips following lockdown restrictions being lifted. Filtered on Waves 24-25 to reflect changing circumstances.
Demographics of intenders compared to the general population

- Compared to the general population, both spring and summer intenders are more likely to be made up of pre-nesters and families – the latter significantly so. Consistent with previous reporting periods, older independents and retirees have significantly lower representation than the general population. However, given how the vaccine boosts travel intention, it may be that intention amongst older life stages will increase as restrictions are loosened.

- Spring and summer intenders are significantly more likely than the U.K. population to belong to AB social grades – also consistent with reporting throughout the pandemic.

**Figure 14. Breakdown of intenders by life stage, Percentage Waves 22-25, UK**

**Figure 15. Breakdown of intenders by social grade, Percentage Waves 22-25, UK**

Source: Demographic questions. Base: All respondents. UK population N=7,038 Spring intenders n=1,144; Summer intenders n=1,214
Financial segments and financial impact of COVID-19 on intenders

- 50% of both spring and summer intenders describe themselves as either ‘unaffected’ by COVID financially or ‘better off than before’, compared to 45% of the U.K. population. Despite being less financially impacted, they are more likely to have had their employment impacted in some way by the pandemic – ‘reduced income’ and ‘furlough’ the most common ways in which this has happened.

Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic? Base: Figure 20. All respondents. U.K population n=7,037; Spring intenders n=1,144 Summer intenders n=1,408 Figure 20. All respondents of working age (16-64). UK population n=5653; Spring intenders n=957 Summer intenders n=1206
Attitudinal segments (see definitions page for more information)

- Both spring and summer intenders are more likely than the U.K. population to be made up of the less risk-averse ‘life goes on’ and ‘less to lose’ segments – around 2 in 5 falling into these audiences compared to just a third of the adult population.
- ‘Struggling’ and ‘currently constrained’ are under-represented amongst intenders, with ‘cautious but content’ at a similar level. The relatively strong representation of ‘cautious but content’ marks a change from the latter part of 2020 when they indexed significantly below the population. This may in part be driven by the vaccine – 3 in 10 of those that have been vaccinated falling into this category.

Figure 18. Breakdown of intenders by risk segment, Percentage Waves 22-25, U.K.

- All U.K. trip takers n=1028; U.K. holidays n=665 summer trip intenders as of weeks 10-14 n=803
- Refer to slide 6 for segment definitions. Base: Figure 20. All respondents. UK population n=7038; Spring intenders n=1,144 Summer intenders n=1,214 Figure 20. All respondents of working age (16-64). UK population n=5653; Spring intenders n=269 Summer intenders n=662
Where planning on staying on next U.K. short break or holiday

- The South West of England is the region of the U.K. most likely to generate a domestic short break or holiday in both spring and summer this year, significantly ahead of Scotland in second place. Behind Scotland, there is little to separate a number of other destinations.

Figure 19. Where planning on staying on next UK overnight trip for Spring intenders, Percentage Waves 22-25, UK

Figure 20. Where planning on staying on next UK overnight trip for Summer intenders, Percentage Waves 22-25, UK

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK; Spring intenders n=960; Summer intenders n=1,214
Type of location for next U.K. short break or holiday

- ‘Countryside or village’ and ‘traditional coastal/seaside town’ are the two leading destination types in spring and summer – both increasing in preference in the summer months.
- ‘City or large town’ and ‘rural coastline’ is the anticipated destination type for around 1 in 4 intenders across both periods; ‘mountains or hills’ for around 1 in 6.

Figure 21. Main type of destination for Spring intenders, Percentage Waves 22-25, UK

Figure 22. Main type of destination for Summer intenders, Percentage Waves 22-25, UK
Make-up of visitor party for next U.K. holiday or short break

- Consistent with previous reporting periods, ‘partner’ is by far the most common party member intenders are likely to spend their spring and summer overnight trip with. ‘Children, grandchildren or young adults’ is the second most common, with significantly higher representation in the summer, driven by July and August where they make up 46% and 50% of visitor parties respectively. ‘Friends’ and ‘other members of the family’ are the next most represented, highest in April when VFR trips are most dominant.

QVB4d. With whom are you likely to be spending your holiday?
Base: All respondents planning on taking a holiday or short break in the UK between Spring intenders n=960; Summer intenders n=1,214
*Child or young adults includes respondents that state ‘children’ or ‘grandchildren’ and 16-24 year olds stating they will travel with their parents
Type of accommodation for next U.K. short break or holiday

- ‘Hotel/motel/inn’ is the preferred accommodation type for trips planned in both spring and summer, although in both periods ‘commercial rental’, ‘caravan/camping’ and ‘a private home’ sit close behind.
- ‘Static caravan’ makes up the largest share of ‘camping’ stays, whilst ‘friends or relatives’ indexes highest amongst those planning on staying in a ‘private home’.

Figure 25. Accommodation planning on staying in on next UK overnight trip for Spring intenders, Net percentage Waves 22-25, UK

Figure 26. Accommodation planning on staying in on next UK overnight trip for Summer intenders, Net percentage Waves 22-25, UK

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All respondents planning on taking a holiday or short break in the UK; Spring intenders n=960; Summer intenders n=1,214
Trip duration of next UK holiday or short break

- The majority of both spring and summer intenders expect their overnight trip to be a longer break of 4+ nights, marginally more so in the summer.

Figure 27. Length of next UK holiday or short break by time period, Percentage
Waves 22-25, UK
Anticipated spend on next U.K. holiday or short break

- Spring intenders anticipate spending significantly less on trips than summer intenders (£775 on average compared to £868) due to a higher proportion of spenders over £1,000. This is in part driven by summer intenders anticipating longer trips, and the higher incidence of less expensive VFR trips in spring (on average VFR trips cost c.£150 less than all trips).

Figure 28. Anticipated spend for Intenders, Percentage Waves 22-25, UK

Figure 29. Anticipated average spend for Intenders, Average, Waves 22-25, UK

QVB6e. Approximately how much do you think this trip will cost in total?
Base: All respondents planning on taking a holiday or short break in the UK; Spring intenders n=960; Summer intenders n=1,214
3. Destination type summary for Spring Intenders

* UK adults aged 16+ that intend to take an overnight domestic short break or holiday during April – June
Type of destination for next U.K. short break or holiday - Consideration

- ‘Countryside or village’ is the destination type most likely to be in Spring intenders’ consideration set, although only marginally ahead of ‘traditional coastal/seaside town’
- ‘City or large town’ and ‘traditional coastal/seaside town’ both share the highest proportion of intenders only considering one destination type, suggesting these will be destinations that are less susceptible to switching
- Consistent with previous reporting, U.K. adults considering visiting ‘mountains or hills’ are the most likely to switch to another destination type, ‘countryside or village’ the most likely destination type they will switch to.

Figure 30. Main type of destination for Spring Intenders, Percentage Waves 22-25, UK

Table 1. Destination types considered, Percentage Waves 22-25, UK

<table>
<thead>
<tr>
<th>INTENDERS</th>
<th>Coastal/seaside town</th>
<th>Countryside or village</th>
<th>City or large town</th>
<th>Rural coastline</th>
<th>Mountains or hills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional coastal/seaside town</td>
<td>20%</td>
<td>12%</td>
<td>33%</td>
<td>21%</td>
<td></td>
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<tr>
<td>Countryside or village</td>
<td>20%</td>
<td>11%</td>
<td>35%</td>
<td>45%</td>
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<tr>
<td>City or large town</td>
<td>10%</td>
<td>9%</td>
<td>10%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Rural coastline</td>
<td>23%</td>
<td>24%</td>
<td>8%</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>12%</td>
<td>25%</td>
<td>10%</td>
<td>24%</td>
<td></td>
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</tbody>
</table>
‘Countryside or village’: Spring Intenders (32% of market)

Figure 31. Life stage of Spring Intenders by destination type, Percentage Waves 22-25, UK

- Retirement age: Spring Intenders 19, Countryside or village 20
- Older independents: Spring Intenders 26, Countryside or village 29
- Families: Spring Intenders 33, Countryside or village 28
- Pre-nesters: Spring Intenders 22, Countryside or village 23

Figure 32. Trip length of Spring Intenders by destination type, Percentage Waves 22-25, UK

- Short break: Spring Intenders 42, Countryside or village 44
- Holiday: Spring Intenders 51, Countryside or village 51
- Unsure: Spring Intenders 7, Countryside or village 5

Figure 33. Anticipated average spend of Spring Intenders by destination type, Average, Waves 22-25, UK

- Spring Intenders: £775
- Countryside or village: £797

Figure 34. Visitor party make-up for Spring Intenders, Top 5, Percentage Waves 22-25, UK

- Partner: Spring Intenders 60, Countryside or village 67
- Child, grandchild or young adults: Spring Intenders 31, Countryside or village 27
- Friends: Spring Intenders 19, Countryside or village 18
- Other family member: Spring Intenders 13, Countryside or village 13
- Pets: Spring Intenders 9, Countryside or village 13

Figure 35. Accommodation planning on staying in on next UK overnight trip for Spring Intenders, Top 5, Percentage Waves 22-25, UK

- Staying in a rented holiday home: Spring Intenders 34, Countryside or village 40
- Hotel / Motel / Inn: Spring Intenders 36, Countryside or village 25
- Friends or relatives home: Spring Intenders 15, Countryside or village 17
- Guest house / Bed and breakfast: Spring Intenders 20, Countryside or village 16
- Air bnb or similar: Spring Intenders 13, Countryside or village 14

Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=960; Countryside or village n=310; Countryside or village exclusive n=154
‘City or large town’: Spring Intenders (26% of market)

Figure 36. Life stage of Spring Intenders by destination type, Percentage Waves 22-25, UK

- Retirement age: 13%
- Older independents: 22%
- Families: 30%
- Pre-nesters: 34%

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>Spring Intenders</th>
<th>City or large town</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement age</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Older independents</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Families</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Pre-nesters</td>
<td>34%</td>
<td></td>
</tr>
</tbody>
</table>

Figure 37. Trip length of Spring Intenders by destination type, Percentage Waves 22-25, UK

- Short break: 49%
- Holiday: 45%
- Unsure: 5%

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<tr>
<th>Destination Type</th>
<th>Spring Intenders</th>
<th>City or large town</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short break</td>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>45%</td>
<td></td>
</tr>
<tr>
<td>Unsure</td>
<td>5%</td>
<td></td>
</tr>
</tbody>
</table>

Figure 38. Anticipated average spend of Spring Intenders by destination type, Average, Waves 22-25, UK

- £775
- £637

Figure 39. Visitor party make-up for Spring Intenders, Top 5, Percentage Waves 22-25, UK

- Partner: 60%
- Child, grandchild or young adults: 31%
- Friends: 30%
- Other family member: 13%
- Other: 4%

Figure 40. Accommodation planning on staying in on next UK overnight trip for Spring Intenders, Top 5, Percentage Waves 22-25, UK

- Hotel / Motel / Inn: 36%
- Staying in a rented holiday home: 34%
- Friends or relatives home: 15%
- Air bnb or similar: 13%
- Guest house / Bed and breakfast: 20%

Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=960; City or large town n=262; City or large town exclusive n=191
‘Traditional seaside or coastal town’: Spring Intenders (31% of market)

**Figure 41. Life stage of Spring Intenders by destination type, Percentage Waves 22-25, UK**

- Spring Intenders: Retirement age 19%, Older independents 26%, Families 33%, Pre-nesters 22%
- Traditional coastal town: Retirement age 25%, Older independents 32%, Families 28%, Pre-nesters 15%

**Figure 42. Trip length of Spring Intenders by destination type, Percentage Waves 22-25, UK**

- Spring Intenders:
  - Short break 42%
  - Holiday 51%
  - Unsure 7%
- Traditional coastal town:
  - Short break 36%
  - Holiday 62%
  - Unsure 3%

**Figure 43. Anticipated average spend of Spring Intenders by destination type, Average, Waves 22-25, UK**

- Spring Intenders: £775
- Traditional coastal town: £750

**Figure 44. Visitor party make-up for Spring Intenders, Top 5, Percentage Waves 22-25, UK**

- Spring Intenders:
  - Partner: 60%, Child, grandchild or young adults: 31%, Other family member: 13%, Friends: 19%, Pets: 9%
- Traditional coastal town:
  - Partner: 70%, Child, grandchild or young adults: 38%, Other family member: 13%, Friends: 12%, Pets: 10%

**Figure 45. Accommodation planning on staying in on next UK overnight trip for Spring Intenders, Top 5, Percentage Waves 22-25, UK**

- Spring Intenders:
  - Hotel / Motel / Inn: 36%
  - Static caravan - not owned by you: 11%
  - Staying in a rented holiday home: 34%
  - Guest house / Bed and breakfast: 20%
  - Air bnb or similar: 13%
- Traditional coastal town:
  - Hotel / Motel / Inn: 36%
  - Static caravan - not owned by you: 23%
  - Staying in a rented holiday home: 22%
  - Guest house / Bed and breakfast: 12%
  - Air bnb or similar: 5%

Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=960; Traditional seaside or coastal town n=291; Traditional seaside or coastal town exclusive n=168
‘Rural coastline’: Spring Intenders (22% of market)

Figure 46. Life stage of Spring Intenders by destination type, Percentage Waves 22-25, UK

- Retirement age: 19
- Older independents: 26
- Families: 33
- Pre-nesters: 22

Spring Intenders: 14
Rural coastline: 21

Figure 47. Trip length of Spring Intenders by destination type, Percentage Waves 22-25, UK

- Short break: 42
- Holiday: 51
- Unsure: 7

Spring Intenders: 36
Rural coastline: 62

Figure 48 Anticipated average spend of Spring Intenders by destination type, Average, Waves 22-25, UK

- Spring Intenders: £775
- Rural coastline: £668

Figure 49. Visitor party make-up for Spring Intenders, Top 5, Percentage Waves 22-25, UK

- Partner: 60
- Child, grandchild or young adults: 31
- 25+ Parents: 7
- Pets: 9
- Other family members: 13

Spring Intenders: 65
Rural coastline: 53

Figure 50. Accommodation planning on staying in on next UK overnight trip for Spring Intenders, Top 5, Percentage Waves 22-25, UK

- Hotel / Motel / Inn: 36
- Staying in a rented holiday home: 49
- Friends or relatives home: 34
- Air bnb or similar: 33
- Guest house / Bed and breakfast: 15

Spring Intenders: 27
Rural coastline: 18

Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=960; Rural coastline n=208 ; Rural coastline exclusive n=81
‘Mountains or hills’: Spring Intenders (18% of market)

Figure 51. Life stage of Spring Intenders by destination type, Percentage Waves 22-25, UK

- Retirement age: 19%
- Older independents: 26%
- Families: 33%
- Pre-nesters: 22%

Spring Intenders: 60%; Mountains or hills: 57%

Figure 52. Trip length of Spring Intenders by destination type, Percentage Waves 22-25, UK

- Short break: 42%
- Holiday: 51%
- Unsure: 7%

Spring Intenders: 44%
Mountains or hills: 52%

Figure 53. Anticipated average spend of Spring Intenders by destination type, Average, Waves 22-25, UK

- Spring Intenders: £775
- Rural coastline: £1243

Figure 54. Visitor party make-up for Spring Intenders, Top 5, Percentage Waves 22-25, UK

- Partner: 60%
- Friend/s: 31%
- Child, grandchild or young adults: 9%
- Pets: 4%
- Other: 27%

Figure 55. Accommodation planning on staying in on next UK overnight trip for Spring Intenders, Top 5, Percentage Waves 22-25, UK

- Staying in a rented holiday home: 34%
- Hotel / Motel / Inn: 36%
- Guest house / Bed and breakfast: 20%
- Air bnb or similar: 13%
- Friends or relatives home: 15%

Base: All respondents planning on taking a holiday or short break in the UK; Spring Intenders n=960; Mountains or hills n=176 ; Mountains or hills exclusive n=56*
4. City or large town summary: Spring Intenders

* Spring Intenders defined as UK adults aged 16+ that intend to take an overnight domestic trip between April-June 2021.
Top six places for city/town intenders to visit during Spring (April – June)

- London is the leading destination for ‘city/town intenders’ this spring by a considerable margin.

Figure 56. Areas intending to stay for Spring city/town Intenders, Net percentage, Top 5, Waves 22-25, UK
Demographics of city/town spring intenders

- Pre-nesters/families make up nearly 7 in 10 (69%) of spring city intenders – significantly more than the 1 in 2 (50%) of non-city intenders. It’s worth noting that despite the higher proportion of families, the incidence of trips ‘with children’ is the same, suggesting that some of those in the family life stage are not planning on taking a city break with their children. Spring city intenders are also significantly more likely to belong to social groups AB.

Source: Demographic questions. Base: All respondents. UK population n=7,037; City spring intenders n=314; Non-city spring intenders n=830
Financial segments and financial impact of city/town intenders

- ‘Spring city intenders’ and ‘spring non-city intenders’ report a similar financial impact as a result of COVID-19, around half having been hit hard or having to be careful.
- Spring city-intenders however, are more likely to have had their employment impacted, ‘reduced income’ the most likely.

**Figure 59. Breakdown of city/town intenders by financial segments, Percentage Weeks 22-25, UK**

- I've been hit hard
- Things are ok but I have to be careful
- I've not been affected
- I'm better off than before

**Figure 60. Employment impact on city/town intenders, Percentage Weeks 22-25, UK**

Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic?

Source: Demographic questions. Base: All respondents of working age. UK population n=5,669; City spring intenders n=232; Non-city spring intenders n=557
Level of comfort undertaking activities and COVID segments

- Spring city intenders are more comfortable conducting everyday indoor activities than non-city intenders. Comfort levels are especially high with travelling by public transport (51% comfortable versus 33%). City intenders are more likely to fall into the ‘less to lose’ segment, linked to the high incidence of pre-nesters taking city trips.

Figure 61. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Wave 25, U.K.

<table>
<thead>
<tr>
<th>Activity</th>
<th>All U.K. residents</th>
<th>Spring city intenders</th>
<th>Spring non-city intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comfort average</td>
<td>49</td>
<td>59</td>
<td>54</td>
</tr>
<tr>
<td>Going for a walk in a park</td>
<td>83</td>
<td>81</td>
<td>90</td>
</tr>
<tr>
<td>Shopping in your local centre</td>
<td>46</td>
<td>54</td>
<td>50</td>
</tr>
<tr>
<td>Eating at a restaurant</td>
<td>34</td>
<td>49</td>
<td>41</td>
</tr>
<tr>
<td>Travelling by public transport</td>
<td>32</td>
<td>51</td>
<td>33</td>
</tr>
</tbody>
</table>

Figure 62. Breakdown of population by COVID segments by life stage, Percentage, Wave 25, U.K.

- Life goes on
- Less to lose
- Protective but pragmatic
- Protective but pragmatic
- Struggling
- Struggling
- Currently constrained
- Cautious but content
- Cautious but content
- Cautious but content

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: All respondents. UK population n=7,037; City spring intenders n=314; Non-city spring intenders n=830
Reasons for not feeling confident taking trips in the U.K.

- Non-city intenders that are not confident about taking a spring trip are more likely to cite 'restrictions from government' and 'a general unease about travelling' as a reason for this lack of confidence.

Figure 63. Reasons for not being confident about travelling from April to June, Percentage, Wave 25, U.K.
Composition of visitor party for city Spring Intenders

- City/town spring intenders are most likely to travel with their partners, although under-index relative to non-city intenders.
- Parties with children and friends make up a high share of intenders, the latter significantly more than spring non-city intenders.

Figure 64. Visitor party make-up for Spring City/Town Intenders, Percentage Weeks 22-25, UK

QVB4d. With whom are you likely to be spending your holiday?
Base: All respondents. Exclusive city spring intenders n=191; Non-city spring intenders n=698
*Child or young adults includes respondents that state ‘children’ or ‘grandchildren’ and 16-24 year olds stating they will travel with their parents
Type of accommodation for city/town spring intenders

- ‘Hotel/motel/inn’ is the dominant accommodation type for city/town intenders during the spring period.
- A private home is the second most preferred accommodation trip during this period (driven by visits to friends or family) and indexes significantly higher than for non-city intenders.

Figure 65. Accommodation planning on staying in on next UK overnight trip for Spring City/Town Intenders, Net percentage Weeks 22-25, UK

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All respondents. Exclusive city spring intenders n=191; Non-city spring intenders n=698
5. Accessible tourism
Proportion of adults in the U.K. with a health condition or impairment

- Just under 1 in 4 adults in the UK claim to have a health condition or impairment, of which ‘long-term illness’ such as arthritis, cancer or diabetes is cited most frequently (13% of adults), followed by ‘mobility impairment – non-wheelchair user (6%) and ‘partial hearing loss’ (6%).

Figure 66. Proportion of U.K. residents with a health condition or impairment, Net and Percentage, Waves 22-25, U.K.
Demographics compared to the overall population

- Adults in the UK with a health condition or impairment are significantly more likely than the overall UK population to be of retirement age and belonging to social grades DE.

**Figure 67. Breakdown by life stage, Percentage Waves 22-25, UK**

- Retirement age: 22% UK, 18% Without health condition or impairment, 40% With health condition or impairment
- Older independents: 32% UK, 32% Without health condition or impairment, 30% With health condition or impairment
- Families: 26% UK, 28% Without health condition or impairment, 21% With health condition or impairment
- Pre-nesters: 20% UK, 21% Without health condition or impairment, 9% With health condition or impairment

**Figure 68. Breakdown by social grade, Percentage Waves 22-25, UK**

- AB: 22% UK, 23% Without health condition or impairment, 19% With health condition or impairment
- C1: 30% UK, 33% Without health condition or impairment, 18% With health condition or impairment
- C2: 22% UK, 23% Without health condition or impairment, 39% With health condition or impairment
- DE: 25% UK, 21% Without health condition or impairment, 39% With health condition or impairment

Source: Demographic questions. Base: All respondents. UK population n=7,037; Without health condition or impairment n=4,806; With health condition or impairment n=1,524
Financial segments and financial impact of COVID-19

- Adults with a health condition or impairment belong to similar COVID-19 financial segments as the overall population and have had their employment status similarly impacted by the pandemic.

Figure 69. Breakdown by financial segments, Percentage Waves 22-25, UK

<table>
<thead>
<tr>
<th></th>
<th>U.K population</th>
<th>Without health condition or impairment</th>
<th>With health condition or impairment</th>
</tr>
</thead>
<tbody>
<tr>
<td>I've been hit hard</td>
<td>15</td>
<td>15</td>
<td>13</td>
</tr>
<tr>
<td>Things are ok but I have to be careful</td>
<td>41</td>
<td>42</td>
<td>38</td>
</tr>
<tr>
<td>I've not been affected</td>
<td>35</td>
<td>34</td>
<td>38</td>
</tr>
<tr>
<td>I'm better off than before</td>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
</tbody>
</table>

Figure 70. Employment impact, Percentage Waves 22-25, UK

- U.K population
- Without health condition or impairment
- With health condition or impairment

Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic?

Base: UK population n=7,037; Without health condition or impairment n=4,806; With health condition or impairment n=1,524
Levels of comfort undertaking activities and COVID segments

- Those with a health condition report lower comfort levels in ‘going for a walk in a country park/local trail’, likely driven by existing impairments. They also report lower comfort with ‘travelling by public transport’ although this gap is closed when both audiences are controlled for age.
- Adults without a health condition are more likely to fall into the ‘less to lose’ segment, although again, this appears to be largely age-driven.

Figure 71. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Wave 25, U.K.

Figure 72. Breakdown of population by COVID segments by life stage, Percentage, Wave 25, U.K.
Confidence in the ability to take a short break or holiday in the U.K.

- Adults with a health condition or impairment do exhibit less confidence that a booked trip would go ahead as planned between April and September compared to those without a health condition, however, there is an age component and when this is statistically accounted for the differences are less apparent.

*Figure 73. Confidence in taking a U.K. overnight trip across a range of different months, Net percentage very and fairly confident, Wave 25, U.K.*
Reasons for not feeling confident taking overnight trips in the U.K.

- All U.K. adults, whether they have a health condition or not, cite similar reasons for a lack of confidence in trips going ahead this spring.
- However, they are significantly more likely to state they have ‘a general unease about travelling’, a difference that remains even when the results are controlled for age.

**Figure 74. Reasons for not being confident about travelling between April and June 2021, Percentage, Wave 25, U.K.**

<table>
<thead>
<tr>
<th>Reason</th>
<th>All U.K. residents</th>
<th>Without health condition or impairment</th>
<th>With health condition or impairment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restrictions on opportunities to socialise / Fewer things to do/places to visit / opportunities to eat/drink out</td>
<td>60</td>
<td>56</td>
<td>60</td>
</tr>
<tr>
<td>Restrictions on travel from government (national or devolved)</td>
<td>58</td>
<td>57</td>
<td>58</td>
</tr>
<tr>
<td>I have concerns about catching COVID-19</td>
<td>40</td>
<td>41</td>
<td>44</td>
</tr>
<tr>
<td>Local residents may be unwelcoming / It’s not responsible to travel</td>
<td>56</td>
<td>57</td>
<td>58</td>
</tr>
<tr>
<td>Personal finances</td>
<td>29</td>
<td>28</td>
<td>30</td>
</tr>
<tr>
<td>I have a general unease about travelling</td>
<td>24</td>
<td>23</td>
<td>31</td>
</tr>
</tbody>
</table>

QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a U.K. short break or holiday between March and September? All U.K. respondents not confident in taking a trip between April and June. n=1,760; Without health condition n=993; With health condition n=228
When anticipating going on an overnight U.K. short break or holiday

- U.K. adults citing a health condition or impairment are significantly more likely to say they have no intention of taking an overnight domestic trip compared to those without a health condition (37% versus 31% respectively).
- However, differences by season are relatively minor and largely removed when controlled by age.

**Figure 75. Proportion anticipating a trip in each time period, Percentage, Wave 25, U.K.**

QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB2. And when else are you likely to take a U.K. holiday or short break? All U.K. respondents. n=1,760; Without health condition n=993; With health condition n=228
Destination type for Spring Intenders

- Spring intenders with a health condition or impairment plan to visit similar destinations to those without a health condition.
- ‘Countryside or village’ and ‘traditional coastal/seaside town’ being the destinations with the highest shares at around 30% each respectively.

Figure 76. Main type of destination for Spring Intenders, Percentage Waves 22-25, 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 respondents planning on taking a holiday or short break in the UK; All spring Intenders n=819; No impairment n=608; With health condition or impairment n=105
Type of accommodation for next U.K. short break or holiday

- Spring Intenders with a health condition or impairment are more likely to stay in a hotel/motel/inn, caravan/camping site or private home

Figure 76. Accommodation planning on staying in on next UK overnight trip for Spring Intenders, Net percentage Waves 22-25, UK

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All respondents planning on taking a holiday or short break in the UK; April Intenders n=256; No impairment n=187; With health condition or impairment n=49*
CAUTION: SMALL BASE SIZES
6. Overnight Business Trips
Overnight business trip intention

- 7% of U.K. adults in employment intend to take an overnight business trip by June 2021. ‘Team building’ and ‘meetings of 1-5 people’ are the most common anticipated reasons for doing so, although half will do so for a combination of other reasons.

Figure 77. Proportion anticipating an overnight business trip by June 2021, Percentage, Waves 22 + 24, U.K.

Figure 78. Reasons for taking an overnight business trip, Percentage Waves 22 + 24, U.K. residents intending to take a business trip

VB14a. Now looking ahead, are you intending to take any overnight business trips in the U.K. between now and June 2021? VB14b. What would be the main reason for this overnight business trip? Base: All in employment: U.K. residents in employment n=2,629; U.K. residents taking a trip n=200
Changes in overnight business trips amongst business trip-takers

- 43% of U.K. adults in employment anticipate taking fewer than normal business trips between now and June 2021, with the largest reduction in the number of business trips apparent at middle management level (social grade B). Overall, all social grades anticipate taking fewer trips than normal, though adults in high managerial positions (social grade A) are the most likely to take more trips.

Figure 79. Anticipated number of overnight business trips compared to normal, Percentage Waves 22 + 24, U.K. residents currently in employment

<table>
<thead>
<tr>
<th></th>
<th>More</th>
<th>About the Same</th>
<th>Fewer</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>A (e.g. high managerial)</td>
<td>43%</td>
<td>49%</td>
<td>25%</td>
<td>18%</td>
</tr>
<tr>
<td>B (e.g. middle management)</td>
<td>32%</td>
<td>27%</td>
<td>51%</td>
<td>18%</td>
</tr>
<tr>
<td>C1 (e.g. supervisory, junior managerial)</td>
<td>36%</td>
<td>42%</td>
<td>36%</td>
<td>21%</td>
</tr>
<tr>
<td>C2 (e.g. skilled manual)</td>
<td>41%</td>
<td>41%</td>
<td>30%</td>
<td>27%</td>
</tr>
<tr>
<td>D (e.g. semi or unskilled)</td>
<td>32%</td>
<td>37%</td>
<td>32%</td>
<td>28%</td>
</tr>
</tbody>
</table>

UK residents in employment: 2,629; A n=272; B n=639; C1 n=739; C2 n=733; D n=246
Reasons for taking fewer overnight business trips

- Cancellations are the most common reason given for taking fewer trips, 39% stating this. Personal choice due to concerns around COVID-19 moves to second place (34%) from 1st in the previous report, and postponement (25%) is the third most common reason for taking fewer business trips.
- Together, cancellations and postponements make up more than half of reasons (55%), while digital alternatives are a reason for 18%.

Figure 80. Reason for taking fewer overnight business trips, Percentage Waves 22 + 24, U.K.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>They are being cancelled</td>
<td>39</td>
</tr>
<tr>
<td>Personal choice due to current concerns</td>
<td>34</td>
</tr>
<tr>
<td>They are being postponed</td>
<td>25</td>
</tr>
<tr>
<td>Using alternatives (e.g. digital)</td>
<td>18</td>
</tr>
<tr>
<td>Other</td>
<td>14</td>
</tr>
<tr>
<td>Problems finding suitable accommodation</td>
<td>7</td>
</tr>
<tr>
<td>Problems finding suitable venues</td>
<td>5</td>
</tr>
</tbody>
</table>

VB14d. Which, if any, of the following factors are contributing to you feeling that you'll be taking fewer overnight business trips? Base: All in employment taking fewer business trips: U.K. residents in employment taking fewer business trips n=1,157
7. Regional profiling for Spring overnight trips in UK
Where planning on staying on next Spring short break or holiday

- As outlined earlier within this report, the South West of England and Scotland are the two most preferred destinations for a spring trip. Behind these two destinations, six destinations are separated by only 4 percentage points.

**Figure 81. Where planning on staying on next UK overnight trip for Spring intenders, Percentage Waves 22-25, UK**
Where intending to visit within UK regions in Spring  (1)

Tables 2-5. Where intending to visit, within regions, Waves 22-25, UK

<table>
<thead>
<tr>
<th>South West of England</th>
<th>Scotland</th>
<th>North West</th>
<th>Wales (Top 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OVERALL VISITS</strong></td>
<td>26%</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>Cornwall &amp; Isles of</td>
<td>42%</td>
<td>Highlands</td>
<td>Snowdonia</td>
</tr>
<tr>
<td>Scilly</td>
<td></td>
<td>35%</td>
<td>22%</td>
</tr>
<tr>
<td>Devon</td>
<td>33%</td>
<td>Edinburgh area</td>
<td>19%</td>
</tr>
<tr>
<td>Dorset</td>
<td>15%</td>
<td>West Coast</td>
<td>Pembrokeshire</td>
</tr>
<tr>
<td>Somerset</td>
<td>11%</td>
<td>Scottish Isles</td>
<td>15%</td>
</tr>
<tr>
<td>Bristol</td>
<td>9%</td>
<td>Glasgow area</td>
<td>14%</td>
</tr>
<tr>
<td>Bath</td>
<td>8%</td>
<td>East Coast</td>
<td>The Isle of Anglesey</td>
</tr>
<tr>
<td>Gloucestershire</td>
<td>7%</td>
<td>Central Scotland</td>
<td>11%</td>
</tr>
<tr>
<td>Wiltshire</td>
<td>5%</td>
<td>South of Scotland</td>
<td>11%</td>
</tr>
</tbody>
</table>

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All respondents planning on taking a holiday or short break in the UK; in Spring
Where intending to visit within UK regions in Spring (2)

Tables 6-9. Where intending to visit within regions, Waves 22-25, UK

<table>
<thead>
<tr>
<th>Yorkshire &amp; The Humber</th>
<th>South East</th>
<th>East of England</th>
<th>West Midlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERALL VISITS</td>
<td>11%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>The North York Moors</td>
<td>29%</td>
<td>East Sussex</td>
<td>28%</td>
</tr>
<tr>
<td>West Yorkshire (e.g. Leeds, Bradford)</td>
<td>21%</td>
<td>Hampshire</td>
<td>21%</td>
</tr>
<tr>
<td>York</td>
<td>20%</td>
<td>Kent</td>
<td>16%</td>
</tr>
<tr>
<td>East Riding of Yorkshire</td>
<td>17%</td>
<td>Isle of Wight</td>
<td>15%</td>
</tr>
<tr>
<td>Lincolnshire</td>
<td>14%</td>
<td>Oxfordshire</td>
<td>12%</td>
</tr>
<tr>
<td>South Yorkshire</td>
<td>10%</td>
<td>Surrey</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Buckinghamshire</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>West Sussex</td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Berkshire</td>
<td>1%</td>
</tr>
</tbody>
</table>
Where intending to visit within UK regions in Spring (3)

Tables 10-11. Where intending to visit within regions, Waves 22-25, UK

<table>
<thead>
<tr>
<th>North East</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERALL VISITS</td>
<td>5%</td>
</tr>
<tr>
<td>Northumberland</td>
<td>43%</td>
</tr>
<tr>
<td>Durham</td>
<td>25%</td>
</tr>
<tr>
<td>Tyne and Wear (Inc. Newcastle)</td>
<td>19%</td>
</tr>
<tr>
<td>Tees Valley</td>
<td>15%</td>
</tr>
<tr>
<td>Cleveland</td>
<td>3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>East Midlands</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERALL VISITS</td>
<td>4%</td>
</tr>
<tr>
<td>Derbyshire and Nottinghamshire (Inc. Peak District)</td>
<td>70%</td>
</tr>
<tr>
<td>Leicestershire and Rutland</td>
<td>19%</td>
</tr>
<tr>
<td>Lincolnshire</td>
<td>8%</td>
</tr>
</tbody>
</table>
## Destinations intending to visit in Spring

Table 12. Where intending to visit by region of residence, Waves 22-25, UK

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>78%</td>
<td>32%</td>
<td>49%</td>
<td>80%</td>
<td>85%</td>
<td>80%</td>
<td>77%</td>
<td>75%</td>
<td>83%</td>
<td>74%</td>
<td>65%</td>
<td>73%</td>
</tr>
<tr>
<td>Scotland</td>
<td>9%</td>
<td>67%</td>
<td>11%</td>
<td>7%</td>
<td>11%</td>
<td>8%</td>
<td>11%</td>
<td>4%</td>
<td>10%</td>
<td>4%</td>
<td>25%</td>
<td>10%</td>
</tr>
<tr>
<td>Wales</td>
<td>8%</td>
<td>2%</td>
<td>39%</td>
<td>11%</td>
<td>7%</td>
<td>13%</td>
<td>5%</td>
<td>11%</td>
<td>2%</td>
<td>9%</td>
<td>0%</td>
<td>5%</td>
</tr>
<tr>
<td>South West</td>
<td>27%</td>
<td>3%</td>
<td>30%</td>
<td>57%</td>
<td>21%</td>
<td>20%</td>
<td>21%</td>
<td>31%</td>
<td>32%</td>
<td>31%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Yorkshire &amp; the Humber</td>
<td>11%</td>
<td>9%</td>
<td>2%</td>
<td>2%</td>
<td>38%</td>
<td>13%</td>
<td>6%</td>
<td>4%</td>
<td>9%</td>
<td>11%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>North West</td>
<td>10%</td>
<td>9%</td>
<td>5%</td>
<td>3%</td>
<td>12%</td>
<td>29%</td>
<td>10%</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
<td>0%</td>
<td>13%</td>
</tr>
<tr>
<td>London</td>
<td>10%</td>
<td>7%</td>
<td>4%</td>
<td>5%</td>
<td>8%</td>
<td>8%</td>
<td>22%</td>
<td>9%</td>
<td>7%</td>
<td>6%</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>South East</td>
<td>9%</td>
<td>3%</td>
<td>3%</td>
<td>7%</td>
<td>5%</td>
<td>5%</td>
<td>14%</td>
<td>19%</td>
<td>4%</td>
<td>8%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>East of England</td>
<td>8%</td>
<td>0%</td>
<td>3%</td>
<td>5%</td>
<td>4%</td>
<td>2%</td>
<td>9%</td>
<td>10%</td>
<td>27%</td>
<td>2%</td>
<td>0%</td>
<td>12%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>7%</td>
<td>1%</td>
<td>2%</td>
<td>6%</td>
<td>2%</td>
<td>4%</td>
<td>15%</td>
<td>2%</td>
<td>5%</td>
<td>12%</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>North East</td>
<td>5%</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
<td>5%</td>
<td>10%</td>
<td>4%</td>
<td>5%</td>
<td>0%</td>
<td>3%</td>
<td>16%</td>
<td>6%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>5%</td>
<td>4%</td>
<td>1%</td>
<td>3%</td>
<td>5%</td>
<td>2%</td>
<td>5%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
<td>10%</td>
<td>13%</td>
</tr>
</tbody>
</table>

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

Base: All respondents planning on taking a holiday or short break in the UK in Spring England n=707; Scotland n=148; Wales n=93; South West n=72; London n=136; North West n=96; Yorkshire and the Humber n=80; South East n=112; East of England n=43*; North East n=29** West Midlands n=89; East Midlands n=50* *Small base sizes **Very small base sizes. Treat with caution.
Life stage breakdown of Spring intenders - by region

- Consistent with previous reporting, the South West of England is the region of the U.K. set to attract the highest proportion of retirees in Spring, whilst London indexes highest on pre-nesters. London also indexes highest on intenders from a family life stage – however as with the West Midlands, a large proportion do not intend to travel with children (see next slide). Wales intenders also index high on families, and do intend to take these trips with children.

**Figure 82. Life stage of Spring Intenders by region, Percentage Waves 22-25, UK**

**Sources:** demographic questions and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: England n=650; Scotland n=167; Wales n=99; South West n=221; London n=95; North West n=59; Yorkshire and the Humber n=93; South East n=73; East of England n=57; North East n=40* West Midlands n=53 East Midlands n=43* *Small base sizes. Treat with caution.
Party composition of Spring Intenders - by region

- In line with a high proportion of families intending a visit, nearly 2 in 5 of Wales spring intenders expect to be accompanied by ‘children’ and 1 in 5 with ‘other members of their family’. Similarly reflecting the high incidence of ‘pre-nesters’, London intenders are the most likely to be accompanied by ‘friends’.

Table 13. Visitor party of Spring Intenders by region, Percentage Waves 22-25, UK

<table>
<thead>
<tr>
<th></th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>South West</th>
<th>Yorkshire &amp; the Humber</th>
<th>North West</th>
<th>London</th>
<th>South East</th>
<th>East of England</th>
<th>West Midlands</th>
<th>North East</th>
<th>East Midlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your partner</td>
<td>58%</td>
<td>66%</td>
<td>63%</td>
<td>67%</td>
<td>57%</td>
<td>45%</td>
<td>34%</td>
<td>55%</td>
<td>70%</td>
<td>58%</td>
<td>78%</td>
<td>68%</td>
</tr>
<tr>
<td>Children or young adults (aged 16-24)</td>
<td>33%</td>
<td>23%</td>
<td>42%</td>
<td>35%</td>
<td>31%</td>
<td>31%</td>
<td>30%</td>
<td>40%</td>
<td>30%</td>
<td>27%</td>
<td>15%</td>
<td>51%</td>
</tr>
<tr>
<td>Friend/s</td>
<td>19%</td>
<td>23%</td>
<td>11%</td>
<td>13%</td>
<td>19%</td>
<td>21%</td>
<td>32%</td>
<td>23%</td>
<td>7%</td>
<td>25%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Pets</td>
<td>9%</td>
<td>7%</td>
<td>15%</td>
<td>8%</td>
<td>6%</td>
<td>20%</td>
<td>9%</td>
<td>2%</td>
<td>12%</td>
<td>8%</td>
<td>4%</td>
<td>22%</td>
</tr>
<tr>
<td>With parents of older adults</td>
<td>7%</td>
<td>6%</td>
<td>11%</td>
<td>8%</td>
<td>7%</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
<td>12%</td>
<td>10%</td>
<td>10%</td>
<td>0%</td>
</tr>
<tr>
<td>Will travel alone</td>
<td>4%</td>
<td>7%</td>
<td>2%</td>
<td>6%</td>
<td>6%</td>
<td>3%</td>
<td>6%</td>
<td>2%</td>
<td>0%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Other members of my family</td>
<td>12%</td>
<td>12%</td>
<td>22%</td>
<td>12%</td>
<td>10%</td>
<td>11%</td>
<td>18%</td>
<td>13%</td>
<td>13%</td>
<td>8%</td>
<td>8%</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>1%</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
<td>7%</td>
<td>3%</td>
<td>7%</td>
<td>1%</td>
<td>12%</td>
<td>6%</td>
<td>0%</td>
</tr>
</tbody>
</table>
Financial segments of Spring Intenders - by region

- There are very few statistical differences in financial segments by spring destination. Wales appears the most likely to attract trip-takers that have either been hit hard financially or have to be careful. Scotland indexes high for intenders better off than before (West Midlands and North East also index high in this area but low base sizes mean these results should be treated with caution).

Figure 83. Financial segments of Spring Intenders by region, Percentage Waves 22-25, UK

<table>
<thead>
<tr>
<th>Region</th>
<th>'I've been hit hard'</th>
<th>'Things are ok but I have to be careful'</th>
<th>'I've not been affected'</th>
<th>'I'm better off than before'</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>12</td>
<td>39</td>
<td>38</td>
<td>11</td>
</tr>
<tr>
<td>Scotland</td>
<td>15</td>
<td>32</td>
<td>36</td>
<td>16</td>
</tr>
<tr>
<td>Wales</td>
<td>17</td>
<td>42</td>
<td>36</td>
<td>6</td>
</tr>
<tr>
<td>South West</td>
<td>13</td>
<td>37</td>
<td>39</td>
<td>11</td>
</tr>
<tr>
<td>Yorkshire &amp; the Humber</td>
<td>10</td>
<td>43</td>
<td>39</td>
<td>8</td>
</tr>
<tr>
<td>North West</td>
<td>11</td>
<td>43</td>
<td>37</td>
<td>10</td>
</tr>
<tr>
<td>London</td>
<td>8</td>
<td>45</td>
<td>32</td>
<td>15</td>
</tr>
<tr>
<td>South East</td>
<td>15</td>
<td>35</td>
<td>42</td>
<td>8</td>
</tr>
<tr>
<td>East of England</td>
<td>12</td>
<td>39</td>
<td>44</td>
<td>4</td>
</tr>
<tr>
<td>West Midlands</td>
<td>6</td>
<td>28</td>
<td>49</td>
<td>17</td>
</tr>
<tr>
<td>North East</td>
<td>11</td>
<td>36</td>
<td>32</td>
<td>21</td>
</tr>
<tr>
<td>East Midlands</td>
<td>17</td>
<td>40</td>
<td>33</td>
<td>10</td>
</tr>
</tbody>
</table>

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

Base: England n=650; Scotland n=167; Wales n=99; South West n=221; London n=95; North West n=59; Yorkshire and the Humber n=93; South East n=73; East of England n=57; North East n=40* West Midlands n=53 East Midlands n=43* *Small base sizes. Treat with caution.
Social grade of Spring Intenders - by region

- Social grades C1C2 have the highest representation for all destinations, although consistent with previous reporting, London attracts a higher proportion of ABs. In line with financial segments, Wales attracts a high proportion of DEs, although Scotland indexes the highest.

Figure 84. Social grade of Summer intenders by region, Percentage Waves 22-25, UK

<table>
<thead>
<tr>
<th>Region</th>
<th>AB</th>
<th>C1C2</th>
<th>DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>29</td>
<td>54</td>
<td>17</td>
</tr>
<tr>
<td>Scotland</td>
<td>20</td>
<td>56</td>
<td>17</td>
</tr>
<tr>
<td>Wales</td>
<td>27</td>
<td>52</td>
<td>21</td>
</tr>
<tr>
<td>South West</td>
<td>26</td>
<td>55</td>
<td>18</td>
</tr>
<tr>
<td>Yorkshire &amp; the Humber</td>
<td>27</td>
<td>56</td>
<td>17</td>
</tr>
<tr>
<td>North West</td>
<td>26</td>
<td>55</td>
<td>18</td>
</tr>
<tr>
<td>London</td>
<td>39</td>
<td>44</td>
<td>17</td>
</tr>
<tr>
<td>South East</td>
<td>30</td>
<td>56</td>
<td>14</td>
</tr>
<tr>
<td>East of England</td>
<td>33</td>
<td>48</td>
<td>10</td>
</tr>
<tr>
<td>West Midlands</td>
<td>41</td>
<td>57</td>
<td>11</td>
</tr>
<tr>
<td>North East</td>
<td>31</td>
<td>57</td>
<td>12</td>
</tr>
<tr>
<td>East Midlands</td>
<td>32</td>
<td>49</td>
<td>19</td>
</tr>
</tbody>
</table>

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

Base: England n=650; Scotland n=167; Wales n=99; South West n=221; London n=95; North West n=59; Yorkshire and the Humber n=93; South East n=73; East of England n=57; North East n=40*; West Midlands n=53; East Midlands n=43* *Small base sizes. Treat with caution.
Accommodation preference of Spring Intenders – by region

- Preferred accommodation patterns align with previous reporting periods – London intenders are the most likely to intend to stay in a private home, or hotel/motel/inn. The wide range of accommodation types selected for some regions underlines the uncertainty around the details of the trip (with other destinations being considered and only a minority having planned or booked their trip at the time of research).

Table 14. Accommodation preference of Spring Intenders by region, Percentage Waves 22-25, UK

<table>
<thead>
<tr>
<th></th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>South West</th>
<th>Yorkshire &amp; the Humber</th>
<th>North West</th>
<th>London</th>
<th>South East</th>
<th>East of England</th>
<th>West Midlands</th>
<th>North East</th>
<th>East Midlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private home</td>
<td>31%</td>
<td>27%</td>
<td>25%</td>
<td>16%</td>
<td>21%</td>
<td>29%</td>
<td>49%</td>
<td>35%</td>
<td>27%</td>
<td>44%</td>
<td>35%</td>
<td>26%</td>
</tr>
<tr>
<td>Hotel/ motel/ inn</td>
<td>34%</td>
<td>34%</td>
<td>33%</td>
<td>33%</td>
<td>32%</td>
<td>41%</td>
<td>44%</td>
<td>34%</td>
<td>19%</td>
<td>37%</td>
<td>42%</td>
<td>11%</td>
</tr>
<tr>
<td>Commercial rental</td>
<td>36%</td>
<td>31%</td>
<td>30%</td>
<td>33%</td>
<td>38%</td>
<td>38%</td>
<td>36%</td>
<td>18%</td>
<td>32%</td>
<td>31%</td>
<td>30%</td>
<td>37%</td>
</tr>
<tr>
<td>Camping / caravan</td>
<td>35%</td>
<td>22%</td>
<td>31%</td>
<td>33%</td>
<td>34%</td>
<td>23%</td>
<td>36%</td>
<td>20%</td>
<td>49%</td>
<td>36%</td>
<td>30%</td>
<td>45%</td>
</tr>
<tr>
<td>Guesthouse/ B&amp;B / Farmhouse</td>
<td>22%</td>
<td>17%</td>
<td>18%</td>
<td>22%</td>
<td>20%</td>
<td>12%</td>
<td>22%</td>
<td>12%</td>
<td>19%</td>
<td>28%</td>
<td>23%</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>4%</td>
<td>5%</td>
<td>1%</td>
<td>5%</td>
<td>3%</td>
<td>12%</td>
<td>1%</td>
<td>17%</td>
<td>14%</td>
<td>0%</td>
<td>8%</td>
</tr>
</tbody>
</table>

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>? And QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: England n=591; Scotland n=131; Wales n=64; South West n=167; London n=63; North West n=59; Yorkshire and the Humber n=60; South East n=48*; East of England n=41*; North East n=24** West Midlands n=27** East Midlands n=28** Small base sizes **Very small base sizes. Treat with caution.
Destination type of Spring Intenders - by region

- Destination type tends to reflect the area being considered. People considering a trip to the South West, South East and Wales are more likely to intend to visit a ‘traditional coastal/seaside town’, Scotland and North West intenders over index on trips to ‘mountains or hills’, and London intenders on a ‘city or large town’. The consideration of destination types that don’t align with the destination (e.g. 9% of London intenders considering a trip to the rural coastline) underlines the lack of certainty and the potential for destination switching.

Table 15. Destination type of Spring Intenders by region, Percentage Waves 22-25, UK

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>England</th>
<th>Scotland</th>
<th>Wales</th>
<th>South West</th>
<th>Yorkshire &amp; the Humber</th>
<th>North West</th>
<th>London</th>
<th>South East</th>
<th>East of England</th>
<th>West Midlands</th>
<th>North East</th>
<th>East Midlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countryside or village</td>
<td>29%</td>
<td>37%</td>
<td>30%</td>
<td>28%</td>
<td>27%</td>
<td>32%</td>
<td>13%</td>
<td>31%</td>
<td>29%</td>
<td>35%</td>
<td>23%</td>
<td>48%</td>
</tr>
<tr>
<td>City or large town</td>
<td>28%</td>
<td>25%</td>
<td>13%</td>
<td>8%</td>
<td>22%</td>
<td>34%</td>
<td>84%</td>
<td>24%</td>
<td>26%</td>
<td>47%</td>
<td>35%</td>
<td>15%</td>
</tr>
<tr>
<td>Traditional coastal/seaside town</td>
<td>31%</td>
<td>21%</td>
<td>41%</td>
<td>50%</td>
<td>32%</td>
<td>12%</td>
<td>5%</td>
<td>43%</td>
<td>35%</td>
<td>4%</td>
<td>27%</td>
<td>12%</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>21%</td>
<td>25%</td>
<td>14%</td>
<td>30%</td>
<td>25%</td>
<td>10%</td>
<td>9%</td>
<td>12%</td>
<td>11%</td>
<td>16%</td>
<td>10%</td>
<td>0%</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>16%</td>
<td>31%</td>
<td>14%</td>
<td>8%</td>
<td>19%</td>
<td>33%</td>
<td>8%</td>
<td>12%</td>
<td>4%</td>
<td>8%</td>
<td>24%</td>
<td>16%</td>
</tr>
</tbody>
</table>

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip? QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: England n=591; Scotland n=131; Wales n=64; South West n=167; London n=63; North West n=59; Yorkshire and the Humber n=60; South East n=48*; East of England n=41*; North East n=24** West Midlands n=27** East Midlands n=28** *Small base sizes **Very small base sizes. Treat with caution.
Trip duration of Spring Intenders – by region

- Most destinations are set to generate a higher proportion of longer breaks than short breaks – in particularly the South East, the South West, Yorkshire and the Humber and Scotland.

Figure 85. Length of next Spring U.K. holiday or short break by destination region, Percentage Waves 22-25, U.K.

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? Base: England n=591; Scotland n=131; Wales n=64; South West n=167; London n=63; North West n=59; Yorkshire and the Humber n=60; South East n=48*; East of England n=41*; North East n=24** West Midlands n=27** East Midlands n=28** *Small base sizes **Very small base sizes. Treat with caution.
Estimated spend for Spring Intenders – by destination

- The anticipated total trip spend among spring intenders is relatively consistent across destinations, although Wales generates the highest average spend at £983.

**Figure 86. Anticipated trip spend for Spring trips by destination region, Percentage, Average, Waves 22-25, UK**

<table>
<thead>
<tr>
<th>Average (£)</th>
<th>£767</th>
<th>£708</th>
<th>£983</th>
<th>£720</th>
<th>£766</th>
<th>£736</th>
<th>£745</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>£1000+</strong></td>
<td>25</td>
<td>27</td>
<td>39</td>
<td>29</td>
<td>21</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td><strong>£500-£999</strong></td>
<td>33</td>
<td>37</td>
<td>35</td>
<td>39</td>
<td>34</td>
<td>35</td>
<td>25</td>
</tr>
<tr>
<td><strong>£200-£499</strong></td>
<td>34</td>
<td>30</td>
<td>23</td>
<td>25</td>
<td>43</td>
<td>35</td>
<td>41</td>
</tr>
<tr>
<td><strong>Under £200</strong></td>
<td>9</td>
<td>6</td>
<td>4</td>
<td>7</td>
<td>2</td>
<td>10</td>
<td>13</td>
</tr>
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QVB6e. Approximately how much do you think this trip will cost in total?

Base: England n=591; Scotland n=131; Wales n=64; South West n=167; London n=63; North West n=59; Yorkshire and the Humber n=60; South East n=48*; East of England n=41*; North East n=24** West Midlands n=27** East Midlands n=28**  *Small base sizes **Very small base sizes. Treat with caution.
8. Understanding Intenders and ‘Persuadables’
Definitions used within this section

• In this section we look at the profiles and attitudes of a number of separate audiences:
  
  – **Multiple Trip-takers**: UK adults that plan on taking overnight domestic trips in both Spring and Summer
  – **Spring intenders**: UK adults who intend to take their next domestic overnight trip between April and June
  – **Summer Intenders**: UK adults who intend to take their next domestic overnight trip between July and September
  – ‘Persuadables’: UK adults who would like to take a domestic overnight trip but don’t know when they might take it
  – **Non-planners**: UK adults who don’t have any domestic overnight trips planned.
Life stage and social grade

• ‘Multiple Trip-takers’ are most likely to be families and belonging to social grades AB – both significantly more represented than the wider population. Spring and summer intenders also over index with these audiences, but are made up of a higher proportion of ‘older independents’.

• In contrast, and consistent with previous reporting, ‘Persuadables’ and ‘Non-planners’ index higher among the older life stages and social grades C2DE

Figure 87. Breakdown by life stage, Percentage Waves 22-25, UK

Figure 88. Breakdown by social grade, Percentage Waves 22-25, UK

Source: Demographic questions. Life stage definitions: Pre-nesters – aged 16-34 without children in household; Families – aged 16-64 with children in household; Older independents – aged 35-64 with no children in household; Retirement age – aged 65+. Base: U.K. population n=7,037 Multiple Trip-takers n=384; Spring intenders n=1,144; Summer intenders n=1,408, Persuadables n=1,589, Non-planners n=2,274.
Financial segments and financial impact

- ‘Multiple Trip-takers’ and intenders in both spring and summer, are more likely than the wider U.K. population to state they are either better off financially than before the pandemic or that they have not been affected.
- The majority of Persuadables and Non-planners have either been hit hard financially or have to be careful. However, it’s unlikely that financial concerns drive their leisure decisions, around 2 in 5 stating they are either better off or unaffected by the pandemic.

Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic?

Base: U.K. population n=7,037 Multiple trip-takers n=384; Spring intenders n=1,144; Summer intenders n=1,408, Persuadables n=1,589, Non-planners n=2,274.
Anticipated number of U.K. trips this year compared to normal

- Compared to normal, all audiences anticipate taking fewer overnight U.K. trips by June 2021. However, this is least likely to be the case amongst multiple trip-takers who only anticipate ‘net -6’ fewer short breaks and ‘net -8’ fewer longer trips – compared to ‘net -34’ and ‘net -36’ in the wider population. Anticipated trips are progressively lower amongst intenders, persuadables and non-planners – the latter two are also more likely than average to say they ‘don’t know’.

**Figure 91. Number of UK short breaks (1-3 nights) by June 2021 compared to normal, Percentage Waves 24-25, UK**

**Figure 92. Number of UK longer trips of 4+ nights by June 2021 compared to normal, Percentage Waves 24-25, UK**

QVB1. Compared to normal, are you likely to take more, fewer or about the same number of UK holidays/short breaks between now and June2021? Base: U.K. population n=3,518 Multiple Trip-takers n=253; Spring intenders n=493; Summer intenders n=963, Persuadables n=813, Non-planners n=1,142. Filtered on waves 24-25 to reflect recent sentiment
Anticipated number of OVERSEAS trips this year compared to normal

• All audiences continue to anticipate a substantial net decline in the amount of overseas trips they will take compared to normal.

Figure 93. Number of OVERSEAS short breaks (1-3 nights) By June 2021 compared to normal, Percentage Waves 24-25, UK

Figure 94. Number of OVERSEAS longer trips of 4+ nights By June 2021 compared to normal, Percentage Waves 24-25, UK

QVB1. Compared to normal, are you likely to take more, fewer or about the same number of UK holidays/short breaks between now and June2021? Base: U.K. population n=3,518  Multiple Trip-takers n=253; Spring intenders n=493; Summer intenders n=963, Persuadables n=813, Non-planners n=1,142. Filtered on waves 24-25 to reflect recent sentiment
Appetite for Risk

- There continues to be a link between intent to take an overnight domestic trip and the levels of comfort in participating in indoor activities.
- Multiple Trip-takers and Intenders in both periods are the most comfortable shopping, eating at a restaurant and travelling by public transport, whilst Persuadables and Non-planners are significantly less so.
- ‘Proximity of intent’ also correlates with comfort – spring intenders are more likely to be comfortable with most indoor activities than summer intenders.

Figure 95. Level of comfort conducting a range of activities separately and combined, Net very and fairly comfortable, Waves 24-25, UK
Confidence in the ability to take a U.K. short break or holiday

- Multiple Trip-takers and spring intenders exhibit significantly higher confidence than other audiences that trips will go ahead between April and June. Summer intenders are almost as likely to be confident from July onwards, with all three audiences equally confident about trips in September.
- It’s not until September that at least half of ‘persuadables’ are confident a trip would go ahead. The confidence of this audience has continued to decline - when asked the same question in October 2020, 65% felt confident a trip would go ahead in this period.

Figure 96. Confidence in taking a UK short break or holiday across a range of different months, Net percentage very and fairly confident, Waves 24-25, UK

QVB7anew. We’d like you to imagine that you have booked a UK holiday or short break in each of the six 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: U.K. population n=3,518 Multiple Trip-takers n=253; Spring intenders n=493; Summer intenders n=963, Persuadables n=813, Non-planners n=1,142. Filtered on waves 24-25 to reflect recent sentiment
Reasons for not feeling confident about taking trips in the U.K. between April and June

- Restrictions on the ‘holiday product’ (e.g. things to do, places to eat and opportunities to socialise) and ‘government restrictions on travel’ are the leading drivers of low confidence in the ability to go on an overnight trip between April and June.
- For a high proportion however, negative consequences of taking a trip – such as unwelcoming residents and concerns about catching COVID – are influential, particularly amongst Persuadables and Non-planners. External factors such as ‘personal finances’ are also influential for these audiences.

Figure 97. Reasons for not being confident about travelling between April and June, Percentage Waves 24-25, UK, Ranked on Multiple Trip-takers

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: U.K. population n=1,080  Multiple Trip-takers n=72; Spring intenders n=145; Summer intenders n=348, Persuadables n=246, Non-planners n=285.
Filtered on waves 24-25 to reflect recent sentiment
Appendix: Methodology
Methodology

- The findings in this report are based on a weekly online survey conducted amongst U.K. adults.
- This sample used in the survey is representative of adults aged 16+ in terms of gender, age, government region and social grade.
- In the initial stage, a core set of 1,500 adults is recruited and interviewed. This is then ‘boosted' in Wales and Scotland to ensure sufficient base sizes for separate nation analysis.
- The data are then subsequently weighted to ensure the results are representative of the attitudes for the U.K. overall and within each member nation.
- This report aggregates the results taken from Waves 22-25 of the COVID-19 consumer weekly tracker, with reference to previous waves when direct comparisons are made.
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.