COVID-19 Consumer Profiling Report

Report 7 (combining waves 26 – 28)

Published: 14th May 2021
Fieldwork Period: 10 March – 10 April 2021

UK Results
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 26-28
  • Fieldwork periods are as follows: Wave 26 (10th-15th March 2021); Wave 27 (22nd-27th March 2021); Wave 28 (6th-10th April 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 groups:

- **Over 45s that have received the vaccine** (including any that have received either one or two doses)
- **Over 45s that have not received the vaccine**

The focus on adults aged 45 and over is to try and understand the impact of taking the vaccine on leisure behaviour but mitigating against purely ‘age-related’ factors potentially skewing results (as the ‘vaccinated’ group will currently have an older bias compared to the overall adult population).

For ease of reference, some time periods in this report have been given seasonal labels, although we appreciate they may not necessarily correspond with meteorological definitions. These include:

- **Spring intenders**: UK 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**: UK adults who claim their next domestic overnight trip will take place sometime between July and September 2021.
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

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+.
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 lifestyle. 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 that 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 (4)

In chapters 3-7 we investigate the differences in profiles and attitudes by a number of audiences and also take a more detailed look at destination types and destination geography. For each of these chapters, the focus is on “Summer Intenders” i.e. UK adults who claim their next domestic overnight trip will take place sometime between July and September 2021.

In Chapter 4, investigating the intent to visit towns and cities, the following definitions have been used:

- **City or large town intenders**: Summer intenders planning on taking an overnight trip to a ‘large city or town’ this spring
- **Non-city or large town intenders**: Summer intenders not planning on taking an overnight trip to a city or large town this spring

In Chapter 5, investigating the impact of health conditions and impairments, the following definitions have been used:

- **Health condition or impairment**: UK adults citing one or more of: long-term illness; mobility impairment; partial sight; partial hearing loss; learning difficulties; Deaf or blind.
- **No health condition of impairment**: UK adults not citing any of the above health conditions or impairments.

The commentary within this section may refer to impacts on the findings when the results are controlled by age to help account for the younger bias evident among those citing ‘no health condition or impairment’.
Definitions used within this report (5)

In the final chapter we look at the profiles and attitudes of a number of nuanced audiences:

- **Multiple Trip-takers**: UK adults that plan on taking an overnight domestic trip in Spring and Summer 2021
- **Spring Intenders**: UK adults who intend to take their next domestic overnight trip between April and June 2021
- **Summer Intenders**: UK adults who intend to take their next domestic overnight trip between July and September 2021
- ‘**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.
1. The impact of the vaccine
Vaccine take-up and intentions

- As of early April, half of British adults said they had received at least one dose of a COVID-19 vaccine, rising to 92% of retirees and 62% of older independents. 7% claimed to have received both doses of the vaccine.
- 1 in 4 of the adult population indicate they will take the vaccine as soon as possible.
- Pre-nesters and families demonstrate the highest levels of reluctance to taking the vaccine, although this has reduced since the previous reporting period in early February.

Q8: How do you think you will respond when a vaccine becomes available? Base: All U.K. respondents. n=1,758; Pre-nesters n=496; Families n=575; Older Independents n=419; Retirees n=270. Note: Vaccine numbers fall out naturally and may not reflect government figures.
Mood and perceptions in relation to COVID-19

- The sentiment of U.K. residents is as positive as at any point within the last 12 months with 17% scoring their mood as a 9-10 out of 10 (compared to 13% in early February), and 40% believing ‘the worst has passed’ in relation to COVID-19 (compared to 29% in early February).
- The vaccine appears to be helping to drive the positive outlook, with those aged over 45 that have had the vaccine more likely than over 45s that have not had the vaccine to provide these responses.
- Early indications suggest a second dose of the vaccine lifts mood and positive sentiment further, although sample sizes are not large enough to make this assertion with certainty.

Figure 3. Current mood out of 10 by life stage, Percentage, Wave 28, U.K.

Figure 4. Perception of the situation with regards to COVID-19 by life stage, Wave 28, Percentage, U.K.
Level of comfort undertaking activities

In line with increasing optimism, comfort levels with everyday activities have risen since the previous wave of reporting in early February. However, there remains a significant gap in comfort levels between outdoor and indoor activities, reflecting continued caution.

Although over 45s that have had the vaccine are more likely than over 45s that have not had the vaccine to be comfortable conducting these activities, the difference is only marginal, and both audiences exhibit lower comfort levels than the population on the whole.

This suggests that where comfort with participating in these select activities is concerned, generational factors are likely to be more influential than a first vaccine dose. That said, early indications suggest a second dose of the vaccine raises comfort levels to at least the equal of the broader population.

Figure 5. Level of comfort conducting activities by vaccine status, Net very and fairly comfortable, Percent, Wave 28, U.K.

<table>
<thead>
<tr>
<th>Activity</th>
<th>All U.K. residents</th>
<th>Over 45s that have had the vaccine</th>
<th>Over 45s that have not had the vaccine</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comfort average</td>
<td>51</td>
<td>45</td>
<td>43</td>
</tr>
<tr>
<td>Going for a walk in a country park/local trail</td>
<td>86</td>
<td>88</td>
<td>78</td>
</tr>
<tr>
<td>Shopping in your local shopping centre</td>
<td>58</td>
<td>53</td>
<td>50</td>
</tr>
<tr>
<td>Eating at a restaurant</td>
<td>49</td>
<td>38</td>
<td>38</td>
</tr>
<tr>
<td>Visit an indoor attraction (e.g. a museum)</td>
<td>40</td>
<td>30</td>
<td>31</td>
</tr>
<tr>
<td>Travelling by public transport</td>
<td>39</td>
<td>33</td>
<td>30</td>
</tr>
<tr>
<td>Visiting a busy city centre</td>
<td>34</td>
<td>27</td>
<td>28</td>
</tr>
</tbody>
</table>
Despite stronger optimism and marginally higher comfort levels, over 45s that have had the vaccine are more likely to fall into the ‘cautious but content’ and ‘currently constrained’ segments, although there is an age component to this since over 45s that have had the vaccine exhibit a higher average age than those that haven’t.

It’s also worth noting that UK adults that do not intend to take the vaccine are more likely to fall into ‘COVID-confident’ segments such as ‘life goes on’ and ‘less to lose’.

**Figure 6. Breakdown of population by COVID segments by life stage, Percentage, Wave 28, U.K.**

- **All U.K. residents**
  - Life goes on: 7%
  - Less to lose: 32%
  - Protective but pragmatic: 12%
  - Struggling: 20%
  - Currently constrained: 15%
  - Cautious but content: 14%

- **Over 45s that have had the vaccine**
  - Life goes on: 4%
  - Less to lose: 13%
  - Protective but pragmatic: 24%
  - Struggling: 15%
  - Currently constrained: 27%
  - Cautious but content: 12%

- **Over 45s that have not had the vaccine**
  - Life goes on: 9%
  - Less to lose: 31%
  - Protective but pragmatic: 13%
  - Struggling: 19%
  - Currently constrained: 17%
  - Cautious but content: 12%

Base: All U.K. respondents. n=1,758; Over 45s that have had the vaccine n=516; Over 45s that have not had the vaccine n=130
Confidence to take a U.K. short break or holiday

- Over 45s are generally less confident than the overall population that a domestic holiday or short break would be able to go ahead as planned, regardless of whether they have had the vaccine.
- However, the vaccine does appear to boost travel confidence from May onwards, an uplift that – compared to the previous reporting period - has driven higher confidence amongst the population on the whole.

**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 28, U.K.**

![Bar chart showing confidence levels across different months by vaccine status.]

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=1,758; Over 45s that have had the vaccine n=516; Over 45s that have not had the vaccine n=130
Reasons for not feeling confident taking trips in the U.K. this spring

- Unsurprisingly, over 45s that have had the vaccine are significantly less likely than those that have not to cite ‘concerns about catching COVID-19’ or ‘waiting to be vaccinated’ as a reason for low confidence in domestic trips going ahead over the next few months.
- However, 3 in 10 of those vaccinated still cite concerns around catching COVID-19 as a barrier, perhaps underlining the importance of a second dose in building confidence (NB. when examining the results by those who claim to have had a second dose, this barrier halves in importance).

Figure 8. Reasons for not being confident about travelling from April to June by retiree vaccine status, Percentage, Waves 27-28, U.K.
2. Profiling Trip Intenders
U.K. and overseas overnight trip planning

- Nearly two thirds plan on taking an overnight trip in the UK at some point in 2021, whereas around 1 in 4 intend to take a trip overseas. The majority of those who anticipate taking an overseas trip also plan to take a trip within the UK (just 4% are only planning a trip overseas).
- Of all UK overnight trip intenders, 31% are also considering taking a trip overseas; a proportion that is broadly unchanged among summer intenders but rises to 41% among spring intenders.

Figure 9. Proportion anticipating each type of trip in 2021, Percentage, Wave 28, U.K.

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>U.K. overnight trip</td>
<td>64</td>
<td>24</td>
<td>20</td>
<td>44</td>
<td>4</td>
</tr>
<tr>
<td>Overseas overnight</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>trip in 2021</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 10. Breakdown of U.K. intenders by UK and overseas trip intention, percentage wave 28, U.K.

- Only planning a U.K. trip this year
  - All U.K. 2021 intenders: 69
  - Spring Intenders: 59
  - Summer Intenders: 67

- Also planning an overseas trip this year
  - All U.K. 2021 intenders: 31
  - Spring Intenders: 41
  - Summer Intenders: 33

VB1A Thinking ahead between now and the end of the year, roughly how many short breaks and holidays will you take in the U.K. and overseas?
Base: All Wave 28 respondents n=1,139; All spring intenders planning a 2021 trip n=218; All summer intenders planning a 2021 trip n=551
When anticipating going on an overnight U.K. short break or holiday

- As of early April, 13% of U.K. adults anticipated taking an overnight domestic break in spring (between April and June).
- More than a third (35%) plan on taking an overnight trip in the summer (between July and September).
- Again, there is some evidence that vaccine uptake may be helping to drive intention given the over 45s that have had at least a first dose appear to be significantly more likely to take a trip in either the spring or summer periods.

Figure 11. Proportion anticipating a trip in each time period, Percentage, Wave 28, U.K.

Figure 12. Proportion that are planning an overnight trip in spring and summer by vaccine status, Percentage, Wave 28, U.K.

As of early April, 13% of U.K. adults anticipated taking an overnight domestic break in spring (between April and June). More than a third (35%) plan on taking an overnight trip in the summer (between July and September). Again, there is some evidence that vaccine uptake may be helping to drive intention given the over 45s that have had at least a first dose appear to be significantly more likely to take a trip in either the spring or summer periods.
Proportion of trip intenders that have already planned or booked their next overnight trip in the UK

- 62% of spring intenders claim to have already planned their trip; with 49% having already booked it, both significantly higher than the previous reporting period in early February.
- The proportion of summer intenders who have already planned or booked their trip stands at 29% and 22% respectively, also higher than the previous reporting period.
- 31% of spring bookings and 24% of summer bookings are transferred from trips that have previously been cancelled or postponed due to COVID-19.

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 Wave 28 respondents planning on taking a holiday or short break in the UK in Spring (April to June) n=225; Summer (July to September) n=468
At a net level, domestic spring and summer trip intenders are planning their overnight U.K. trips broadly in line with typical behaviour (i.e. pre-pandemic).

However, both spring and summer intenders anticipate actually booking their trips significantly closer to the travel date than usual.

**Figure 16.** PLANNING lead times for Spring or Summer trips compared to normal, percentage wave 28, U.K.

<table>
<thead>
<tr>
<th>Net (closer minus further away)</th>
<th>Spring Intenders</th>
<th>Summer Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning closer to the travel date than normal</td>
<td>26</td>
<td>30</td>
</tr>
<tr>
<td>About the Same</td>
<td>43</td>
<td>44</td>
</tr>
<tr>
<td>Planning further from the travel date than normal</td>
<td>25</td>
<td>18</td>
</tr>
<tr>
<td>Don't know</td>
<td>5</td>
<td>8</td>
</tr>
</tbody>
</table>

**Figure 17.** BOOKING lead times for Spring or Summer trips compared to normal, percentage wave 28, U.K.

<table>
<thead>
<tr>
<th>Net (closer minus further away)</th>
<th>Spring Intenders</th>
<th>Summer Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking closer to the travel date than normal</td>
<td>33</td>
<td>30</td>
</tr>
<tr>
<td>About the Same</td>
<td>42</td>
<td>44</td>
</tr>
<tr>
<td>Booking further from the travel date than normal</td>
<td>16</td>
<td>18</td>
</tr>
<tr>
<td>Don't know</td>
<td>9</td>
<td>8</td>
</tr>
</tbody>
</table>

*VB6diic. Compared to normal, when did or will you plan and book your next UK trip? Base: All Wave 28 respondents planning on taking a holiday or short break in the UK in Spring (April to June) n=225; Summer (July to September) n=468*
Purpose of next U.K. trip

- ‘Holidays’ make up the majority of trips in all the months defined as being spring or summer, although VFR is slightly more prevalent during May.

Figure 18. Purpose of next holiday or short break in UK, Percentage, Wave 26-28, U.K.
Demographics of intenders compared to the general population

- The life stage profile of spring intenders is broadly in line with the general population, although retirees do index higher.
- For the summer period, families are likely to join older independents as the largest audience.
- ABs have higher representation than the overall population among both spring and summer intenders.

Figure 19. Breakdown of intenders by life stage, Percentage Waves 26-28, UK

- Retirement age
- Older independents
- Families
- Pre-nesters

Figure 20. Breakdown of intenders by social grade, Percentage Waves 26-28, UK

- AB
- C1
- C2
- DE

Source: Demographic questions. Base: All respondents. UK population n=5,280 Spring intenders n=711; Summer intenders n=1,819
Financial segments and financial impact of COVID-19 on intenders

- 62% of spring intenders describe themselves as either ‘unaffected’ by COVID financially or ‘better off than before’, compared to 49% of the UK population. These differences will, in part, be driven by age profile given that retirees (who are more dominant in spring) are the least likely to say they have been financially impacted.
- For the summer period, the proportion unaffected or better off is lower at 56% which reflects the fact summer intenders have a slightly younger age profile.

Figure 21. Breakdown of intenders by financial segments, Percentage Waves 26-28, UK

<table>
<thead>
<tr>
<th></th>
<th>U.K population</th>
<th>Spring intenders</th>
<th>Summer intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>I’ve been hit hard</td>
<td>15</td>
<td>8</td>
<td>12</td>
</tr>
<tr>
<td>Things are ok but I</td>
<td>37</td>
<td>30</td>
<td>33</td>
</tr>
<tr>
<td>have to be careful</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I’ve not been</td>
<td>37</td>
<td>45</td>
<td>43</td>
</tr>
<tr>
<td>affected</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I’m better off than</td>
<td>12</td>
<td>17</td>
<td>13</td>
</tr>
<tr>
<td>before</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 22. Employment impact on intenders, Percentage Waves 26-28, UK residents of ‘working age’

<table>
<thead>
<tr>
<th>Employment impact</th>
<th>U.K population</th>
<th>Spring intenders</th>
<th>Summer intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>I’m on furlough</td>
<td>14</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td>Reduced income</td>
<td>17</td>
<td>15</td>
<td>18</td>
</tr>
<tr>
<td>Unpaid leave/redundant</td>
<td>9</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>None of these</td>
<td>59</td>
<td>63</td>
<td>60</td>
</tr>
</tbody>
</table>
Attitudinal segments (see definitions page for more information)

- The COVID segment profile of spring and summer intenders is largely consistent with the segment profile of the wider U.K. population. The key exceptions are ‘protective but pragmatic’ (which have higher representation amongst intenders) and ‘struggling’ (that have lower representation).

Figure 23. Breakdown of intenders by risk segment, Percentage Waves 26-28, U.K.
Where planning on staying on next U.K. short break or holiday

- The South West of England looks set to command the greatest visitor share among both spring and summer intenders, but the subsequent four destinations are characterised by having very similar levels of preference.

Figure 24. Where planning on staying on next UK overnight trip for Spring intenders, Percentage Waves 26-28, UK

Figure 25. Where planning on staying on next UK overnight trip for Summer intenders, Percentage Waves 26-28, 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=706; Summer intenders n=1,415
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.
Destination type for next overnight trip in UK

- There is no separation between the top two destination types for spring trips with 3 in 10 intenders likely to stay in a ‘traditional coastal/seaside town’ or ‘countryside or village’; both of which have significantly higher shares of intention than other destinations.
- For the summer, the leading two destination types are the same as spring, although ‘traditional coastal/seaside town’ is marginally preferred.

Figure 26. Main type of destination for Spring intenders, Percentage Waves 26-28, UK

Figure 27. Main type of destination for Summer intenders, Percentage Waves 26-28, UK

QVBSa. 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; Spring intenders n=706; Summer intenders n=1,415
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.
Make-up of visitor party for next U.K. holiday or short break

- ‘Partner’ is by far the most common response concerning who intenders are likely to spend their spring and summer overnight trip with. This is followed by ‘children, grandchildren or young adults’ with significantly higher representation in the summer driven by July and August where they make up 46% and 45% of visitor parties respectively.

**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; Spring intenders n=706; Summer intenders n=1,415
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.
Accommodation type for next overnight trip in UK

- For both spring and summer trips, ‘commercial rental’ (e.g. rented holiday cottage) is the leading accommodation choice, although only marginally ahead of ‘camping/caravan’, ‘hotel/motel/inn’ and ‘private home’.
- On average, intenders are expecting to stay in 1.7 accommodation types in spring and 1.8 types in summer, possibly reflecting some uncertainty about accommodation availability and how restrictions may impact their choice.

Figure 30. Accommodation planning on staying in on next UK overnight trip for Spring intenders, Net percentage Waves 26-28, UK

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Spring Intenders</th>
<th>Summer Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial rental</td>
<td>40%</td>
<td>42%</td>
</tr>
<tr>
<td>Caravan/Camping</td>
<td>39%</td>
<td>38%</td>
</tr>
<tr>
<td>Hotel/motel/inn</td>
<td>36%</td>
<td>37%</td>
</tr>
<tr>
<td>A private home</td>
<td>35%</td>
<td>36%</td>
</tr>
<tr>
<td>Guesthouse/B&amp;B/Farm house</td>
<td>19%</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>10%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Figure 31. Accommodation planning on staying in on next UK overnight trip for Summer intenders, Net percentage Waves 26-28, 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=706; Summer intenders n=1,415
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation.
Duration of the next overnight trip in UK

• Broadly speaking, overnight domestic trips are relatively evenly split between short breaks (1-3 nights) and longer breaks (4+ nights), although shorter breaks are slightly more prevalent in the ‘shoulder months’ of April and September, whereas longer breaks are of greater prominence during the peak summer holiday period.

Figure 32. Length of next UK holiday or short break by time period, percentage Waves 26-28, UK
Anticipated spend on next U.K. holiday or short break

- Spring intenders anticipate spending significantly less on overnight trips than summer intenders (£754 on average compared to £877) partly driven by a greater prevalence among the latter of trips exceeding £1,000 cost. This is in part linked to summer intenders anticipating longer trips, and the higher incidence of children in the trip parties (on average, trips with children spend £1,096 compared to £802 for those without).

Figure 33. Anticipated spend for Intenders, Percentage Waves 26-28, UK

- Spring intenders, Summer intenders

Figure 34. Anticipated average spend for Intenders, Average, Waves 26-28, UK

- £754, £877

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=706; Summer intenders n=1,415
3. Destination type

Summer Intenders
Type of destination for next U.K. short break or holiday - Consideration

- ‘Traditional coastal/seaside town’ and ‘countryside or village’ are the lead destination types among people considering an overnight domestic trip this summer. Those considering ‘mountains or hills’ are the most likely to also be considering an alternative location, with ‘countryside or village’ being the most likely second choice.
- Although ‘large city’ is the 5th most preferred destination type overall, it is as likely as ‘rural coastline’ and ‘smaller city or town’ to be a single consideration destination type. Notably those considering ‘a smaller city or town’ are considerably more likely to consider rural alternatives in preference to a ‘large city’.

Figure 35. Main type of destination for Summer Intenders, Percentage Waves 26-28, UK

Table 1. Destination types also considered, Percentage Waves 26-28, UK

Table: Destination types also considered, Percentage Waves 26-28, UK

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>SUMMER INTENDERS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Traditional coastal/seaside town</td>
</tr>
<tr>
<td>Traditional coastal/seaside town</td>
<td>24%</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>21%</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>21%</td>
</tr>
<tr>
<td>Smaller city or town</td>
<td>14%</td>
</tr>
<tr>
<td>Large city</td>
<td>8%</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>11%</td>
</tr>
</tbody>
</table>
‘Traditional coastal/seaside town’: Summer Intenders (34% share)

- Summer intenders planning a trip to a ‘traditional costal/seaside town’ index higher than average on families, parties with children and stays in static caravans.

Figure 36. Life stage of Summer Intenders by destination type, Percentage Waves 26-28, UK

Figure 37. Trip length of Summer Intenders by destination type, Percentage Waves 26-28, UK

Figure 38. Anticipated average spend of Summer Intenders by destination type, Average, Waves 26-28, UK

Figure 39. Visitor party make-up for Summer Intenders, Top 5, Percentage Waves 26-28, UK

Figure 40. Accommodation planning on staying in on next UK overnight trip for Summer Intenders, Top 5, Percentage Waves 26-28, UK

Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=706; Base for life stage chart: All traditional coastal/seaside town intenders n=480 ; Base for all other charts: Only traditional coastal/seaside town intenders n=311
‘Countryside or village’: Summer Intenders (30% share)

- Summer intenders planning a trip to a ‘countryside or village’ location index higher than average on ‘older independents’, longer trips of 4+ nights, trips with a partner and stays in a rented holiday home.
‘Rural coastline’: Summer Intenders (22% share)

- Summer intenders planning a trip to a ‘rural coastline’ index higher on ‘families’ and ‘pre-nesters’, longer trips of 4+ nights, trips with children and stays in a rented holiday home. Anticipated average trip spend is also higher than average.

Figure 46. Life stage of Summer Intenders by destination type, Percentage Waves 26-28, UK

- Figure 47. Trip length of Summer Intenders by destination type, Percentage Waves 26-28, UK
- Figure 48. Anticipated average spend of Summer Intenders by destination type, Average, Waves 26-28, UK
- Figure 49. Visitor party make-up for Summer Intenders, Top 5, Percentage Waves 26-28, UK
- Figure 50. Accommodation planning on staying in on next UK overnight trip for Summer Intenders, Top 5, Percentage Waves 26-28, UK

Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=706; Base for life stage chart: All Rural coastline intenders n=321 ; Base for all other charts: Only Rural coastline intenders n=145
‘Small city or town’: Summer Intenders (20% share)

- Summer intenders planning a trip to a ‘small city or town’ index higher on ‘pre-nesters’, shorter breaks, stays in a ‘hotel/motel/inn’ or ‘friend or relative’s home’ and expect to spend less than average on their trip.

Figure 51. Life stage of Summer Intenders by destination type, Percentage Waves 26-28, UK

Figure 52. Trip length of Summer Intenders by destination type, Percentage Waves 26-28, UK

Figure 53. Anticipated average spend of Summer Intenders by destination type, Average, Waves 26-28, UK

Figure 54. Visitor party make-up for Summer Intenders, Top 5, Percentage Waves 26-28, UK

Figure 55. Accommodation planning on staying in on next UK overnight trip for Summer Intenders, Top 5, Percentage Waves 26-28, UK

Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=706; Base for life stage chart: All Small city or town intenders n=273; Base for all other charts: Only Small city or town intenders n=132
‘Large city’: Summer Intenders (15% share)

- Similar to ‘small city and town’ intenders, those planning a trip to a ‘large city’ index higher on ‘pre-nesters’, shorter breaks and stays in a ‘hotel/motel/inn’ or a ‘friend or relative’s home’. Anticipate average spend on the trip is also lower than average compared to all summer intenders.

---

**Figure 56. Life stage of Summer Intenders by destination type, Percentage Waves 26-28, UK**

- Retirement age: 17% Summer Intenders, 11% Large city
- Older independents: 30% Summer Intenders, 30% Large city
- Families: 32% Summer Intenders, 32% Large city
- Pre-nesters: 21% Summer Intenders, 32% Large city

**Figure 57. Trip length of Summer Intenders by destination type, Percentage Waves 26-28, UK**

- Short break: 46% Summer Intenders, 58% Large city
- Longer break of 4+ nights: 46% Summer Intenders, 34% Large city
- Unsure: 8% Summer Intenders, 8% Large city

**Figure 58. Anticipated average spend of Summer Intenders by destination type, Average, Waves 26-28, UK**

- £877 Summer Intenders
- £782 Large city

**Figure 59. Visitor party make-up for Summer Intenders, Top 5, Percentage Waves 26-28, UK**

- Partner: 60 Summer Intenders, 50 Large city
- Child, grandchild or young adults: 38 Summer Intenders, 28 Large city
- Friends: 20 Summer Intenders, 21 Large city
- Other family member: 18 Summer Intenders, 17 Large city
- Will travel alone: 4 Summer Intenders, 8 Large city

**Figure 60. Accommodation planning on staying in on next UK overnight trip for Summer Intenders, Top 5, Percentage Waves 26-28, UK**

- Hotel/motel/inn: 38 Summer Intenders, 50 Large city
- Friends or relatives home: 19 Summer Intenders, 25 Large city
- Staying in a rented holiday home: 42 Summer Intenders, 20 Large city
- Guest house / Bed and breakfast: 24 Summer Intenders, 19 Large city
- Air bnb or equivalent: 15 Summer Intenders, 13 Large city

Base: All respondents planning on taking a holiday or short break in the UK; Summer Intenders n=706; Base for life stage chart: All Large city intenders n=242; Base for all other charts: Only Large city intenders n=150
‘Mountains or hills’: Summer Intenders (13% share)

- Summer intenders planning a trip to ‘mountains or hills’ index lower on retirees but are expected to yield a higher than average spend and are more likely to involve a stay in a ‘rented holiday home’.
4. Focus on cities and large towns

Summer Intenders
Areas intending to stay for summer city/town Intenders

- London is the most likely summer destination for city/town intenders, with a 19% share.

Figure 66. Areas intending to stay for summer city/town Intenders, Net percentage, Top 5, Waves 26-28, UK
Demographics of intenders compared to the general population

- ‘Large city intenders’ are significantly more likely to belong to the ‘pre-nester’ and ‘older independents’ life stages with a similar, although less marked skew, evident among ‘small city or town intenders’ too.
- ‘Large city intenders’ also have a strong bias towards the AB social grade with 33% falling into this category (over 10 points higher than the overall adult population and small city/town intenders).

Figure 67. Breakdown of summer intenders by life stage, Percentage Waves 26-28, UK

Figure 68. Breakdown of summer intenders by social grade, Percentage Waves 26-28, UK

Source: Demographic questions. Base: All respondents. UK population n=5,280; Large city summer intenders n=242; Non-large city summer intenders n=1,173; Small city or town summer intenders n=273; Non-small city or town intenders n=1,142
There is minimal separation by financial status, however, city or town intenders of working age are significantly more likely to have had their employment impacted by COVID-19, driven by the high incidence of pre-nesters in these groups.

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. U.K. population n=5,280 Large city summer intenders n=242; Non-large city summer intenders n=1,173; Small city or town summer intenders n=273; Non-small city or town summer intenders n=1,142

- 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

U.K. population
Large city summer intenders
Non-large city summer intenders
Small city or town summer intenders
Non-small city or town summer intenders

I'm on furlough
Reduced income
Unpaid leave/redundant
None of these
Level of comfort undertaking activities

- ‘Large city intenders’ show significantly higher levels of comfort participating in the listed range of activities than other groups.
- This is particularly the case for ‘eating at a restaurant’ and ‘travelling by public transport’.

Figure 71. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Waves 26-28, U.K.
COVID segments

- The more COVID-confident ‘Less to lose’ segment exhibits significantly higher representation among large city intenders.
- This trait is also shared by ‘small city or town’ intenders although to a lesser extent.

Figure 72. Breakdown of population by COVID segments by life stage, Percentage, Waves 26-28, U.K.
Reasons for not feeling confident taking trips in the U.K.

- The small proportion of ‘large city summer intenders’ that are not confident about their trip going ahead this summer, are most likely to cite restrictions as driving this sentiment. However, they are significantly less likely than other groups to have concerns about catching COVID-19 or state they won’t travel until vaccinated, but are more likely to cite personal finances as a potential barrier.
- ‘Concerns about catching COVID-19’ are significantly more prevalent for ‘small city or town intenders’ than ‘large city intenders’.

Figure 73. Reasons for not being confident about travelling this summer, Percentage, Waves 26-28, U.K.
## Composition of visitor party

- Both large city and smaller city or town intenders index lower than ‘non-city or town intenders’ on the presence of children within their trip party.
- They additionally exhibit a lower expectation to be travelling with a partner, pets and, in the case of large city intenders, their parents.

### QVB4d. With whom are you likely to be spending your holiday?

**Base:** Large city summer intenders n=150; Small city or town summer intenders n=132; Non-large city or non-small city or town intenders n=1,389

**Figure 74. Visitor party make-up for Spring City/Town Intenders, Percentage Waves 26-28, UK**

<table>
<thead>
<tr>
<th></th>
<th>Large City intenders</th>
<th>Small city or town intenders</th>
<th>Non city or town intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner</td>
<td>50</td>
<td>53</td>
<td>60</td>
</tr>
<tr>
<td>Child, grandchild or young adults*</td>
<td>28</td>
<td>22</td>
<td>37</td>
</tr>
<tr>
<td>Friends</td>
<td>21</td>
<td>17</td>
<td>20</td>
</tr>
<tr>
<td>Other members of family</td>
<td>17</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>Your parents (of adults aged 25+ only)</td>
<td>4</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Intend to travel on own</td>
<td>8</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>Pets</td>
<td>4</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>
Type of accommodation for city/town intenders

- Both ‘large city’ and ‘small city/town’ summer intenders over-index on stays in a ‘hotel/motel/inn’ and ‘a private home’, with the latter driven by visiting friends or relatives.
- Summer intenders to small cities or towns are considerably more likely than large city intenders to stay in commercial rental, a caravan/campsite or a guesthouse/B&B accommodation.

Figure 75. Accommodation planning on staying in on next UK overnight trip for summer city/town Intenders, Net percentage Waves 26-28, UK

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

Base: Large city summer intenders n=150; Small city or town summer intenders n=132; Non-large city or non-small city or town intenders n=1,389
5. Health Conditions & Impairments

Summer Intenders
Proportion citing a health condition or impairment

- 37% of adults in the UK claim to have at least one health condition or impairment
- Of these, ‘a mental health condition’ (12%) was most frequently cited followed by ‘a long-term illness or health condition’ such as arthritis or diabetes (9%) and ‘physical or mobility impairment’ (also at 9%).

Figure 76. Proportion of U.K. residents citing a health condition or impairment, Net and Percentage, Waves 26-28, U.K.
Demographics compared to the general population

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

Source: Demographic questions. Base: All respondents. UK population n=5,280; Without health condition or impairment n=1,975; With health condition or impairment n=1,203
Those with a health condition or impairment belong to similar COVID-19 financial segments as the overall population, while those of working age have also had their employment similarly impacted by the pandemic.

Figure 79. Breakdown by financial segments, Percentage Waves 26-28, UK

Figure 80. Employment impact, Percentage Waves 26-28, 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: UK population n=5,280; Without health condition or impairment n=1,975; With health condition or impairment n=1,203
Level of comfort undertaking activities

- Adults with a health condition or impairment report slightly lower comfort levels conducting the listed activities than those without.
- The gap widens for ‘shopping in your local area’ and ‘eating at a restaurant’ with these differences remaining in place even when controlling for the age disparity between the groups.

Figure 81. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Wave 28, U.K.
COVID segments

- Adults with a health condition index significantly higher within the ‘struggling’ segment – a segment that has been hit hard by the pandemic and characterised by containing those more concerned than average about catching COVID-19.

Figure 82. Breakdown of population by COVID segments by life stage, Percentage, Wave 28, U.K.
Confidence in the ability to take a U.K. short break or holiday

- Those with a health condition or impairment initially appear to exhibit less confidence that a booked trip would go ahead as planned, however, when the audiences are controlled for age, this difference is removed.

Figure 83. Confidence in taking a U.K. overnight trip across a range of different months, Net percentage very and fairly confident, Wave 28, U.K.
Reasons for not feeling confident taking trips in the U.K.

- Adults with a health condition or impairment generally cite similar reasons for lacking confidence in trips going ahead this summer compared to adults without a health condition.
- However, they are more likely to cite 'personal finances'; a difference that remains even when controlling for age differences.

Figure 84. Reasons for not being confident about travelling from July to September. Percentage, Wave 28, U.K.

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? Base: All U.K. respondents. n=1,760; Without health condition n=499; With health condition n=339
When anticipating going on an overnight U.K. short break or holiday

- Adults citing a health condition or impairment are less likely to anticipate taking an overnight domestic holiday or short break.
- Just under a quarter don’t intend to take a trip, compared to 19% of those without a health condition or impairment. This difference is largely driven by their lower summer intention (31% compared to 38%).

Figure 85. Proportion anticipating a trip in each time period, Percentage, Wave 28, U.K.
Type of location for next U.K. short break or holiday

- Summer intenders with a health condition or impairment anticipate choosing similar destinations compared to those without a health condition or impairment.
- ‘Traditional coastal/seaside town’ and ‘countryside or village’ are the two leading destinations among both audiences.

Figure 86. Main type of destination for summer intenders, Percentage Waves 26-28, UK

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>All summer intenders</th>
<th>Summer intenders without health condition or impairment</th>
<th>Summer intenders with health condition or impairment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional coastal/seaside town</td>
<td>34</td>
<td>36</td>
<td>34</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>30</td>
<td>33</td>
<td>30</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>22</td>
<td>25</td>
<td>20</td>
</tr>
<tr>
<td>Small city or town</td>
<td>20</td>
<td>21</td>
<td>19</td>
</tr>
<tr>
<td>Large city</td>
<td>15</td>
<td>14</td>
<td>16</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>13</td>
<td>14</td>
<td>14</td>
</tr>
</tbody>
</table>
Type of accommodation for next U.K. short break or holiday

- There are minimal differences in accommodation preference between summer intenders regardless of health condition or impairment status.

Figure 87. Accommodation planning on staying in on next UK overnight trip for summer intenders, Net percentage Waves 26-28, 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; All summer intenders n=819; No impairment n=460; With health condition or impairment n=210
6. Regional profiling

Summer Intenders
Where planning on staying on next summer short break or holiday

- As indicated previously within this report, the South West of England is the part of the UK likely to receive the highest volume of summer trip intenders at 24% share.
- However, the subsequent four destinations all receive the same levels of interest, at 11% share respectively.

Figure 88. Where planning on staying on next UK overnight trip for Summer intenders, Percentage Waves 26-28, UK
Where intending to visit within UK regions in summer (1)

Tables 2-5. Where intending to visit within regions, Waves 26-28, UK

<table>
<thead>
<tr>
<th>South West of England</th>
<th>Scotland</th>
<th>North West</th>
<th>Yorkshire &amp; The Humber</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERALL VISITS</td>
<td>24%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Devon</td>
<td>48%</td>
<td>Highlands</td>
<td>Cumbria</td>
</tr>
<tr>
<td>Cornwall &amp; Isles of Scilly</td>
<td>46%</td>
<td>Edinburgh area</td>
<td>Greater Manchester</td>
</tr>
<tr>
<td>Dorset</td>
<td>19%</td>
<td>Scottish Isles</td>
<td>Lancashire</td>
</tr>
<tr>
<td>Somerset</td>
<td>12%</td>
<td>Glasgow area</td>
<td>Merseyside</td>
</tr>
<tr>
<td>Bath</td>
<td>9%</td>
<td>West Coast</td>
<td>Cheshire</td>
</tr>
<tr>
<td>Gloucestershire (inc. Cotswolds, Forest of Dean)</td>
<td>6%</td>
<td>East Coast</td>
<td></td>
</tr>
<tr>
<td>Wiltshire</td>
<td>4%</td>
<td>Central Scotland</td>
<td></td>
</tr>
<tr>
<td>Bristol</td>
<td>4%</td>
<td>South of Scotland</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>The North York Moors</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>York</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>East Riding of Yorkshire</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>West Yorkshire (e.g. Leeds, Bradford)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>South Yorkshire</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Lincolnshire</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 summer
Where intending to visit within UK regions in summer (2)

Tables 6-9. Where intending to visit within regions, Waves 26-28, UK

<table>
<thead>
<tr>
<th>East of England</th>
<th>South East</th>
<th>Wales (Top 10)</th>
<th>West Midlands</th>
</tr>
</thead>
<tbody>
<tr>
<td>OVERALL VISITS</td>
<td>South East</td>
<td>OVERALL VISITS</td>
<td>West Midlands</td>
</tr>
<tr>
<td>Overall</td>
<td>11%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Great Yarmouth</td>
<td>46%</td>
<td>East Sussex</td>
<td>Birmingham</td>
</tr>
<tr>
<td>Broads National Park</td>
<td>37%</td>
<td>Hampshire</td>
<td>Warwickshire incl. Stratford-upon-Avon</td>
</tr>
<tr>
<td>Cambridge</td>
<td>15%</td>
<td>Kent</td>
<td>Worcestershire</td>
</tr>
<tr>
<td>Southwold</td>
<td>14%</td>
<td>Oxfordshire</td>
<td>Shropshire</td>
</tr>
<tr>
<td></td>
<td></td>
<td>West Sussex</td>
<td>Staffordshire</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Isle of Wight</td>
<td>Coventry</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Surrey</td>
<td>Solihull</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Berkshire</td>
<td>Herefordshire</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Buckinghamshire</td>
<td></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 summer
Where intending to visit within UK regions in summer (3)

Tables 10-11. Where intending to visit within regions, Waves 26-28, UK

<table>
<thead>
<tr>
<th>Region</th>
<th>OVERALL VISITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>North East</td>
<td>4%</td>
</tr>
<tr>
<td>Northumberland</td>
<td>47%</td>
</tr>
<tr>
<td>Tyne and Wear</td>
<td>22%</td>
</tr>
<tr>
<td>Durham</td>
<td>15%</td>
</tr>
<tr>
<td>Tees Valley</td>
<td>8%</td>
</tr>
<tr>
<td>Cleveland</td>
<td>4%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region</th>
<th>OVERALL VISITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Midlands</td>
<td>4%</td>
</tr>
<tr>
<td>Derbyshire and Nottinghamshire</td>
<td>69%</td>
</tr>
<tr>
<td>Lincolnshire</td>
<td>19%</td>
</tr>
<tr>
<td>Leicestershire and Rutland</td>
<td>17%</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 summer
Destinations intending to visit in summer by region of residence

- Some 22% of summer intenders to the South West reside in the South East, with a further 15% coming from London. Local demand in the region is also strong with 16% of intenders residing within the South West itself.

Table 12. Where intending to visit by region of residence, Waves 26-28, UK

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>92%</td>
<td>61%</td>
<td>77%</td>
<td>91%</td>
<td>91%</td>
<td>85%</td>
<td>81%</td>
<td>93%</td>
<td>96%</td>
<td>95%</td>
<td>96%</td>
<td>96%</td>
</tr>
<tr>
<td>Scotland</td>
<td>3%</td>
<td>36%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>7%</td>
<td>9%</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Wales</td>
<td>4%</td>
<td>3%</td>
<td>21%</td>
<td>5%</td>
<td>3%</td>
<td>4%</td>
<td>7%</td>
<td>3%</td>
<td>3%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>South West</td>
<td>8%</td>
<td>4%</td>
<td>6%</td>
<td>16%</td>
<td>2%</td>
<td>5%</td>
<td>9%</td>
<td>6%</td>
<td>3%</td>
<td>5%</td>
<td>0%</td>
<td>5%</td>
</tr>
<tr>
<td>Yorkshire &amp; Humber</td>
<td>10%</td>
<td>8%</td>
<td>2%</td>
<td>6%</td>
<td>24%</td>
<td>7%</td>
<td>6%</td>
<td>7%</td>
<td>14%</td>
<td>6%</td>
<td>21%</td>
<td>7%</td>
</tr>
<tr>
<td>North West</td>
<td>11%</td>
<td>8%</td>
<td>12%</td>
<td>6%</td>
<td>14%</td>
<td>26%</td>
<td>11%</td>
<td>5%</td>
<td>12%</td>
<td>12%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>London (within M25)</td>
<td>16%</td>
<td>9%</td>
<td>13%</td>
<td>15%</td>
<td>11%</td>
<td>11%</td>
<td>24%</td>
<td>14%</td>
<td>30%</td>
<td>4%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>South East (outside London)</td>
<td>15%</td>
<td>13%</td>
<td>15%</td>
<td>22%</td>
<td>9%</td>
<td>8%</td>
<td>12%</td>
<td>28%</td>
<td>12%</td>
<td>9%</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td>East of England</td>
<td>10%</td>
<td>7%</td>
<td>7%</td>
<td>6%</td>
<td>10%</td>
<td>7%</td>
<td>7%</td>
<td>3%</td>
<td>28%</td>
<td>5%</td>
<td>4%</td>
<td>13%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>9%</td>
<td>5%</td>
<td>17%</td>
<td>13%</td>
<td>9%</td>
<td>4%</td>
<td>3%</td>
<td>8%</td>
<td>7%</td>
<td>19%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>North East</td>
<td>4%</td>
<td>5%</td>
<td>1%</td>
<td>1%</td>
<td>7%</td>
<td>6%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>5%</td>
<td>17%</td>
<td>1%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>9%</td>
<td>1%</td>
<td>3%</td>
<td>7%</td>
<td>6%</td>
<td>11%</td>
<td>7%</td>
<td>4%</td>
<td>11%</td>
<td>3%</td>
<td>15%</td>
<td>20%</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 summer England n=840; Scotland n=129; Wales n=124; South West n=74; London n=113; North West n=96; Yorkshire and the Humber n=84; South East n=151; East of England n=66; North East n=49* West Midlands n=116; East Midlands n=91
*Small base size treat with caution. Column percentages may not quite equal 100% due to the omission of NI in the table.
Life stage breakdown of summer intenders - by destination

- Wales and the East of England are characterised by having particularly high proportions of summer intenders falling within the family life stage. It should be noted that belonging to the family life stage does not necessarily guarantee an overnight trip will be with children (see next slide for more detail).
- The South East of England, Scotland, the East Midlands and the South West of England look set to attract the highest proportion of retirees during this summer, while London and the West Midlands index highest on pre-nesters. (Note: base sizes for the West Midlands and East Midlands are low, so percentages should be considered indicative only).

Figure 89. Life stage of summer intenders by destination, Percentage Waves 26-28, 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=958; Scotland n=197; Wales n=150; South West n=331; London n=137; North West n=146; Yorkshire and the Humber n=137; South East n=30; East of England n=25; West Midlands n=66; East Midlands n=55.
Party composition of summer intenders - by destination

- Consistent with life stage breakdown, Wales is likely to exhibit the highest proportion of visitors with children in the trip party (almost half falling into that category). Interestingly, the South West of England also looks set to have a high proportion of children within trip parties to this destination, reflecting that non-family life stages can also be characterised by the presence of children (e.g. extended families or retirees with grandchildren).
- Summer intenders to London are the most likely to be accompanied by ‘friends’ (at 25%) reflecting the high proportion of pre-nesters among visitors to this destination.

Table 13. Visitor party of summer intenders by destination, Percentage Waves 26-28, 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>59%</td>
<td>62%</td>
<td>63%</td>
<td>63%</td>
<td>65%</td>
<td>58%</td>
<td>35%</td>
<td>62%</td>
<td>67%</td>
<td>61%</td>
<td>68%</td>
<td>52%</td>
</tr>
<tr>
<td>Children or young adults (aged 16-24)</td>
<td>37%</td>
<td>36%</td>
<td>49%</td>
<td>41%</td>
<td>32%</td>
<td>39%</td>
<td>34%</td>
<td>23%</td>
<td>26%</td>
<td>35%</td>
<td>51%</td>
<td>30%</td>
</tr>
<tr>
<td>Friend/s</td>
<td>20%</td>
<td>12%</td>
<td>18%</td>
<td>19%</td>
<td>14%</td>
<td>21%</td>
<td>25%</td>
<td>21%</td>
<td>18%</td>
<td>21%</td>
<td>6%</td>
<td>14%</td>
</tr>
<tr>
<td>Pets</td>
<td>3%</td>
<td>10%</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
<td>2%</td>
<td>12%</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>With parents of older adults</td>
<td>8%</td>
<td>6%</td>
<td>10%</td>
<td>8%</td>
<td>6%</td>
<td>7%</td>
<td>4%</td>
<td>10%</td>
<td>4%</td>
<td>7%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Will travel alone</td>
<td>3%</td>
<td>10%</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
<td>2%</td>
<td>12%</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>Other members of my family</td>
<td>17%</td>
<td>18%</td>
<td>25%</td>
<td>20%</td>
<td>21%</td>
<td>17%</td>
<td>24%</td>
<td>12%</td>
<td>24%</td>
<td>7%</td>
<td>7%</td>
<td>21%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>3%</td>
<td>2%</td>
<td>5%</td>
<td>1%</td>
<td>7%</td>
<td>0%</td>
<td>2%</td>
</tr>
</tbody>
</table>
There are few statistical differences in financial segments by anticipated destination, although Wales over-indexes on summer intenders falling into the “things are ok but I have to be careful” category.

Figure 90. Financial segments of summer intenders by destination, Percentage Waves 26-28, UK

Financial segments questions and QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(Ill)>? Base: England n=958; Scotland n=197; Wales n=150; South West n=331; London n=137; North West n=146; Yorkshire and the Humber n=137; South East n=110; East of England n=124; North East n=57 West Midlands n=66 East Midlands n=55.
Social grades C1C2 have the highest representation amongst summer intenders to all destinations, but particularly so for Wales and the East of England.

London looks set to attract a relatively high proportion of ABs, as does the North West of England. The West Midlands also appears set to receive a high proportion of ABs, although low base sizes means this finding should be treated with caution.

Figure 91. Social grade of Summer intenders by destination, Percentage Waves 26-28, 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: England n=958; Scotland n=197; Wales n=150; South West n=331; London n=137; North West n=146; Yorkshire and the Humber n=137; South East n=110; East of England n=124; North East n=57 West Midlands n=66 East Midlands n=55.
Accommodation preference of summer intenders – *by destination*

- Summer intenders to London are the most likely to anticipate staying in a private home, or hotel/motel/inn.
- Wales and the East of England over-index on camping and caravan, whereas guesthouse/B&B/farmhouse has particularly strong representation in the North West.

**Table 14. Accommodation preference of summer intenders by destination, Percentage Waves 26-28, 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>Commercial rental</td>
<td>42%</td>
<td>39%</td>
<td>39%</td>
<td>40%</td>
<td>38%</td>
<td>36%</td>
<td>46%</td>
<td>34%</td>
<td>35%</td>
<td>40%</td>
<td>52%</td>
<td>55%</td>
</tr>
<tr>
<td>Camping / caravan</td>
<td>38%</td>
<td>36%</td>
<td>45%</td>
<td>38%</td>
<td>32%</td>
<td>36%</td>
<td>35%</td>
<td>35%</td>
<td>48%</td>
<td>27%</td>
<td>25%</td>
<td>40%</td>
</tr>
<tr>
<td>Hotel/motel/inn</td>
<td>36%</td>
<td>42%</td>
<td>37%</td>
<td>26%</td>
<td>35%</td>
<td>33%</td>
<td>48%</td>
<td>55%</td>
<td>26%</td>
<td>46%</td>
<td>34%</td>
<td>27%</td>
</tr>
<tr>
<td>Private home</td>
<td>35%</td>
<td>37%</td>
<td>31%</td>
<td>30%</td>
<td>29%</td>
<td>30%</td>
<td>59%</td>
<td>33%</td>
<td>22%</td>
<td>41%</td>
<td>18%</td>
<td>29%</td>
</tr>
<tr>
<td>Guesthouse/ B&amp;B / Farmhouse</td>
<td>26%</td>
<td>20%</td>
<td>23%</td>
<td>23%</td>
<td>29%</td>
<td>39%</td>
<td>28%</td>
<td>12%</td>
<td>13%</td>
<td>20%</td>
<td>24%</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
<td>8%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
<td>8%</td>
<td>11%</td>
<td>7%</td>
<td>6%</td>
<td>7%</td>
<td>2%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Destination type of summer intenders - by destination

As outlined in previous reports, 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 ‘large city’. The consideration of destination types that don’t align with the destination (e.g. 12% of London intenders considering a trip to the rural coastline) underlines the lack of certainty and the potential for destination switching. It may also imply non-central accommodation bases.

Table 15. Destination type of summer intenders by destination, Percentage Waves 26-28, 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>Traditional coastal/seaside town</td>
<td>35%</td>
<td>18%</td>
<td>31%</td>
<td>48%</td>
<td>30%</td>
<td>22%</td>
<td>7%</td>
<td>46%</td>
<td>40%</td>
<td>7%</td>
<td>22%</td>
<td>16%</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>30%</td>
<td>31%</td>
<td>30%</td>
<td>27%</td>
<td>33%</td>
<td>39%</td>
<td>13%</td>
<td>22%</td>
<td>33%</td>
<td>17%</td>
<td>25%</td>
<td>37%</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>20%</td>
<td>29%</td>
<td>19%</td>
<td>28%</td>
<td>17%</td>
<td>7%</td>
<td>12%</td>
<td>16%</td>
<td>21%</td>
<td>5%</td>
<td>26%</td>
<td>6%</td>
</tr>
<tr>
<td>Small city or town</td>
<td>21%</td>
<td>17%</td>
<td>14%</td>
<td>15%</td>
<td>20%</td>
<td>14%</td>
<td>25%</td>
<td>26%</td>
<td>17%</td>
<td>45%</td>
<td>26%</td>
<td>15%</td>
</tr>
<tr>
<td>Large city</td>
<td>15%</td>
<td>21%</td>
<td>8%</td>
<td>5%</td>
<td>11%</td>
<td>15%</td>
<td>56%</td>
<td>3%</td>
<td>4%</td>
<td>26%</td>
<td>17%</td>
<td>7%</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>9%</td>
<td>31%</td>
<td>13%</td>
<td>4%</td>
<td>6%</td>
<td>23%</td>
<td>15%</td>
<td>3%</td>
<td>4%</td>
<td>14%</td>
<td>8%</td>
<td>24%</td>
</tr>
</tbody>
</table>
Trip length of summer intenders – by destination

- Most destinations show a relatively even split of short breaks (1-3 nights) and longer breaks of 4+ nights for trips planned this summer, although the South West of England exhibits more of a bias in favour of longer breaks, while trips to the North East are more likely to be shorter.

Figure 92. Length of next summer U.K. holiday or short break by destination type, Percentage Waves 26-28, U.K.

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>Unsure</th>
<th>Longer break (4+ nights)</th>
<th>Shorter break (1-3 nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>46</td>
<td>49</td>
<td>49</td>
</tr>
<tr>
<td>Scotland</td>
<td>7</td>
<td>49</td>
<td>44</td>
</tr>
<tr>
<td>Wales</td>
<td>11</td>
<td>43</td>
<td>46</td>
</tr>
<tr>
<td>South West Yorkshire &amp; the Humber</td>
<td>3</td>
<td>54</td>
<td>45</td>
</tr>
<tr>
<td>North West</td>
<td>6</td>
<td>45</td>
<td>51</td>
</tr>
<tr>
<td>London</td>
<td>4</td>
<td>40</td>
<td>52</td>
</tr>
<tr>
<td>South East</td>
<td>11</td>
<td>39</td>
<td>46</td>
</tr>
<tr>
<td>East of England</td>
<td>5</td>
<td>46</td>
<td>50</td>
</tr>
<tr>
<td>West Midlands</td>
<td>35</td>
<td>50</td>
<td>44</td>
</tr>
<tr>
<td>North East</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>East Midlands</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? Base: England n=870; Scotland n=147; Wales n=98; South West n=232; London n=86; North West n=97; Yorkshire and the Humber n=82; South East n=72; East of England n=78; North East n=33* West Midlands n=43* East Midlands n=35*
Estimated spend for summer intenders – by destination

- Summer intenders to London estimate they will spend the most, averaging £1,068 per trip. By contrast, the average estimated trip spend to Yorkshire & the Humber is £677.

Figure 93. Anticipated trip spend for summer trips by destination type, Percentage, Average, Waves 26-28, UK

QVB6e. Approximately how much do you think this trip will cost in total?
Base: England n=870; Scotland n=147; Wales n=98; South West n=232; London n=86; North West n=97; Yorkshire and the Humber n=82; South East n=72; East of England n=78; North East n=33* West Midlands n=43* East Midlands n=35*
7. Profiling 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 an overnight domestic trip in Spring and Summer
- **Spring intenders**: UK adults who intend to take their next domestic overnight trip between April and June this year
- **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 (those who intend to take an overnight domestic trip in spring and summer) broadly replicate the life stage profile of spring intenders by indexing slightly higher than the overall UK adult population on retirees. They are, however, more likely than all featured audiences to belong to social grades AB.
- Non-planners are also more likely than the population to be retirees, but index significantly higher on the DE social grades.
- Persuadables also index higher on the DE social grades, but are more closely aligned with the wider population in terms of life stage.

Figure 94. Breakdown by life stage, Percentage Waves 26-28, UK

Figure 95. Breakdown by social grade, Percentage Waves 26-28, 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=5,280 Multiple Trip-takers n=390; Spring intenders n=711; Summer intenders n=1,415, Persuadables n=948, Non-planners n=1,230.
Financial segments and financial impact

- ‘Multiple Trip-takers’ and spring intenders are more likely to state they are both better off financially than before the pandemic or that they have not been affected. Summer intenders also demonstrate a comparatively robust financial status, although less so than spring intenders.
- The majority of Persuadables and Non-planners have either been hit hard financially or have to be careful. However, 2 in 5 of these groups have not been impacted financially, which suggests there are also other factors influencing their trip reticence.

Figure 96. Breakdown by financial segments, Percentage Waves 26-28, UK

Figure 97. Breakdown by work and financial impact of COVID-19, Percentage Waves 26-28, 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: U.K. population n=5,280 Multiple Trip-takers n=390; Spring intenders n=711; Summer intenders n=1,415, Persuadables n=948, Non-planners n=1,230.
Anticipated number of U.K. trips this year compared to normal

- Multiple trip-takers and spring intenders plan on taking ‘net more’ domestic overnight short breaks (1-3 nights) and longer breaks (4+ nights) by the end of 2021 compared to normal.
- Summer intenders plan on taking ‘net fewer’ trips, although this is less the case for short breaks than longer breaks. Persuadables and non-planners unsurprisingly plan on taking significantly fewer domestic trips compared to normal.

Figure 98. Number of UK short breaks (1-3 nights) by end December 2021 compared to normal, Percentage Wave 26-28, UK

Figure 99. Number of UK longer trips of 4+ nights by end December 2021 compared to normal, Percentage Wave 26-28, 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 end December 2021? Base: U.K. population n=5,280 Multiple Trip-takers n=390; Spring intenders n=711; Summer intenders n=1,415, Persuadables n=948, Non-planners n=1,230.
Anticipated number of OVERSEAS trips this year compared to normal

- All audiences anticipate a net decline in the amount of overseas trips they will take compared to normal between now and the end of this year.

Figure 100. Number of OVERSEAS short breaks (1-3 nights) by end December 2021 compared to normal, Percentage Wave 26-28, UK

Figure 101. Number of OVERSEAS longer trips of 4+ nights by end December 2021 compared to normal, Percentage Wave 26-28, UK
Appetite for Risk

- There continues to be a link between intent to take an overnight domestic trip and the levels of comfort participating in the listed range of activities.
- Multiple Trip-takers and intenders in both the spring and summer periods generally exhibit high levels of comfort, whilst Persuadables and Non-planners are significantly less likely to.
- ‘Proximity of intent’ also appears related to “comfort” with spring intenders typically registering higher levels than summer intenders.

**Figure 102. Level of comfort conducting a range of activities separately and combined, Net very and fairly comfortable, Wave 26-28, 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 as planned between April and July. Summer intenders are almost as likely to be confident from August onwards (but significantly less so before that), with all three audiences equally confident about trips in September.
- It’s not until September trips are considered that at least half of Persuadables feel confident that such a trip would go ahead as intended.

Figure 103. Confidence in taking a UK short break or holiday across a range of different months, Net percentage very and fairly confident, Wave 26-28, 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=5,280 Multiple Trip-takers n=390; Spring intenders n=711; Summer intenders n=1,415, Persuadables n=948, Non-planners n=1,230.
Reasons for not feeling confident about taking trips in the U.K.

- Restrictions on the ‘fun’ elements of trips (e.g. things to do, places to eat and opportunities to socialise) is the most frequently cited reason given by those lacking confidence in the ability to go on an overnight trip between July and September.
- Both summer intenders and Persuadables index high relative to spring intenders on ‘government restrictions’ as a barrier to confidence, whereas Persuadables also over-index on concerns around catching COVID-19, a sense that travel is not responsible, and their personal finances.

Figure 104. Reasons for not being confident about travelling between July and September, Percentage Wave 26-28, UK, Ranked on Multiple Trip-takers

QVB8. Which of the following factors are contributing to you being ‘not confident’ about taking a trip about taking a U.K. holiday or short break in <insert month>? Base: U.K. population n=1,367  Multiple Trip-takers n=27**; Spring intenders n=53*; Summer intenders n=281, Persuadables n=297, Non-planners n=370 **Denotes small base sizes – treat with caution
8. Day Trip Intentions
Day trip intention overall

- The likelihood to take day trips in the short term continues to increase with 25% of adults anticipating doing so in the next 2 weeks.
- Longer-term day trip intention has dropped marginally over the past two waves, although not significantly.

Figure 105. Likelihood to take any day trip, percentage wave-on-wave, UK

QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 30 respondents n=1,758 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple day trips across several time periods.
The destinations of choice for day trippers are more likely to be rural or coastal in nature. Urban day trips, particularly to ‘large cities’, continue to show lower levels of intent especially during the spring and summer periods relative to other destinations, and just over half of UK adults have no plans to visit a large city for a day trip at any point.

Figure 106. Likelihood to take a day trip by destination type, percentage, Wave 30, UK
Life stage of day trip intenders

Day trippers typically have higher representation amongst pre-nesters and families compared to the overall UK adult population although there are differences by life stage. Older groups exhibit a stronger preference for rural locations, while more urbanised destinations are characterised by a having a younger visitor profile.

Figure 107. Breakdown of day trip intenders* by life stage, percentage, Wave 28, UK

- Retirement age
- Older independents
- Families
- Pre-nesters

U.K. population

All daytrippers by summer

Countryside or village day trippers

Traditional coastal/seaside town day trippers

Large city day trippers

Smaller city or town day trippers

Rural coastline day trippers

Mountains or hills day trippers

Demographics questions and QVB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Wave 28 respondents:

*All day trippers within the next 2 weeks and spring/summer n=1072; Countryside or village day trippers n=851; Traditional coastal/seaside town day trippers n=882 Large city day trippers n=483 Smaller city or town day trippers n=686 Rural coastline day trippers n=804 Mountains or hills day trippers n=698
Methodology
Methodology

• The findings in this report are based on a fortnightly 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 26-28 of the COVID-19 consumer sentiment 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.