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 will repeated across a 13 week period with the first wave published on 1 June 2020.

• The findings in this report are based on weeks 5 to 8 with comparisons to weeks 1 to 4 where appropriate. This is based on fieldwork taking place during the following dates:
  – 15-19 June; 22-26 June; 29 June-3 July; 6-10 July
Definitions used within this report (1)

• In this report we look at the profiles and attitudes of a number of separate audiences:
  – **Multiple trip-takers:** Members of the public who intend to take a U.K. holiday or short break between June and September this year and have at least one other domestic trip planned this year
  – **Summer Intenders:** Members of the public who state their next U.K. holiday or short break will be between June and September this year (24% of U.K. population)
  – **Winter Intenders:** Members of the public who state their next U.K. holiday or short break will be from October 2020 to March 2021 (21% of the U.K. population)
  – **‘Persuadables’:** Members of the public who would like to take a U.K. holiday or short break but do not know when they will take it (19% of the U.K. population)
  – **Non-planners:** Don’t have a U.K. holiday or short break planned (21% of the U.K. population)

• To deliver clearer profiles, we also profile 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 (2)

- 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
Profiling Intenders
When anticipating going on next U.K. short break or holiday

- 24% of those interviewed in weeks 5-8 anticipate going on their next U.K. short break or holiday by September, significantly more than the 21% that intended to do so in weeks 1 to 4. The proportion of ‘Winter Intenders’ has also increased, from 19% to 21%.
- 58% of Summer Intenders intend to take more than one trip by the end of the year. This is the same proportion as in weeks 1 to 4, but due to the higher proportion of Summer Intenders, it is a higher number in absolute terms.

Figure 1. When anticipate GOING on next UK trip, Percentage Weeks 5-8, UK

<table>
<thead>
<tr>
<th></th>
<th>Non-planners</th>
<th>Persuadables</th>
<th>Spring/Summer 2021 Intenders</th>
<th>Winter Intenders</th>
<th>Summer Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>24%</td>
<td>21</td>
<td>19</td>
<td>16</td>
<td>21</td>
<td>24</td>
</tr>
</tbody>
</table>

Figure 2. Proportion of Summer Intenders who have more than one trip planned in 2020, Percentage Weeks 5-8, UK

- Summer Intenders with more than one trip planned*

* Additional trips may be taken outside of the summer period.

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. Weeks 5-8 n=6,993
Demographics of intenders compared to the general population

- Compared to the overall U.K. adult population, both ‘Summer Intenders’ and ‘Winter Intenders’ are more likely to be ‘families’ and from social grades AB. Broadly speaking, Summer and Winter Intenders are demographically similar, with the latter showing a slight younger bias.
- The incidence of ‘Retiree’ and DE Summer Intenders has increased since weeks 1 to 4, suggesting these groups may be helping to drive overall growth in the summer audience.

Figure 3. Breakdown of intenders by life stage, Percentage Weeks 5-8, UK

Figure 4. Breakdown of intenders by social grade, Percentage Weeks 5-8, UK

Source: Demographic questions. Base: All respondents. UK population n=6,993; Summer Intenders n=1,598; Winter Intenders n=1,442
Life stage and social grade combined

- Notably, both AB and C1C2 families are the only life stage / social grade combination that indexes significantly higher than the overall U.K. population for those intending to take summer domestic breaks.
- The slight younger bias towards Winter Intenders, especially C1C2s, is also evident.

Table 1. Life stage and social grade combined, Percentage, Weeks 5-8, UK

<table>
<thead>
<tr>
<th>Category</th>
<th>U.K. Population</th>
<th>Summer Intenders</th>
<th>Winter Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-nesters – AB</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Pre-nesters - C1C2</td>
<td>11%</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>Pre-nesters – DE</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Families – AB</td>
<td>10%</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Families - C1C2</td>
<td>15%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Families – DE</td>
<td>3%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Older Independents – AB</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Older Independents - C1C2</td>
<td>19%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Older Independents – DE</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Retirement age – AB</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Retirement age - C1C2</td>
<td>7%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Retirement age - DE</td>
<td>11%</td>
<td>10%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: Demographic questions. Base: All respondents. UK population n=6,993; Summer Intenders n=1,598; Winter Intenders n=1,442
Financial segments and financial impact of COVID-19 on intenders

- As in weeks 1 to 4, Summer Intenders are more likely than both the general population and Winter Intenders to be ‘financially better off than they were before the pandemic’, although this segment of the population still makes up a minority. The majority of both the overall U.K. adult population and Intenders either have not been affected or feel they have to be careful.

Figure 5. Breakdown of intenders by financial segments, Percentage Weeks 5-8, UK

Figure 6. Employment impact on intenders, Percentage Weeks 5-8, 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?
Base: All respondents. UK population n=6,993; Summer Intenders n=1,598; Winter Intenders n=1,442
Type of destination for next U.K. short break or holiday

- ‘Traditional coastal/seaside town’ is the main destination type for a trip this summer, followed by ‘countryside or village’. Both destination types have increased in popularity since weeks 1 to 4. ‘City or large town’ is significantly less preferred as a summer destination type than in weeks 1 to 4.
- However, in the winter months, ‘city or large town’ has increased preference and is now the clear number one destination of choice, potentially driven by the younger profile of these Intenders.

**Figure 7. Main type of destination for Summer Intenders, Percentage Weeks 5-8, UK**

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional coastal/seaside town</td>
<td>34</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>33</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>23</td>
</tr>
<tr>
<td>City or large town</td>
<td>21</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>15</td>
</tr>
</tbody>
</table>

**Figure 8. Main type of destination for Winter Intenders, Percentage Weeks 5-8, UK**

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>City or large town</td>
<td>34</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>29</td>
</tr>
<tr>
<td>Traditional coastal/seaside town</td>
<td>26</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>20</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>15</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?  
Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,598; Winter Intenders n=1,442
Life stage breakdown of Summer Intenders - by destination type

- Families are the largest life stage for all destination types this summer. However it's worth noting that not all of those in a family life stage will necessarily take children on their trip. This is particularly the case for 'city or large town intenders' (see slide 14).
- Older independents tend to be the second largest life stage with the exception of 'city or large towns' which contains a relatively high proportion of pre-nesters. ‘Retirement age’ Summer Intenders are most likely to visit a ‘countryside/village’ or ‘traditional coastal/seaside town’, perhaps helping to increase the preference of these destinations since weeks 1 to 4.

Figure 9. Life stage of Summer Intenders by destination type, Percentage Weeks 5-8, UK

Demographic questions and 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; Summer Intenders n=1,598; Countryside or village n=534; Traditional coastal/seaside town n=527; City or large town n=357; Rural coastline n=372; Mountains or hills n=271
The majority of Summer Intenders are in social grades C1C2 for each destination type. Social grades AB have the highest representation in trips to ‘mountains or hills’ and ‘cities or large towns’.

**Figure 10. Social grade of Summer Intenders by destination type, Percentage Weeks 5-8, UK**

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>AB</th>
<th>C1C2</th>
<th>DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer Intenders</td>
<td>25</td>
<td>53</td>
<td>21</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>26</td>
<td>51</td>
<td>23</td>
</tr>
<tr>
<td>Traditional coastal/seaside town</td>
<td>22</td>
<td>57</td>
<td>21</td>
</tr>
<tr>
<td>City or large town</td>
<td>32</td>
<td>47</td>
<td>21</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>27</td>
<td>55</td>
<td>18</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>36</td>
<td>52</td>
<td>12</td>
</tr>
</tbody>
</table>

Demographic questions and 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; Summer Intenders n=1,598; Countryside or village n=534; Traditional coastal/seaside town n=527; City or large town n=357; Rural coastline n=372; Mountains or hills n=271
Make-up of visitor party for next U.K. holiday or short break

- Both Summer and Winter Intenders are most likely to travel with their partner (57% and 54% respectively), followed by children or young adults (35% in summer and 28% in winter).

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 Summer Intenders n=1,598; Winter Intenders n=1,442
*Child or young adults includes respondents that state ‘children’ or ‘grandchildren’ and 16-24 year olds stating they will travel with their parents

Figure 11. Visitor party make-up for Summer Intenders, Percentage Weeks 5-8, UK

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner</td>
<td>57%</td>
</tr>
<tr>
<td>Child, grandchild or young adults*</td>
<td>35%</td>
</tr>
<tr>
<td>Other members of family</td>
<td>16%</td>
</tr>
<tr>
<td>Friends</td>
<td>15%</td>
</tr>
<tr>
<td>Your parents (of adults aged 25+ only)</td>
<td>9%</td>
</tr>
<tr>
<td>Pets</td>
<td>9%</td>
</tr>
<tr>
<td>Intend to travel alone</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
</tbody>
</table>

Figure 12. Visitor party make-up for Winter Intenders, Percentage Weeks 5-8, UK

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner</td>
<td>54%</td>
</tr>
<tr>
<td>Child, grandchild or young adults*</td>
<td>28%</td>
</tr>
<tr>
<td>Friends</td>
<td>20%</td>
</tr>
<tr>
<td>Other members of family</td>
<td>17%</td>
</tr>
<tr>
<td>Your parents (of adults aged 25+ only)</td>
<td>7%</td>
</tr>
<tr>
<td>Pets</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
<tr>
<td>Intend to travel alone</td>
<td>5%</td>
</tr>
</tbody>
</table>
Visitor party breakdown of Summer Intenders - by destination type

- A partner is the most likely travel companion for all destination types, although significantly less so for trips to ‘cities or large towns’ (42% compared to 57%) whereas travel with ‘friends’ indexes relatively high (18% compared to 15% on average) for this destination type.
- Parties with children or young adults are most likely to visit coastal destinations, in particular ‘rural coastlines’. Although a high incidence of intenders are in the family life stage, ‘cities or large towns’ and ‘mountains or hills’ show a lower than average composition of children or young adults.

Table 2. Visitor party by destination type, Percentage Weeks 5-8, UK

<table>
<thead>
<tr>
<th></th>
<th>Summer Intenders</th>
<th>Traditional 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>Your partner</td>
<td>57%</td>
<td>58%</td>
<td>61%</td>
<td>42%</td>
<td>54%</td>
<td>54%</td>
</tr>
<tr>
<td>Children or young adults</td>
<td>35%</td>
<td>36%</td>
<td>30%</td>
<td>28%</td>
<td>44%</td>
<td>31%</td>
</tr>
<tr>
<td>Children or young adults</td>
<td>35%</td>
<td>36%</td>
<td>30%</td>
<td>28%</td>
<td>44%</td>
<td>31%</td>
</tr>
<tr>
<td>Friends</td>
<td>15%</td>
<td>16%</td>
<td>11%</td>
<td>18%</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>With parents of older</td>
<td>9%</td>
<td>10%</td>
<td>9%</td>
<td>11%</td>
<td>8%</td>
<td>0%</td>
</tr>
<tr>
<td>adults</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other family member</td>
<td>16%</td>
<td>20%</td>
<td>16%</td>
<td>12%</td>
<td>15%</td>
<td>7%</td>
</tr>
<tr>
<td>Pets</td>
<td>9%</td>
<td>8%</td>
<td>10%</td>
<td>4%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Will travel alone</td>
<td>5%</td>
<td>2%</td>
<td>5%</td>
<td>8%</td>
<td>1%</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
<td>5%</td>
<td>5%</td>
<td>8%</td>
</tr>
</tbody>
</table>

QVB4d. With whom are you likely to be spending your holiday? 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; Summer Intenders n=1,598 and exclusively Countryside or village n=297; Traditional coastal/seaside town n=312; City or large town n=244; Rural coastline n=163; Mountains or hills n=85
Type of accommodation for next U.K. short break or holiday

- There is a relatively even split in accommodation types for trips planned for this summer, with ‘caravan/camping’ (37%), ‘hotel/motel/inn’ (35%), ‘a private home’ (34%) and ‘commercial rental’ (also 34%) in the top four. Compared to weeks 1 to 4, there has been a slight rise in intention to stay in a ‘commercial rental’ this summer.
- Among those intending to travel between October 2020 and March 2021 ‘a private home’ (42%) and ‘hotel/motel/inn’ (41%) are the preferred accommodation types, while caravan/camping significantly declines in popularity, likely linked to the change in weather and shift towards more urban breaks.

Figure 13. Accommodation planning on staying in on next UK overnight trip for Summer Intenders, Net percentage
Weeks 5-8, UK

Figure 14. Accommodation planning on staying in on next UK overnight trip for Winter Intenders, Net percentage
Weeks 5-8, UK
Accommodation preference for Summer Intenders – by life stage

- Different accommodation types tend to attract different life stages. ‘Caravan/camping’, ‘commercial rental’ and ‘private home’ index highest on families. ‘Hotel/motels/inns’ index higher for the older life stages. Pre-nesters index highly for ‘a private home’ particularly for staying at ‘Airbnb’ or similar homestay options. Summer Intenders of retirement age index highest for hotels/motels/inns.

Figure 15. Life stage breakdown of Summer Intenders by accommodation preference, Percentage Weeks 5-8, UK

Demographic questions and 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; Summer Intenders n=1,598; Caravan/camping n=605; A private home n=576; Hotel/motel/inn n=565; Commercial rental n=565; Guesthouse/ B&B/ farmhouse n=335
Social grade of Summer Intenders - *by accommodation preference*

- Social grade representation is relatively even across accommodation types. 'A private home' and 'commercial rental' are the accommodation types that index highest for the AB social grades. 'Hotel/motel/inns' index highest for social grades DE, linked to the higher proportion of 'retirees'.

Figure 16. Social grade breakdown of Summer Intenders by accommodation preference, Percentage Weeks 5-8, UK

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>AB</th>
<th>C1C2</th>
<th>DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer Intenders</td>
<td>25</td>
<td>53</td>
<td>21</td>
</tr>
<tr>
<td>Caravan/Camping</td>
<td>30</td>
<td>54</td>
<td>16</td>
</tr>
<tr>
<td>A private home</td>
<td>33</td>
<td>52</td>
<td>15</td>
</tr>
<tr>
<td>Hotel/motel/inn</td>
<td>28</td>
<td>51</td>
<td>21</td>
</tr>
<tr>
<td>Commercial rental</td>
<td>35</td>
<td>51</td>
<td>15</td>
</tr>
<tr>
<td>Guesthouse/ B&amp;B/ Farmhouse</td>
<td>30</td>
<td>56</td>
<td>14</td>
</tr>
</tbody>
</table>

Demographic questions and 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 between June-Sept. n=1598; Caravan/camping n=605; A private home n=576; Hotel/motel/inn n=548; Commercial rental n=565; Guesthouse/ B&B/ farmhouse n=335
Party composition of Summer Intenders – by accommodation type

- Party composition largely aligns with life stage profiles. Caravan/camping and commercial rental over-index on ‘children or young adults’. Private homes exhibit a strong connection with accommodating ‘other family members’ and ‘friends’.

Table 3. Visitor party by accommodation type, Percentage Weeks 5-8, UK

<table>
<thead>
<tr>
<th></th>
<th>Summer Intenders</th>
<th>Caravan/Camping</th>
<th>A private home</th>
<th>Hotel/ motel/ inn</th>
<th>Commercial rental</th>
<th>Guesthouse/ B&amp;B / Farmhouse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your partner</td>
<td>57%</td>
<td>67%</td>
<td>44%</td>
<td>65%</td>
<td>62%</td>
<td>48%</td>
</tr>
<tr>
<td>Children or young adults (aged 16-24)</td>
<td>35%</td>
<td>40%</td>
<td>33%</td>
<td>24%</td>
<td>46%</td>
<td>28%</td>
</tr>
<tr>
<td>Friend/s</td>
<td>15%</td>
<td>9%</td>
<td>18%</td>
<td>15%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>With parents of older adults</td>
<td>9%</td>
<td>8%</td>
<td>15%</td>
<td>5%</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Other family member</td>
<td>16%</td>
<td>17%</td>
<td>23%</td>
<td>11%</td>
<td>18%</td>
<td>24%</td>
</tr>
<tr>
<td>Pets</td>
<td>9%</td>
<td>16%</td>
<td>6%</td>
<td>4%</td>
<td>12%</td>
<td>3%</td>
</tr>
<tr>
<td>Will travel alone</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>8%</td>
<td>2%</td>
<td>11%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>0%</td>
</tr>
</tbody>
</table>
Accommodation preference of Summer Intenders – by destination type

- Accommodation preference differs significantly by destination type – mountains or hills and rural coastline are most likely to generate a ‘caravan/camping’ preference. For countryside or villages, ‘commercial rental’ is the leading choice. In cities and large towns, ‘hotel/motel/inn’ and ‘a private home’ both index significantly higher than average.

Table 4. Accommodation type by destination type, Percentage Weeks 5-8, UK

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>Summer Intenders</th>
<th>Traditional 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>Caravan/Camping</td>
<td>37%</td>
<td>36%</td>
<td>32%</td>
<td>28%</td>
<td>43%</td>
<td>60%</td>
</tr>
<tr>
<td>A private home</td>
<td>34%</td>
<td>25%</td>
<td>27%</td>
<td>48%</td>
<td>30%</td>
<td>45%</td>
</tr>
<tr>
<td>Hotel/ motel/ inn</td>
<td>35%</td>
<td>31%</td>
<td>26%</td>
<td>51%</td>
<td>20%</td>
<td>27%</td>
</tr>
<tr>
<td>Commercial rental</td>
<td>34%</td>
<td>23%</td>
<td>35%</td>
<td>29%</td>
<td>35%</td>
<td>44%</td>
</tr>
<tr>
<td>Guesthouse/ B&amp;B / Farmhouse</td>
<td>21%</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
<td>31%</td>
</tr>
<tr>
<td>Other</td>
<td>11%</td>
<td>5%</td>
<td>8%</td>
<td>14%</td>
<td>8%</td>
<td>29%</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 QVB5 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; Summer Intenders n=1,598; Caravan/camping n=257; A private home n=215; Hotel/motel/inn n=271; Commercial rental n=190; Guesthouse/ B&B/ farmhouse n=72
Trip length of next UK holiday or short break

Both Winter and Summer Intenders are more likely to anticipate taking a short-break of 1-3 nights than a longer holiday on their next domestic trip. Figures are near-identical to weeks 1 to 4, suggesting that although the incidence of trips has increased, their average length has not.

Figure 17. Length of next UK holiday or short break by time period, Percentage Weeks 5-8, UK

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,598; Winter Intenders n=1,442
Breakdown of trip length - *by life stage and social grade*

- As in weeks 1 to 4, longer trips are comprised of a higher proportion of retirees. There is minimal difference by social grade.

**Figure 18. Life stage breakdown of Summer Intenders by trip length, Percentage Weeks 5-8, UK**

- Retirement age: Summer short breaks (1-3 nights) 18%, Summer holidays (4+ nights) 22%
- Older independents: Summer short breaks (1-3 nights) 29%, Summer holidays (4+ nights) 27%
- Families: Summer short breaks (1-3 nights) 32%, Summer holidays (4+ nights) 34%
- Pre-nesters: Summer short breaks (1-3 nights) 21%, Summer holidays (4+ nights) 16%

**Figure 19. Social grade breakdown of Summer Intenders by trip length, Percentage Weeks 5-8, UK**

- AB: Summer short breaks (1-3 nights) 24%, Summer holidays (4+ nights) 26%
- C1C2: Summer short breaks (1-3 nights) 55%, Summer holidays (4+ nights) 52%
- DE: Summer short breaks (1-3 nights) 21%, Summer holidays (4+ nights) 22%

Demographic questions and QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All respondents planning on taking a holiday or short break in the UK between June-Sept. Summer short breaks n=841; Summer holidays n=682
Trip length of Summer Intenders – by destination type

- Holidays of 4+ nights make up the majority of trips to ‘rural coastlines’ and ‘mountains or hills’. For all other trip types, short breaks are more prevalent – in particular to cities or large towns, where they make up almost two-thirds of trips.

Figure 20. Length of next June to September UK holiday or short break by destination type, Percentage Weeks 5-8, UK

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? And QVB5 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; Summer Intenders n=1,598 and exclusively Countryside or village n=297; Traditional coastal/seaside town n=312; City or large town n=244; Rural coastline n=163; Mountains or hills n=85
Anticipated spend on next U.K. holiday or short break

- The average estimated spend for trips taken this summer is £676, lower than the anticipated spend during the winter months (£715). Almost 1 in 4 Summer Intenders estimate a total trip cost of more than £1,000.

Figure 21. Anticipated spend for Intenders, Percentage Weeks 5-8, UK

- Under £200: Summer Intenders 12%, Winter Intenders 9%
- £200-£499: Summer Intenders 39%, Winter Intenders 40%
- £500-£999: Summer Intenders 26%, Winter Intenders 30%
- £1000+: Summer Intenders 23%, Winter Intenders 21%

Figure 22. Anticipated average spend for Intenders, Average, Weeks 5-8, UK

- Summer Intenders: £676
- Winter Intenders: £715

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; Summer Intenders n=1,455; Winter Intenders n=1,316
Anticipated spend for Summer Intenders – *by life stage and social grade*

- Anticipate spend is likely to be highest amongst ‘families’ (set to spend £817 on average) and ABs (£781), both of whom generate the highest proportion of £1,000+ trips.

**Figure 23. Anticipated trip spend for Summer Intenders by life stage, Percentage, Average, Weeks 5-8, UK**

<table>
<thead>
<tr>
<th>Average</th>
<th>£676</th>
<th>£700</th>
<th>£817</th>
<th>£570</th>
<th>£589</th>
</tr>
</thead>
<tbody>
<tr>
<td>£1000+</td>
<td>23</td>
<td>20</td>
<td>32</td>
<td>16</td>
<td>19</td>
</tr>
<tr>
<td>£500-£999</td>
<td>26</td>
<td>19</td>
<td>29</td>
<td>28</td>
<td>27</td>
</tr>
<tr>
<td>£200-£499</td>
<td>39</td>
<td>45</td>
<td>27</td>
<td>46</td>
<td>42</td>
</tr>
<tr>
<td>Under £200</td>
<td>12</td>
<td>16</td>
<td>12</td>
<td>10</td>
<td>12</td>
</tr>
</tbody>
</table>

**Figure 24. Anticipated trip spend for Summer Intenders by social grade, Percentage, Average, Weeks 5-8, UK**

<table>
<thead>
<tr>
<th>Average</th>
<th>£781</th>
<th>£640</th>
<th>£645</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB</td>
<td>29</td>
<td>21</td>
<td>20</td>
</tr>
<tr>
<td>C1C2</td>
<td>24</td>
<td>28</td>
<td>25</td>
</tr>
<tr>
<td>DE</td>
<td>32</td>
<td>41</td>
<td>42</td>
</tr>
</tbody>
</table>

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; Summer Intenders n=1,455; Pre-nesters n=308; Families n=501; Older independents n=397; Retirement age n=249; AB n=429; C1C2 n=642, DE n=384
Anticipated spend for Summer Intenders – by accommodation preference

- ‘Commercial property’ visitors are likely to spend the most (at £938 per trip). Other accommodation types are likely to be associated with lower overall spend, particularly in the case of ‘camping/caravanning’.

Figure 25. Anticipated trip spend for Summer Intenders by accommodation preference, Percentage, Average, Weeks 5-8, UK

<table>
<thead>
<tr>
<th>Average (£)</th>
<th>£676</th>
<th>£561</th>
<th>£491</th>
<th>£938</th>
<th>£538</th>
<th>£560</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer Intenders</td>
<td>23</td>
<td>16</td>
<td>14</td>
<td>37</td>
<td>18</td>
<td>17</td>
</tr>
<tr>
<td>Hotel/motel/inn</td>
<td>26</td>
<td>28</td>
<td>23</td>
<td>38</td>
<td>18</td>
<td>29</td>
</tr>
<tr>
<td>Camping/Caravanning</td>
<td>39</td>
<td>48</td>
<td>44</td>
<td>38</td>
<td>39</td>
<td>47</td>
</tr>
<tr>
<td>Commercial property</td>
<td>12</td>
<td>8</td>
<td>19</td>
<td>24</td>
<td>24</td>
<td>7</td>
</tr>
<tr>
<td>Private home</td>
<td>12</td>
<td>8</td>
<td>19</td>
<td>24</td>
<td>24</td>
<td>7</td>
</tr>
<tr>
<td>B&amp;B/Farmhouse</td>
<td>12</td>
<td>8</td>
<td>19</td>
<td>24</td>
<td>24</td>
<td>7</td>
</tr>
</tbody>
</table>

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; Summer Intenders n=639; and exclusively Caravan/camping n=239; A private home n=87; Hotel/motel/inn n=263; Commercial rental n=186; Guesthouse/ B&B/ Farmhouse n=71
Anticipated spend for Summer Intenders – by destination type

- Across destination types, average spend is relatively consistent. Mountains or hills are the only type of destination where average estimated total trip spend exceeds £700, possibly driven by the high incidence of those planning to stay in ‘commercial rental’ accommodation.

Figure 26. Anticipated trip spend for Summer Intenders by destination type, Percentage, Average, Weeks 5-8, 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; Summer Intenders n=639; and exclusively at Countryside or village n=267; Traditional coastal/seaside town n=295; City or large town n=219; Rural coastline n=152; Mountains or hills n=71
Destination type summary for summer intenders
Type of destination for next U.K. short break or holiday

- There is a consistent gap of between 10 to 15 percentage points in the proportion of summer intenders only considering a specific destination type and intenders considering that destination type and others, with the exception of ‘city or large’ towns where the gap is smaller. ‘City or large town’ is the least likely alternative for all destination types.
- Mountains or hill intenders appear most susceptible to switching, two thirds looking at other destination types and a substantial 44% considering ‘countryside or village’.

Figure 26. Main type of destination for Summer Intenders, Percentage Weeks 5-8, UK

Table 7. Destination types considered, Percentage Weeks 5-8, 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; Summer Intenders n=1,598;
‘Traditional coastal/seaside town’: Summer Intenders (34% of summer market)

Figure 27. Life stage of Summer Intenders by destination type, Percentage Weeks 5-8, UK

- Retirement age: 20%
- Older independents: 28%
- Families: 33%
- Pre-nesters: 18%

Figure 28. Trip length of Summer Intenders by destination type, Percentage Weeks 5-8, UK

- Short break: 52%
- Holiday: 43%
- Unsure: 5%

- Summer Intenders: 49%
- Trad. coastal / seaside town: 47%

Figure 29. Anticipated average spend of Summer Intenders by destination type, Average, Weeks 5-8, UK

- Summer Intenders: £676
- Trad. coastal / seaside town: £678

Figure 30. Visitor party make-up for Summer Intenders, Top 5, Percentage Weeks 5-8, UK

- Partner: 57%
- Child, grandchild or young adults: 35%
- Other members of family: 16%
- Friends: 15%
- Your parents (of adults aged 25+ only): 9%

Figure 31. Accommodation planning on staying in on next UK overnight trip for Summer Intenders, Top 5, Percentage Weeks 5-8, UK

- Rented holiday cottage/flat: 37%
- Hotel/motel/inn: 39%
- Guesthouse or B&B: 21%
- Static caravan - not owned by you: 11%
- Airbnb or equivalent: 16%

Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,598; Exclusively Traditional coastal/seaside town n=312; Inclusive Traditional coastal/seaside town n=527
‘Countryside or village’: Summer Intenders (33% of summer market)

**Figure 32. Life stage of Summer Intenders by destination type, Percentage Weeks 5-8, UK**

- **Retirement age**: 20%
- **Older independents**: 28%
- **Families**: 33%
- **Pre-nesters**: 18%

**Summer Intenders**

- **Countryside or village**
  - **Retirement age**: 22%
  - **Older independents**: 27%
  - **Families**: 31%
  - **Pre-nesters**: 19%

**Figure 33. Trip length of Summer Intenders by destination type, Percentage Weeks 5-8, UK**

- **Short break**: 52%
- **Holiday**: 43%
- **Unsure**: 5%

**Summer Intenders**

- **Countryside or village**
  - **Short break**: 57%
  - **Holiday**: 42%
  - **Unsure**: 1%

**Figure 34 Anticipated average spend of Summer Intenders by destination type, Average, Weeks 5-8, UK**

- **Summer Intenders**: £676
- **Countryside or village**: £660

**Figure 35. Visitor party make-up for Summer Intenders, Top 5, Percentage Weeks 5-8, UK**

- **Partner**: 57%
- **Child, grandchild or young adults**: 35%
- **Other members of family**: 16%
- **Friends**: 16%
- **Pets**: 9%

**Summer Intenders**

- **Countryside or village**
  - **Partner**: 61%
  - **Child, grandchild or young adults**: 30%
  - **Other members of family**: 16%
  - **Friends**: 11%
  - **Pets**: 10%

**Figure 36. Accommodation planning on staying in on next UK overnight trip for Summer Intenders, Top 5, Percentage Weeks 5-8, UK**

- **Rented holiday cottage/flat**: 37%
- **Hotel/motel/inn**: 39%
- **Guesthouse or B&B**: 27%
- **Friends or relatives homes**: 21%
- **Airbnb or equivalent**: 16%

**Summer Intenders**

- **Countryside or village**
  - **Rented holiday cottage/flat**: 40%
  - **Hotel/motel/inn**: 27%
  - **Guesthouse or B&B**: 18%
  - **Friends or relatives homes**: 16%
  - **Airbnb or equivalent**: 15%

Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,598; Exclusively Countryside or village n=297; Inclusive Countryside or village n=534
‘Rural coastline’: Summer Intenders (23% of summer market)

Figure 37. Life stage of Summer Intenders by destination type, Percentage Weeks 5-8, UK

- Retirement age: Summer Intenders 20%, Rural coastline 14%
- Older independents: Summer Intenders 28%, Rural coastline 30%
- Families: Summer Intenders 33%, Rural coastline 37%
- Pre-nesters: Summer Intenders 18%, Rural coastline 19%

Figure 38. Trip length of Summer Intenders by destination type, Percentage Weeks 5-8, UK

- Short break: Summer Intenders 52%, Rural coastline 46%
- Holiday: Summer Intenders 43%, Rural coastline 52%
- Unsure: Summer Intenders 5%, Rural coastline 3%

Figure 39. Anticipated average spend of Summer Intenders by destination type, Average, Weeks 5-8, UK

- Summer Intenders: £676
- Rural coastline: £663

Figure 40. Visitor party make-up for Summer Intenders, Top 5, Percentage Weeks 5-8, UK

- Partner: Summer Intenders 57%, Rural coastline 54%
- Child, grandchild or young adults: Summer Intenders 35%, Rural coastline 44%
- Other members of family: Summer Intenders 16%, Rural coastline 15%
- Friends: Summer Intenders 15%, Rural coastline 13%
- Your parents (of adults aged 25+ only): Summer Intenders 9%, Rural coastline 8%

Figure 41. Accommodation planning on staying in on next UK overnight trip for Summer Intenders, Top 5, Percentage Weeks 5-8, UK

- Rented holiday cottage/flat: Summer Intenders 37%, Rural coastline 42%
- Hotel/motel/inn: Summer Intenders 39%, Rural coastline 20%
- Guesthouse or B&B: Summer Intenders 21%, Rural coastline 18%
- Airbnb or equivalent: Summer Intenders 16%, Rural coastline 18%
- Static caravan - not owned by you: Summer Intenders 11%, Rural coastline 13%

Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,598; Exclusively Rural coastline n=163; Inclusive Rural coastline n=372
‘City or large town’: Summer Intenders (21% of summer market)

Figure 42. Life stage of Summer Intenders by destination type, Percentage Weeks 5-8, UK

- Retirement age: 20%
- Older independents: 23%
- Families: 36%
- Pre-nesters: 16%

Summer Intenders: 16%
City or large town: 25%

Figure 43. Trip length of Summer Intenders by destination type, Percentage Weeks 5-8, UK

- Short break: 52%
- Holiday: 43%
- Unsure: 5%

Summer Intenders: 58%
City or large town: 31%

Figure 44 Anticipated average spend of Summer Intenders by destination type, Average, Weeks 5-8, UK

- £676
- £644

Summer Intenders: 57%
City or large town: 42%

Figure 45. Visitor party make-up for Summer Intenders, Top 5, Percentage Weeks 5-8, UK

- Partner: 57%
- Child, grandchild or young adults: 42%
- Friends: 35%
- Other members of family: 18%
- Your parents (of adults aged 25+ only): 12%

Summer Intenders: 9%
City or large town: 11%

Figure 46. Accommodation planning on staying in on next UK overnight trip for Summer Intenders, Top 5, Percentage Weeks 5-8, UK

- Hotel/motel/inn: 39%
- Friends or relatives homes: 27%
- Rented holiday cottage/flat: 26%
- Guesthouse or B&B: 21%
- Airbnb or equivalent: 16%

Summer Intenders: 17%
City or large town: 28%

Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,598; Exclusively City or large town n=244; Inclusive City or large town n=357
‘Mountains or hills’: Summer Intenders (15% of summer market)

Figure 47. Life stage of Summer Intenders by destination type, Percentage Weeks 5-8, UK

- Retirement age: 20
- Older independents: 28
- Families: 33
- Pre-nesters: 18

Summer Intenders: 11, Mountains or hills: 23

Figure 48. Trip length of Summer Intenders by destination type, Percentage Weeks 5-8, UK

- Short break: 52
- Holiday: 43
- Unsure: 5

Summer Intenders: 39, Mountains or hills: 54

Figure 49. Anticipated average spend of Summer Intenders by destination type, Average, Weeks 5-8, UK

- Summer Intenders: £676
- Mountains or hills: £729

Figure 50. Visitor party make-up for Summer Intenders, Top 5, Percentage Weeks 5-8, UK

- Partner: 57
- Child, grandchild or young adults: 35
- Friends: 15
- Pets: 9
- Other: 4

Summer Intenders: 54, Mountains or hills: 31

Figure 51. Accommodation planning on staying in on next UK overnight trip for Summer Intenders, Top 5, Percentage Weeks 5-8, UK

- Rented holiday cottage/flat: 37
- Hotel/motel/inn: 39
- Guesthouse or B&B: 21
- Airbnb or equivalent: 16
- Hostel: 9

Summer Intenders: 50, Mountains or hills: 27

Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,598; Exclusively Mountains or hills n=85; Inclusive Mountains or hills n=271
Regional profiling
When anticipating going on next U.K. short break or holiday – by region

- Although intention to take a U.K. holiday or short break this summer is broadly similar across regions, residents of Eastern and South West England index slightly higher for those who have no plans to take a trip during this period.

Figure 52a. When planning on going on next U.K. short break or holiday, Percentage Weeks 5-8, 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?

Base: All respondents. Weeks 5-8 n=6,993.
Where planning on staying on next U.K. short break or holiday

- As in weeks 1 to 4, the South West of England and Scotland are the two most likely U.K. destinations this summer, however, there’s relatively little to separate the rankings from positions 2-8.
- In the winter months, the South West is also the preferred destination, followed by London, Scotland and the North West.

**Figure 52. Where planning on staying on next UK overnight trip for Summer Intenders, Percentage Weeks 5-8, UK**

**Figure 53. Where planning on staying on next UK overnight trip for Winter Intenders, Percentage Weeks 5-8, 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; Summer Intenders n=1,598; Winter Intenders n=1,442
Life stage breakdown of Summer Intenders - by destination

- Generally, there are minimal statistically significant differences in life stage representation by destination.
- However, London is significantly more likely than average to attract ‘pre-nesters’ and those in the ‘family’ life stage – although it’s worth noting not all of those in the family life-stage will travel with their children.

Figure 54. Life stage of Summer Intenders by destination, Percentage Weeks 5-8, 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: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,598; South West n=299; Scotland n=251; Wales n=184; North West n=170; London n=149; Yorkshire and The Humber n=161; South East n=130; East of England n=123; North East n=78; West Midlands n=100; East Midlands n=84; Northern Ireland n=48* *Base sizes low – treat with caution.
Party composition of Summer Intenders - by destination

- Although 51% of London intenders fall into the family life stage (as indicated on the previous slide) only 39% intend to travel with children. London, given its relative skew towards pre-nesters, also indexes strongly as a destination people will travel to with friends as opposed to partners.

Table 5. Visitor party of Summer Intenders by destination, Percentage Weeks 5-8, UK

<table>
<thead>
<tr>
<th></th>
<th>Summer Intenders</th>
<th>South West</th>
<th>Scotland</th>
<th>Wales</th>
<th>North West</th>
<th>London</th>
<th>South East</th>
<th>Yorkshire /Humber</th>
<th>East of England</th>
<th>North East*</th>
<th>West Mids*</th>
<th>East Mids*</th>
<th>Northern Ireland*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your partner</td>
<td>57%</td>
<td>63%</td>
<td>59%</td>
<td>63%</td>
<td>51%</td>
<td>41%</td>
<td>55%</td>
<td>51%</td>
<td>55%</td>
<td>61%</td>
<td>52%</td>
<td>57%</td>
<td>51%</td>
</tr>
<tr>
<td>Children or young adults (aged 16-24)</td>
<td>35%</td>
<td>37%</td>
<td>31%</td>
<td>40%</td>
<td>39%</td>
<td>39%</td>
<td>36%</td>
<td>29%</td>
<td>32%</td>
<td>25%</td>
<td>19%</td>
<td>40%</td>
<td>38%</td>
</tr>
<tr>
<td>Friend/s</td>
<td>15%</td>
<td>12%</td>
<td>12%</td>
<td>15%</td>
<td>13%</td>
<td>22%</td>
<td>19%</td>
<td>20%</td>
<td>10%</td>
<td>12%</td>
<td>12%</td>
<td>9%</td>
<td>17%</td>
</tr>
<tr>
<td>With parents of older adults</td>
<td>9%</td>
<td>10%</td>
<td>7%</td>
<td>9%</td>
<td>7%</td>
<td>7%</td>
<td>12%</td>
<td>11%</td>
<td>16%</td>
<td>9%</td>
<td>9%</td>
<td>6%</td>
<td>14%</td>
</tr>
<tr>
<td>Other family member</td>
<td>16%</td>
<td>20%</td>
<td>13%</td>
<td>15%</td>
<td>17%</td>
<td>13%</td>
<td>13%</td>
<td>15%</td>
<td>19%</td>
<td>20%</td>
<td>16%</td>
<td>15%</td>
<td>23%</td>
</tr>
<tr>
<td>Pets</td>
<td>9%</td>
<td>13%</td>
<td>6%</td>
<td>8%</td>
<td>8%</td>
<td>6%</td>
<td>5%</td>
<td>10%</td>
<td>11%</td>
<td>19%</td>
<td>8%</td>
<td>1%</td>
<td>6%</td>
</tr>
<tr>
<td>Will travel alone</td>
<td>5%</td>
<td>2%</td>
<td>7%</td>
<td>2%</td>
<td>7%</td>
<td>5%</td>
<td>2%</td>
<td>5%</td>
<td>6%</td>
<td>1%</td>
<td>4%</td>
<td>3%</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>1%</td>
<td>3%</td>
<td>6%</td>
<td>3%</td>
<td>10%</td>
<td>1%</td>
<td>3%</td>
<td>6%</td>
<td>0%</td>
<td>9%</td>
<td>7%</td>
<td>7%</td>
</tr>
</tbody>
</table>

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? And 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; Summer Intenders n=1,598 and exclusively in each region South West n=228; Scotland n=197; Wales n=127; North West n=117; London n=92; Yorkshire and The Humber n=112; South East n=99; East of England n=85; North East n=45*; West Midlands n=66*; East Midlands n=50*; Northern Ireland n=31* *Base sizes low – treat with caution.
Financial segments of Summer Intenders - by destination

- There are also minimal statistical differences in the financial segments by destination, although London is set to attract the highest proportion who state they are ‘better off than before’ (25%) with West Midlands and the North East also having almost a quarter falling into this category.

Figure 55. Financial segments of Summer Intenders by destination, Percentage Weeks 5-8, UK

---

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

Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,598; South West n=299; Scotland n=251; Wales n=184; North West n=170; London n=149; Yorkshire and The Humber n=161; South East n=130; East of England n=123; North East n=78; West Midlands n=100; East Midlands n=84; Northern Ireland n=48

*Base sizes low – treat with caution.*
Social grade of Summer Intenders - by destination

- London is substantially more likely than any other destination to attract those in social grades AB, with the West Midlands also strongly over-indexing on this group.

Figure 56. Social grade of Summer Intenders by destination, Percentage Weeks 5-8, UK

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: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,598; South West n=299; Scotland n=251; Wales n=184; North West n=170; London n=149; Yorkshire and The Humber n=161; South East n=130; East of England n=123; North East n=78; West Midlands n=100; East Midlands n=84; Northern Ireland n=48* *Base sizes low – treat with caution.
Accommodation preference of Summer Intenders – by destination

- Accommodation type varies widely according to destination. For trips to Wales for example, ‘caravan/camping’ is the preferred accommodation type; in Scotland ‘commercial rental’ and ‘hotel/motel/inn’ is preferred, whereas in London, ‘a private home’ is dominant.

Table 6. Accommodation preference of Summer Intenders by destination, Percentage Weeks 5-8, UK

<table>
<thead>
<tr>
<th></th>
<th>Summer Intenders</th>
<th>South West</th>
<th>Scotland</th>
<th>Wales</th>
<th>North West</th>
<th>London</th>
<th>South East</th>
<th>Yorkshire &amp; the Humber</th>
<th>East of England</th>
<th>North East*</th>
<th>West Mids*</th>
<th>East Mids*</th>
<th>Northern Ireland*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caravan/Camping</td>
<td>37%</td>
<td>38%</td>
<td>36%</td>
<td>41%</td>
<td>31%</td>
<td>49%</td>
<td>31%</td>
<td>27%</td>
<td>36%</td>
<td>37%</td>
<td>36%</td>
<td>37%</td>
<td>35%</td>
</tr>
<tr>
<td>A private home</td>
<td>34%</td>
<td>29%</td>
<td>32%</td>
<td>32%</td>
<td>29%</td>
<td>67%</td>
<td>26%</td>
<td>28%</td>
<td>30%</td>
<td>38%</td>
<td>45%</td>
<td>40%</td>
<td>36%</td>
</tr>
<tr>
<td>Hotel/ motel/ inn</td>
<td>35%</td>
<td>26%</td>
<td>39%</td>
<td>23%</td>
<td>42%</td>
<td>41%</td>
<td>32%</td>
<td>25%</td>
<td>17%</td>
<td>26%</td>
<td>43%</td>
<td>28%</td>
<td>58%</td>
</tr>
<tr>
<td>Commercial rental</td>
<td>34%</td>
<td>30%</td>
<td>39%</td>
<td>24%</td>
<td>30%</td>
<td>48%</td>
<td>27%</td>
<td>28%</td>
<td>30%</td>
<td>40%</td>
<td>32%</td>
<td>42%</td>
<td>29%</td>
</tr>
<tr>
<td>Guesthouse/ B&amp;B / Farmhouse</td>
<td>21%</td>
<td>13%</td>
<td>17%</td>
<td>21%</td>
<td>24%</td>
<td>27%</td>
<td>23%</td>
<td>18%</td>
<td>17%</td>
<td>18%</td>
<td>14%</td>
<td>23%</td>
<td>26%</td>
</tr>
<tr>
<td>Other</td>
<td>11%</td>
<td>6%</td>
<td>7%</td>
<td>7%</td>
<td>10%</td>
<td>30%</td>
<td>7%</td>
<td>8%</td>
<td>10%</td>
<td>17%</td>
<td>19%</td>
<td>12%</td>
<td>15%</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: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,598 and exclusively in each region South West n=228; Scotland n=197; Wales n=127; North West n=117; London n=92; Yorkshire and The Humber n=112; South East n=99; East of England n=85; North East n=45*; West Midlands n=66*; East Midlands n=50*; Northern Ireland n=31* *Base sizes low – treat with caution.
Destination type of Summer Intenders - by destination

- Destination type generally reflects the area being visited. The South West, Wales and the South East are most likely to generate ‘traditional coastal/seaside town’ trips. Scotland, the North West of England and Wales are most likely to generate trips to mountains or hills.

- It’s notable that some visitors to London are likely to define their destination type as ‘rural’ in nature, possibly suggesting a more suburban location is being chosen.

Table 7. Destination type of Summer Intenders by destination, Percentage Weeks 5-8, UK

<table>
<thead>
<tr>
<th></th>
<th>Summer Intenders</th>
<th>South West</th>
<th>Scotland</th>
<th>Wales</th>
<th>North West</th>
<th>London</th>
<th>South East</th>
<th>Yorkshire &amp; the Humber</th>
<th>East of England</th>
<th>North East*</th>
<th>West Mids*</th>
<th>East Mids*</th>
<th>Northern Ireland*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional coastal/seaside town</td>
<td>34%</td>
<td>51%</td>
<td>21%</td>
<td>45%</td>
<td>21%</td>
<td>7%</td>
<td>43%</td>
<td>36%</td>
<td>39%</td>
<td>19%</td>
<td>8%</td>
<td>19%</td>
<td>45%</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>33%</td>
<td>24%</td>
<td>37%</td>
<td>32%</td>
<td>28%</td>
<td>27%</td>
<td>26%</td>
<td>34%</td>
<td>33%</td>
<td>51%</td>
<td>46%</td>
<td>48%</td>
<td>26%</td>
</tr>
<tr>
<td>City or large town</td>
<td>21%</td>
<td>10%</td>
<td>22%</td>
<td>6%</td>
<td>29%</td>
<td>56%</td>
<td>20%</td>
<td>20%</td>
<td>12%</td>
<td>18%</td>
<td>31%</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>23%</td>
<td>29%</td>
<td>30%</td>
<td>25%</td>
<td>12%</td>
<td>18%</td>
<td>21%</td>
<td>16%</td>
<td>24%</td>
<td>22%</td>
<td>6%</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>15%</td>
<td>5%</td>
<td>33%</td>
<td>20%</td>
<td>22%</td>
<td>11%</td>
<td>6%</td>
<td>13%</td>
<td>7%</td>
<td>14%</td>
<td>5%</td>
<td>19%</td>
<td>13%</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: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,598 and exclusively in each region South West n=228; Scotland n=197; Wales n=127; North West n=117; London n=92; Yorkshire and The Humber n=112; East of England n=99; East Mids n=85; North East n=45; West Midlands n=66; East Midlands n=50; Northern Ireland n=31* *Base sizes low – treat with caution.
Trip length of Summer Intenders – by destination

- Wales is likely to generate the highest proportion of holidays of 4+ nights this summer. The West Midlands, the South East of England, and Yorkshire and the Humber are the most likely to generate short breaks.

Figure 57. Length of next summer U.K. holiday or short break by destination type, Percentage Weeks 5-8, U.K.

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=1,598 and exclusively in each region South West n=228; Scotland n=197; Wales n=127; North West n=117; London n=92; Yorkshire and The Humber n=112; South East n=99; East of England n=85; North East n=45*; West Midlands n=66*; East Midlands n=50*; Northern Ireland n=31* • Base sizes low – treat with caution.
Anticipated total trip spend is likely to be highest in London, driven by a relatively high proportion claiming in excess of £1,000. As in weeks 1 to 4, trips to London, Scotland and the South West of England are likely to generate the highest spend.

Figure 58. Anticipated trip spend for summer trips by destination type, Percentage, Average, Weeks 5-8, UK

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>Under £200</th>
<th>£200-£499</th>
<th>£500-£999</th>
<th>£1000+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer Intenders</td>
<td>17</td>
<td>36</td>
<td>29</td>
<td>19</td>
</tr>
<tr>
<td>South West</td>
<td>9</td>
<td>35</td>
<td>31</td>
<td>24</td>
</tr>
<tr>
<td>Scotland</td>
<td>7</td>
<td>34</td>
<td>33</td>
<td>27</td>
</tr>
<tr>
<td>Wales</td>
<td>10</td>
<td>45</td>
<td>22</td>
<td>23</td>
</tr>
<tr>
<td>North West</td>
<td>15</td>
<td>48</td>
<td>21</td>
<td>16</td>
</tr>
<tr>
<td>London</td>
<td>18</td>
<td>33</td>
<td>22</td>
<td>28</td>
</tr>
<tr>
<td>South East</td>
<td>15</td>
<td>42</td>
<td>25</td>
<td>18</td>
</tr>
<tr>
<td>Yorkshire &amp; The Humber</td>
<td>12</td>
<td>49</td>
<td>22</td>
<td>16</td>
</tr>
<tr>
<td>East of England</td>
<td>23</td>
<td>31</td>
<td>25</td>
<td>21</td>
</tr>
</tbody>
</table>

**Average (£)**

- £676
- £713
- £726
- £670
- £526
- £837
- £584
- £484
- £571

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; Summer Intenders n=1,598 and exclusively in each region South West n=228; Scotland n=197; Wales n=127; North West n=117; London n=92; Yorkshire and The Humber n=112; South East n=99; East of England n=75.

*Other regions not shown due to small base sizes*
Understanding Intenders and Persuadables
In this section, we look at the profiles and attitudes of a number of separate audiences:

- **Multiple trip-takers**: Members of the public who intend to take a U.K. holiday or short break between June and September this year and have at least one other domestic trip planned this year.
- **Summer Intenders**: Members of the public who state their next U.K. holiday or short break will be between June and September this year (24% of U.K. population).
- **Winter Intenders**: Members of the public who state their next U.K. holiday or short break will be from October 2020 to March 2021 (21% of the U.K. population).
- **Persuadables**: Members of the public who would like to take a U.K. holiday or short break but do not know when they will take it (19% of the U.K. population).
- **Non-planners**: Don’t have a U.K. holiday or short break planned (21% of the U.K. population).
Definitions used within this section (2)

- This chapter also includes five attitudinal segments produced to understand how audiences differ attitudinally in relation to COVID-19. These are defined below:
  - **Anxious Appreciator Hermits**: Anxious about the virus, the handling of the situation and society's behaviour, but have valued the time at home. As such, they are likely to take longer to resume 'normal' behaviour. ‘Concerns about catching the virus’ and ‘It’s not responsible to travel’ are the biggest barriers to taking a U.K. summer holiday or short break.
  - **COVID Impacted**: This segment is suffering financially and is also concerned about the ongoing health implications of the virus and the potential impact of the easing of lockdown. They give the lowest mood ratings of all the segments. ‘Concerns about catching COVID-19’ is the biggest barrier to taking a U.K. summer break, and the segment most likely to cite ‘personal finances’ as a barrier.
  - **COVID Cautious**: While they are less concerned about the impact of the pandemic on themselves, this segment fears that we may not yet be past the worst and would prefer a longer lockdown. They are likely to be cautious in their own post-lockdown behaviour. Index high on “it’s not responsible to travel’ and ‘restrictions on travel’.
  - **Pragmatic Policy Supporters**: Concerned about the impact of COVID-19, but trusting and supportive of the authorities’ policies and most believe the worst is behind us. Most likely to cite ‘concerns about catching COVID-19’ as a barrier to taking domestic trips. Restrictions on travel also a factor.
  - **Life Goes On**: Aching for lockdown to be lifted, this segment is not worried about the risks associated with COVID-19 and are supportive of lockdown lifting in order to protect the economy and get back to living their lives. ‘Opportunities to eat/drink out’ and ‘fewer things to do’ are the main barriers to taking a U.K. trip.
Life stage and social grade

- As in weeks 1 to 4, there is a clear pattern between likelihood to take trips and life stage. U.K. adults expressing an inclination to take a domestic trip index higher on the younger groups such ‘families’ and ‘pre-nesters’. while ‘Persuadables’ are more likely to include retirees (although to a lesser extent than in weeks 1 to 4). Non-planners are considerably more likely to be ‘older independents’ and of ‘retirement age’.
- There is a similar pattern associated with social grade – those more likely to take trips falling into higher social grades.

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: Multiple trip-takers n=1,086; Summer Intenders n=1,598; Winter Intenders n=1,442; Persuadables n=1,348; Non-planners n=1,441.
Life stage and social grade combined

- The size of the ‘older independence’ group should not be overlooked, given they represent over a quarter of intended trip intenders.

Table 8. Life stage and social grade combined, Percentage, Weeks 5-8, UK

<table>
<thead>
<tr>
<th></th>
<th>Multiple trip-takers</th>
<th>Summer Intenders</th>
<th>Winter Intenders</th>
<th>Persuadables</th>
<th>Non-planners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-nesters – AB</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Pre-nesters - C1C2</td>
<td>11%</td>
<td>10%</td>
<td>14%</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>Pre-nesters – DE</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Families – AB</td>
<td>16%</td>
<td>13%</td>
<td>14%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Families - C1C2</td>
<td>18%</td>
<td>18%</td>
<td>15%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Families – DE</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Older Independents – AB</td>
<td>7%</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Older Independents - C1C2</td>
<td>18%</td>
<td>18%</td>
<td>18%</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Older Independents – DE</td>
<td>3%</td>
<td>5%</td>
<td>4%</td>
<td>7%</td>
<td>11%</td>
</tr>
<tr>
<td>Retirement age – AB</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Retirement age - C1C2</td>
<td>6%</td>
<td>7%</td>
<td>5%</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Retirement age - DE</td>
<td>8%</td>
<td>10%</td>
<td>7%</td>
<td>13%</td>
<td>17%</td>
</tr>
</tbody>
</table>

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: Multiple trip-takers n=1,086; Summer Intenders n=1,598; Winter Intenders n=1,442; Persuadables n=1,348; Non-planners n=1,441
Financial segments and financial impact

- There is also a pattern between trip-taking and financial segments. Multiple trip-takers and Summer Intenders are the most likely to describe themselves as ‘better off than before Covid-19’, followed by Winter Intenders.
- Persuadables, by contrast, are most likely to state ‘things are ok but I have to be careful’, perhaps suggesting they’re waiting to see how their financial circumstances evolve before committing to a domestic short break or holiday.

Figure 61. Breakdown by financial segments, Percentage Weeks 5-8, UK

I've been hit hard

<table>
<thead>
<tr>
<th></th>
<th>Multiple trip-takers</th>
<th>Summer Intenders</th>
<th>Winter Intenders</th>
<th>Persuadables Non-planners</th>
</tr>
</thead>
<tbody>
<tr>
<td>I've been hit hard</td>
<td>10</td>
<td>11</td>
<td>13</td>
<td>15</td>
</tr>
<tr>
<td>Things are ok but I have to be careful</td>
<td>36</td>
<td>37</td>
<td>41</td>
<td>45</td>
</tr>
<tr>
<td>I've not been affected</td>
<td>38</td>
<td>37</td>
<td>34</td>
<td>31</td>
</tr>
<tr>
<td>I'm better off than before</td>
<td>16</td>
<td>14</td>
<td>12</td>
<td>11</td>
</tr>
</tbody>
</table>

Figure 62. Breakdown by work and financial impact of COVID-19, Percentage Weeks 5-8, UK

I'm on furlough

<table>
<thead>
<tr>
<th></th>
<th>Multiple trip-takers</th>
<th>Summer Intenders</th>
<th>Winter Intenders</th>
<th>Persuadables Non-planners</th>
</tr>
</thead>
<tbody>
<tr>
<td>I'm on furlough</td>
<td>19</td>
<td>18</td>
<td>22</td>
<td>14</td>
</tr>
<tr>
<td>Reduced income</td>
<td>18</td>
<td>8</td>
<td>8</td>
<td>5</td>
</tr>
<tr>
<td>Unpaid leave/redundant</td>
<td>18</td>
<td>17</td>
<td>15</td>
<td>13</td>
</tr>
<tr>
<td>None of these</td>
<td>53</td>
<td>57</td>
<td>62</td>
<td>68</td>
</tr>
</tbody>
</table>

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: Multiple trip-takers n=1,086; Summer Intenders n=1,598; Winter Intenders n=1,442; Persuadables n=1,348; Non-planners n=1,441
Anticipated number of U.K. trips this year compared to normal

- Multiple trip-takers are significantly more likely to say they will take ‘more’ UK short breaks and UK holidays this year than normal in comparison to other audiences. Notably, the net intention to take more U.K. short breaks or holidays has increased since weeks 1-4 amongst all Intenders.

Figure 63. Number of UK short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Weeks 5-8, UK

Figure 64. Number of UK holidays (4+ nights) over the rest of this year compared to normal, Percentage Weeks 5-8, 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 the end of the Base: Multiple trip-takers n=1,083; Summer Intenders n=1,598; Winter Intenders n=1,442; Persuadables n=1,391; Non-planners n=1,580
Anticipated number of OVERSEAS trips this year compared to normal

- All audiences are significantly more likely to take fewer overseas trips this year compared to normal, although intention to take overseas trips has increased slightly since weeks 1-4.

Figure 65. Number of overseas short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Weeks 5-8, UK

QVB1. Compared to normal, are you likely to take more, fewer or about the same number of overseas holidays/short breaks between now and the end of the year? Base: Multiple trip-takers n=1,083; Summer Intenders n=1,598; Winter Intenders n=1,442; Persuadables n=1,391; Non-planners n=1,580

Figure 66. Number of overseas holidays (4+ nights) over the rest of this year compared to normal, Percentage Weeks 5-8, UK
Attitudinal segments

- The ‘life goes on’ attitudinal segment is a characteristic of multiple trip-takes and the Summer and Winter Intenders.
- Persuadables and Non-planners are considerably more likely to be in ‘COVID-cautious’ group.

**Figure 67. Breakdown by life stage, Percentage Weeks 5-8, UK**

<table>
<thead>
<tr>
<th>Attitudinal Segment</th>
<th>U.K. population</th>
<th>Multiple trip-takers</th>
<th>Summer Intenders</th>
<th>Winter Intenders</th>
<th>Persuadables</th>
<th>Non-planners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pragmatic Policy Supporters</td>
<td>21</td>
<td>21</td>
<td>23</td>
<td>20</td>
<td>18</td>
<td>21</td>
</tr>
<tr>
<td>Anxious Appreciator Hermits</td>
<td>33</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>COVID cautious</td>
<td>31</td>
<td>42</td>
<td>38</td>
<td>39</td>
<td>29</td>
<td>25</td>
</tr>
<tr>
<td>Life goes on</td>
<td>8</td>
<td>5</td>
<td>6</td>
<td>8</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>COVID Impacted</td>
<td>8</td>
<td>5</td>
<td>6</td>
<td>8</td>
<td>9</td>
<td>9</td>
</tr>
</tbody>
</table>

Source: Attitudinal segments: Full description on page 45
Base: Multiple trip-takers n=463; Summer Intenders n=792; Winter Intenders n=653; Persuadables n=639; Non-planners n=637
Appetite for Risk

- Appetite for risk also corresponds with likelihood to take U.K. short breaks or holidays.
- Multiple trip takers have an average comfort score of 60%, compared to 58% for Summer Intenders, 52% for Winter Intenders, 44% for persuadables and 45% for non-planners.
- Comfort scores have increased for all audiences compared to weeks 1 to 4.

Figure 68. Level of comfort conducting a range of activities separately and combined, Net very and fairly comfortable, Weeks 5-8, UK

<table>
<thead>
<tr>
<th>Activity</th>
<th>Multiple trip-takers</th>
<th>Summer Intenders</th>
<th>Winter Intenders</th>
<th>Persuadables</th>
<th>Non-planners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Going for a walk in a country park/ local trail</td>
<td>60/58/52/44/45</td>
<td>90/91/84/86/80</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shopping in your local shopping centre</td>
<td>64/61/54/41/44</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eating at a restaurant</td>
<td>50/47/37/25/27</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travelling by public transport</td>
<td>36/34/31/23/27</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?

Base: Multiple trip-takers n=1,083; Summer Intenders n=1,598; Winter Intenders n=1,442; Persuadables n=1,391; Non-planners n=1,580
Confidence in the ability to take a U.K. short break or holiday

- Multiple trip-takers and Summer Intenders are significantly more likely than Winter Intenders, Persuadables and Non-planners to be confident they would be able to go on a trip they had booked in any month this year.
- While confidence to take a trip in the summer months has increased significantly amongst the Winter Intenders since weeks 1 to 4, they don’t approach the same levels of ‘confidence’ as either the summer intenders or multiple trip-takers until January 2021 onwards.

**Figure 69. Confidence in taking a UK short break or holiday across a range of different months, Net percentage very and fairly confident, Weeks 5-8, UK**

<table>
<thead>
<tr>
<th>Month</th>
<th>Multiple trip-takers</th>
<th>Summer Intenders</th>
<th>Winter Intenders</th>
<th>Persuadables</th>
<th>Non-planners</th>
</tr>
</thead>
<tbody>
<tr>
<td>July this year</td>
<td>44</td>
<td>39</td>
<td>19</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>August this year</td>
<td>68</td>
<td>68</td>
<td>29</td>
<td>15</td>
<td>14</td>
</tr>
<tr>
<td>September this year</td>
<td>79</td>
<td>83</td>
<td>48</td>
<td>26</td>
<td>22</td>
</tr>
<tr>
<td>October to December this year</td>
<td>83</td>
<td>82</td>
<td>71</td>
<td>38</td>
<td>30</td>
</tr>
<tr>
<td>January 2021 onwards</td>
<td>87</td>
<td>88</td>
<td>85</td>
<td>59</td>
<td>48</td>
</tr>
</tbody>
</table>

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: Multiple trip-takers n=203; Summer Intenders n=356; Winter Intenders n=379; Persuadables n=354; Non-planners n=338
Reasons for not feeling confident about taking trips in the U.K. between July and September

- For the summer period, there’s a clear pattern between levels of confidence and commitment to trip-taking.
- Winter Intenders exhibit higher concerns over catching Covid-19 and show a slightly higher impact on personal finances compared to Summer Intenders. The same is true for Persuadables, but to a greater extent, alongside an overall higher incidence citing issues around travel restrictions, fewer things to do and unease about travelling.

Figure 70. Reasons for not being confident about travelling between July to September, Percentage Weeks 5-8, 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: Multiple trip-takers n=165; Summer Intenders n=293; Winter Intenders n=310; Persuadables n=209; Non-planners n=168
General leisure activity intentions as lockdown restrictions are lifted

- As with appetite for risk, likelihood to exhibit a net positive likelihood of doing an activity is highest amongst Multiple trip-takers and Summer Intenders, followed by Winter Intenders, Persuadables and Non-planners.
- Outdoor areas and outdoor activities are likely to generate the highest net increase in activity.

**Figure 71. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Weeks 5-8, UK**

- Outdoor areas (e.g. beaches, mountains, trails etc.)
- Outdoor leisure or sports activities (e.g. walking, cycling, swimming etc.)
- Predominantly outdoor attractions (e.g. theme parks, playgrounds etc.)
- Entertainment and events (e.g. restaurants, cinema, festivals etc.)
- Health or wellbeing activities (e.g. spa/beauty, retreat or meditation, indoor swimming)
- Predominantly indoor or covered attractions (e.g. museums, cathedrals etc.)
Appendix: Net activity engagement
General leisure activity intentions as lockdown restrictions are lifted

- There is clearly substantial pent-up demand to visit restaurants/cafés/pubs, but it’s important they have access to outdoor space.

Figure 72. Entertainment and events venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Weeks 5-8, UK

There is clearly substantial pent-up demand to visit restaurants/cafés/pubs, but it’s important they have access to outdoor space.
Visitor attraction intentions as lockdown restrictions are lifted

- The importance of outdoor space and controls over the proximity to other people is evident.

Figure 73. Visitor attractions more or less likely to visit as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Weeks 5-8, UK

- Garden or country park
- Castle, fort or other historic site
- Zoo/farm attraction
- Historic house/palace, museum or art gallery
- Scenic/historic railway
- Outdoor playground or activity centre e.g. climbing, ziplining, high ropes
- Theme park
- Cathedral/church or other religious attraction
- Aquarium
- Indoor play or activity centre/attraction e.g. climbing, ziplining, high ropes
- Dungeon, prison or other underground attraction (e.g. show cave, mine)

QVB9a/B10a/b. Which, if any, of these types of places/activities in the UK are you more/less likely than normal to visit/do as restrictions are lifted? Base: All n=6,975; Multiple trip-takers n=1,083; Summer Intenders n=1,598; Winter Intenders n=1,442; Persuadables n=1,391; Non-planners n=1,580
Outdoor area intentions as lockdown restrictions are lifted

- Each of these outdoor areas are in net-positive territory regarding likelihood to be visited once lockdown ends.

Figure 74. Outdoor areas more or less likely to visit as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Weeks 5-8, 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 as restrictions are lifted? Base: All n=6,975; Multiple trip-takers n=1,083; Summer Intenders n=1,598; Winter Intenders n=1,442; Persuadables n=1,391; Non-planners n=1,580
Outdoor activity intentions as lockdown restrictions are lifted

- Walking/hiking looks set to be an activity that experiences a rise in participation levels once restrictions ease.

Figure 75. Outdoor activities more or less likely to visit as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Weeks 5-8, UK

Walking/hiking: Net 35363433, Multiple trip-takers -2, Summer Intenders -4, Winter Intenders -8, Persuadables -12, Non-planners -16
Cycling/mountain biking: Net 9884, Multiple trip-takers 2, Summer Intenders 4, Winter Intenders 6, Persuadables 8, Non-planners 10
Watching wildlife/bird watching: Net 9855, Multiple trip-takers 2, Summer Intenders 4, Winter Intenders 6, Persuadables 8, Non-planners 10
Swimming - outdoor: Net 0, Multiple trip-takers -2, Summer Intenders -4, Winter Intenders -6, Persuadables -8, Non-planners -10
Boating including/kayak/rafting/jet ski/water ski: Net -2.5-4, Multiple trip-takers -2, Summer Intenders -4, Winter Intenders -6, Persuadables -8, Non-planners -10
Golf: Net -2.3-4, Multiple trip-takers -2, Summer Intenders -4, Winter Intenders -6, Persuadables -8, Non-planners -10
Adventure activity: Net -2.5-4, Multiple trip-takers -2, Summer Intenders -4, Winter Intenders -6, Persuadables -8, Non-planners -10
Horse riding, pony trekking: Net -3.6-5, Multiple trip-takers -3, Summer Intenders -5, Winter Intenders -7, Persuadables -9, Non-planners -10
Fishing: Net -5.5-6.9, Multiple trip-takers -5, Summer Intenders -6, Winter Intenders -7, Persuadables -9, Non-planners -10
Other watersports: Net -6.6-8, Multiple trip-takers -6, Summer Intenders -8, Winter Intenders -9, Persuadables -10, Non-planners -10
Sailing: Net -8.8-10, Multiple trip-takers -8, Summer Intenders -10, Winter Intenders -10, Persuadables -10, Non-planners -10
Indoor health & wellness intentions as lockdown restrictions are lifted

- Indoor health and wellness activities are likely to exhibit a general decline in demand, likely due to the perceived difficulties with ensuring effective social distancing and hygiene/cleanliness measures are implemented.

Figure 76. Indoor health and wellness more or less likely to visit as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Weeks 5-8, 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 as restrictions are lifted? Base: All n=6,975; Multiple trip-takers n=1,083; Summer Intenders n=1,598; Winter Intenders n=1,442; Persuadables n=1,391; Non-planners n=1,580
Methodology

- The findings in this report are based on a weekly online survey conducted amongst a nationally representative sample of the U.K. population.
- The sample is representative of UK adults aged 16+ by gender, age, government region and social grade.
- 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 aggregates the results taken from Weeks 5-8 of the COVID-19 consumer weekly tracker.
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.