COVID-19 Consumer Tracker

February 2022

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

UK Results
Introduction

- VisitEngland, VisitScotland and Visit Wales have commissioned a Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight trips, both within the UK and abroad.
- The survey addresses areas such as: current attitude to travel (incl. concerns around travel and reassurances needed from the tourism sector), intentions of UK residents to travel for day trips, short breaks and holidays, when they plan to book and when they plan to go on their trip, as well as the destination, type of location and accommodation of their intended trip.
- This tracker is based on a UK nationally representative sample of 1,500 adults aged 16+, with additional boosts for Scotland and Wales.
- Fieldwork tends to take place at the start of each month and this wave’s fieldwork was conducted between 1st – 7th February 2022.
- The results are made publicly available and updated each wave at the following website: https://www.visitbritain.org/covid-19-consumer-sentiment-tracker
In this report we look at the profiles and attitudes of a number of separate audiences depending on when they intend to take an overnight domestic trip.

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

- **April to June 2022 Intenders**: Residents of the UK who claim their next domestic overnight trip will take place between April and June 2022
# February 2022: Scorecard of Key Metrics

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

* Represents a statistically significant change on previous wave
1. Covid Impact on Attitudes to Travel
The Current Mood

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

Q5: How would you rate, between 0 and 10, your mood today? Base: All respondents. February 2022 = 1,756 All other months n=c,1750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
Note: Fieldwork for each month took place at the start of each month – exact dates vary). October data is taken from BVA BDRC’s survey.

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

[Graph showing mood levels from April 2020 to February 2022, with values ranging from 6.1 to 6.8]
Perceptions of the situation relating to COVID-19

The perception of the current situation in relation to COVID-19 has improved since January 2022. Proportion of those who think ‘the worst has passed’ (52%) is now significantly larger than % of those who feel ‘the worst is still to come’ (14%).

Figure 2. Perception of the situation with regards to COVID-19, Percentage wave-on-wave, UK
The ‘appetite for risk’ score has slightly increased from 2.8 in January 2022 to 2.9 (out of 4). There is an indication of increases across most of the activities from January to February 2022.

Figure 5. Level of comfort conducting a range of activities separately and combined, average score where 1 = not at all comfortable doing activity and 4 = very comfortable doing activity, average wave-on-wave, UK

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents excluding those stating ‘don’t know’ or who wouldn’t do activity under any circumstances. Mean average based on those that gave a score of 1-4. February 2022 = 1,756 All other months n=c.1,750. Pre June 2020, research was conducted by BVA BDRC with base size of c.750
Note: These questions were not asked in October 2021
Intention to visit leisure places in the UK

Out of the included places/venues, ‘restaurant with indoor seating’ is the venue most likely to be visited in the next month (32% intending to do so). ‘Cinema/theatre’ and ‘festival/exhibitions in an enclosed space’ are the venues most likely to be avoided in the next 12 months due to COVID-related reasons (13% stating this).

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

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

Base: All respondents. February 2022 = 1,756
Out of the activities included, ‘walking/hiking’ is the most likely activity for the next month (35%). ‘Indoor swimming’ is the activity most likely to be avoided due to COVID-19, 10% of those who would normally swim indoors stating this.

Figure 4. Intention to conduct leisure activities, Percentage, February 2022, UK

<table>
<thead>
<tr>
<th>Activity</th>
<th>Never</th>
<th>Will do in next 12 months (exc. next month)</th>
<th>Will do in next month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking/hiking</td>
<td>49%</td>
<td>83%</td>
<td>82%</td>
</tr>
<tr>
<td>Swimming - indoor</td>
<td>65%</td>
<td>87%</td>
<td>83%</td>
</tr>
<tr>
<td>Spa treatments</td>
<td>73%</td>
<td>91%</td>
<td>91%</td>
</tr>
<tr>
<td>Wildlife</td>
<td>82%</td>
<td>93%</td>
<td>93%</td>
</tr>
<tr>
<td>Cycling/mountain biking</td>
<td>82%</td>
<td>93%</td>
<td>93%</td>
</tr>
<tr>
<td>Yoga/meditation</td>
<td>83%</td>
<td>90%</td>
<td>90%</td>
</tr>
<tr>
<td>Swimming - outdoor</td>
<td>83%</td>
<td>94%</td>
<td>94%</td>
</tr>
<tr>
<td>Adventure activity</td>
<td>87%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Fishing</td>
<td>91%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Horse riding, pony trekking</td>
<td>93%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Golf</td>
<td>93%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Boating</td>
<td>90%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Other watersports</td>
<td>94%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Sailing</td>
<td>95%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

VB10a. Which, if any, of these types of activities are you likely to do in the UK in the next 12 months? VB10b. Which, if any, are you likely to do in the UK in the next month? Which, if any, would you normally do in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government restrictions, the risk of catching COVID-19 etc.)?

Base: All respondents. February 2022 = 1,756
Required conditions for indoor leisure / tourism providers

‘Free cancellation’ is the leading condition that UK adults deem essential for indoor leisure and tourism providers to have in place to encourage a visit (46% stating this). ‘Guest/staff interventions’ and ‘social distancing measures’ are less mentioned in Feb’22 than in Jan’22 (this is possibly linked to lifting of restrictions in England on 27th January)

Figure 6. Conditions that are essential for indoor tourism and leisure providers to have in place to visit them in the next few months, Percentage, February 2022, UK, Full list
2. Trip Intentions: UK and overseas
Anticipated number of UK and overseas trips in next 12 months compared to last 12 months

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

Figure 7. Number of UK and overseas overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, January 2022, UK

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

VB1a  Thinking about the next 12 months, are you likely to take more, fewer or about the same number of UK and overseas holidays/short breaks as you took in the last 12 months? Base: All respondents. February 2022 = 1,756
Nearly 3 in 5 (59%) of UK adults plan on taking their next overnight domestic trip in the next 12 months, significantly more than the 43% planning to take an overnight overseas trip in this period. Next trip intention is highest for July to September 2022.

Figure 8a. Proportion anticipating going on overnight UK and overseas trips, Percentage, February 2022, UK

QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All respondents. February 2022 = 1,756 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.
Next overnight trips intention trend – Apr-Jun’22 and Jul-Sep’22

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

QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2b. And when else do you anticipate going on a UK holiday or short break? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2d. And when else do you anticipate going on an overseas holiday or short break? Base: All February respondents.

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

<table>
<thead>
<tr>
<th></th>
<th>UK trips intended</th>
<th>Overseas trips intended</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nov-21</td>
<td>16</td>
<td>26</td>
</tr>
<tr>
<td>Dec-21</td>
<td>16</td>
<td>25</td>
</tr>
<tr>
<td>Jan-22</td>
<td>15</td>
<td>22</td>
</tr>
<tr>
<td>Feb-22</td>
<td>15</td>
<td>24</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>UK trips intended</th>
<th>Overseas trips intended</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nov-21</td>
<td>37</td>
<td>36</td>
</tr>
<tr>
<td>Dec-21</td>
<td>36</td>
<td>37</td>
</tr>
<tr>
<td>Jan-22</td>
<td>37</td>
<td>22</td>
</tr>
<tr>
<td>Feb-22</td>
<td>38</td>
<td>24</td>
</tr>
</tbody>
</table>

Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate taking multiple trips across several time periods.
Confidence in the ability to take an overnight trip

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

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

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

- UK overnight trip confidence (Feb'22 data)
- Overseas overnight trip confidence (Feb'22 data)
- UK overnight trip confidence (Jan'22 data)
- Overseas overnight trip confidence (Jan'22 data)

Feb'22: 64
Mar'22: 65
Apr'22: 70
May'22: 72
Jun'22: 75
Jul'22: 77
Aug'22: 78
Sep'22: 76
Oct'22: 73
Nov'22: 69
Dec'22: 66

Jan'22: 46
Feb'22: 48
Mar'22: 53
Apr'22: 57
May'22: 59
Jun'22: 60
Jul'22: 61
Aug'22: 57
Sep'22: 52
Oct'22: 52

VB7a. We'd like you to imagine that you have booked a UK holiday or short break in each of the time periods listed below. How confident are you that you would be able to go on these UK trips in these months? VB7d. We'd like you to imagine that you have booked an overseas holiday or short break in each of the time periods listed below. How confident are you that you would be able to go on these UK trips in these months?
Base: All respondents. February 2022 = 1,756
The main perceived barriers to taking an overnight trip in the UK between February and March are ‘personal finances’ (30%) and ‘UK Weather’ (26%). For overseas trips, ‘personal finances’ and ‘risk of quarantine’ are the top 2 biggest barriers, both at 23%. Compared to January, ‘personal finances’ is more mentioned in February.

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

- Personal finances: 30%
- UK weather: 26%
- Rising costs of holidays/leisure: 21%
- Concerns about catching COVID-19: 19%
- My general health: 18%
- Restrictions on travel from government: 16%
- Limited available annual leave: 12%
- Unwelcoming residents due to COVID-19: 12%
- General unease about travelling: 11%
- Fewer things to do: 10%
- Staff shortages impacting the experience: 9%
- Vaccine passports: 8%
- It’s not responsible to travel in this period: 7%
- Waiting to be fully vaccinated: 4%
- Would never take a UK trip in these months: 18%

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

- Personal finances: 23%
- The risk of quarantine: 23%
- Restrictions on travel from government: 20%
- The cost/hassle of a COVID-19 test: 20%
- Rising costs of overseas travel: 19%
- The amount of paperwork: 17%
- Concerns about catching COVID-19: 15%
- My general health: 14%
- I have a general unease about travelling: 11%
- Unwelcoming residents due to COVID-19: 10%
- Limited available annual leave: 9%
- It’s not responsible to travel in this period: 7%
- Fewer things to do: 7%
- The need to be fully vaccinated: 6%
- Waiting to be fully vaccinated: 4%
- Would never take trip in these months: 35%
Perceived barriers to taking overnight UK and Overseas trips between Apr’22 and Jun’22

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

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

- Personal finances: 33%
- Rising costs of holidays/leisure: 25%
- UK weather: 21%
- Restrictions on travel from government: 18%
- Concerns about catching COVID-19: 17%
- My general health: 15%
- Limited available annual leave: 12%
- Staff shortages impacting the experience: 10%
- Fewer things to do: 10%
- Unwelcoming residents due to COVID-19: 10%
- Vaccine passports: 9%
- General unease about travelling: 9%
- It’s not responsible to travel in this period: 7%
- Waiting to be fully vaccinated: 6%
- Would never take a UK trip in these months: 14%

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

- Personal finances: 28%
- The risk of quarantine: 26%
- Rising costs of overseas travel: 22%
- The amount of paperwork: 22%
- Restrictions on travel from government: 22%
- The cost/hassle of a COVID-19 test: 21%
- Concerns about catching COVID-19 test: 18%
- My general health: 12%
- Unwelcoming residents due to COVID-19: 11%
- Limited available annual leave: 11%
- General unease about travelling: 10%
- The need to be fully vaccinated: 8%
- It’s not responsible to travel in this period: 7%
- Fewer things to do: 7%
- Waiting to be fully vaccinated: 3%
- Would never take trip in these months: 27%
COVID-19 influence on choice of destination - among next 12 months trip intenders

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

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

<table>
<thead>
<tr>
<th>Choice of Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avoiding destinations with lots of people / Stay in less populated places</td>
<td>24</td>
</tr>
<tr>
<td>Taking UK holidays at less busy times</td>
<td>22</td>
</tr>
<tr>
<td>Travelling less because it's now more expensive</td>
<td>20</td>
</tr>
<tr>
<td>More worried about trips not going ahead</td>
<td>19</td>
</tr>
<tr>
<td>Choosing less expensive places</td>
<td>19</td>
</tr>
<tr>
<td>Travelling less because of restrictions</td>
<td>18</td>
</tr>
<tr>
<td>Travelling less because of worries of catching Covid</td>
<td>15</td>
</tr>
<tr>
<td>Avoiding shared accommodation (e.g. hotels, B&amp;Bs etc.)</td>
<td>12</td>
</tr>
<tr>
<td>Avoiding places with overseas tourists</td>
<td>12</td>
</tr>
<tr>
<td>Choosing places close to home</td>
<td>12</td>
</tr>
<tr>
<td>Taking UK holidays with smaller groups than usual</td>
<td>9</td>
</tr>
<tr>
<td>Prioritising places I have been before on UK holidays</td>
<td>8</td>
</tr>
<tr>
<td>Only staying in places that require vaccine passports</td>
<td>6</td>
</tr>
<tr>
<td>No influence on my choice of destination</td>
<td>23</td>
</tr>
</tbody>
</table>
All potential UK overnight trips intentions by destination

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

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

<table>
<thead>
<tr>
<th>Feb’22 – Mar’23</th>
<th>Have a trip intention [%]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large city</td>
<td>31</td>
</tr>
<tr>
<td>Smaller City or Town</td>
<td>37</td>
</tr>
<tr>
<td>Traditional coastal/seaside town</td>
<td>47</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>39</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>44</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>29</td>
</tr>
</tbody>
</table>

February 2022 = 1,756 *The months were asked as individual months in this wave for Feb-Mar and Apr-Jun 2022.
3. Next Domestic Trip
- Overnight and Day Trips
Planning and booking time for next UK / overseas overnight trips

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

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

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

QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? QVB2c. Thinking of the next overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip

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

*Low base size
Booking lead times for the next overnight trips, vs pre-pandemic

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

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

- Will book closer to the travel date
- About the same
- Will book further from the travel date
- Don't know

Feb-Mar’22 UK trip booking: 21%
Feb-Mar’22 overseas trip booking: 22%
Apr-Jun’22 UK trip booking: 22%
Apr-Jun’22 overseas trip booking: 28%

Base: Feb-Mar 2022 UK trip intenders n=175; Feb-Mar 2022 overseas trip intenders n=72; Apr-Jun 2022 UK trip intenders n=372; Apr-Jun 2022 overseas trip intenders n=223

VB2/h. Roughly how much time is there likely to be between you booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2(III)> and the first day of your trip? V2e/g. Compared to before the pandemic, when are you likely to book your UK/overseas trips? *Lead times are based on trips that have not yet been booked

Base: Feb-Mar 2022 UK trip intenders n=175; Feb-Mar 2022 overseas trip intenders n=72; Apr-Jun 2022 UK trip intenders n=372; Apr-Jun 2022 overseas trip intenders n=223
Duration of the next overnight trip in UK

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

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

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All February 2022 respondents intending to take next holiday or short break in each time period: February to March 2022 n=175; April to June 2022 n=372; July to September 2022 n=400. February to March 2021 n=52; April to June 2021 n=209; July to September 2021 n=345
Where planning on staying on the next overnight trip in the UK

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

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

<table>
<thead>
<tr>
<th>Location</th>
<th>Jan/Feb 2022</th>
<th>Jan/Feb 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>South West</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>North West</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Scotland</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>South East</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Yorkshire &amp; the Humber</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Wales</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>North East</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>East of England</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>14%</td>
<td>2%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Location</th>
<th>Jan/Feb 2022</th>
<th>Jan/Feb 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>South West</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>North West</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Scotland</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>London</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>South East</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Wales</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>North East</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>East of England</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>8%</td>
<td>2%</td>
</tr>
</tbody>
</table>

QVB4a. Where in the UK are you likely to stay on this next trip in <insert month>?
Base: All January and February 2022 respondents planning on taking a holiday or short break in the UK between February to March 2022 n=348; April to June 2022 n=706; January and February 2022 respondents: February to March 2021 n=113, April to June 2021 n=434.
Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate staying in more than one location.
Main mode of transport for the next overnight trip in the UK

Across both time periods, ‘own car’ is by far the leading main mode of transport for travelling to an overnight destination, followed by ‘train’.

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

- Own car: 54% (Jan/Feb 2022), 43% (Jan/Feb 2021)
- Train: 22% (Jan/Feb 2022), 18% (Jan/Feb 2021)
- Public bus/coach: 6% (Jan/Feb 2022), 7% (Jan/Feb 2021)
- Plane: 5% (Jan/Feb 2022), 6% (Jan/Feb 2021)
- Private coach/bus: 3% (Jan/Feb 2022), 4% (Jan/Feb 2021)

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

- Own car: 60% (Jan/Feb 2022), 60% (Jan/Feb 2021)
- Train: 15% (Jan/Feb 2022), 14% (Jan/Feb 2021)
- Plane: 6% (Jan/Feb 2022), 7% (Jan/Feb 2021)
- Car - hired/rented/taxi home/Campervan: 4% (Jan/Feb 2022), 4% (Jan/Feb 2021)
- Motor: 2% (Jan/Feb 2022), 2% (Jan/Feb 2021)

QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All January and February 2022 respondents planning on taking a holiday or short break in the UK between February to March 2022 n=348; April to June 2022 n=706; January and February 2021 respondents: February to March 2021 n=113, April to June 2021 n=434
‘A hotel/motel/inn’ is the leading accommodation choice for a trip between February and March 2022, at 48% showing an increase of 14% vs Jan/Feb last year. Between April and June 2022, ‘a private home’ is the leading accommodation choice (at 39%).

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

Base: All January and February 2022 respondents planning on taking a holiday or short break in the UK between February to March 2022 n=348; April to June 2022 n=706; January and February 2021 respondents: February to March 2021 n= 113, April to June 2021 n= 434 Note: Multiple choice question. Totals may exceed 100% as some respondents anticipate using more than one type of accommodation

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Jan/Feb 2022</th>
<th>Jan/Feb 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel/ motel/ inn</td>
<td>48</td>
<td>34</td>
</tr>
<tr>
<td>A private home</td>
<td>35</td>
<td>35</td>
</tr>
<tr>
<td>Camping/ caravan</td>
<td>48</td>
<td>54</td>
</tr>
<tr>
<td>Commercial rental (e.g. rented holiday cottage)</td>
<td>33</td>
<td>27</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B/ Farm house</td>
<td>27</td>
<td>19</td>
</tr>
<tr>
<td>A private home</td>
<td>39</td>
<td>28</td>
</tr>
<tr>
<td>Commercial rental (e.g. rented holiday cottage)</td>
<td>38</td>
<td>33</td>
</tr>
<tr>
<td>Hotel/ motel/ inn</td>
<td>38</td>
<td>36</td>
</tr>
<tr>
<td>Camping/ caravan</td>
<td>37</td>
<td>37</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B/ Farm house</td>
<td>23</td>
<td>22</td>
</tr>
</tbody>
</table>
Reasons for not staying in a city on the next UK trip

Among February to March 2022 Intenders not planning on visiting a large city, ‘worried about catching COVID-19 in a large city’ (30%) remains the leading reason, followed by ‘fewer things to do/places to visit’ (25%) and ‘large cities being too expensive’ (25%).

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

- I am more worried about catching COVID-19 in a large city (30%)
- Fewer things to do/places to visit (25%)
- Large cities tend to be too expensive (25%)
- There are no large cities in the U.K. I want to see (20%)
- I will stay in a large city later in the year (17%)
- Restrictions on opportunities to socialise (16%)
- It’s not responsible to travel to a city in this period (13%)
- I don’t trust other people to be responsible (13%)
- Fewer opportunities to eat/drink out (12%)
- Local residents may be unwelcoming due to COVID-19 (8%)
- I’m unwilling to travel to a large city until I get a ‘booster vaccine’ (4%)
- I wouldn’t stay in one regardless of COVID (18%)
- Other (15%)
15% of UK adults intend to take any type of day trip by the end of the month. ‘Countryside or village’ is the destination type most likely to generate a day trip by June 2022, while ‘traditional coastal/seaside town’ gains popularity by September.

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

Any day trip by end of the month: 15% (18% for intentions stated in January)
4. Overnight Business Trip Intentions
Intentions for overnight business trips in the next three months

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

81% of UK adults interviewed are in employment.

16% in November, 20% in December, 16% in January, 15% in February.

81% of UK adults in employment planning a trip.

Team building: 34% in November, 34% in December, 29% in January, 29% in February.
Conference/convention/congress: 32% in November, 35% in December, 28% in January, 21% in February.
Meeting 6 or more people: 31% in November, 30% in December, 26% in January, 20% in February.
Meeting 5 or fewer people: 22% in November, 26% in December, 19% in January, 19% in February.
Exhibition/Event/Trade fair: 12% in November, 19% in December, 17% in January, 19% in February.
Training/on a course: 10% in November, 9% in December, 7% in January, 11% in February.
Other: 7% in November, 6% in December, 7% in January, 12% in February.

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

Figure 31. Reasons for taking an overnight business trip in next 3 months, Percentage, February 2022, UK adults in employment planning a trip
5. Past UK vs Overseas Trips
Proportion taken a UK and overseas trip since April 2021

Just over half (52%) of UK adults have taken an overnight UK trip since April, more than twice as many as have taken an overseas overnight trip in that period (21%). Both types of trips are most likely to have been taken between July and September (32% and 10% respectively).

![Bar chart showing proportion taken an overnight UK or overseas trip in below time period, Percentage, February 2022, UK](chart_image)

- Since April 2021: 52% UK overnight trip taken, 21% overseas overnight trip taken
- In April to June 2021: 15% UK overnight trip taken, 7% overseas overnight trip taken
- In July to September 2021: 32% UK overnight trip taken, 10% overseas overnight trip taken
- In October to December 2021: 19% UK overnight trip taken, 8% overseas overnight trip taken
Where stayed and purpose of last UK overnight trip

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

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

Figure 34. Purpose of overnight UK trip taken since September, Percentage, February 2022, UK

VB13c. Where in the UK did you stay on your most recent trip in <INSERT MOST RECENT MONTH>? VB13e. And which of the following best describe the purpose/s of your most recent trip in <INSERT MOST RECENT MONTH >?
Base: All February 2022 respondents that took an overnight trips since September n=571
Note: Multiple choice questions. Totals may exceed 100% as some respondents stayed in more than one location or travelled for more than one purpose
Methodology
Methodology

• This report presents findings from the February 2022 wave of the COVID-19 consumer sentiment tracker, with comparisons to previous months where appropriate.
• The survey is conducted online, among a sample of the UK adult population.
• In the first stage, a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then ‘boosted’ for Wales and Scotland to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the UK overall and within each nation.
• February 2022 fieldwork was conducted between 1-7 February 2022.
Master Data Table

• To access a .csv file of the data contained within the charts, please open this report with Adobe Reader. When you have done so, navigate to the left hand side of the page to the attachments area, symbolised by a paperclip icon, and click on the file to open the attachment.